Appendix D: Survey Findings

Appendix D-1: Equine Business Profile

2012	Overall	Equine Operations	Equine Support Services	Q#
Own an equine-related business or service	60	34	26	1.0
Erin total[5]	256	146	110	
Age and gender				5.0
Women	73%	82%	62%	5.1
	70% between 40-59	65% between 40-59	82% between 40-59	
Men[6]	23%	15%	36%	
	71% between 40-59	80% between ages 50-69	56% between 60-69	
Legal form of business				1.2
Corporation	23%	21%	27%	
Partnership	15%	12%	19%	
Self-employed	62%	68%	54%	
Business tenure				1.3
Less than 1	2%	3%	0%	
1 to 3	0%	0%	0%	
4 to 10	42%	42%	42%	
11 to 25	29%	27%	31%	
26 to 35	7%	9%	4%	
over 35	20%	18%	23%	

[5] From the project contact list (assembly discussed in the Introduction). As cross check, we assumed 50% of the ~800 farm properties in Erin (based on 2012 tax roll) were equine-related properties (80 x 50% = 400) which closely corresponds to Dr. Bob Wright's estimate in his 2008 publication, *Economic Impact of the Ontario Horse Industry, Info Sheet*). 256 of 400 is ~65% leaving the remaining 35% as hobby farms which we believe is a reasonable apportionment.

[6] Small sample size: 14 total | 5 equine operations | 9 equine support services

2012	Overall	Equine Operations	Equine Support Services	Q#
		For newer equine businesses (4 to 10 years in operation) 93% are run by people between ages 30-59) – and more than 1/3 are under 40.	For newer businesses (4 to 10 years in operation) 100% are run by people between ages 40-59)	
		Equine businesses tend to operate a diverse number of enterprises, on average 2.6 per business. About half of equine businesses derive 100% of revenue from equine. For 25% of businesses, equine is about 1/3 of overall revenue, and for the remaining 25%, equine is about 10-15% of overall revenue.	Support service businesses are much more inclined to focus on one enterprise (82%), or at most two.	1.4
Top 3 businesses Male		1. Sale of horses | boarding (27% each) 2. Breeding/stud fees | horse training, conditioning | purses (13% each)	1. feed / hay (33% each) 2. construction (25% each) 3. property maintenance (17%)	1.5 5.1
Female		1. Boarding (28%) 2. Horse training, conditioning (19%) 3. Sale of horses (17%)	1. Administration (20%) 2. Horse maintenance, therapeutic (16% each) 3. Lease, rent facilities (16%)	
Age		In younger years (30-59), the top businesses are: 1. Boarding 2. Horse training, conditioning 3. Horse sales 4. Coaching	In younger years (30-49), the top businesses are: 1. lease, rent facilities 2. horse maintenance 3. administration 4. property maintenance	

2012	Overall	Equine Operations	Equine Support Services	Q#
		Over 60, emphasis shifts from horse training / conditioning and coaching to horse sales and boarding.	In the 50-59 age group, there is a shift away from horse maintenance and property maintenance with a shift towards education, feed & hay, therapeutic, and construction. Over 60, it is almost exclusively regulatory, feed & hay, and administration.	
Average annual household income	$170,000	~$135,000	~$225,000	5.8
Median	$125,000			5.9
Average household income from equine	~$53,000	Average household income from equine business is ~$53,000, or approximately 40% of household income	The average dollar amount of household income from equine support services is about the same as equine businesses (~$53,000) but it is a considerably smaller percentage of overall household income – only 24% compared to 39% for equine business.	

Appendix D-2: Business Income Analysis

2012	Overall	Equine Operations	Equine Support Services	Q#
Business income				1.4/1.5
Average annual equine income	~$72,500	~$67,00	~$58,500	2.29
Erin total	~$18 million	~$10 million	~$6 million	2.24
Average annual gross revenues	~$147,000	~$104,000	~$272,000	
Erin total	~$37 million	~$15 million	~$30 million	
Average annual gross sales	~$458,000	~$187,000	~$718,000	
Erin total	~$117 million	~$27 million	~$78 million	
% of gross revenue earned in Erin	66%	43%	87%	2.30
Average anticipated sales growth next year	16%	17%	15%	2.25
				2.26
Primary reasons for growth	Business plan			
Primary reasons for decline	Age Economy Government policy (OLG) Industry			
Geographic distribution of sales				2.27
Erin	38%	40%	36%	
Average change in last 3 yrs	7%	+1%	+6%	
Ontario	53%	47%	60%	
Average change in last 3 yrs	+7%	+7%	+7%	
Canada	4%	5%	2%	
Average change in last 3 yrs	-1%	-5%	+4%	
International	4%	7%	2%	
Average change in last 3 yrs	-1%	-1%	-2%	

2012	Overall	Equine Operations	Equine Support Services	Q#
Reasons for positive change	Marketing			
	Change in operations			
	Increased workforce			
Reasons for negative change	Downsizing			
	Age			

Appendix D-3: Business Climate Analysis

2012	Overall	Equine Operations	Equine Support Services	Q#
Current business climate outlook		72% are satisfied with the current business climate, although 23% are more negative compared to 3 years ago	76% are satisfied with the current business climate, with most as positive or more positive than 3 years ago	2.0 2.1
Primary reasons for positive outlook	Equine infrastructure Local community Equine support services			
Primary reasons for negative outlook	Government policy (OLG) Industry Local community Local governance			
Notable business climate factors				2.2
Satisfactory	Roads & highways, utilities infrastructure Snow removal Garbage removal Health and protection services Labour costs Support from local business and residents Access to market, customers Size of local market Quality of life Access to suppliers Access to training facilities Availability of skilled labour			

2012	Overall	Equine Operations	Equine Support Services	Q#
Unsatisfactory	Land costs Telecom infrastructure Development fees & charges Local permit approval process, planning / engineering / zoning / building permits Municipal taxes Business insurance Utility costs Transportation costs			
Don't Know / Not Applicable	Availability of zoned land, serviced land, suitable sized land parcels, rental / lease space Natural gas availability Municipal by-laws Support from municipality Proactive business recruitment Cost of leasing space Business taxes Availability of transport services Access to R&D Database of farm labour Availability of unskilled labour			
Equine business climate improvements	Equine infrastructure • utilize fairgrounds • new facilities • year-round facilities Local governance • tax incentives • permits, by-law, and other process improvements • housing			2.3

2012	Overall Equine Operations Equine Support Services	Q#
	Marketing, promotion, collaboration • e.g., promote Erin as equine destination, market to surrounding suburban areas • greater collaboration within industry • more accessible for children • industry networking opportunities • business directory • information sessions, seminars	
	Proactive lobbying of provincial government	
	Hay and hay production	
Benefits of the area for equine business (themes)	Setting • Proximity to large urban area • Landscape and topography • Lot of equine operations in the area • Large concentration of horses • Rural atmosphere • Land availability	2.4 2.5
	Good existing equine infrastructure	
Challenges of the area for equine business (themes)	Equine facilities – quantity, type, accessibility	
	Equine trails – quantity, access	
	Cost – land, operations	
	Local housing	
	Not much to do in Erin	
	Local governance • Sustainable recycling initiatives • Property taxes • Lack of municipal support • Policies, by-laws	

2012	Overall / Equine Operations / Equine Support Services	Q#
	Marketing, promotion, collaboration • Marketing to suburban areas, youth • Promotion of equine events, activities • Inter-industry networking, collaboration • Equine directory • Information events, e.g., workshops, clinics, seminars • More events Government policy on racing Economy Green belt restrictions Cost of land Indirect road access Lack of equine services, notably hay and tack	
Important for creating local equine strengths, in order of importance	1. Emergency response (97%) 2. Maintenance of rural transportation routes (94%) 3. Local government support (91%) 4. Protection of farmland (91%) 5. Support for youth (85%) 6. Provincial support (85%) 7. Access to equine education programs (79%) 8. Strong provincial organizations (79%) 9. Access to trails (76%)	2.9
Biggest threats to local equine industry, in order of importance	1. Lack of senior government support (82%) 2. Loss of agricultural land to urban development (68%) 3. Lack of access of places to ride (50%) 4. Inability to attract new riders (44%) 5. Lack of involvement by next generation (41%)	2.10

2012	Overall Equine Operations Equine Support Services	Q#
	6. Lack of coaching for next generation competitors (26%) 7. Infectious diseases (21%)	
Advantages of Erin as a place to do equine business	Proximity to facilities Variety of equine disciplines Strong equine base Professional services available locally Quality of life Friend local atmosphere Central location Terrain Rural character Availability of equine products and services	2.11
Disadvantages of Erin as a place to do equine business	Lack of awareness of benefit of equine industry Lack of organized leadership Lack of industry collaboration Lack of marketing Lack of parking for trailers Cost of living Lack of business support services Lack of vision by Council Roads – condition, safety Land and building policies Property taxes Lack of senior government support Distance to large municipal centre Limited selection of goods and services	2.12

2012	Overall	Equine Operations	Equine Support Services	Q#
Top 10 barriers to expanding existing business	1. Utility cost (40%) 2. E-communications capacity (37%) 3. Approval processes (32%) 4. Public transit (32%) 5. Road and highway system (27%) 6. Business taxes (25%) 7. Development charges (22%) 8. Availability of skilled labour (22%) 9. Availability of serviced land (20%) 10. Lack of proactive business recruitment (20%) 11. Available space for lease (20%)			2.13
Top 10 barriers to developing new business	1. Utility cost (27%) 2. Development charges (22%) 3. Utility capacity / access (18%) 4. Lack of proactive business recruitment (17%) 5. Approval process (17%) 6. Public transit (17%) 7. Availability of serviced land (15%) 8. Business taxes (15%) 9. Availability of properly zoned land (13%) 10. Available space for lease (13%)			
Satisfaction with current location	93%	91%	96%	2.14 2.15

2012	Overall	Equine Operations	Equine Support Services	Q#
Satisfaction with local services	Most reported no contact.			2.18
Top 10 areas of satisfaction:	1. Medical and health services (47%) 2. Snow removal (47%) 3. Recreational facilities (40%) 4. Public utilities (43%) 5. Policing (42%) 6. Street repairs (40%) 7. Garbage removal (35%) 8. Fire prevention (33%) 9. Cultural facilities (25%) 10. Library (23%)			
Top areas of dissatisfaction	1. Recreational facilities (18%) 2. Municipal building services (12%) 3. Schools (13%) 4. Cultural facilities (13%) 5. Street repairs (17%) 6. Garbage removal (12%)			
Top 10 areas of no contact	1. Business enterprise support services (90%) 2. Local training board (87%) 3. Professional associations (88%) 4. Economic development (78%) 5. Community college (77%) 6. Child care services (67%) 7. Chamber of Commerce (66%) 8. Health administration (65%) 9. BIA (62%) 10. Public transit (62%)			

2012	Overall	Equine Operations	Equine Support Services	Q#
E-communication barriers for business	1. Access (30%) 2. Cost (38%) 3. Time to learn and stay current (20%) 4. Mobile communications (25%)			2.7 2.8
Top 3 barriers to implementing e-communication technologies	1. Infrastructure cost (30%) 2. Ongoing cost (18%) 3. Start-up cost (10%)			
Most cited issues:	Availability in rural areas Intermittent service			
Satisfaction with local community services				5.14
Chamber of Commerce				
Satisfied	8%	6%	12%	
Dissatisfied	8%	3%	3%	
No contact	80%	88%	85%	
Business Improvement Area (BIA)				
Satisfied	17%	9%	33%	
Dissatisfied	8%	9%	6%	
No contact	72%	79%	61%	
Hills of Headwaters Tourism				
Satisfied	35%	39%	31%	
Dissatisfied	5%	6%	4%	
No contact	57%	53%	62%	
Business Self Help /Enterprise Centre				
Satisfied	2%	0%	3%	
Dissatisfied	3%	6%	0%	
No contact	92%	91%	97%	

2012	Overall	Equine Operations	Equine Support Services	Q#
Erin Agricultural Society				
Satisfied	45%	50%	57%	
Dissatisfied	10%	9%	0%	
No contact	42%	38%	42%	
Assessment of equine industry features in Erin				5.15
High quality land for horses				
Strong element	73%	76%	69%	
Could be stronger	16%	18%	16%	
Absent	0%	0%	0%	
Unsure, no opinion	3%	3%	4%	
High quality hay supply				
Strong element	52%	56%	46%	
Could be stronger	34%	33%	33%	
Absent	2%	3%	0%	
Unsure, no opinion	7%	6%	8%	
Abundant clean water supply				
Strong element	78%	82%	73%	
Could be stronger	11%	12%	12%	
Absent	0%	0%	0%	
Unsure, no opinion	3%	3%	4%	
Valuable purse, prize money at tracks				
Strong element	13%	12%	15%	
Could be stronger	9%	12%	4%	
Absent	23%	24%	23%	
Unsure, no opinion	48%	50%	46%	
Good variety of local higher level competition				
Strong element	17%	24%	8%	
Could be stronger	31%	27%	38%	
Absent	18%	18%	19	
Unsure, no opinion	27%	29%	23%	

2012	Overall	Equine Operations	Equine Support Services	Q#
Knowledgeable professionals in the industry				
Strong element	58%	62%	54%	
Could be stronger	29%	40%	28%	
Absent	2%	3%	0%	
Unsure, no opinion	3%	0%	8%	
Access to good local horse trails				
Strong element	23%	21%	27%	
Could be stronger	48%	50%	45%	
Absent	2%	3%	0%	
Unsure, no opinion	20%	24%	15%	
Access to good horse trainers				
Strong element	45%	56%	31%	
Could be stronger	25%	21%	31%	
Absent	3%	3%	4%	
Unsure, no opinion	20%	18%	23%	
Access to good local riding instructors, coaches				
Strong element	47%	53%	38%	
Could be stronger	26%	21%	31%	
Absent	2%	3%	0%	
Unsure, no opinion	20%	21%	19%	
Access to good local veterinarian				
Strong element	70%	74%	65%	
Could be stronger	19%	21%	16%	
Absent	0%	0%	0%	
Unsure, no opinion	5%	3%	8%	
Locally available horse equipment				
Strong element	18%	21%	15%	
Could be stronger	22%	32%	8%	
Absent	7%	9%	4%	
Unsure, no opinion	47%	35%	62%	

2012	Overall	Equine Operations	Equine Support Services	Q#
Successful breeding programs				
Strong element	18%	21%	15%	
Could be stronger	22%	32%	8%	
Absent	7%	9%	4%	
Unsure, no opinion	47%	35%	62%	
Strong [industry] associations, organizations				
Strong element	10%	12%	8%	
Could be stronger	32%	38%	23%	
Absent	8%	6%	12%	
Unsure, no opinion	40%	32%	50%	
Strong national, international reputation				
Strong element	12%	15%	8%	
Could be stronger	48%	47%	55%	
Absent	33%	29%	38%	
Unsure, no opinion	17%	21%	12%	
Comments about Erin as a place to do business				2.22
Positive	Good place to do business			
	Community support			
Negative	Fair grounds under utilized			
	Local by-laws			
	Vacant industrial facilities			
	Marketing, promotion, collaboration			
	Senior government tax policies			
	Seniors housing, handicap accessibility			
	Building on rural land			
	Recreation facilities			

2012	Overall	Equine Operations	Equine Support Services	Q#
Top 5 ways market potential could be enhanced	1. Direct marketing to consumers (42%) 2. Increased co-operative marketing (35%) 3. Additional value-added opportunities (20%) 4. Improved transportation (13%) 5. Access to distribution channels, networks (22%)			3.29
Products and services missing in the community	More equine facilities and events Retail – clothing, groceries, dry goods, hardware, books Community services – hotel, swimming pool, public transit Business training and programs IT support Equine social gathering place Hay, feed, tack, straw, shavings Equine genetic testing, bloodwork, quarantine facilities Biodiesel Skilled workforce Youth programs			3.37 3.20
Top 10 areas for local government assistance	1. Joint advertising and marketing (42%) 2. Website development (32%) 3. Trade shows (32%) 4. Attraction of related supply & services businesses (32%) 5. Business networking sessions (37%) 6. Marketing seminars (28%) 7. E-marketing (28%) 8. Productivity improvement workshops (18%) 9. Workforce planning, employee training and attraction (17%) 10. Identification of opportunities for shared use of buildings, infrastructure, etc. (15%)			3.38

2012	Overall / Equine Operations / Equine Support Services	Q#
General business climate comments	Depressed economy Government policy on racing, OLG Local equine industry very competitive, low margins Lack of public awareness Cost of hay	2.31
Improvements to Federal and Provincial programs and services	More accountability and transparency Better understanding of the equine industry Business support: Incentives, grants, subsidies Less red tape Increase awareness of available support and services; more accessible Re-evaluate taxation of equine businesses Re-evaluate OLG policy; invest more in mitigating fall out	2.17
Federal and Provincial programs accessed in the past	OMAFRA, OMAFRA Growing forward programs Agri-Invest, Agri-Stability, Crop Insurance Equine Canada Farm designation towards grants Ontario Equine Federation OFA hay distribution Hydro farm business upgrade energy for profit programs Ontario Home energy credit (furnace replacement rebate) Hydro retrofit Farm Credit Canada (solar panels) Apprenticeship Apprentice program	2.19 2.20 2.21

2012	Overall	Equine Operations	Equine Support Services	Q#
	Apprenticeship Board			
	Risk management project			
	CAIS			
	Eco-rebate			
	Grand River Conservation Authority grant			
	Stewardship			
Plans to access Federal and Provincial programs in the future	Apprenticeship programs			
	CAIS			
	compensation for losses related to changes to racing industry			
	EI for employees laid off as a result of changes to racing industry			
	general			
	Growing Forward - OMAFRA and rebate programs			
	Hydro retrofit			
	OEF Canada			
	OMAFRA			
	Risk management project			
	To be determined			
	tree planting			
Desire for information on Federal and Provincial programs and services	agriculture			
	animal rights			
	Business marketing			
	crops			
	education			
	employee hiring			

2012	Overall	Equine Operations	Equine Support Services	Q#
	employment			
	energy programs			
	Equine general			
	Equine Infrastructure			
	Equine officiating			
	fencing grants			
	Financial - funding, grants, incentives, rebates, etc.			
	General awareness			
	insurance, compensation			
	Non-profit fund-raising			
	Public relations			
	racing			
	reforestation programs			
	Small business			
	small farms			
	Tourism associations			
	training			

Appendix D-4: Operations

2012	Overall	Equine Operations	Equine Support Services	Q#
Have a business plan	58%	56%	62%	3.13
Would like assistance	15%	18%	12%	3.14
Have a succession plan	23%	18%	31%	3.15
Would like assistance	8%	6%	12%	3.16
Have a marketing plan	37%	35%	35%	3.25
Have interest in energy sources	28%	29%	27%	3.19
Financial planning barriers to growth:				3.30
Access to expertise	12%	15%	8%	3.31
Knowledge of financing, lending sources	15%	9%	23%	
Change in financial situation in the last 3 years				3.32
Improved	29%	34%	23%	3.33
Stayed the same	57%	50%	66%	
Declined	14%	16	12%	
Change in financial situation in the next 3 years				
Stay the same	100%	100%	100%	
Sale or transfer of assets				3.17
Don't expect to sell or transfer	59%	56%	64%	3.18
Don't know	17%	22%	9%	
1-5 years	11%	6%	18%	
6-15 years	6%	9%	0%	
15+ years	6%	6%	5%	
To whom?				
Third party	15%	26%	35%	
Family member	5%	9%	12%	

2012	Overall	Equine Operations	Equine Support Services	Q#
Comments on future plans and business development	Industry changes More marketing, promotion, collaboration			3.41
EXPAND				
Number of respondents *Experiencing difficulties*	37% *41%*	26% *44%*	50% *38%*	3.0 3.2
Top 5 changes as a result of expansion	1. Equipment / technology changes (68% 2. Services (68%) 3. Workforce (50%) 4. Process improvements (41%) 5. Demand for skills training (41%)	1. Equipment / technology changes (67%) 2. Services (44%) 3. Floor space (33%) 4. Workforce (33%) 5. Process improvements (22%)	1. Services (85%) 2. Equipment / technology changes (69%) 3. Demand for skills training (62%) 4. Increased workforce (62%) 5. Process improvements (54%)	3.1
Top 5 factors contributing to expansion	1. Business plan (36%) / Business planning (32%) 2. Marketing (45%) 3. Financing (41%) 4. Local by-laws (27%) 5. Local infrastructure (27%)	1. Business planning (33%) / business plan (22%) 2. Financing (33%) 3. Marketing (33%) 4. Road, highway system (22%) 5. Local by-laws (22%) 6. Local infrastructure (22%)	1. Marketing (54%) 2. Business plan (46%) / business planning (31%) 3. Financing (46%) 4. Finding labour (31%) 5. Local by-laws (31%) 6. Local infrastructure (31%)	3.3
Top factors requiring assistance	1. Internet service (100%) 2. Building availability (50%) 3. Local approvals (50%) 4. Succession planning (33%) 5. Workforce training (33%)	1. Succession planning (100%) 2. Local approvals (100%) 3. Business planning (67%) / Business plan (50%) 4. Local by-laws (50%)	1. Internet service (100%) 2. Building availability (100%) 3. Local approvals (33%) 4. Workforce training (33%) 5. • Financing (17%)	

2012	Overall	Equine Operations	Equine Support Services	Q#
Top 3 reasons for expansion	1. Profits (50%) 2. Changing market (41%) 3. Workforce (14%)	1. Facility (22%) 2. Changing market (44%) 3. Competition (22%) 4. Marketing (22%) 5. Profits (22%)	1. Profits (69%) 2. Changing market (38%) 3. Workforce (23%) 4. Marketing (15%) 5. Financing (15%) 6. Zoning (14%)	3.4
Plans to relocate outside Erin	9% (2)	11% (1)	8% (1)	3.5 3.10
DOWNSIZE				
Number of respondents *Experiencing difficulties*	20% (12) *67%*	24% (8) *75%*	15% (4) *50%*	3.0 3.2
Top changes as a result of downsizing	1. Equipment / technology changes (58%) 2. Services (50%) 3. Workforce (50%) 4. Importing (33%) 5. Product line (33%)	1. Reduction in workforce (75%) 2. Equipment / technology changes (63%) 3. Reduction in services (63%) 4. Importing (50%) 5. Product line (50%)	1. Reduction in floor space (50%) 2. Reduction in equipment / technology changes (50%) 3. Reduction in services (25%)	3.1
Top factors contributing to downsizing Assistance required	1. Senior government (67%) 2. Succession planning (17%) None	1. Senior government policies (75%) 2. Succession planning (25%) None	1. Senior government policy (50%) 2. Business planning (25%) 3. Local by-laws (25%) None	3.3
Top reasons for downsizing	1. Government policies (58%) 2. Changing market (42%)	1. Senior government policies (63%) 2. Changing market (50%) 3. Succession planning (13%	1. Senior government policies (50%) 2. Business plan (25%) 3. Changing market (25%) 4. Local approvals (25%)	3.4

2012	Overall	Equine Operations	Equine Support Services	Q#
NO CHANGE	42% (25)	47% (16)	35% (9)	3.0
CLOSING Main reasons	3% (2)	6% (2) Senior government policy on OLG slots, racing	0%	3.0

Appendix D-5: Marketing

2012	Overall (60)	Equine Operations (34)	Equine Support Services (26)	Q#
Top 3 partnership initiatives interest	1. Co-op students (53%) 2. Mentorship (40%) 3. Unpaid job placement (32%)	1. Co-op students (60%) 2. Mentorship (41%) 3. Industry advisory committee (38%) 4. Unpaid job placement (38%)	1. Co-op students (42%) 2. Mentorship (38%) 3. Unpaid job placement (23%)	3.21
Top 3 interests in business collaboration	1. Networking, information sharing (47%) 2. Joint marketing (42%) 3. Joint training (30%)	1. Networking, information sharing (50%) 2. Joint marketing (38%) 3. Joint training (29%)	1. Joint marketing (42%) 2. Networking, information sharing (38%) 3. Joint training (31%) 4. Service buyer-supplier network (31%)	3.22
Top 3 complementary businesses	1. Services (39%) 2. Supplier (22%) 3. Manufacturer (17%) 4. Vendor (17%)	1. Services (33%) 2. Suppliers (33%) 3. Vendors (17%)	1. Services (50%) 2. Manufacturer (33%) 3. Vendors (17%)	3.24
Receive industry market research *Willing to share information*	28% *76%*	32% *55%*	23% *100%*	3.26 3.27
Sources	General sources: Internet, magazines, newspapers, horse shows, veterinary clinics, Canada Revenue Agency, broker Agency and organizations: Equine Canada, OFA, OHA, OMAFRA, Parelli Natural Horsemanship Organization, Standardbed Canada, Ecological Farmers Organization, Ontario Maple Producers Association Speciality publications: Better Farming, horse sport magazine, Stratus			

2012	Overall (60)	Equine Operations (34)	Equine Support Services (26)	Q#
Top 5 marketing techniques In Erin	1. Word of mouth (67%) 2. Internet (53%) 3. Social media (35%) 4. Business card (33%) 5. Direct marketing (32%)	1. Word of mouth (56%) 2. Internet (53%) 3. Social media (44%) 4. Direct marketing (35%) 5. Business card (32%)	1. Word of mouth (77%) 2. Internet (50%) 3. Business card (35%) 4. Direct marketing (27%) 5. Social media (23%) 6. Trade shows (23%)	3.28
In Ontario	1. Word of mouth (65%) 2. Internet (53%) 3. Business card (40%) 4. Social media (33%) 5. Direct marketing (27%)	1. Internet (62%) 2. Word of mouth (56%) 3. Social media (41%) 4. Business card (41%) 5. Direct marketing (26%)	1. Word of mouth (73%) 2. Internet (50%) 3. Business card (38%) 4. Trade shows (27%) 5. Event sponsorships (27%)	
Outside Ontario	1. Internet (43%) 2. Word of mouth (32%) 3. Social media (25%) 4. Publications (13%) 5. Business card (13%)	1. Internet (44%) 2. Word of mouth (32%) 3. Social media (29%) 4. Business card (15%) 5. Direct marketing (15%)	1. Internet (38%) 2. Word of mouth (27%) 3. Social media (19%) 4. Business card (12%) 5. Publications (15%)	
Top 3 ways to enhance market potential	1. Direct marketing to consumer (42%) 2. Increased co-operative marketing (35%) 3. Access to distribution channels/networks (20%) 4. Additional value-added opportunities (20%)	1. Direct marketing to consumer (41%) 2. Increased co-operative marketing (35%) 3. Access to distribution channels/networks (18%) 4. Improved transportation (15%)	1. Direct marketing to consumer (42%) 2. Increased co-operative marketing (35%) 3. Additional value-added opportunities (35%) 4. Access to distribution channels/networks (23%)	3.29

Appendix D-6: Workforce

2012	Overall (60)	Equine Operations (34)	Equine Support Services (26)	Q#
Employ staff	65%	79%	46%	1.6
Unpaid	*8%*	*7%*	*8%*	1.7
				1.8
Number of jobs				1.16
FTE (full-time equivalent)				1.19
Average	~3	~4	~2	
Erin total	~772	~550	~224	
Employment Tenure				
Permanent full-time	50%	68%	27%	
Average	~2	~1	~1	
Erin total	~384	~215	~169	
Permanent part-time	37%	53%	15%	
Average	~1	~1	~0.2	
Erin total	~235	~210	~25	
Level of expertise				
Unskilled	0%	*0%*	0%	
Semi-skilled	44%	*48%*	33%	
Skilled	28%	33%	17%	
Job growth in next 3 years				1.9
Increase	18%	11%	33%	1.10
Average	*~2.3*	*~1.3*	*~3*	
Decrease	13%	19%	0%	
average	*~0.60*	*~0.6*	0	
Net change	~1.7	~0.7	~12	
Average annual employment growth	7.7	1.4	4.0	

2012	Overall (60)	Equine Operations (34)	Equine Support Services (26)	Q#
Top 3 reasons	1. Management effectiveness (15%) 2. Increase / decrease in sales (13%) 3. Increase / decrease in market share (8%)	1. Management effectiveness (15%) 2. Increase / decrease in sales (11%) 3. Corporate decision (7%)	1. Increase / decrease in market share (25%) 2. Management effectiveness (17%) 3. Increase / decrease in sales (17%)	
Reasons				
Increase	Age More business			
Remain the same	At capacity Fewer horses Economy Pending government decision re: racing /OLG Meets current demand			
Decrease	Government policy re: racing / OLG Employee left			
Job growth in last 3 years				1.11
Increase	33%	30%	42%	1.12
Average increase	2.7	*1.8*	4.2	
Decrease	15%	22%	0%	
Average decrease	3.0	*3.0*	0	
Net change	-0.3	-1.3	4.2	
Average annual employment growth	-0.1	-0.4	1.4	
Primary factors	1. Management effectiveness (13%) 2. Increase / decrease in sales (25%) 3. Increase /decrease in market share (5%)	1. Increase /decrease in sales (22%) 2. Management effectiveness (19%)	1. Increase /decrease in sales (33%) 2. New products, services introduced (8%)	

2012	Overall (60)	Equine Operations (34)	Equine Support Services (26)	Q#
Reasons Increase	More demand for race horses More business More incentive (purses) More hands-on effort per horse More demand			
Decrease	Downsizing, retirement Government policy re: racing/OLG			
Hiring difficulties	31% 1. Lack of specific skills or training (equipment, process, system) (15%) 2. Lack of motivation/poor attitude (15%) 3. Lack of specific skills or training (equipment, process, system) (15%) 4. Lack of relevant experience (13%)	33% 1. Lack of motivation/poor attitude (19%) 2. Lack of relevant experience (15%) 3. Lack of specific skills or training (equipment, process, system) (11%) 4. Too few applicants (7%) 5. Lack of general skills (literacy, numeracy)(7%)	25% 1. Lack of specific skills or training (equipment, process, system) (25%) Lack of general skills (literacy, numeracy) (17%)	1.13
Primary methods to overcome hiring difficulties	Hiring someone even though the person didn't meet the requirements (13%) Additional use of overtime/longer shifts (5%) Passed some responsibilities onto other employees (5%) Recruited outside my community (5%) Improved training (5%)			1.15

2012	Overall (60)	Equine Operations (34)	Equine Support Services (26)	Q#
Top 5 recruiting methods	Referrals (56%) Personal network (46%) Local media advertising (21%) Website (15%) Social media (10%)			1.17
Ability to attract immigrant employees Poor	30%	35%	23%	1.20 1.18
Reasons	Mostly hire locally so not needed Jobs not suitable Lack of jobs Community character – too small, expensive, lack of suitable housing, small immigrant population, no public transit / car-oriented, housing is expensive Community setting – lack of affordable housing, no public transit / car-oriented, housing is expensive, language barrier			
Top 3 sources of employee training	1. In-house (79%) | satisfaction – 79% 2. Customized training (23%) | satisfaction – 89% 3. Local community college (23% | satisfaction – 67%	1. In-house (79%) | satisfaction - 6% 2. Customized training (23%) | satisfaction - 86% 3. Local community college (22%) | satisfaction - 50%	1. In-house (67%) | satisfaction - 75% 2. Local community college (25%) | satisfaction - 100% 3. Customized training (17%) | satisfaction - 100%	1.21 1.22
Primary barriers to training	Cost (21%) Relevant training not offered (21%) Availability of training locally (8%)	Relevant training not offered (30%) Cost (10%) Availability of local training (11%) Loss of productivity during training (11%)	Cost (25%) Losing trained employees to other businesses (17%)	

Appendix D-7: Equine Herd Profile

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Response Rate	78%	79%	54%	97%	4.26
Number of horse owners	153	64	28	62	
Average number of horses	3.6	5.6	2.8	1.9	
Total number of horses	549	356	77	117	
Variety of breeds	19	16	13	15	
Top 3 breeds by owners	1. Quarterhorse (23%) 2. Thoroughbred (14%) 3. Warmblood (12%)	1. Quarterhorse (20%) 2. Thoroughbred (16%) 3. Warmblood (17%)	1. Quarterhorse (13%) 2. Standardbred (5%) 3. Warmblood (5%)	1. Quarterhorse (22%) 2. Thoroughbred (16%) 3. Cross / Unknown (13%)	
Top 3 breeds by quantity	1. Quarterhorse (29%) 2. Donkey / Burro / Mule (16%) 3. Thoroughbred (15%)	1. Donkey / Burro / Mule (24%) 2. Quarterhorse (20%) 3. Thoroughbred (17%)	1. Quarterhorse (13%) 2. The rest distributed fairly evenly across reported breeds	1. Quarterhorse (12%) 2. Miniature (6%) 3. Thoroughbred (4%)	
Average value per horse	$9,555	$9,959	$11,718	$6,820	
Total value of horses	$5.2 million	$3.5 million	$900,000	$800,000	
Top 5 uses in rank	1. Pleasure 2. Competition 3. Riding instruction 4. Breeding 5. Retired / Rescue	1. Competition 2. Pleasure 3. Riding instruction 4. Breeding 5. Retired / Rescue	1. Pleasure 2. Competition 3. Retired / Rescue 4. Breeding 5. Pony Club / Pet	1. Pleasure 2. Competition 3. Retired / Rescue 4. Riding Instruction 5. Breeding	

Appendix D-8: Equine Herd Activity

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
% with horses[7],[8]	78%	79%	54%	97%	4.19
Distribution		37%	19%	44%	4.27
Average # of horses	*7.6*	*13.3*	*5.5*	*3.7*	4.28
					4.29
% with rideable horses	96%	93%	93%	100%	
Average # of rideable horses	*6.2*	*10.8*	*5.2*	*3.0*	
% with young horses	27%	48%	21%	13%	
Average # of young horses	*4.9*	*5.6*	*4.0*	*3.3*	
% with retired horses	37%	56%	29%	25%	
Average # of retired horses	*2.7*	*3.5*	*1.5*	*2.0*	
% that changed herd size:					4.20
More now					
Compared to last year	19%	26%	21%	13%	
Average change	*+2*	*+2*	*+3*	*+2*	
Compared to 3 years ago	25%	30%	36%	16%	
Average change	*+3*	*+3*	*+6*	*+1*	
Compared to 10 years ago	48%	48%	57	44%	
Average change	*+5*	*+8*	*+5*	*+2*	

[7] Only 2 leased horses
[8] Q#4.26 reports 549 total horses; Q#4.19 reports 555 total horses; Q# 4.27-4.29 report 603 total horses; Q#4.30 reports 763 total horses (in residence)

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Less now					
Last year	27%	37%	29%	19%	
Average change	*-8*	*-14*	*-3*	*-2*	
3 years	34%	48%	29%	25%	
Average change	*-9*	*-12*	*-18*	*-6*	
10 years	27%	26%	21%	31%	
Average change	*-4*	*-6*	*-7*	*-2*	
Net change in herd size					
Last year	-8%	-11%	-7%	-6%	
Average change	-6	-12	-3	-1	
3 years	-10%	-19%	+7%	-9%	
Average change	-5	-8	+1	-5	
10 years	+21%	+22%	+36%	+13%	
Average change	+1	+2	-2	0	
Horses sold in 2011:					4.21
% that sold horses	22%	33%	50%	22%	
Average # sold	4	5	8	13	
% who plan to change herd size in next 5 years:					4.22
Stay the same	40%	33%	36%	47%	4.23
Decrease	26%	37%	29%	16%	
Yes	21%	15%	21%	25%	
Maybe	14%	15%	14%	13%	
Increase herd by:[9]					
Breeding	10%	12%	12%	6%	
Purchase	20%	21%	15%	24%	

[9] Increasing herd by leasing or adopt/rescue was minimal.

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Years of horse ownership[10]					4.24
more than 30	42%	63%	43%	25%	4.25
21-30	26%	23%	28%	28%	
11-20	15%	11%	21%	15%	
1-10	15%	4%	7%	29%	
How many more years?[11]					
21 or more	74%	78%	86%	66%	
11-20	10%	7%	0%	16%	
2-10	14%	11%	14%	16%	

[10] All horses owned more than 1 year.
[11] None anticipated having horses for less than a year.

Appendix D-9: Equine Property Analysis

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Average # of horses in residence	13	22	8	11	4.30
% who own / lease property where horses reside	68%	72%	67%	60%	4.31
Operating acreage:					4.32
Own	96%	89%	100%	92%	
Rent from others	10%	28%	0%	12%	
Average per property[12]	61 acres	69 acres	57 acres	68 acres	
Rent to others	12%	11%	13%	23%	
Average per property	37 acres	48 acres	31 acres	37 acres	
% acreage by use					4.33
Equine	74%	94%	63%	81%	4.34
Pasture	76%	72%	78%	85%	
Hay, feed crops	52%	72%	41%	81%	
Equine facilities	72%	83%	66%	85%	
Average	48 acres	68 acres	36 acres	42 acres	
Non-equine agriculture	48%	39%	53%	42%	
Total Average[13]	56 acres	76 acres	45 acres	48 acres	

[12] Assume reported in acres

[13] Less total acreage than reported in Q#4.32 (operating acreage): Total – 449 acres | Business Use – 77 acres | Non-Business Use – 372 acres | Pleasure Riders – 188 acres | Competitive Riders – 283 acres

Appendix D-10: Equine Fiscal Analysis

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Number of properties with horses	73	27	14	32	
Distribution		37%	19%	44%	
% of respondent total	*78%*	*79%*	*54%*	*97%*	
% horses boarded	37%	22%	64%	38%	4.35
In Erin	*74%*	*33%*	*89%*	*83%*	4.36
Equine supplies and services used in Erin					4.38
** / ** not generally available in Erin*[14]					
Hay	60%	41%	86%	66%	
Bedding	63%	48%	79%	69%	
Feed	74%	67%	86%	75%	
Feed supplements	64%	59%	71%	66%	
Tack, harness supplies	30%	11%	43%	41%	
Farm supplies	63%	63%	71%	59%	
Veterinarian	64%	59%	57%	72%	
Farrier	51%	37%	71%	53%	
Saddle Fitter*	12%	11%	14%	13%	
[Equine] Massage Therapist*	22%	11%	43%	22%	
Equine Chiropractor*	12%	7%	7%	19%	
Coach	40%	26%	50%	47%	
[Horse] Trainer	33%	19%	36%	44%	
Competitions, Shows*	22%	19%	21%	25%	
Races**	1%	0%	0%	3%	
Public Trails	45%	33%	50%	53%	

[14] Considered not generally available in Erin if response rate was less than 50%. **Less than 10% reported being able to find in Erin

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Fair Grounds	44%	37%	57%	44%	
Apparel**	0%	0%	0%	0%	
Horse Transportation**	1%	0%	7%	0%	
Farm maintenance**	1%	0%	0%	3%	
Why not Erin?[15]	availability / awareness				
	cost				
	location / relationship				
	not needed				
	quality				
Average monthly equine-related expenses	$14,500	$24,700	$8,300	$3,600	4.40
Hay	$1,024	$1,802	$725	$304	
Grain and feed supplements	$730	$1,395	$475	$134	
Boarding	$1,056	$2,800	$873	$680	
Horse training	$1,354	$2,845	$1,150	$180	
Riding lessons	$179	$107	$162	$208	
Tack	$121	$176	$73	$81	
Farrier	$264	$480	$183	$147	
Horse care	$171	$406	$44	$33	
Medical	$318	$479	$418	$138	
Drugs	$120	$176	$55	$118	
Horse therapies	$114	$154	$100	$53	
Manure removal	$206	$341	$88	$63	

[15] Applies to all in varying degrees

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Stud fees	$776	$1,167	$300	$80	
Utilities [for horses}	$371	$535	$525	$67	
Association fees	$66	$74	$53	$60	
Promotion, advertising	$426	$309	$830	$30	
Property maintenance	$348	$489	$193	$157	
Utilities, insurance	$368	$432	$221	$385	
Transportation	$625	$998	$235	$396	
Event expenses	$639	$828	$918	$237	
Taxes [horse-related activities]	$1,952	$4,933	$472	$86	
Labour	$3,218	$3,840	$200	$10	
Value of equine-related assets					4.39
Average capital investment	$222,566	$310,865	$190,254	$139,140	4.41
Average planned capital improvements	*$134,044*	*$301,429*	*$30,150*	*$26,944*	4.42
Average capital investment with improvements	$356,611	$612,294	$220,404	$166,084	
Average capital investment including horses	$366,165	$622,253	$232,122	$172,904	
Total capital investment	$40,507,050	$24,247,500	$6,658,900	$9,600,650	
Total planned capital improvements	*$2,412,800*	*$2,110,000*	*$60,300*	*$242,500*	
Total capital investment with improvements	$42,919,850	$26,357,500	$6,719,200	$9,843,150	
Total capital investment including horses	$48,165,350	$29,902,800	$7,621,450	$10,641,100	
Erin capital investment	$394,159,835	$217,298,644	$63,787,945	$100,848,023	
Erin planned capital improvements	*$53,617,778*	*$44,594,912*	*$2,312,877*	$4,724,505	
Erin capital investment with improvements	$447,777,613	$261,893,556	$66,100,822	$105,572,528	
Erin capital investment including horses	$451,599,470	$263,366,899	$66,999,701	$106,768,379	

2012	Overall	Equine Operations	Equine Support Services	Riders Only	Q#
Average value:					
Land & Buildings	$828,563	$1,296,875	$652,500	$448,281	
Vehicles & Equipment	$112,290	$107,652	$138,750	$107,040	
Feed & Supplies	$8,802	$11,941	$19,771	$1,953	
Equine tack & apparel	$26,995	$38,310	$17,000	$17,875	
Other (not specified)	$8,750	$14,000	$3,500	$0	
Horses	$9,555	$9,959	$11,718	$6,820	

Appendix D-11: Rider Profile

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Participate in riding	69	26	9	34	4.0
Gender					5.0
Female	91%	92%	31%	91%	
Male	6%	1	0	3	
Age[17]					5.1
30 – 39	13%	8%	33%	12%	
40 – 49	32%	12%	11%	55%	
50 – 59	37%	54%	56%	18%	
60 – 69	12%	23%	0%	6%	
Average annual household income	~$148,000	~$136,000	~$180,000	~$147,000	5.8
Median annual household income	*$125,000*				
Employment status					5.3
Employed	36%	36%	25%	52%	
Full-time	67%	67%	100%	94%	
Part-time	33%	33%	0%	6%	
Self-employed	40%	40%	75%	39%	
Retired	20%	20%	0%	3%	
Homemaker	4%	4%	0%	6%	
How often do you ride for pleasure?			No response		4.1
Daily	19%	4%		30%	
several times per week	55%	60%		52%	
several times per month	16%	16%		15%	
several times per year	10%	20%		3%	

[16] Small sample size

[17] There 3 riders reported age 19-29, 1 over 70, and none over 80.

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Where do you ride?			No response		4.2
local private property	74%	73%		94%	
local trails	38%	46%		41%	
local roadways	19%	15%		26%	
local facilities	30%	12%		53%	
private property outside Erin	7%	12%		6%	
trails outside Erin	22%	15%		32%	
facilities outside Erin	7%	0%		15%	
How long do you plan on continuing riding?			No response		4.3
1 - 5 years	5%	12%		0%	
6 - 10 years	10%	12%		9%	
11 - 15 years	7%	16%		0%	
16 - 20 years	8%	12%		6%	
21+ years	69%	48%		85%	
How satisfied are you with the trails in Erin?					4.4
Satisfied	52%	56%	No response	59%	
Dissatisfied	16%	16%		16%	
Undecided	32%	28%		35%	
Primary reasons	Access to trails				
	Not aware of trails				
	Not used				
	Quality – mixed reviews				
	Limited quantity				

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Primary recreational rider issues	rider safety trails		No response		4.5
Other recreational rider issues	Lack of organized recreational riding Industry concerns Lack of community support Loss of land Equine support services workforce costs facilities				
Primary recommendations for improving recreational riding	Rider safety More trails, access		No response		4.6
Other recommendations for improving recreational riding	Organized rides Social activities Clinic, seminars				
Interest in a social riding group	58%	69%	No response	65%	4.7
Current participation in recreation riding activities			No response		4.8
Primary	Trail riding Events				4.9
Other	Social events Training, riding lessons Clinics				

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Primary recommendations	Marketing, promotion, collaboration				
	Organized trail rides				
	Organized events				
	Social activities				
	Better utilization of fair grounds				
	More trails				
	Clinics, seminars				
Competitive disciplines		No response			4.12
English					
Hunter/Jumper	33%		36%	32%	
Dressage	15%		27%	13%	
Eventing	15%		0%	18%	
Driving	4%		0%	5%	
Pony Club/4H	9%		9%	9%	
Western					
Western Games	9%		9%	9%	
Rodeo	7%		9%	7%	
Other					
Endurance	1%		0%	2%	
Breed Show	6%		9%	5%	
Heavy Horse	0%		0%	0%	
Competition frequency per year		No responses			4.10
1 - 10	60%		33%	67%	4.11
11 - 25	26%		44%	21%	
26 - 50	10%		11%	9%	
50+	5%		11%	3%	

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Year round	17%		25%	15%	
1 - 10	*14%*		0%	20%	
11 - 25	*29%*		50%	20%	
26 - 50	*29%*		0%	40%	
50+	*29%*		50%	20%	
Seasonally	83%		75%	85%	
1 - 10	*69%*		50%	72%	
11 - 25	*23%*		33%	21%	
26 - 50	*6%*		17%	3%	
How long will you continue competing?		No response			4.13
1 - 5 years	9%		22%	6%	
6 - 10 years	14%		0%	18%	
11 - 15 years	9%		22%	6%	
16 - 20 years	0%		0%	0%	
21+ years	67%		56%	71%	
Location of competitions (average)		No response			4.14
Erin	28%		8%	32%	
Ontario	82%		80%	82%	
Canada	16%		18%	16%	
International	26%		32%	24%	
Satisfaction with competitions in Erin		No response	[18]	[19]	4.15
Satisfied	68%		50%	70%	
Dissatisfied	27%		50%	24%	
Undecided	5%		0%	6%	

[18] Only 2 responses
[19] Only 50% response rate

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Primary reasons	Erin Fall Fair - mixed reviews Need an indoor arena, professional facilities Not enough room for trailers				
Recommendations	Social clubs Marketing, promotion, collaboration More variety in events Larger quality facility; indoor facility More overnight horse stables for events Better quality horse care at events	No response			4.16 4.17
Competitive riding concerns	Lack of sponsorships, prize money, funding Losing youth interest Lack of community support Safety of inexperienced riders Lack of local shows Lack of quality venues Limited variety of events Cost; not tax deductible High fees Horse transportation	No response			4.18
Participation in equine activities	Education (clinics, seminars, workshops) Events Racing Trail riding				5.10 5.11

2012		Overall	Pleasure Only	Compete Only[16]	Both	Q#
Reasons for not participating in equine activities	Lack of awareness, availability					
	Not needed					
Equine events missing in Erin	Education (clinics, seminars, workshops)					5.12
	Marketing, promotion, collaboration					
	Tack exchange					
	More varied events					
	Clubs, social events					
Agree an equine centre in Erin would be a benefit[20]		86%	71%	100%	77%	5.13
Satisfaction with local service organizations						5.14
Chamber of Commerce						
Satisfied		12%	15%	22%	12%	
Dissatisfied		4%	4%	0%	3%	
No contact		84%	81%	78%	82%	
Business Improvement Area (BIA)						
Satisfied		22%	34%	11%	33%	
Dissatisfied		7%	0%	22%	6%	
No contact		71%	65%	67%	59%	
Hills of Headwaters Tourism Association						
Satisfied		37%	46%	33%	44%	
Dissatisfied		6%	0%	22%	6%	
No contact		57%	54%	44%	47%	

[20] Details in survey analysis

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Business Self Help / Enterprise Centre					
Satisfied	1%	4%	0%	3%	
Dissatisfied	3%	0%	22%	0%	
No contact	96%	96%	78%	94%	
Erin Agricultural Society					
Satisfied	49%	39%	44%	56%	
Dissatisfied	7%	8%	0%	0%	
No contact	43%	54%	56%	41%	
Assessment of equine industry features in Erin					5.15
High quality land for horses					
Strong element	72%	62%	67%	82%	
Could be stronger	25%	38%	33%	12%	
Absent	0%	0%	0%	0%	
Unsure, no opinion	3%	0%	0%	6%	
High quality hay supply					
Strong element	45%	31%	78%	47%	
Could be stronger	42%	54%	11%	41%	
Absent	4%	8%	0%	3%	
Unsure, no opinion	9%	8%	11%	9%	
Abundant clean water supply					
Strong element	75%	54%	100%	85%	
Could be stronger	14%	27%	0%	6%	
Absent	1%	4%	0%	03%	
Unsure, no opinion	9%	15%	0%	6%	

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Valuable purse, prize money at tracks					
Strong element	6%	8%	0%	6%	
Could be stronger	9%	12%	11%	6%	
Absent	22%	23%	22%	21%	
Unsure, no opinion	64%	58%	67%	65%	
Good variety of local higher level competition					
Strong element	13%	19%	11%	9%	
Could be stronger	43%	38%	11%	56%	
Absent	23%	12%	56%	24%	
Unsure, no opinion	20%	31%	22%	12%	
Knowledgeable professionals in the industry					
Strong element	58%	54%	33%	68%	
Could be stronger	33%	35%	56%	26%	
Absent	0%	0%	0%	0%	
Unsure, no opinion	7%	12%	11%	3%	
Access to good local horse trails					
Strong element	23%	15%	33%	26%	
Could be stronger	59%	69%	33%	59%	
Absent	6%	4%	0%	9%	
Unsure, no opinion	12%	12%	33%	6%	
Access to good horse trainers					
Strong element	42%	15%	56%	59%	
Could be stronger	35%	46%	33%	26%	
Absent	7%	8%	0%	9%	
Unsure, no opinion	14%	27%	11%	6%	

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Access to good local riding instructors, coaches					
Strong element	51%	35%	56%	62%	
Could be stronger	38%	50%	33%	29%	
Absent	3%	0%	0%	6%	
Unsure, no opinion	9%	15%	11%	3%	
Access to good local veterinarian					
Strong element	72%	58%	78%	82%	
Could be stronger	20%	27%	22%	15%	
Absent	0%	0%	0%	0%	
Unsure, no opinion	7%	15%	0%	3%	
Locally available horse equipment					
Strong element	12%	8%	11%	15%	
Could be stronger	68%	77%	33%	71%	
Absent	19%	12%	56%	15%	
Unsure, no opinion	1%	4%	0%	0%	
Successful breeding programs					
Strong element	12%	4%	22%	15%	
Could be stronger	19%	19%	22%	18%	
Absent	9%	8%	0%	12%	
Unsure, no opinion	61%	69%	56%	56%	
Strong [industry] associations, organizations					
Strong element	22%	27%	11%	21%	
Could be stronger	36%	38%	11%	41%	
Absent	12%	8%	22%	12%	
Unsure, no opinion	29%	27%	44%	26%	

2012	Overall	Pleasure Only	Compete Only[16]	Both	Q#
Strong national, international reputation					
Strong element	4%	4%	0%	6%	
Could be stronger	33%	31%	0%	44%	
Absent	30%	31%	44%	26%	
Unsure, no opinion	23%	35%	33%	12%	