

Wisconsin State Horse Council General Population Survey and Horse Owners' Survey Report

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Executive Summary

General Population

In November 2007, the Survey Research Center (SRC) at the University of Wisconsin – River Falls mailed surveys to 10,000 Wisconsin residents in order to estimate the number of horse owners in the state. The initial surveys were followed by a second mailing to non-respondents. The overall response rate was 24 percent (2,449 completed questionnaires). The estimates provided in this report should be accurate to within plus or minus 2 percent. Further, non-response bias (concern that people who did not return their questionnaire hold consistently different views than those who completed it) does not appear to be a problem with this survey. In general, the sample aligns with the 2006 American Community Survey Census with the possible exceptions of a lower number of renters than would be expected and a higher proportion of males in the sample. In short, we expect the sample to accurately represent the population of the State of Wisconsin.

The following are key observations from the general population survey:

- 1. The SRC's best estimate of the number of households in the state that currently own horses is between 116,031 and 126,915.** Ownership of horses is spread fairly evenly across the state with the exception of the sparsely populated northern counties, which have somewhat fewer horse owners.
- 2. The demographic profile of horse owners differ from the general population in a number of ways: women, the employed, higher income households and those 45 and older are more likely to report that they currently own one or more horses.** A majority of horse owners report household incomes of less than \$75,000.
- 3. There is a substantial discrepancy between the number of premises with horses that have registered with the state and the number the SRC estimates exist in the state.**
- 4. 17 percent of Wisconsin's households' report that they go horseback riding in a typical year.** This suggests that more residents go horseback riding than are licensed hunters and nearly as many as report that they go snowmobiling. Most of the state's residents, who ride, do so once to several times per year.

Horse Owner Population

In January 2008, the SRC mailed surveys to 1,579 Wisconsin horse owners to gather data that would allow us to estimate the number of horses in Wisconsin and the economic impact of the horse sector on the state's economy. The initial survey mailing was followed by a post card and a second mailing to non-respondents. The response rate for the horse owners' survey was 48 percent (764 completed questionnaires). Based on an estimated total of 121,473 households in Wisconsin with horses, the estimates provided in this survey should be accurate to within plus or minus 3.53 percent. Non-response bias does not appear to be an issue for this survey either and the estimates should accurately reflect the current status of the horse industry in the state.

The following are key observations from the survey of Wisconsin horse owners:

1. The SRC estimates that **there are between 571,988 and 671,429 horses in the state** and that their total value is between \$2.543 billion and \$2.986 billion.
2. The equine industry directly generates **\$1.623 to \$1.905 in annual revenues and \$2.416 to \$2.836 billion in expenses**. Horse owners are estimated to pay up to **\$200 million in horse-related taxes annually** and generate approximately **5,000 full-time and 20,000 part-time jobs**. It is, in short, a significant economic sector in the state.
3. The total impact of the equine industry in Wisconsin, including indirect and induced impacts, is estimated to be
 - between \$2.610 and \$3.064 billion in sales
 - between 12,300 and 14,438 full time jobs that generate between \$361 and \$424 million in labor income
 - between \$646 and \$758 million in total income in Wisconsin
4. Most horse owners keep their horses on their own property (81%) and the most common breed is the quarter horse (63% of horse owners have at least one quarter horse). Horses in Wisconsin are primarily used for pleasure/trail riding (78%) or showing/competing (56%) and most owners riding about once a week (52%).
5. The issues facing Wisconsin's horse owners focus primarily on land use concerns. Housing developments that limit where horses can be ridden (61%) and lack of local trails (50%) were the most commonly cited issues facing the state's equestrians. Relatively few horse owners said that they faced a lack of local services (e.g. veterinarians, information, farriers) needed for their horses.

Study Purpose

The goal of the General Population Survey was to estimate the number of households in the state that own at least one horse. The Horse Owners' Survey was designed to assess the economic impact horse owners have on the State's economy. The Wisconsin State Horse Council chose to work on these projects with the Survey Research Center (SRC) at the University of Wisconsin – River Falls.

Survey Methods

General Population Survey. In November 2007, the Survey Research Center (SRC) at the University of Wisconsin – River Falls mailed surveys to 10,000 Wisconsin residents seeking to estimate the number of horse owners in the state. A second questionnaire was sent to remaining non-respondents in December. The SRC received a total of 2,449 completed questionnaires from residents for a 24 percent response rate. The estimates provided in this report for the General Population Survey are expected to be accurate to within plus or minus 2 percent with 95 percent confidence.

Horse Owners' Survey. In January 2008, the SRC mailed surveys to 1,597 Wisconsin residents who had been identified as being current horse owners based on their membership in various horse associations. A cover letter asked that the person in the household with the most information about their horse-related activities and the financial aspects of their horse enterprise to complete the survey. After two weeks, the SRC mailed postcards to those from whom a completed questionnaire had not been received. A second questionnaire was sent to remaining non-respondents in February. The SRC received a total of 764 completed questionnaires from residents for a very robust 48 percent response rate. Based on an estimated total of 121,473 households in Wisconsin with horses, the estimates provided in this survey should be accurate to within plus or minus 3.53 percent.

Any survey has to be concerned with “non-response bias”. Non-response bias refers to a situation in which people who don't return a questionnaire have opinions that are systematically different from the opinions of those who return their surveys. **Based upon a standard statistical analysis that is described in Appendix B, the Survey Research Center (SRC) concludes that non-response bias is not a concern for either the General Population Survey or the Horse Owners' Survey.**

In addition to the numeric responses, respondents provided additional written comments which were compiled by the SRC from the surveys. As appropriate, selected quotes will be used in some sections of this report to illustrate these comments. **Appendix C to this report contains the complete compilation of comments from the General Population Survey and Appendix D compiles the comments from the Horse Owners' Survey.**

Appendix E contains a copy of the General Population Survey questionnaire with a quantitative summary of responses by question. Finally, Appendix F is a quantitative summary of responses for the Horse Owners' Survey.

Profile of Respondents

Table 1 summarizes the demographic profile of respondents to the General Population and Horse Owner Surveys. Where comparable data was available from the 2006 American Community Survey Census, they were included to indicate the degree to which the sample represents the underlying adult population in Wisconsin. The data in Table 1 show that, in general, the General Population survey sample aligns well with the Census data. The two areas in which there are discrepancies between the General Population sample and the Census are with respect to gender and housing status¹. The sample has a higher proportion of males and home owners. There are a number of variables for which the opinions of males differ from females. These differences will be noted in the report. There does not appear to be significant differences between the responses of home owners and renters. In short, the General Population data should provide accurate and reliable estimates of horse ownership in the state.

Table 1: Demographic Profile of Respondents							
Gender	Count	Male	Female				
General Population Survey	2,368	63%	37%				
Horse Owners Survey	751	22%	78%				
Census (18+)	4,241,563	49%	51%				
Age 18+	Count	18-24	25-34	35-44	45-54	55-64	65+
General Population Survey	2,390	3%	9%	16%	27%	21%	25%
Horse Owners Survey	752	5%	7%	20%	36%	22%	10%
Census	4,241,563	13%	16%	19%	20%	14%	17%
Adults in Household	Count	0	1	2	3	4+	
General Population Survey	2,315		19%	69%	9%	3%	
Horse Owners Survey	733		23%	61%	12%	4%	
Children in Household	Count	0	1	2	3	4+	
General Population Survey	2,152	66%	13%	13%	5%	3%	
Horse Owners Survey	581	62%	20%	14%	3%	1%	
Housing	Count	Own	Rent				
General Population Survey	2,355	91%	8%				
Horse Owners Survey	756	92%	5%				
Census (Occupied Housing Units)	2,230,060	70%	30%				
Employment Status	Count	Full-Time	Part-Time	Self	Unemp	Retired	Other
General Population Survey	2,345	49%	7%	10%	2%	30%	2%
Horse Owners Survey	743	50%	12%	21%	2%	13%	3%
Census (16+)	4,405,240	66% ²			4%	4%	8%
Household Income Range	Count	<\$25,000	\$25-\$49,999	\$50-\$74,999	\$75-\$99,999	\$100-\$199,999	\$200,000+
General Population Survey	2,178	13%	30%	27%	16%	11%	3%
Horse Owners Survey	718	4%	20%	29%	19%	20%	7%
Census (Total households)	2,230,060	24%	28%	22%	13%	12%	2%

¹ A particular challenge for mail surveys is obtaining addresses for rental units.

² Census employment data does not differentiate between full-time, self-employed, and part-time workers.

The demographic profile of horse owners differs in a number of ways from the overall state population. In particular, there are much higher proportions of females, homeowners, employed people and higher income households in the horse owners sample than would be expected in a random sample of Wisconsin households. Given that owning a horse is an active and, frequently, expensive activity, it is not surprising that the demographic profile of horse owners differs from the state averages. The differences that are apparent in Table 1 conform to our expectations about this population. Further, as will be pointed out shortly, women tend to be much more involved in the equine enterprise than men, so the disproportionate number of women in the Horse Owners Survey is to be expected. The SRC is confident that the estimates provided in this report are an accurate reflection of horse ownership in Wisconsin.

The next section of this report summarizes the results of the General Population Survey. We summarize the results of Horse Owners Survey in a subsequent section.

General Population Survey

Surveys were sent to a random sample of 2,000 households in each of the five horse council districts in Wisconsin (Figure 1 below).

Figure 1: District Map

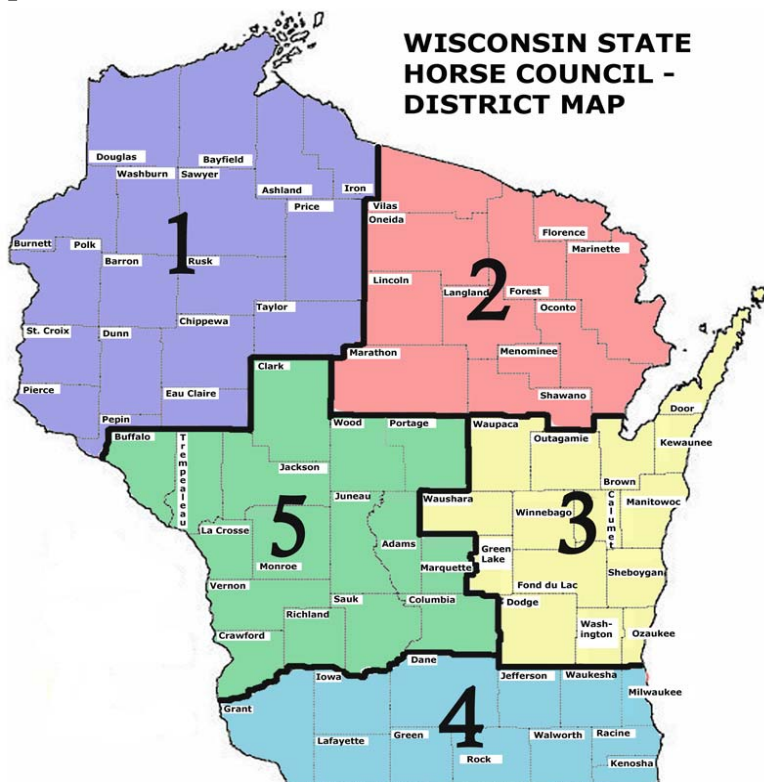


Figure 2: General Population Survey Response Rate by District

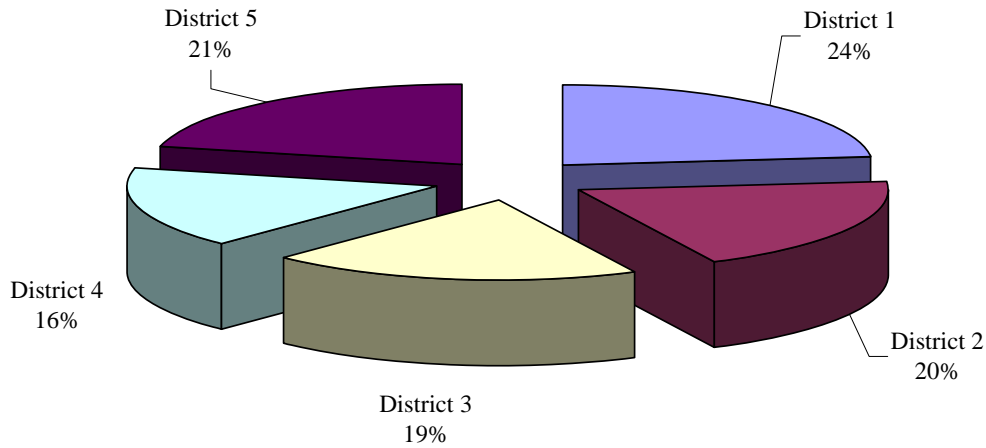
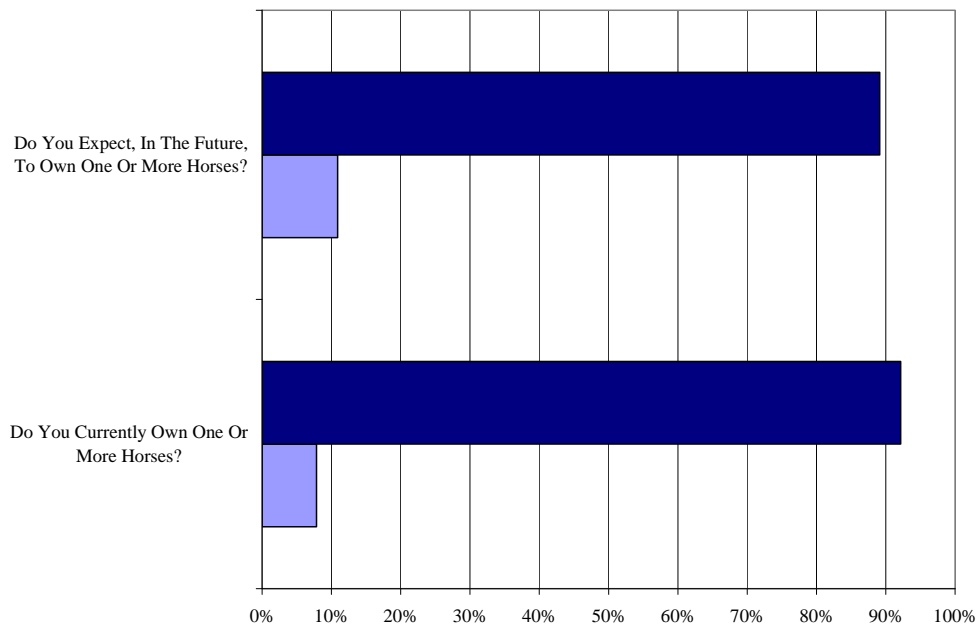


Figure 2 shows that the response rates from the five districts were very similar. District 1 in the northwest portion of the state had the highest response (24%) and District 4 in southern Wisconsin the lowest (16%). Where appropriate, the report includes observed differences in the responses of residents based on their district. See Tables 1A through 11A in Appendix A for cross-tabulation tables comparing survey questions by district.

Current and Future Horse Ownership

Overall, eight percent of survey respondents report currently owning one or more horses. When asked if they expect to own one or more horses in the future, eleven percent of survey respondents state that they do (Figure 3).

Figure 3: Current and Future Horse Ownership



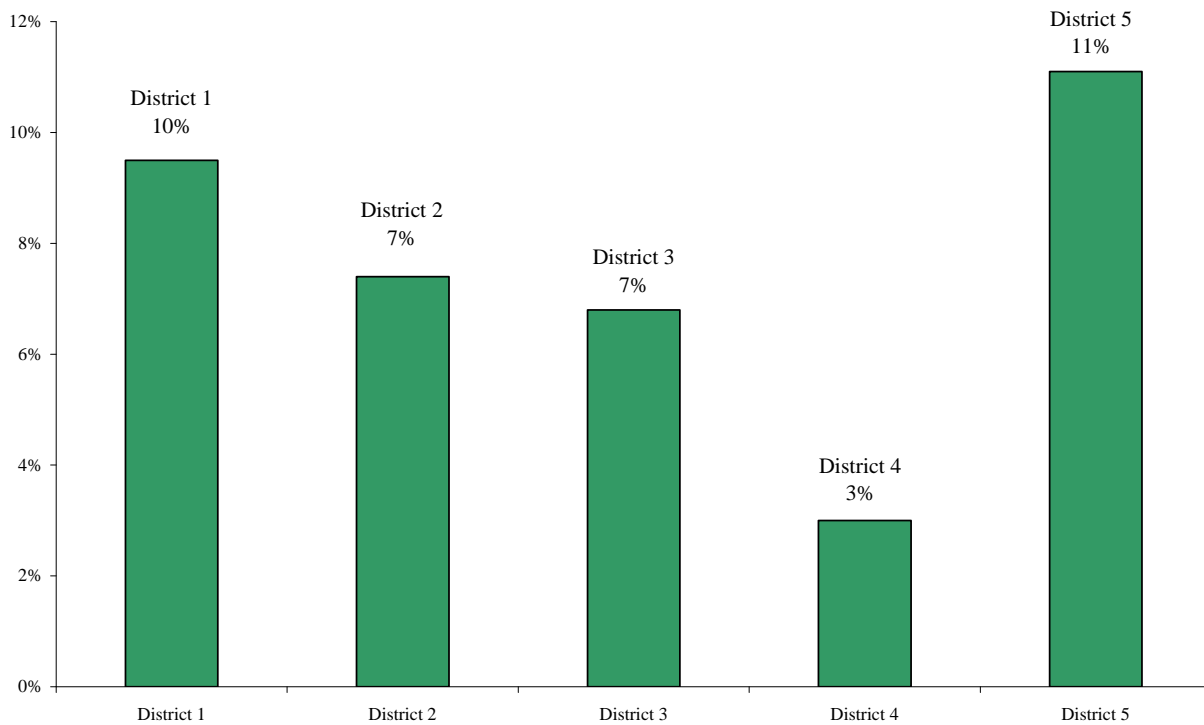
Current and future horse owners have specific demographic profiles:

- Women, the employed, and those *45 and older* are more likely to report that they *currently* own one or more horses
- Women, households with children, the employed, and respondents *younger than 45* are more likely to report that they expect to own horses in the future.

Horse Ownership by District

Figure 4 illustrates the pattern of current horse ownership by district.

Figure 4: Percent Ownership by District



- Respondents from District 5 (west central district) are significantly more likely than those in other districts to currently own a horse and to say that they expect to horses in the future.
- Respondents from District 4 (southern district) are less likely than those from other districts, to currently own a horse or expect to own one in the future.

Table 2: Estimated Number Households with Horses, by District, 2007		
District	Min Number Households	Max Number Households
District 1	19,921	21,625
District 2	10,404	11,378
District 3	32,445	35,495
District 4	27,991	30,888
District 5	25,270	27,529
Total	116,031	126,915

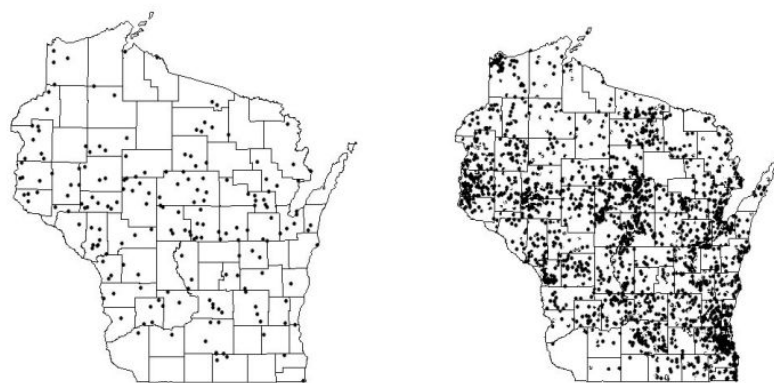
The number of households in the Wisconsin Horse Council districts varies from about 150,000 in District 2 to nearly 1 million in District 4. Therefore, it is useful to translate the percentage of horse owners, as depicted in Figure 4 into the estimated number of households in each district with horses. This is done in Table 2. The estimates in Table 2 are based on the average number of households with horses in each district

and the confidence interval for each district. The confidence intervals vary from a low of plus or minus 4.1% for district 1 to a high of plus or minus 4.9% for district 4. The confidence interval is calculated based on the number of observations in each district relative to the number of households in each district. Table 2 indicates that districts 3 and 4, which have the lowest percentage of households that report owning a horse but relatively large numbers of households, have the largest number of horse-owning households. With the exception of the lightly-populated district 2, there are approximately 20,000 – 30,000 horse-owning households in each of the other Horse Council districts. Horse ownership is, in short, widely distributed around the state.

As noted in Table 2, the SRC estimates that between 116,031 and 126,915 Wisconsin households currently own horses. This estimate, because it is weighted by the number of households in each district, is our best estimate of the number of households in the state with horses. To give these numbers some context, the National Agricultural Statistical Service estimates that in 2007 there were a total of 76,000 farms in Wisconsin (<http://www.nass.usda.gov/>).³ So, there are more households who currently own horses than are classified as farms. There are about twice as many households, between 167,701 and 183,492 who said they expect to own horses in the future as there are farms in the state.

The wide geographic distribution of horse ownership is also illustrated in the following maps. The map on the left in Figure 6 shows the locations of horse owners by zip code. The map on the right shows the geographic distribution of total respondents to the General Population Survey. The dots in the maps are randomly located within a county and do not represent the location of a respondent. There are no apparent concentrations of horse ownership in the map on the left. Rather, as Table 2 suggests, horse ownership is widespread within Wisconsin.

Figure 6: Horse Ownership by Zip Code and Survey Response by Zip Code



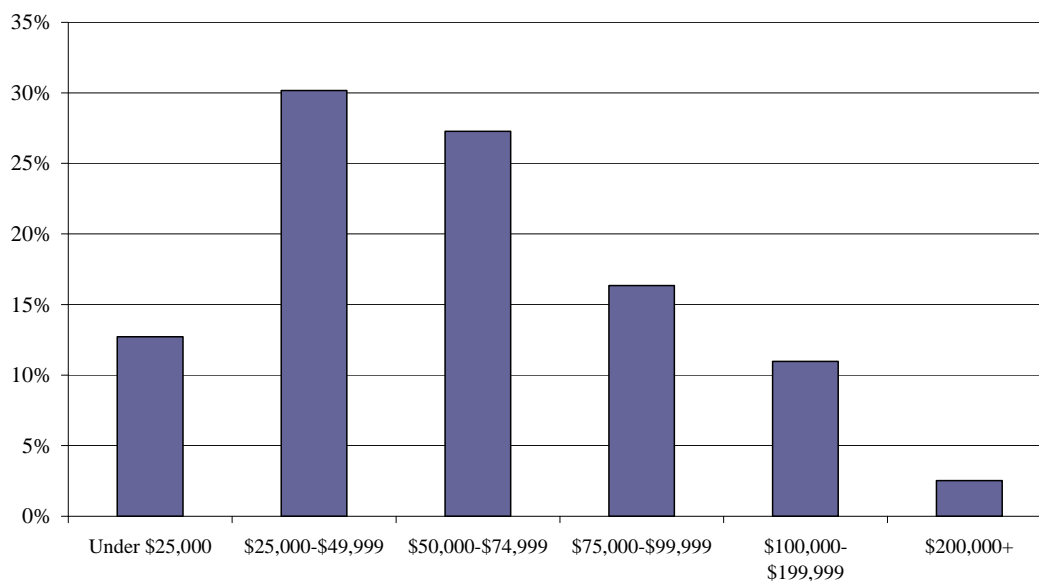
One dot = 1 respondent

³ To be defined as a farm by USDA, an entity has to sell \$1,000 worth of agricultural products in a “normal” year.

Horse Ownership by Household Income

Figure 7 shows that horse ownership is, perhaps surprisingly, fairly consistent among households with incomes between \$25,000 and \$200,000. Between 8% and 10% of households in the middle 4 income categories reported owning horses. Sixty-six percent of households reporting that they own a horse had incomes less than \$75,000.

Figure 7: Horse Ownership by Household Income Level, Wisconsin
2007



Livestock Registration Data

The SRC wanted to compare estimates of the number of households with horses based on the General Population Survey to the number of equine premises registered in Wisconsin's livestock premises registration program.⁴ As Table 3 indicates, the proportion of equine premises registered by DATCP and

Table 3: Comparison of 'Equine on Premises' DATCP Data vs. Horse Ownership Reporting in Survey

Wisconsin State Horse Council District	Equine Premises in WI DATCP Livestock Premises Registration Program, by District	Percentage WI DATCP Livestock Premises Registration Program, by District	Estimated Households with Horses from General Population Survey, by District	Percentage Households with Horses from General Pop Survey
1	4,591	23%	20,773	17%
2	2,193	11%	10,891	9%
3	3,694	18%	33,970	28%
4	4,120	21%	29,439	24%
5	5,412	27%	26,399	22%
Total	20,010	100%	121,473	100%

⁴ Wisconsin Department of Agriculture, Trade and Consumer Protection's (DATCP) livestock premises registration program does not collect information about how many horses there are in Wisconsin, but it does collect the types of livestock on the premises being registered. The 'equine' type includes horses, mules and donkeys. There were three counties in Wisconsin (Iron, Menominee, and Milwaukee) with asterisks in the data count indicating that the county had less than 25 premises with horses. The data used for this survey consisted of premises count by species and county and was current on 24-AUG-07.

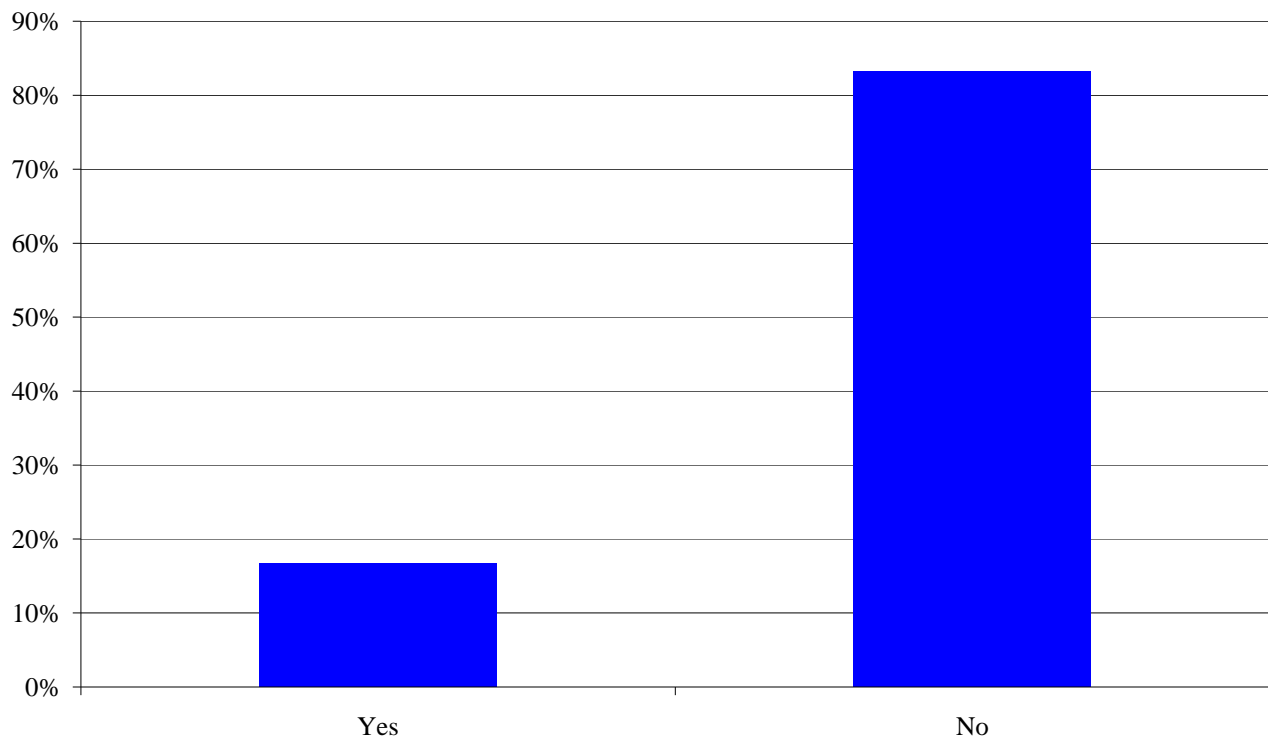
the percentage of horse-owning households in each of the Wisconsin Horse Council districts as estimated by the SRC aligns quite well. The percentage of all Wisconsin households with horses that the SRC estimates are in district 3 (28%) is, however, substantially greater than the proportion of premises registered by DATCP from that district (18%). There is general agreement between the SRC estimates and DATCP registrations in the four other districts.

There is, however, a dramatic difference between the total number of equine premises that DATCP has registered (20,010) and the numbers of Wisconsin households the SRC estimates have horses (121,473). Some of this discrepancy is probably accounted for by households who board their horse(s) at an equine facility rather than on their own property. One equine facility registration could cover a substantial number of households who have horses. It is unlikely, however, that this would account for all of the difference given that there are 6 times as many households with horses according to the SRC estimates as are registered with DATCP.

Horseback Riding

Residents were asked if they ever go horseback riding in a typical year. Seventeen percent of residents said that they do (Figure 8). This is roughly double the proportion of households who report owning a horse, indicating that there is a fair amount of casual horseback riding by the state’s residents.

Figure 8: In a typical year, do you ever go horseback riding?



- Women, homeowners, households with children, the employed, and those 45 and older are more likely to report that they go horseback riding.
- Respondents from District 5 (west central district) are more likely to say they go horseback riding in a typical year and respondents from District 4 (southern district) are less likely to say they go horseback riding in a typical year.

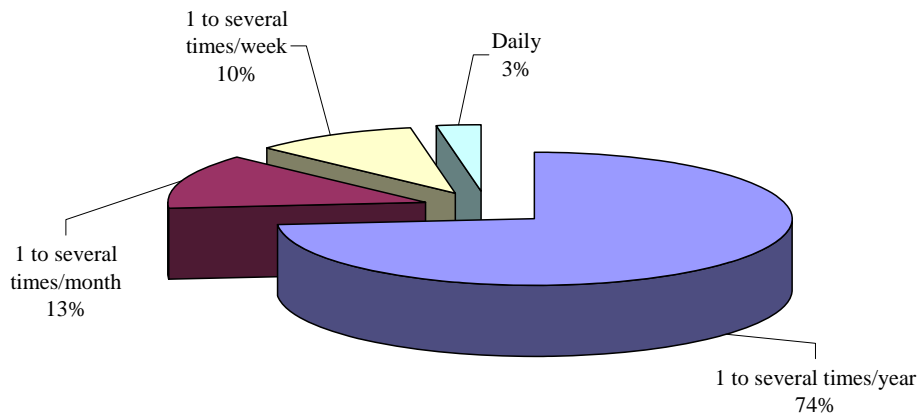
The SRC converted the horseback riding survey data into state figures. Based on the percentage of respondents that say that in a typical year they go horseback riding (17 percent), the number of adults in the state (4,241,563), and a confidence interval of plus or minus 2 percent, **these data indicate that in a typical year, between 706,645 and 735,487 adults in Wisconsin go horseback riding.**

Table 4: Wisconsin Recreation Participation	
Activity	# of Participants
Licensed Anglers	1,400,000 ⁵
Sledding	1,218,000
Snowmobiling	761,000
Estimated Horseback Riding	706,645-735,487
Licensed Hunters	652,370 ⁶
Cross-Country Skiing	474,000
Ice Fishing	474,000
Downhill Skiing	403,000
Snowshoeing	333,000
Snowboarding	195,000
Ice hockey outdoors	166,000
Dog sledding	99,000

The SRC compared horseback riding with other recreational activities compiled from Wisconsin Department of Natural Resources (DNR) recreation participation survey data, DNR fishing report data, and U.S. Fish and Wildlife Service hunting data. Table 4 highlights activities that Wisconsin residents participate in by number of participants.⁷ Based on the General Population survey results, horseback riding would be ranked fourth in terms of resident participation when compared to the activities described in Table 4.

Frequency of Horseback Riding. Of residents who say that they ride, about three-quarters report riding one to several times a year. Three percent report riding daily (Figure 9). Frequency of riding tends to be higher among women, younger residents, home owners, those with kids and higher income households.

Figure 9: Riding Frequency, General Population Survey



⁵ Wisconsin Department of Natural Resources. Pub-FH-506 2007 <http://dnr.wi.gov/fish/reports/fishingreport/fishingreport2007web.pdf#top>

⁶ Davis, Jerry. "Deer Numbers Don't Add Up" Wisconsin State Journal. 11 Nov. 2007. <http://www.madison.com/wsj/home/sports/outdoors/256306>

⁷ Winter activities only/Wisconsin residents 16 and older. Wisconsin Department of Natural Resources. 18 Feb. 2008 <http://www.dnr.state.wi.us/aboutdnr/specialreports/winter/>

General Population Survey Conclusions

Key conclusions from General Population Survey include:

1. About 8 percent of Wisconsin's 2,230,060 households own horses.
2. Horse ownership is widely distributed around the state
3. There are significant differences between demographic groups with respect to current and future horse ownership. Women, the employed, and those *45 and older* are more likely to report that they *currently* own one or more horses. Women, households with children, the employed, and respondents *younger than 45* are more likely to report that they expect to own horses in the future.
4. Two-thirds of respondents reporting horse ownership have an annual household income of \$75,000 or less.
5. There is a wide discrepancy between the number of Wisconsin households the SRC estimate own horses (121,473) and the number of equine premises registered with DATCP (20,010)
6. 17 percent of Wisconsin residents report going horseback riding at least once in a typical year. This means that horseback riding is engaged in by nearly as many people who report going snowmobiling and by more than say they are a licensed hunter.

Horse Owners Survey

The goals of the Horse Owners Survey (HOS) were substantially more ambitious than those of the General Population Survey. The HOS was designed to estimate the number of horses that Wisconsin horse owners typically own, what types of horses they have, how they use their horses, income earned from their horse enterprise, the expenses associated with owning horses, employment generated by the horse industry, and an assessment of potential issues they face as horse owners.

Thanks to the efforts of Mike McGowan of the Wisconsin Horse Council addresses for 1,597 horse owners around the State were gathered. The geographic distribution of the 749 who returned their questionnaires is shown in Figure 10. Figure 10 indicates that responses came from virtually every county of the state. The greater density of responses in the eastern and southern portions of the state aligns well with the findings reported in the section of this report that summarized the general population survey.

Table 5 provides a snapshot of the average Wisconsin horse owner. If we use the confidence interval for this survey (plus or minus 3.53%) and the lower and upper bounds of horses owned in each of the 5 districts in Table 2 (a minimum number of households in Wisconsin with horses of 116,031 and a maximum of 126,915) to provide estimates for the state, we get some fairly impressive numbers. Based on the estimates in these two studies, we estimate that:

Figure 10: Geographic Distribution of Horse Owner Respondents

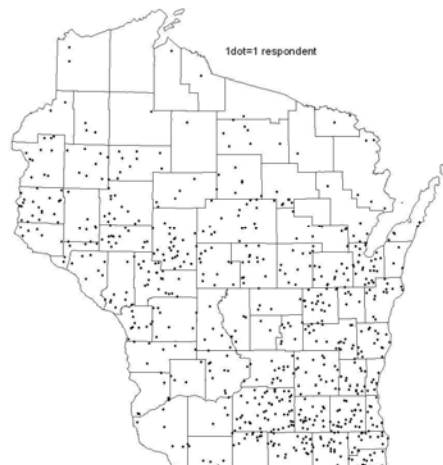


Table 5: Snapshot of Wisconsin Horse Owner	
Average Number of Horses	5.1
Average Value of Horses	\$22,727
Average Total Horse-Related Earnings	\$14,506
Average Total Horse-Related Expenses	\$21,583
Average Horse-Related Taxes Paid	\$1,519
Average Full-Time Workers	0.04
Average Part-Time Workers	0.17
Average Seasonal Workers	0.18

- there are between 571,988 and 671,429 horses in the state
- these horses are estimated to be worth between \$2.543 and \$2.986 billion
- horse operations annually generate \$1.623 to \$1.905 billion in revenues
- horse operations annually generate \$2.416 to \$2.836 billion in expenses
- horse operations pay between \$170 and \$200 million in horse-related taxes
- horse operations generate 4,500 to 5,300 thousand full-time jobs and 19,000 to 22,300 thousand part-time jobs.

The data in the table and the state estimates measure the direct effects of the equine industry only. In a subsequent section of the report the total impact (direct and indirect) of the equine sector will be discussed.

Description of the Wisconsin Horse Industry

Table 6 shows that the distribution of horse ownership in Wisconsin is a bit skewed. Roughly three-quarters of all horse owners own five or fewer horses. So the average number of horses owned, 5.1 per horse-owning household, indicates that there are a few quite large horse operations in the state. As noted in Table 6, 8 percent of the sample report owning 11 or more horses; the largest in our sample owned 62 animals. Most of Wisconsin’s horse owners are not involved in buying or selling horses on a regular basis. Roughly two-thirds of the sample neither bought nor sold a horse during 2007 and only about 10 percent bought or sold more than one horse.

Table 6: Number of Horses Owned, Bought, Sold and Their Value, Wisconsin Horse Owner Survey								
	N	Mean	1 - 2	3 – 5	6 - 10	11+		
Number Horses Owned	762	5.1	35%	39%	18%	8%		
	N	Mean	0	1	2 - 5	6+		
Number Bought	703	0.6	67%	21%	11%	0%		
Number Sold	702	0.8	68%	23%	6%	3%		
	N	Mean	<\$2,000	\$2,000-\$5,000	\$5,001-\$15,000	\$15,001-\$25,000	\$25,001-\$75,000	\$75,000+
Market Value of Horses	703	22,726	11%	20%	37%	12%	16%	5%
	N	Mean	\$0-\$1,000	\$1,000-\$2,000	\$2,000-\$5,000	\$5,000-\$10,000	\$10,000+	
Value Horses Bought	448	2,894	62%	12%	14%	6%	6%	
Value Horses Sold	445	3,946	59%	8%	16%	9%	8%	

The average horse in Wisconsin appears to be worth slightly less than \$5,000. Table 6 indicates that the average value of the 5.1 horses owned on the average Wisconsin horse operation is \$22,726, or \$4,456 per horse. The value of horses sold was \$4,823 (= \$2,894 per horse sold/0.6 horses sold) and the average value of horses purchased was \$4,033 (= \$3,946 per horse sold/0.8 horses sold). The consistency of these values gives us some confidence in their general validity. Only about 1 out of 5 horse operations in the state placed a value of more than \$25,000 on their horses.

Most Wisconsin horse owners keep their horses on their own property (80%); 28% report boarding horses on someone else's property. The types of horses owned by Wisconsin's horse-men and -women are summarized in Table 7. Nearly two-thirds of all horse owners have a quarter horse and more than one in four report owning a paint horse. The 38 percent who report owning other breeds of horses included those who own miniature horses and ponies (12%), Tennessee Walkers (6%), and work horses (4%). The vast majority of Wisconsin horse owners have one or two horses of any given breed.

Table 7: Types of Horses Owned, Wisconsin Horse Owners Survey						
Breed	% Own	Mean	1	2	2 - 5	6+
Quarter Horse	63%	3.61	43%	23%	22%	13%
Paint	29%	2.13	56%	17%	20%	6%
Arab/Cross	19%	2.22	53%	25%	17%	5%
Appaloosa	12%	1.82	64%	19%	13%	4%
Thoroughbred	6%	1.52	73%	13%	15%	0%
Morgan	6%	3.86	52%	20%	11%	16%
Warmblood	4%	1.86	76%	10%	7%	7%
Saddlebred	3%	2.10	65%	20%	10%	5%
Standardbred	2%	1.67	60%	20%	20%	0%
Other Breeds	38%	2.69	48%	20%	23%	9%

Figure 11 indicates that nearly 80 percent of horse owners report using their animal for pleasure/trail riding. More than half are involved in shows or other competition and about one-quarter are involved in breeding. There are a wide variety of uses included in the "other" category including: "pasture ornaments", barrel racing, roping and cutting, lessons, 4-H, driving, and endurance races.

Figure 11: How Wisconsin Horse Owners Use their Horses

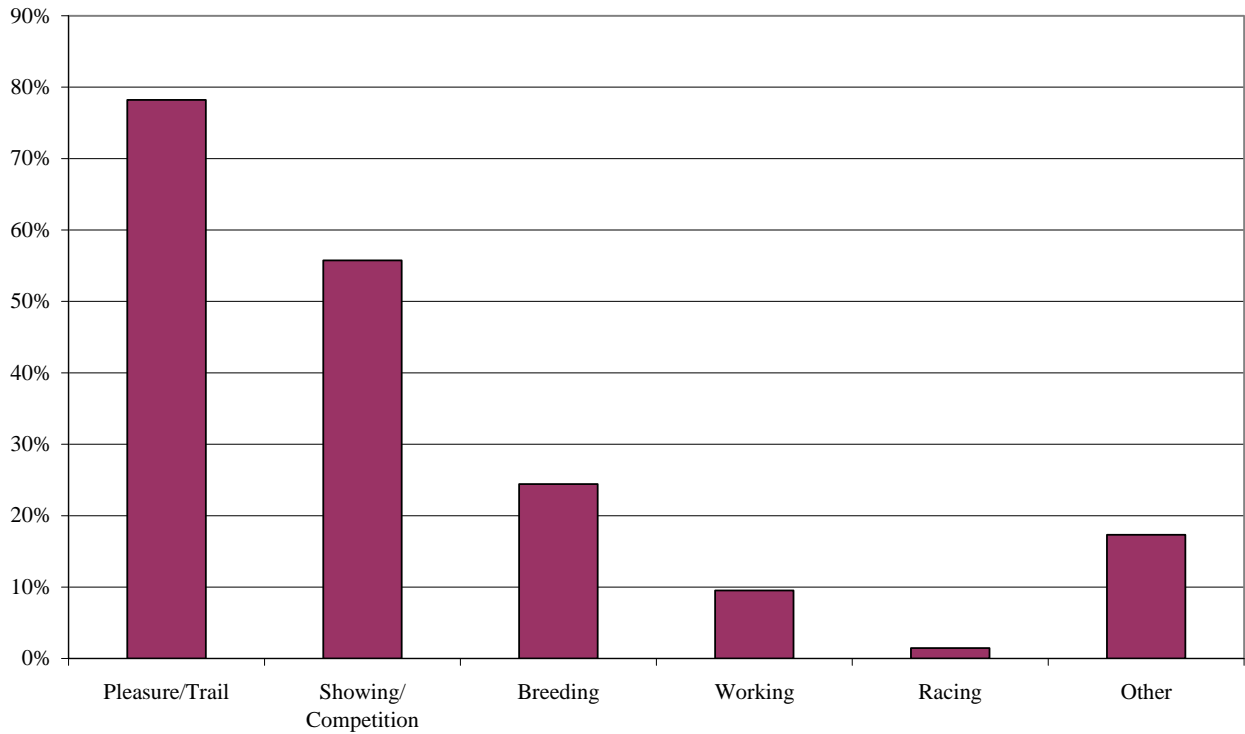
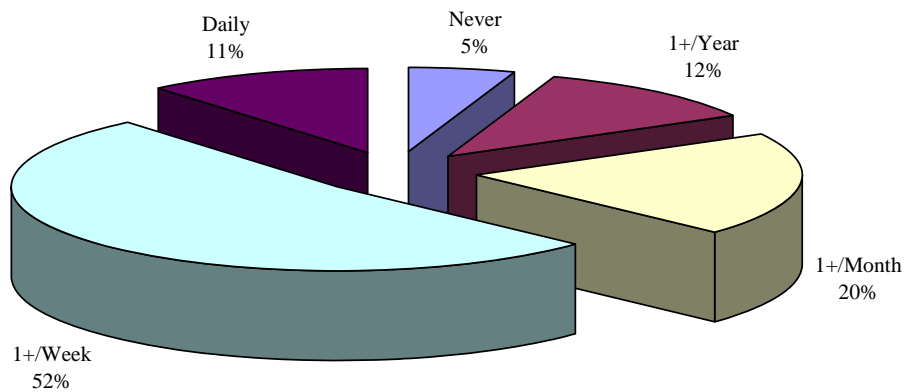


Figure 12 indicates that about half of Wisconsin horse owners go riding once or more per week. Those who report riding for pleasure, for work, or showing tend to ride with greater frequency. Those involved in breeding and other activities ride with less frequency.

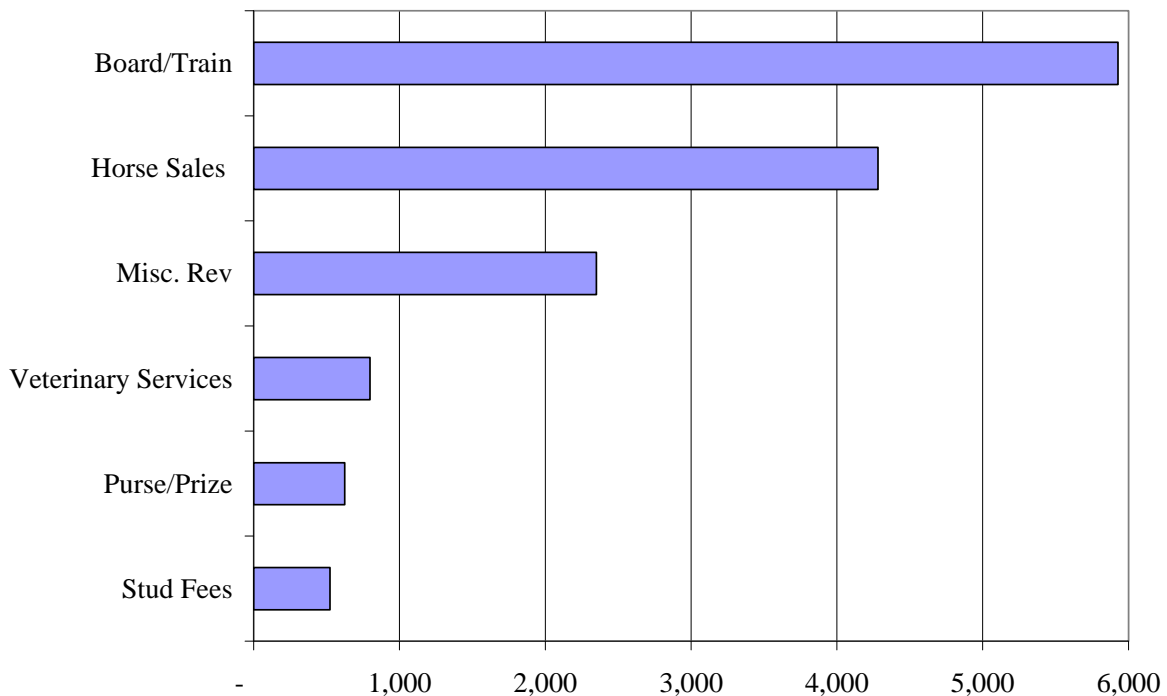
Figure 12: Frequency with which Wisconsin Horse Owners Ride



The Economics of Wisconsin's Horse Industry

Revenues. Respondents were asked to indicate the amount of revenue earned in purses or prizes, stud fees, horse sales, boarding and training, providing veterinary services, and from other aspects of their horse operation. As Figure 13 indicates boarding and training generate the largest average annual revenue on horse farms Wisconsin. The sale of horses and boarding and training horses account for slightly more than 70% of the roughly \$14,500 in annual revenues generated on the average Wisconsin horse operation.

Figure 13: Average Annual Revenues from Horse Operations, 2007



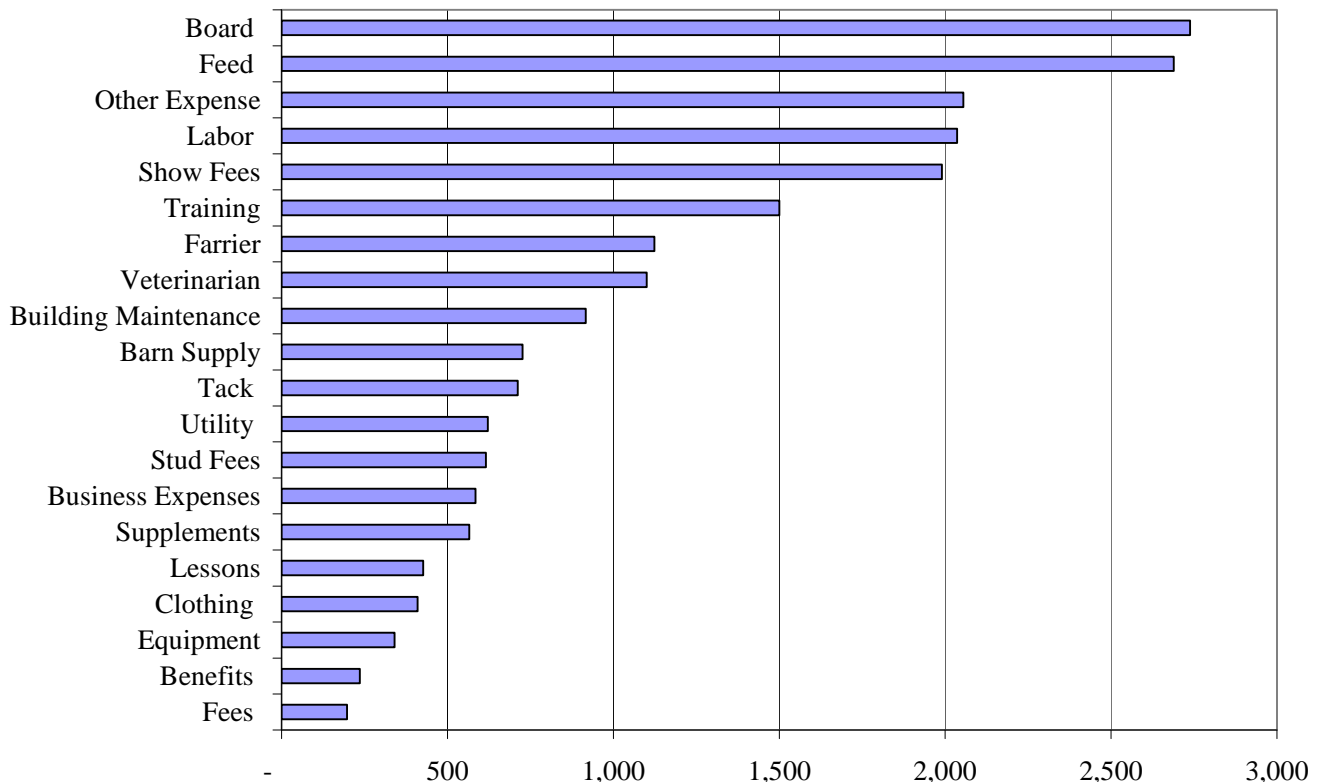
As noted, the SRC estimates that the equine industry in Wisconsin generates between **\$1.62 billion and \$1.91 billion** in revenue per year (see Table 2).

Costs. The cost structure for an average Wisconsin household with horses is summarized in Figure 14. Again, as noted in Table 2 and accompanying text, the average horse owner in the state spends nearly \$21,600 per year on her/his horse operation and the equine sector as a whole injects between **\$2.50 billion and \$2.74 billion** into the state's economy. The SRC analyzed factors associated with total expenditures and found, not surprisingly, that they increased if households have more horses owned, report riding more frequently, and have higher household incomes. Total expenditures are negatively correlated with the number of children under 18 living in the home.

Wisconsin horse owners pay an average of \$5,427 per year for board and feed for their horses, an average of about \$450 per month, and these two items account for about one-quarter of total expenses. Since only 28 percent of horse owners report boarding their horses off their property and relatively few respondents who keep their horses on their own property imputed a value for boarding their horse, the average of \$450 per month underestimates the "value" of these expenditures.

There are a wide range of items listed under the \$2,000 annual "Other Expenses" item, which is the third highest average expense category. Many of respondents mentioned trail fees, various forms of insurance and expenses associated with travelling with their horses (gas, camping fees, etc.) in this category.

Figure 14: Average Annual Expenditures from Horse Operations, 2007



Labor expenses and show fees also generate about \$2,000 worth of expenses per year for Wisconsin horse operations. There is a significant drop to the next largest horse owner expense, training for their horses, at \$1,500 per year and another large drop to about \$1,100 per year for farrier and veterinarian expenses. The eight largest expense categories (through veterinarian expenses) account for about 70% of total expenses for the typical Wisconsin horse operation.

At the other end of the scale, the typical Wisconsin horse owner spends only about \$200 for horse association fees/magazine subscriptions and in-kind benefits for employees (e.g. room and board for workers' horses).

As suggested in Table 2 and its accompanying text, most of the labor on Wisconsin's horse operations is provided by the horse owner's family. Never-the-less, the SRC estimates that statewide the sector directly provides approximately 5,000 full time jobs and 4 times that number of part-time and seasonal jobs.

Total Economic Impacts. The economic impact of any industry includes the direct impacts discussed above and the "indirect" and "induced" economic impacts. Indirect and induced economic impacts measure the economic activities that occur because the industry exists.

Indirect economic impacts are based on business to business transactions. The purchases of horse owners cause the businesses from which they buy to increase their production. This increased production creates additional economic activity. For example, when a horse owner buys a rubberized mat for a horse stall, the producer of the mat has to buy more raw materials, hire more labor, use more transportation services, and so on. Some of these economic activities stimulate the horse owner's local economy (e.g. the wages

paid to the local person who makes or delivers the mat) and some leaks out into the national or international economy (e.g. the purchase of the rubber). Indirect impacts measure the total additional local economic activity generated by these business to business transactions.

Induced impacts measure the additional economic activity generated by the way workers and owners spend the incomes they earn in the equine industry. To illustrate, consider an employee at a horse farm. When she/he receives a paycheck, the money is likely to be used to pay for rent/mortgage, groceries, utilities, fuel for the vehicle, and so on. As the paycheck is spent, some of it “leaks” out of the local economy (e.g. to pay for the gasoline that was shipped to the local filling station from a refinery in a neighboring state) but some of it remains in the local economy (e.g. to pay the wages for the clerk at the filling station). Likewise, some of the clerk’s wages remain in the local economy and some of it pays for products coming from outside the local economy and some of it for goods and services produced locally. Induced impacts measure the total local economic value of these expenditures.

The standard way that the total economic impact of an industry (direct + indirect + induced effects) is estimated is via an input-output model. Dr. Steve Deller (UW-Madison) used the direct impact estimates generated by the SRC survey in the well accepted input-output model called Implan. The results of the Implan model indicate that the total impact of the equine industry in Wisconsin are between:

- \$2.610 and \$3.064 billion in sales per year
- 12,300 to 14,438 jobs that generate between \$361 and \$424 million in labor income
- \$646 and \$758 million in total income in Wisconsin

As one respondent said, “. . . *the equine industry needs to be recognized for the important economic factor that it is . . .*”

Taxes. Only about one in four respondents responded to the questions asking about the amount of federal, state, and local taxes they paid on horse related activities in 2007. Of those who responded, they reported paying an average of \$1,519 on their horse-related activities in 2007. Nearly 50% (\$728) was paid in federal taxes with the remaining 50% split equally between state and local taxing authorities.

Assets. Table 8 summarizes the SRC’s findings with respect to ownership of trucks and horse trailers. More than 80 percent of the 764 horse owners who returned their survey reported owning both a truck and a trailer. Table 8 indicates that, on average, the trucks owned by Wisconsin horse owners are 4 or 5 years old and cost their owners about \$25,000 to buy. There is close agreement between the mean and median (the point at which 50% of the sample reported a higher and 50% a lower number) with respect to the price paid for these trucks and the year in which they were acquired. There is a greater difference between the mean and median with respect to the miles driven each year that are associated with the horse business. The fact that the mean is substantially larger indicates that there are a few respondents who report driving a large number of miles in support of their horse business. Indeed, there were 30 who said they drove their truck in excess of 50,000 miles in support of their horse business.

Table 8: Truck and Trailer Ownership		
	Truck	Trailer
Average Price	\$24,798	\$13,388
Median Price	\$25,000	\$8,850
Average Year	2003	2002
Median Year	2004	2003
Ave Miles/Year	11,678	6812
Median Miles/Year	4,000	2000

The trailers owned by the state's horse owners are a bit older, on average, than the trucks used to pull them. Again there are substantial differences between the mean and median with respect to the purchase price and the average number of miles it is used each year. Some horse owners report having spent a great deal on their trailers; nearly one in six reported spending more than \$25,000 on their horse trailer. Five percent of those who answered the question about the number of miles they put on their trailer said they drove in excess of 25,000 miles.

Table 9 indicates that only about 1 in 10 of Wisconsin's horse owners don't own any acres that they use in their horse enterprise. Nearly three-quarters of these horse owners report using fewer than 40 acres for their horses. Only 15% rent land for their horse enterprise and the amount of land rented is generally quite small; only 7% rent more than 10 acres. In short, most horse operations in Wisconsin operate on relatively small acreages that they own.

Table 9: Acres Owned and Rented				
Acres	Owned		Rented	
	Number	Percent	Number	Percent
0	70	11%	362	85%
5	123	19%	15	4%
10	122	19%	17	4%
40	225	35%	18	4%
41+	103	16%	13	3%

The SRC also asked horse owners to estimate how much their horse enterprise adds to the value of their property, the approximate value of their horse enterprise equipment, and the replacement cost of that equipment. Horse owners said that, on average, their horse operation added \$56,287 to the value of their property, which they have \$23,297 worth of horse equipment that would cost them \$35,387 to replace. If we expand these figures to the state level, horse enterprises are expected:

- to add between \$6.3 billion and \$7.4 billion to the value of properties in Wisconsin.
- to contain between \$2.6 billion and \$3.1 billion worth of equipment used with horses
- to require between \$4.0 and \$4.6 billion to replace that equipment

All of these data indicate that the equine industry in Wisconsin is a significant economic force. The overall GDP of the state in 2006 was \$227 billion according to the U.S. Commerce Department (<http://www.bea.gov/regional/>), so the equine sector's \$1.62 - \$1.91 billion in revenues and \$2.50 - \$2.74 billion in costs are significant numbers. In addition, the investments that horse owners have made in their properties have added significantly to the overall wealth of the state.

Issues Facing the State’s Horse Owners

Respondents were asked to indicate the extent to which they agreed or disagreed with a number of statements regarding issues that might affect their ownership of horses. The items in the top half of Table 10 identify issues that more horse owners identified as problems.

A majority of the problems identified by horse owners are related to local land use planning. More than 60 percent of the respondents indicated that housing developments have limited where they can ride their horses and more than three times as many agreed this was a problem than said it wasn’t an issue for them. In what may be a related topic, 55% of respondents said that there is a lack of horse trails in their local area and only 24% said that this is not a problem. Finally, substantially more respondents said that zoning restrictions limited where they can keep their horse(s) (44%) compared to those who said zoning issue were not a problem. Each of these items suggest that **horse owners need to be more involved in the land use planning efforts (Smart Growth) in their local jurisdictions.**

Concerns about land-use related issues are apparent in the comments horse owners provided. For example, more than 100 comments were received about trails:

[There is a] “lack of riding areas- appears all the money for trails goes for hiking or bikes.”

[There are] “not enough trails - making it necessary to go out of state for good trails.”

“I pay for trail passes, state park stickers, and taxes - and yet the two riding clubs I belong to have to volunteer to get any improvements in camping or trail upkeep. NOT fair.”

- *Other states (IL, SD, IA) that I have been horse camping to seem to have larger, cleaner, more accessible sights than WI. We always seem to be fighting for our trails AND our campsites!!*

Table 10: Issues Facing Wisconsin Equestrians			
	Count	Generally Not a Problem	Generally a Problem
Housing Development Limits Where I Can Ride	738	18%	61%
Local Trails Lacking	745	24%	55%
Easy Access to Local Instructor	732	21%	50%
Zoning Restrictions Limit Where I Can Keep Horse	732	27%	44%
Difficult Finding Local Farrier	747	52%	35%
Horse Equipment Not Available Locally	745	55%	27%
Easy Access to Local Trainer	736	54%	24%
Good Access Local Info	743	62%	15%
Good Access Veterinarians	751	86%	9%

Other comments received that relate to public policy impacts on the horse industry included:

“I do not consider WI to be a very horse friendly or tax friendly state. I will probably be moving away from WI when my daughter graduates even though our families live here.”

“ . . . the more farmers who sell their land (land that is turned into subdivisions with "green space" as opposed to subdivisions that could have followed an existing country atmosphere), allowing for 5 to 10 acre lots for potential horse owners, the more private land that is lost to those horse-owning families who frequented those lands as a place to ride. Add to that fact that many of the trails that meander throughout horse communities where farm land was turned into subdivisions are designated as foot paths only and do not allow horses.”

Half of the respondents said that they have difficulty finding a good local riding instructor and only 21 percent felt this was not a problem. Interestingly, while finding a riding instructor seems to be a problem, finding a horse trainer does not. Only about a quarter of respondents said they cannot easily find a good local horse trainer.

The items in the bottom half of Table 10, things that are **not** perceived as problems for the average Wisconsin horse owner, tend to focus on goods and services needed for their animals. A majority of respondents feel that they have adequate local access to farriers, horse equipment, horse trainers, information and (especially) veterinarians. The relatively high proportion of respondents who disagreed that they have adequate access to farriers (35%), suggests that there are local shortages of these services.

There are few differences in the way different demographic groups view the issues summarized in Table 10. Concern about access to trails and the impact of housing development on where horses can be ridden increases with the age of the respondent and, compared to men, more women agree that there is an adequate supply of local horse trainers but disagree that the local supply of riding instructors is adequate.

Other Issues

In addition to the issue raised above, a substantial number of people noted a concern about the ban on slaughtering horses (60 voiced concern, 4 supported the ban on slaughtering horse). The following are characteristic of the responses received:

“I want to see the law against slaughter rescinded. Horses are livestock that should be disposed of if need be. Most horse people do not consider them to be pets. There must be a way to dispose of the sick, old, or inferior animals. People should not have to own them forever just because they can not find any way of getting rid of the animal.”

Horse owners were also concerned about facilities in Wisconsin, especially as they pertain to shows. Typical of comment received about these related topics include:

“Because of the weather, much riding needs to be done inside. Building arenas or finding arenas that you can use is hard!!”

“Need big show arena like Minnesota and Michigan. Will bring big money to Wisconsin.”

Horse Owners' Survey Conclusions

The horse owners survey collected general information about the state's equestrian operations (number of horses, types, how they are used, etc.), the economics of owning a horse, and the challenges faced by horse enthusiasts. The number of horse owners who responded to the survey and their geographic distribution give us confidence that the data accurately reflect the condition of the horse sector in the state.

The results of our survey indicate that there are likely to be 600,000 or more horses in the state. The average horse is worth about \$5,000 and the average horse-owning family owns about 5 horses, most of which are quarter horses. Most horse owners use their animals for pleasure and trail riding and more than half engage in shows and other competitions.

The average horse operation in the state generates about \$14,500 in revenue, mostly the sale of room and board and of horses. These operations have average costs of nearly \$21,600 per farm. The disparity between revenues and expenses indicate that for most Wisconsin horse owners, this is a recreational activity and not a business. The impact of this industry on the state, whether we classify it as agriculture or recreation, however, is substantial. Based on the estimated number of households in the state with horses and these average revenues and expenditures, the SRC estimates that the horse industry generates more than \$1.6 billion in revenue and incurs at least \$2.5 billion in costs. In addition, owners estimate that their horse operations add at least \$6.3 billion to the value of their properties. These are substantial numbers.

The biggest issues facing horse owners tend to be associated with land use (e.g. finding trails and other places to ride locally) rather than accessing needed services (e.g. most owners are satisfied with their access to local veterinarian services).

Conclusions

This two-stage survey was designed to answer a few key questions:

- How many horses and horse-owners are there in Wisconsin?
- How significant is the equine industry in the Wisconsin economy?
- What are the key issues facing Wisconsin's horse industry?

Given the size of the samples in these surveys, the SRC feels confident that the estimates provided in this report are quite accurate. Based on a random sample of households in Wisconsin, the SRC estimates that between 116,031 and 126,915 Wisconsin households own horses. Further, we estimate that more Wisconsin residents go horseback riding in a typical year than buy a hunting license and nearly as many as go snowmobiling. In short, the equine industry touches the lives of a very substantial portion of the state's population.

The SRC estimates that **there are between 571,988 and 671,429 horses in the state** and that their total value is between \$2.543 billion and \$2.986 billion. The equine industry appears to be spread relatively uniformly throughout the state, though the concentration of horses is somewhat less in the northern tier of counties.

The horse industry is a significant part of the Wisconsin economy. The direct impacts of the industry are estimated to be:

- \$1.623 to \$1.905 in annual revenues and \$2.416 to \$2.836 billion in expenses
- \$200 million in horse-related taxes are paid annually
- 5,000 full-time and 20,000 part-time jobs are generated

If we include the indirect and induced impacts of the equine industry, its impact is even more impressive:

- \$2.610 to \$3.064 billion in sales
- 12,300 to 14,438 jobs that generate between \$361 and \$424 million in labor income
- \$646 to \$758 million in total income in Wisconsin

Finally, the key issues facing Wisconsin's horse owners tend to revolve around land use issues. In particular, housing developments that restrict places where horses can be ridden and a lack of trails were identified as key concerns. Relatively few horse owners identified a lack of local services (veterinarians, farriers, etc.) as serious concerns.

Appendix A – Cross-Tabulation Tables: Comparing Survey Responses by District Wisconsin State Horse Council General Population Survey

Table 1A: Horses Owned - By District

			District					Total
			1	2	3	4	5	
Own horses	Yes	Count	54	35	32	12	58	191
		% within District	9.5%	7.4%	6.8%	3.0%	11.1%	7.9%
	No	Count	513	440	440	383	463	2239
		% within District	90.5%	92.6%	93.2%	97.0%	88.9%	92.1%
Total	Count		567	475	472	395	521	2430
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 2A: Expect, in the future, to own one or more horses - By District

			District					Total
			1	2	3	4	5	
Expect to own	Yes	Count	77	47	47	19	74	264
		% within District	13.7%	9.9%	10.0%	4.8%	14.3%	10.9%
	No	Count	485	427	425	375	443	2155
		% within District	86.3%	90.1%	90.0%	95.2%	85.7%	89.1%
Total	Count		562	474	472	394	517	2419
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 3A: Going horseback riding in a typical year - By District

			District					Total
			1	2	3	4	5	
Horseback riding in a typical year	Yes	Count	93	72	80	47	110	402
		% within District	16.8%	15.4%	17.1%	12.0%	21.2%	16.8%
	No	Count	460	396	387	344	408	1995
		% within District	83.2%	84.6%	82.9%	88.0%	78.8%	83.2%
Total	Count		553	468	467	391	518	2397
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4A: Frequency of Horseback Riding - By District

			District					Total
			1	2	3	4	5	
If horseback riding, which best describes the frequency with which you ride	1 to several times/yr	Count	78	72	68	50	91	359
		% within District	68.4%	75.0%	74.7%	86.2%	71.1%	73.7%
	1 to several times/mth	Count	21	13	8	2	20	64
		% within District	18.4%	13.5%	8.8%	3.4%	15.6%	13.1%
	1 to several times/wk	Count	12	10	11	4	13	50
		% within District	10.5%	10.4%	12.1%	6.9%	10.2%	10.3%
	Daily	Count	3	1	4	2	4	14
		% within District	2.6%	1.0%	4.4%	3.4%	3.1%	2.9%
Total	Count		114	96	91	58	128	487
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 5A: Gender - By District

			District					Total
			1	2	3	4	5	
Gender	Male	Count	345	285	292	252	320	1494
		% within District	63.2%	61.7%	63.1%	65.5%	63.0%	63.2%
	Female	Count	201	177	171	133	188	870
		% within District	36.8%	38.3%	36.9%	34.5%	37.0%	36.8%
Total	Count		546	462	463	385	508	2364
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 6A: Age - By District

			District					Total
			1	2	3	4	5	
Age	Count		15	18	12	4	13	62
	% within District		2.7%	3.8%	2.6%	1.0%	2.5%	2.6%
18 to 24	Count		38	35	41	44	47	205
	% within District		6.9%	7.5%	8.8%	11.5%	9.1%	8.6%
25 to 34	Count		107	67	72	70	76	392
	% within District		19.3%	14.3%	15.4%	18.2%	14.8%	16.4%
35 to 44	Count		142	114	131	97	152	636
	% within District		25.7%	24.4%	28.1%	25.3%	29.6%	26.7%
45 to 54	Count		109	103	102	84	104	502
	% within District		19.7%	22.0%	21.8%	21.9%	20.2%	21.0%
65+	Count		142	131	109	85	122	589
	% within District		25.7%	28.0%	23.3%	22.1%	23.7%	24.7%
Total	Count		553	468	467	384	514	2386
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 7A: Employment Status - By District

			District					Total
			1	2	3	4	5	
Employment Status	Emp Full Time	Count	265	211	219	201	256	1152
		% within District	48.4%	45.6%	48.5%	53.0%	51.2%	49.2%
	Emp Part Time	Count	30	28	39	24	36	157
		% within District	5.5%	6.0%	8.6%	6.3%	7.2%	6.7%
	Self Emp	Count	60	44	41	39	51	235
		% within District	11.0%	9.5%	9.1%	10.3%	10.2%	10.0%
	Unemp	Count	13	8	10	9	10	50
		% within District	2.4%	1.7%	2.2%	2.4%	2.0%	2.1%
	Retired	Count	170	157	134	95	135	691
		% within District	31.1%	33.9%	29.6%	25.1%	27.0%	29.5%
	Other	Count	9	15	9	11	12	56
		% within District	1.6%	3.2%	2.0%	2.9%	2.4%	2.4%
Total	Count		547	463	452	379	500	2341
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 8A: Housing - By District

			District					Total
			1	2	3	4	5	
Housing Own	Count		511	422	413	340	461	2147
	% within District		92.9%	90.9%	90.2%	90.2%	91.8%	91.3%
Rent	Count		39	42	45	37	41	204
	% within District		7.1%	9.1%	9.8%	9.8%	8.2%	8.7%
Total	Count		550	464	458	377	502	2351
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 9A: Adults 18+ in Household - By District

			District					Total
			1	2	3	4	5	
Adults (18+) in Household	1	Count	114	90	73	66	93	436
		% within District	21.2%	19.8%	16.4%	17.6%	18.6%	18.9%
	2	Count	359	319	300	264	342	1584
		% within District	66.9%	70.1%	67.6%	70.4%	68.5%	68.6%
	3	Count	52	33	52	36	43	216
		% within District	9.7%	7.3%	11.7%	9.6%	8.6%	9.4%
	4	Count	9	13	15	6	20	63
		% within District	1.7%	2.9%	3.4%	1.6%	4.0%	2.7%
	5+	Count	3	0	4	3	1	11
		% within District	.6%	.0%	.9%	.8%	.2%	.5%
Total	Count		537	455	444	375	499	2310
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 10A: Children in Household - By District

			District					Total
			1	2	3	4	5	
Children in Household	0	Count	337	294	263	223	294	1411
		% within District	66.1%	68.9%	64.6%	64.3%	64.2%	65.7%
	1	Count	65	54	56	45	68	288
		% within District	12.7%	12.6%	13.8%	13.0%	14.8%	13.4%
	2	Count	69	47	58	46	63	283
		% within District	13.5%	11.0%	14.3%	13.3%	13.8%	13.2%
	3	Count	21	20	23	19	18	101
		% within District	4.1%	4.7%	5.7%	5.5%	3.9%	4.7%
	4	Count	12	9	4	12	12	49
		% within District	2.4%	2.1%	1.0%	3.5%	2.6%	2.3%
	5+	Count	6	3	3	2	3	17
		% within District	1.2%	.7%	.7%	.6%	.7%	.8%
Total	Count		510	427	407	347	458	2149
	% within District		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 11A: Household Income Range - By District

			District					Total
			1	2	3	4	5	
Household Income Range	Under \$25,000	Count	79	67	40	30	59	275
		% within District	15.3%	16.0%	9.5%	8.7%	12.6%	12.6%
	\$25,000-\$49,999	Count	147	145	114	86	164	656
		% within District	28.4%	34.6%	27.1%	24.9%	34.9%	30.2%
	\$50,000-\$74,999	Count	152	102	125	87	128	594
		% within District	29.3%	24.3%	29.7%	25.1%	27.2%	27.3%
	\$75,000-\$99,999	Count	77	59	84	60	75	355
		% within District	14.9%	14.1%	20.0%	17.3%	16.0%	16.3%
	\$100,000-\$199,999	Count	52	37	48	66	36	239
		% within District	10.0%	8.8%	11.4%	19.1%	7.7%	11.0%
	\$200,000+	Count	11	9	10	17	8	55
		% within District	2.1%	2.1%	2.4%	4.9%	1.7%	2.5%
	Total	Count	518	419	421	346	470	2174
		% within District	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Appendix B – Non-Response Bias Test

General Population Survey

Any survey has to be concerned with “non-response bias.” Non-response bias refers to a situation in which people who don’t return a questionnaire have opinions that are systematically different from the opinions of those who return their surveys. For example, suppose, in a typical year, non-respondents do not go horseback riding (Question 3), whereas most of those who returned their questionnaire said they do. In this case, non-response bias would exist and the raw results would overstate Wisconsin residents’ yearly horseback riding frequency.

The standard way to test for non-response bias is to compare the responses of those who return the first mailing of a questionnaire to those who return the second mailing. Those who return the second questionnaire are, in effect, a sample of non-respondents (to the first mailing), and we assume that they are representative of that group. In this survey, 2,178 people responded to the first mailing and 271 responded to the second mailing.

We found 3 variables with statistically significant differences between the mean responses of these two groups of respondents (Table A1) out of 11 tested. With respect to owning horses (Question 1), respondents to the second mailing were statistically more likely to say that they do not own a horse, do not go horseback riding in a typical year (Question 2), and have lower household incomes (Question 11) than respondents to the first mailing. As Table A1 shows, the differences in mean values between the first and second mailings are generally quite small and, in no instance do the differences change the interpretation of the results. **The Survey Research Center (SRC) concludes that non-response bias is not a concern for this sample.**

Table A1 – Statistically Significant Differences Between Responses of First and Second Mailings			
Variable	Mean First Mailing	Mean Second Mailing	Statistical Significance
Q1 Currently own one or more horses	1.92	1.96	.027
Q3 In a typical year, goes horseback riding	1.82	1.89	.004
Q11 Household Income Range	2.92	2.72	.026

Horse Owners' Survey

The SRC tested 87 variables in the Horse Owners survey and found statistically significant differences in the means of 8 variables. These differences are summarized in Table B1. Because there are relatively few statistically significant differences between the mean values of the first and second mailing, the differences are relatively small, and are scattered throughout the questionnaire, the SRC concludes that non-response bias is not present in the horse owners' survey.

Table B1 – Statistically Significant Differences Between Responses of First and Second Mailings			
Variable	Mean First Mailing	Mean Second Mailing	Statistical Significance
Q2 Market Value of your horses	\$21,294.70	\$27,423.49	.042
Q4 During 2007 boarded out horses	26%	34%	.000
Q6 Use horse for pleasure riding	81%	71%	.000
Q8 Frequency with which you ride	3.54	3.45	.009
Q10o Utilities	\$526.08	\$981.94	.000
Q10w Local taxes	\$337.38	\$553.70	.038
Q12a Truck price	\$24,444.10	\$25,843.22	.041
Q22 Children (under 18) in home	1.57	1.76	.029

It does, however, appear that the size of the horse operations that responded to the second mailing are slightly larger than those who responded to the first mailing. If anything, therefore, the estimates provided in this report may slightly understate the economic impact of the equine industry on the state.

Appendix C: General Population Comments

Q7 Employment Status

'Other' responses

- Student (11x)
- Disabled (8x)
- Homemaker (8x)
- Full time student (3x)
- Stay at home mom (3x)
- College student
- DAV
- Job hunting
- Medical leave
- Seasonal worker
- Semi-retired
- Substitute teacher
- Teacher
- Widowed

Appendix D: Horse Owners' Comments

Question 16

Are there any other issues you would like to raise about owning and using horses in Wisconsin?

Trail Riding (118 responses)

More Trails/Access to Trails (60 responses)

- Horses should be allowed on some bike trails. The old railroad bed trails are wide and straight to allow both bikes and horses. The trails around our house are seldom used by bikes (rural Jefferson County).
- More access to trails and events.
- We also need to keep public lands open for trail riding.
- Access to trails.
- Allow horses on trails and limit ATV's on trails!
- Also, there are so many trails that horses have used in the past because they have been allowed to use them, but now they are being forced off those trails - often trails that horses and horse people created - simply because the general, non horse owning public doesn't want them around.
- Dislike sharing trails with bikes, etc.
- Existing trails don't permit horses.
- Have horse trails in summer where there are ATV trails in winter.
- Have wooded areas more accessible to weekend riding at a fee - to benefit the private landowners (i.e. farmers get tax breaks).
- I also want to keep the horse trails we have and expand them!
- I do a lot of trail riding from April through November. It would be nice to have more trails open to horses year round.
- I enjoy camping with my horses. Camping in WI is limited with quantity of trails. Camp more often in MN.
- I strongly support whatever trails we now have-better maintenance-especially state owned-and more trails open to horses for driving.
- It would be nice to have more trails that you could camp at.
- Lack of riding areas- appears all the money for trails goes for hiking or bikes.
- Not enough trails in Southern Wisc. Ice Age think they own everything, why can't everyone share?
- Lack of shared riding trails.
- Lack of trails!
- Local trails are my 2 biggest issues.
- Loss of trails. Loss of number of trails at state parks in camping and horse.
- Make more trails at camp grounds that have some already.
- Many multi-use trails do not allow horses
- More horse only trails.
- More multi-use trails-prefer motorized vehicle separate from horses.
- More public trails
- More public trails (of course!).
- More riding trails-or just access to ride on state forest land. Our use is not evident and does not destroy terrain as do ATVs and snowmobiles.
- More trails to be available in the forests and parks
- More trails!!
- Need more local horse trails or more access to local public land.

- Need more trails
- Need more trails and camping in West Central Wisconsin (Trempealeau, Buffalo, Pepin, and Dunn).
- Not enough trails - making it necessary to go out of state for good trails.
- Of course we trail riders would love more trails with Lowe Lake being in mind. It used to have many trails when privately owned but the state is not utilizing them
- Riding on "public land" - Meade Wildlife Area and Sandhill Wildlife Refuge open to hunters but NOT horses/riders?!
- State parks by Wisc Dells do not allow horses.
- The loss of or potential loss of available trails, especially on public land and parks.
- There are not enough horse accessible trails- and what there are, are shared use and NOT appropriate (ATVs, joggers, etc). These can spook horses. I find it ridiculous that with the money horse owners send here it's not a more accommodating climate. I doubt snowmobilers spend nearly as much and they have trails from one end to the other and all across, and horses DON'T POLLUTE!!
- There are not enough horse trails to ride, especially those with horse camping available.
- They keep trying to either close or make us share our trails with 4-wheelers or mountain bikes. BAD mix! Most of them have many more miles of trails than we have, yet they keep trying to close our horse trails!
- They need to get more horse trails!
- Trail development. Access to public land.
- Trail rights. Keeping state trails open to horses.
- Trails to ride on!
- We all take trips OUT of state to get to great trails.
- We definitely need more trails to ride on
- We have tried for years to see more multipurpose trails pit in or used (50 years).
- We need more access to local trails used by bikers and hikers. Also make newly created trails on state lands.
- We need more trails
- We really need more access to riding areas for trails!!
- We trailer out of state to ride, but no one specifically comes to Wisc. If a comment like that would get us more trails throughout the state, then so be it.
- Why that our county of wood has no horse trails available?
- WI lacks in the number of trails available to horses.
- Wisconsin also needs more horse trails
- Wish we had local (Rock County) access to trail system similar to the snowmobile trail system - we understand that much of it is farmland though.
- More trails!
- Would like more trails.
- Would like to have more areas to trail ride and camp. Maybe we could share more bike trails with bikers.
- Would like to see more access to CTY trails-with people moving in my area-they tell us No-I have been riding these trails for 15 years.

On Public Roads (18 responses)

- Know traffic laws and courtesy!!!
- Any road right of ways? How far can I legally ride in the ditch from the center line of the road before I'm trespassing (when I'm on county roads!)?
- Education campaign needed to teach auto drivers about horse's road rights!!!!
- Horse signs need to be out and about more frequently on the highway.

- Horses should not be allowed on Hwy 29!! 65 mph and trucks and cars mixed with horses and buggies are a mess waiting to happen.
- I feel that car and truck drivers need to be educated about horse rights and right of ways (safety) on and along roads and highways.
- I have become aware that horses cannot be ridden down the road in some towns (Elkhorn). I thought a state law allowed horses on the roads.
- When riding on the road, the rude drivers that honk their horns or run you off the road.
- I would like to see the general public educated on right of way issues (horses vs. cars, hikers, bikes, etc.).
- Making motorists aware that horses and riders have rights to the road.
- Mandatory education of motor vehicle drivers on horse safety "rules of the road", and the rights of horses and riders.
- People respecting horses on the road. People moving out of the city want everything prim and proper (meaning landscape).
- People should learn to s-l-o-w down when meeting horses on the road.
- Raising awareness of laws and etiquette of vehicles vs. horses when riding on country roads.
- Some drivers fail to pay attention to slow moving signs on equipment pulled by horses.
- The rights that horse riders have on a road when riding or driving.
- Traffic problems when road riding - drivers do not know how to handle vehicles when approaching riders (speed, clearance, etc). With the number of developments decreasing rideable land, traffic is a huge problem.
- We live on a dirt road, but safety is an issue with road riding.

Condition of trails (17 responses)

- Conflict with bicyclists. They want to "pave" trails in the Kettle Moraine State forest. Leave it natural. If they want to ride on a hard surface - then stay on the roads!
- Greatly appreciate what has been done to preserve and maintain trails in Wisc.
- However, personally I'd be happy if we didn't get the onslaught of tourists cluttering our trails if we actually had enough trails to ride.
- I love kettle Moraine Trails, but hate hunters there.
- I pay for trail passes, state park stickers, and taxes - and yet the two riding clubs I belong to have to volunteer to get any improvements in camping or trail upkeep. NOT fair.
- I would like to see more trails groomed exclusively for horses.
- Lack of horse only trails and multiuse trails with motorized vehicles that are hazardous.
- More awareness for other trail users on what to do when encountering a horse on a multi-use trail.
- Riding trails are not user friendly - having black top on them.
- Safety on trails that 4-wheelers abuse.
- Shared areas for horses, i.e. county ski, hiking, etc. Multiuse trails where horses are excluded or facilities are lacking.
- Sharing trails with bicyclists. They are rude and hate horses on 'their' trails. I don't know if anything can be done about it, but must.
- The biggest problem I see is not necessarily that we need more of those well developed, high traffic, horse trails as we often see in only limited areas of the state, but we also need to develop and preserve trails that are accessible to small time horse communities where a good number of trail riders reside but have nowhere to ride or are in danger of losing those "hidden" networks of trails that were always available to them. That's a HUGE, growing problem as well as the problem of maintaining, increasing, and developing actual, designated state and federal trails for horses.
- The problem is that, while horse communities are scattered throughout the state, including areas of high growth, horse people have nowhere to go for a ride without trailering off site. That is not a good thing because the bold riders will attempt to ride down busy roads when they could have

simply joined up on trails that have long been established as foot trails, but are seldom used by hikers.

- There are many areas that could still be developed for trail use. A good job is being done but riders must help develop and maintain old and new trails
- Unlike other states, Wisconsin does not recognize the horse as the one to whom all other trail users must
- Horses are expected to yield instead to all other users-even when they don't let us know they are behind us.

Camping and facilities (15 responses)

- Facilities with overnight camping for trail riders.
- Also more electric hookup at parks.
- Better camping with water and electric.
- Campground for horse use limited.
- Camping is very popular, we don't have enough camp grounds
- Get flush bathrooms and showers at state horse campgrounds.
- Improve camping grounds with electricity.
- More campgrounds
- Need for electrical outlets at state parks so can camp with dogs.
- Other states (IL, SD, IA) that I have been horse camping to seem to have larger, cleaner, more accessible sights than WI. We always seem to be fighting for our trails AND our campsites!!
- Several fairgrounds in Wisconsin are not equipped to handle campers. Such as adequate Electric and water
- We need more places to camp with our horses that have electric sites.
- WI Horse trial parks lack amenities such as electric and water and showers.
- Would like showers in the state horse campgrounds.
- Would like to see more facilities for overnight camping with horses.

Miscellaneous (8 responses)

- Also-not that I enjoy paying fees- but there is a horse trail pass requirement for some trails. I can't find any info in Northern WI on purchasing a pass. Just thought it would be nice to support our trails
- Lack of use of exercise areas at way sides.
- Accessibility of info on WI trails, local trails, DNR land.
- All horses should have an ID no for riding such as what IL has on bridles.
- Trail riding in state forests and having said trails and parking for vehicle with horse trailer.
- Trail rights. Keeping state trails open to horses.
- Wisc should have the yearly bridle tag fee per horse like the state of Indiana to help fund horse trails.
- I really can't stress enough how important it is to permanently keep and save trails for horse users. Trails that are horse trails now should be saved! And must be grandfathered in!

Slaughter (60 responses)

Pro-Slaughter (56 responses)

- The lack of kill plants in the U.S. has hurt the horse industry financially and made life more inhumane for suffering horses.
- Banning horse slaughter in the US has created more problems. Horses are being slaughtered in Mexico while we have no control over humane treatment.
- Disposal of animals no longer serviceable - the kill market.

- Disposal of unwanted horses-there is a need for a kill market for some horses.
- Extremely poor market, US loss of slaughter market
- Freedom of choice for slaughter. I do not like that my choice was taken from me. We should be able to choose ourselves for equine slaughter inside the USA-just like cows, pigs, chickens, etc.
- Get the slaughter plants back operating. They set the base price on horses at sales. Also, what's more humane? A horse living a few more hours OR one starving to death in a dirt pasture for months?
- Oppose horse slaughter ban in the US.
- Government needs to re-open slaughter plants.
- Horse slaughter ban is a big problem
- Horses should be agricultural animals and a humane system for disposing of unwanted animals should be in place.
- How to dispose of horses for meat.
- Humane slaughter is necessary.
- I am worried that horse slaughter will be stopped with no place for unwanted horses.
- I believe that as citizens of a free country (USA), we should have a choice whether we want to use horse slaughter. I do not like others taking my choices away from me.
- I believe the no slaughter law should be changed. Having this law keeps approximately 20,000 horses alive every year that we have to pay for their care, especially sickly, older horses.
- I disagree with the no slaughter law
- I don't agree with no slaughter offered in US.
- I strongly believe that they should reopen kill plants in the US (horse kill) for unwanted horses.
- I think that horse slaughter plants should be allowed to take horses.
- I want to see the law against slaughter rescinded. Horses are livestock that should be disposed of if need be. Most horse people do not consider them to be pets. There must be a way to dispose of the sick, old, or inferior animals. People should not have to own them forever just because they can not find any way of getting rid of the animal.
- It is very hard to make money in the horse industry right now, since the shut down of sending horses to processing plants. People are purchasing cheap animals from auction houses rather than better quality animals from reputable breeders.
- It is wrong and backward not to have a place for unwanted and problem hoses to be disposed of/slaughtered. This issue has caused a backlash of problems to the horse industry.
- Keep slaughter plants open for horses, disposal of old horses.
- More of a national issue - the anti-slaughter bill needs to be repealed.
- Need to open kill barns again.
- Need to open slaughter houses back up in the US.
- Need to reinstate kill market - Although I hate the thought of it, restrictions have "killed" the horse sales business and contributed to the problem of what to do with unwanted horses...abandonment, cruelty, and starvation.
- Outlawing the horse-kill market has hurt the horse industry.
- Disagree with the slaughter ban **STRONGLY!** We no longer have any respect for the humane society and PETA at all, can't believe they have joined at the hips."
- Slaughter of older horses issue. We need some way to dispose of them so they don't become a burden.
- The ban on (dog) meat sales has really crashed the horse market. Auction prices are low. Old sick horses all over.
- The closing of slaughter houses was a serious mistake. Will only lead to serious horse neglect and abuse.
- The closing of the horse butcher market has created overall excess stress on the horse industry/market.

- The closing slaughter plants and the question of what becomes of unwanted horses, etc.
- Wisc. should have a state regulated horse slaughter facility."
- The current selling climate is VERY BAD - the slaughter issue CAN NOT pass! We need these slaughter houses to keep the population in check, rescues, etc. are NOT going to work! Plus, the whole issue of breeding everything has got to stop.
- The issues with unwanted horses must be resolved.
- The slaughter houses need to be reopened. This killed our horse market. Why is it ok to kill cows, pigs, chickens, etc but not horses? We need somewhere to take horses that are not needed anymore.
- The slaughter houses should be reopened-they have a purpose-the 90,000 horses slaughtered in 2006. Will the anti-slaughter people feed and house all those horses (some of them unfit or unhealthy enough that they need destroying)?
- The slaughter plants closing have significantly affected our industry. We need to have the legislature re-evaluate the laws and remove the ban on US slaughter houses!
- There absolutely must be an outlet for horses to go to slaughter. Having all the "unwanted" horses around has WRECKED the market for good ones!
- They have to keep horse slaughter open; this has cost my family its way of life and \$4000 annually so far. The American Rancher will go broke for some bleeding heart liberals that we don't need!! Keep the slaughter open!!!
- To be able to send horses to slaughter
- We are facing a crisis already in the form of unwanted horses. Eliminating humane slaughter was a mistake. Too many rescue places are already well over capacity; that's where we will soon see neglect of horses. Rescue places can't absorb the excess.
- We are in need of a horse kill plant
- We need a facility for kill horses for people needing help with old or crippled horses.
- What do you do with sickly or disabled horses?
- Yes, the slaughter restriction. It should be put back into operation!
- Lack of political recognition of problems created by closing of horse processing meat plants. Why are the few select wealthy political advocates not committed to the industry dictating our own futures?
- slaughter houses, spaying
- the major issue of no outlet for the excessive unwanted horse population
- What are people supposed to do with old horses?
- What are we supposed to do with them when they are too old to ride?
- What is the controversy about putting down horses or using them like stock? Confused.

Anti-Slaughter (4 responses)

- A ban against slaughter!
- Support the slaughter bill and have our lobbyists work even harder.
- This might not be related to me, but I strongly dislike horses being sold for slaughter - now in Canada and Mexico.
- Why is Wisconsin State Horse Council in favor of slaughtering horses? I would think they'd stand up and protect horses!

Government and Regulations (53 responses)

- 4-way vaccination (E-W-T-F) and rabies shots yearly. EPM outbreaks and EIA occurrences should be reported promptly to the state, accessible via internet, with fines for those who don't report.
- Rewrite laws which will promote the equine industry on the whole!

- Also having a DOT number and stopping at weigh stations is unreasonable and an attempt to get more money from us. It's not about safety! Property taxes are out of control horses should be considered as agriculture.
- Keep horses as livestock, not as pets.
- A clear, concise understanding to exactly what hauling regulations are. Exactly who needs a DOT magnet/registration, exactly what trailers need plates. We have been getting warned almost to the point of harassment this past year from a ranger running around up in the Northern Kettle Moraine checking trailer registrations. First of all, we need to know if these actions are being carried over to the people campgrounds and their huge trailers or if horse people are being singled out unfairly? We also need to know how they can warn us if there is no idea what the weight of the trailer is or even if it's hauling one horse or two. It was mostly the 2H BP's that were being picked on our course due to their weight class and many people don't need to register them if they are hauling one horse. So since when has this become a DNR responsibility? What EXACTLY are hauling regulations, not as they pertain or are understood by each officer but as they are written? There are too many gray areas.
- Also, very disappointed with "trail charges" in recreational areas where land is owned. Landowners should not have to pay these trail use charges!! (we made the trails to begin with!)
- Am concerned about national pressure to implement NAIS and micro-chipping. The cost/paperwork federally seems to be very costly for average horse owners and invasive to small farms.
- Be nice if the expense was deductible on income taxes.
- Contact for legal issues regarding horses.
- DNR too restrictive with a stream running through my pasture.
- Driving horses on roadways, or crossing roads should not be taxed.
- Federal ID Premises issue. What is the next stage - how much privacy do we have? How strict will the reporting of movement of horses be?
- Get the DNR to change N.R 45.06 and open the DNR up to riding like they National Forest land is!
- Homeowner insurance penalties for having horses on property are ridiculous!
- Horse business facilities should qualify for crisis and financial assistance from USDA similar to livestock farms (i.e., dairy, beef, hogs, sheep, etc.).
- Horses should have livestock status-maintenance and business with horses require all the same things as farm livestock, but are excluded from state programs for agriculture.
- I believe people should need to obtain a license to be able to breed horses - then we might have less abandoned, abused, and neglected horses.
- I do not consider WI to be a very horse friendly or tax friendly state. I will probably be moving away from WI when my daughter graduates even though our families live here.
- I want to be able to use a specialist in dental care, chiropractic, or voodoo for my horse without gov't interference or political stupidity!!
- I wish the county would support the county fair and their building improvements plan better. Money well spent for our kids!
- I wish the state would give a tax break for horses - especially horses I have rescued. I want to start a horse rescue and the government funding is not enough.
- If a town has a lot of farms in it they should take that into more consideration when they zone for business.
- Just wanted to let you know about the 2007 census (illegible word) wants all horse information. If not sent out it is a \$500 fine. So you'll be able to tap into that later.
- Land costs are too high,
- Less restrictions on using holistic health practitioners without vet referral.
- livestock ID number thing is unnecessary, government bureaucracy and ridiculous

- local regulations and restrictions
- local zoning
- Making horse trainers be liable for their actions or lack thereof. There are no guidelines or rules they have to be accountable for.
- How does Wisconsin deal with abused and neglected horses? Is it the Sheriff's Department that handles this? I think we (in Wis.) are not dealing with this issue here! Why are we not networking together to help these horses?
- Managed forest land was recently restricted so that I can't charge to allow people to ride in my woodland. My boarders pay me so if they ride in my woods am I in trouble?
- My concerns - are that the government wants to get involved with what I can and cannot own and use. And I think they will try to control my use of land and ownership of my horses.
- Need more information about riding trails and policies for use of public recreational lands
- Our county administrator is always trying to limit our use of county trails
- Please keep horses listed as livestock.
- Public officials are unaware that most of the cows in Wis. have disappeared and have been replaced with horses and that the equine industry needs to be recognized for the important economic factor that it is - including tourism.
- Purpose of farm IDs - how soon do they start charging fees?
- Restrictions for buildings on property that is "horse friendly."
- Restrictions on where horses can be kept.
- shelter laws
- Should be more money making opportunities for horse owners - tax rebates. Also, should be no legal ramifications against horse owners.
- Thank the Lord we have the freedom to use horses as a way to work the fields and for transportation. Keep the animal righters at bay!
- The expense and superfluousness of obtaining health papers each time for a horse exhibiting in contiguous states. Who pockets these fees?!
- There are getting to be a lot of restrictions in the horse world.
- There is no horse market of any real value in Wisc.
- Very much against mandatory animal identification!!
- We are concerned about new laws like horse slaughter, "wheel tax", horses being taken off the "livestock" list...
- We need local humane officers and more easily enforced laws to prevent cruelty and neglect (we run an unofficial rescue).
- Why are some DNR areas that are closed to horses open to public hunting and fishing?
- Why not considered livestock? Then they can be kept in cities, correct?
- Yes. The statutes list horses as livestock, but none of the government small business agencies will offer loans on horse businesses because they say they list horses as pets, in that they don't produce anything. Isn't that a bit contradictory?
- Horse pasture-does not get agricultural use values when talking tax classification on land.
- Zoning restriction
- Zoning restrictions on horses-ownership

Shows and Facilities (43 responses)

- Although I no longer own a horse, when I did an equine center was needed badly!
- A facility where we can compete that is weather friendly and can show year round.
- Are reasonable.
- Because of the weather, much riding needs to be done inside. Building arenas or finding arenas that you can use is hard!!

- Boarding stables are very hard to find with proper footing in areas and turn out space for my horse to be alone.
- Classes for the younger, inexperienced riders are less in availability. Make local shows.
- Cost of facilities to hold horse shows. Very costly or too small.
- Good horse show indoor arenas are definitely lacking in Wisc.
- I get frustrated because there are not a lot of opportunities to try new events...e.g. cutting, reining, working cow horse. It's the same old pleasure and barrels.
- I think there should be an equine center centrally located in the state for large horse shows.
- I took my horse to Iowa and boarding him there during school (attend ISU). The stable provides "exceptional" care for my horse and I pay less than I did in WI. The quality of stables in SE WI is poor compared to Iowa. The quality of hay is also much better. WI needs better quality stables.
- I would like to see a year round show facility built with plenty of camping in Wisc (indoor facility). The Oshkosh fairgrounds could be improved drastically..
- It is a rare occasion to find a good boarding stable in Wisconsin. Owners cut corners and do not have enough knowledge to run facilities safely.
- It's impossible to show year round in Wisconsin because there is no good heated facility. Always go to Illinois, Iowa, Minnesota, Indiana, Oklahoma, or Texas to show at anytime of the year.
- It would be nice to see a horse park near Madison. We need a show grounds with heated barns and arena so we could show all year and it would be important to accommodate all riding disciplines.
- Lack of affordable facilities to put on horse shows (which is what I do).
- Lack of large arenas with adequate facilities to hold large shows. Alliant Energy Center lacks adequate covered warm up areas, West Allis has too many conflicts with car races, Jefferson lacks adequate number of stalls and large enough covered pen. We need a facility like Kirkwood Community College in Cedar Rapids, IA or Winona Equestrian Center in Winona, MN.
- Lack of public cross country jumping courses.
- Lack of public show facility (state horse grounds).
- Wisconsin could use more facilities for large events (shows, etc.) with stabling.
- More indoor facilities during winter.
- Need big show area like Minnesota and Mich. Will bring big money to Wis.
- Need more local shows
- Need more show grounds
- Need shows for minority breeds (fjords, paso finos). I know the judges council works on equine education, but if you don't own Quarter Horse and have a big head on the ground, the judges will not use you. This is why we only do breed shows. But it would be nice to start folks out at open shows and have a fair chance.
- No good, big, heated, show facilities. Must go to IL, MN, Iowa.
- No indoor arenas for inclement or winter shows like other states have.
- Not enough good competition facilities in the area.
- Often activities and breed shows are all in the southern part of the state. It would be nice to have more available for the northern area.
- Should have a year round facility for showing/seminars
- Show fees are out of control. Amateurs with available funds are taxed enough funds to compete. Almost impossible to continue to show and promote the breeds.
- The Kentucky Incentive program should also be offered here in WI. Over \$2000 paid per point at approved shows-Quarter Horse and APHA.
- There is not one decent year 'round facility in the state. We haul to Iowa and Minnesota (Winona facility) to show in the winter.
- There needs to be a facility built where equine events and shows can be held year round.

- Use of good show facilities throughout the state. The number of (or lack there of) good boarding facilities that
- we need more places to ride
- We need more public riding areas.
- Where did all the shows go?
- WI does not have an indoor show facility so we end up spending money showing in MN most of the time.
- Lack of good show arenas in WI makes it hard for breed associations, etc. to put on quality, multiple day horse shows. All surrounding states have access to many indoor facilities. WI has VERY few.
- Wisconsin needs a large show facility (arenas, stalls, warm up arenas, wash racks, etc.) all under one roof - suitable for winter shows.
- Wisconsin needs a place to show horses in the winter. Our neighboring states have these facilities and Wisconsin horsemen are going out of state to show their horses-therefore Wisconsin is losing valuable revenue.
- Would LOVE an indoor, heated show facility in Wisc. Would bring revenue to the state from hotels, restaurants, etc.

General Health (23 responses)

Vet and Farrier (12 responses)

- Also of concern is the dwindling number of large animal vets.
- And good vets, those who like dealing with horses, are getting harder to find. Most new grads from just about any Vet school are inclined to go into small animal practice. That seems to be where the money is. I suspect all horse owners have problems at some point with finding a good Veterinarian.
- As a veterinarian, have seen several neglect cases (even involving death of horses) and we have NO WHERE to turn for help! People breeding irresponsibly.
- We need to educate people about proper breeding. We need to reduce the amount of poor breeding stock.
- Equine vets are scarce around here, no local farrier either.
- Farrier, trainer, and vet I use are from IL
- I think there needs to be a list made of all the farriers and vets in St. Croix County so people can find vets and farriers easily.
- In our area (Rhineland) we need more equine vets available.
- It's also tough to find a Farrier who will work on draft horses. Most are scared off by the size.
- We need more experienced vets and farriers in Wisc. I travel 2.5 hours to UW Madison for vet and farrier appts.
- We need some type of certification for all farriers and horse trainers
- Veterinary care sucks in Northwoods

Coggins (11 responses)

- All commercial riding stables (rental horses) should be required to have Coggins tests,
- Also the requirements for travel between MN and WI with a horse as far as health certificate are very fuzzy. We do a coggins. What else is required if anything for day trips?
- Coggins test should be valid for one year from the date it was drawn.
- Coggins tests that expire Dec 31? They should last one full year and not cost so much.
- Eliminate the coggins test. Eliminate the coggins test. Eliminate the coggins test.
- Get rid of coggins test!

- I believe the Coggins test only benefits drug companies and testing labs who make all the money. It is not necessary to control any disease.
- I don't believe we have to have coggins tests done on horses that do not travel out of state. This is only another financial burden on horse owners that just use their horses locally
- Mandatory coggins testing is stupid.
- My concern is that we have to get our horses coggins tested and the Amish are exempt.
- Ridiculousness of Coggins testing

Rural Area Preservation (14 responses)

- A big part of the problem is that the horses are grouped in many communities throughout the state - but the more farmers who sell their land (land that is turned into subdivisions with "green space" as opposed to subdivisions that could have followed an existing country atmosphere), allowing for 5 to 10 acre lots for potential horse owners, the more private land that is lost to those horse-owning families who frequented those lands as a place to ride. add to that fact that many of the trails that meander throughout horse communities where farm land was turned into subdivisions are designated as foot paths only and do not allow horses.
- Boarding facilities closing due to land developers in Waukesha County. Hard to find boarding facilities!!!
- Concerned with the decreasing availability of good horse hay due to farms being developed into subdivisions.
- I believe with urban sprawl and 'city people' moving into rural areas, there will become less opportunities to ride and own livestock.
- I want to make sure that spreading of suburban populations cannot force horse farms out of the area.
- I would like to see housing development with managed barn/ trails in my community - not extravagant housing!
- It is crucial that we protect and preserve our rural areas. The explosion of housing subdivisions in rural areas is destroying the rural characteristics and appeal of Wisconsin. I choose to live "out in the country" because I like the space. I don't want a subdivision built next door!
- Maintaining ag zoning and restricting encroaching housing by permitting developments on smaller acreage.
- Maintaining and preserving enough agricultural land or land zoned for keeping horses to preserve this lifestyle.
- Roadways and speed limits for horses. Keeping proper ties and transporting horses is becoming less safe as ag and rural areas become subdivisions with housing and higher speed limits, etc.
- rural development
- The need to preserve rural areas so we do not run out of places to ride, or even keep our horses.
- We need trails established before housing developments take all the land.
- With the number of developments decreasing rideable land, traffic is a huge problem.

Input Costs (12 responses)

- I worry about price of hay and now with other rises for corn, I wonder what things will cost.
- Concern for feed availability - fuel issues pricing people out.
- Fuel prices make it difficult to afford a lot of showing.
- Good boarding facilities that are reasonable. Board used to be \$150 per month per horse and not it is more like \$300 per month per horse. Finding good locally grown hay.
- High bedding/feed costs.
- High price of gas has limited my hauling of horses.
- It really costs a lot of money to raise horses.
- Prices are increasing for sawdust, diesel, etc.

- Said it in #15. Also, in general, until people understand the horse business has to be treated like a business with things priced at or above the actual real cost (in order to at best break even!) - it is not, and will not survive. Just because people "love horses" shouldn't mean participating in horse related activities shouldn't cost much. I have had to go "out of business" because my customers could not afford to participate and/or not enough customer volume.
- The highest priced item for raising horses is bedding material. There needs to be a low priced alternative to shavings at \$40.98 a bag and 1-2 bags a day per horse.
- Too expensive-hay and grain prices way up as the acreage disappears.
- Zoning of boarding is unbelievable! I had 3 horses boarded and the zoning board wanted me to spend over \$80000 on additional upgrades to have 3 horses here.

Communication and Networking (7 responses)

- Access to information specific to Southeast Wisconsin.
- It would be nice to have a local directory listing farriers, trainers, facilities to rent for shows, etc.
- More riding clubs
- Would like to have equine activities promoted more, and assist non-equine people who have a desire to join the horse world."
- Would be nice to have a website that lists all saddle clubs and show dates.
- would like to have an easy way to network
- Would like to see more horse related information, workshops/seminars offered regarding care, feeding, pasture management, illness, etc. River Falls would be a perfect place to sponsor these!

Horse Market (4 responses)

- How long till horse market picks up?
- Concerns about the current market and values-problems with over population of the horse industry due to elimination of slaughter horses.
- Horse industry is in a huge slump. I am getting less than 50% of what I used to for horses. How to market and sell anymore?
- Values have dropped off to the point we are losing a great deal of money annually.

Liability (4 responses)

- Insurance and liability! How much insurance is enough?!
- Legal liability incurred when people step on our farm
- Liability issues prevent my showing of my horses with others - i.e. kinship mentoree.
- Liability to home owners if horses get loose.

Miscellaneous (49 responses)

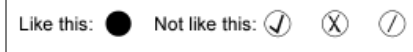
- Are there any groups for people who have been injured by horses?
- Many long standing horse owners in various communities were grand-fathered in and "allowed" to ride on land alongside foot trails or crossing over foot rails if they were "invisible" to non horse loving people or didn't raise a stink from people who saw them on trails that they've use without opposition for many years.
- Thanks to the Wisc Horse Council for supporting our local clubs and their efforts to improve trails and campers!
- As a horse owner, we support (\$\$) many people in our area. We show open shows and 4-H, pony club. We feel we have many choices. What a great hobby!
- Donkeys should be included as well
- Don't breed low quality horses. There is no excuse for neglect. Quit watching RFDTV.
- Don't buy an untrained horse if it is your first horse!!!
- Electricity in Palmyra Horse riders.

- Finding good, quality horse hay in small square bales is challenging
- From a student standpoint, I would like to see a school in south WI that has to do with horses like River Falls. Also, more tack shops in south WI.
- From the Amish. I don't mind doing that, but it would be nice to see tack shops carry at least some draft horse related items. A small handful do, but most don't. Although, to be fair, maybe they don't have the need in their particular area. I haven't seen much in either "Wisconsin Horseman" or the Wisconsin State Horse Council newsletter related to draft horses. We're out there too, folks, and we're still part of the horse industry as a whole. I've let my membership in the WSHC lapse, as well as my subscriptions to "Wisconsin Horseman" because of the decided lack of draft horse related material and information covered by both. We still buy horses, feed, tack and harnesses, trucks, trailers, and all the things owners of light horses use. Those of us who are fortunate to have our horses with us, on our property, have fencing, shelter (possibly a barn), stock tanks, etc. We have to care and provide for our horses just like everyone else does.
- Great idea to do! Horses add a LOT to the economy in Wisconsin. Both business and recreational.
- Horse people must get along with each other first - agree on a united front, and stay friendly with the DNR.
- Horseback.
- Would really like to see you get a humane agent/restart the humane part of WSHC."
- Horses are recreation, need more recognition and promotion - especially horse shows.
- I am concerned with the leaders in our country that don't seem to know how to manage things, putting not only people's jobs in jeopardy, but also our way of life. Economic hard times affect everything, including the privilege to manage and care for a very wonderful animal such as the equine.
- I am not able to ride as often due to pregnancy. I board by a family member so no cost to me other than helping with chores occasionally.
- I have horses for personal and recreational use and I did not notice a question about how much I spend for food and lodging while riding. It's a lot. Wisconsin should develop a greater commitment to horse/trail riding tourism. Consider Eminence, MO and Midwest Trail Ride of Norman IN as examples.
- I live in an area with a lot of dairy farms. Many farmers view horses as "recreation"- therefore horse people don't get a lot of respect as being more than "snobby" horse people.
- I spend money to belong to saddle clubs, to be counted by the state.
- If you share any of this (my) information with any government agency so that they can identify who I am, I will sue your butt off.
- It would be nice if the WI Horse Council was active in ALL counties. Not just the southern ones.
- Just that acreage should be large enough to sustain horses efficiently. I see too many horses and not enough room.
- Know-how when help is needed during a trailering situation (ex able to call 911-they should have information by zone who can help with trailering, who can help in special situations like a horse down in the mud, or a horse that falls off a cliff on trail ride).
- Legal environment is not as horse friendly as in the western and southern states.
- More education and care sessions in different areas, safety classes for young and beginning riders or owners, promote more youth (mentoring programs).
- More education for 4-H in dressage.
- More mustangs in state and where are they all at. Helping them train them.
- More volunteers are needed for 4-H, local trail ride (discontinued), local horse fairs. Probably a problem for any volunteer organization!
- My draft horses really don't apply in most cases.
- Need public awareness of manure application on own land.

- Need to be allowed to unload horses at waysides! Vehicle repairs, horse injuries, equipment failure, etc.
- No good local feed places with horse feed/supplements, all are more than 45 minutes away and still don't carry much.
- Not having to pay a fee to own livestock!
- One of our good riding areas has now been closed to horses due to one irresponsible group- they won't even let other horse people fix the problem! This is on state land. It's very frustrating. This has also happened in MN at a private area
- People moving from the city out to the country need to understand country ways. Stop complaining if they see horses on the roadways.
- There are no breaks
- Responsible horse ownership: there seems to be a high number of horses to people ration - lots of horses. Also, people who let their horses graze in cornfields like cattle.
- Since you've asked about concerns I may have, I'd like to address one or two. I keep draft horses. They are trained for driving and riding, although they are mostly used for work. The equine infrastructure doesn't seem to support draft horses, nor does it appear that it will. I have to buy harnesses, draft saddles and implements
- Sorry, can not do the rest of the survey. This would sicken me, cause I work to afford my horses and tallying up the costs would make you think we were nuts!
- Thank you for this opportunity. Please do a 2008 survey due to constant changes!
- The fact of many people hanging out shingles to say they are riding instructors or horse trainers and they do more damage to people and horses. This excessive horse breeding so people can "raise a foal" too many horses unwanted.
- There are no animal cruelty or abuse laws in the state of Wisconsin that apply to horses. Hundreds of animals suffer each day in Wisc because of this.
- Try to do most riding at home now. Very few trips to the state parks.
- Unwanted horses - overcrowding in rural areas. Don't like to see people keeping too many horses on too small acreage.
- Waking up our legislators (all politicians and local govt's) to how important the equine industry is....economically and tourism. They need to know that all those cows that are missing have been replaced by horses. Many of us leave the state to get wonderful trails. But nobody leaves their state to come here! Wisc needs to recognize the importance of developing trails and making our natural resources reachable by
- We have a training and boarding facility and this is our first year owning the farm so we have not paid taxes yet.
- We need a good hoofed animal humane society
- We teamsters are often looked down on when we show up to horse related events, such as trail rides. Other horsemen look at us like we have the plague if we ride the trails or appeared at their shows with something other than a gaited thoroughbred. A good horse is a good horse no matter what the breed. Likewise, a good horseman no matter what kind of horse he may have, or how it's utilized. We want to have places to ride, and, of course, drive our horses too! The number of people getting involved with draft horses or draft crosses is growing. We do make a contribution to the equine world, so please don't forget about us.
- Weather sucks-can't ride enough!
- What to do with sick/down horse? What to do with neighbors who provide no shelter for horses during extreme weather conditions (heat/sun/cold)?
- Wisc incentive fund similar to Kentucky's would give the horse economy a HUGE boost!

Appendix E: Quantitative Summary of General Population Survey

Please use blue or black ink to completely fill in the 'bubble' that corresponds to your selection.



	Yes	No					
1. Do you currently own one or more horses? Count = 2434	8%	92%					
2. Do you expect, in the future, to own one or more horses? Count = 2424	11%	89%					
3. In a typical year, do you ever go horseback riding? Count = 2401	17%	83%					
4. <u>If you do go horseback riding</u> , which of the following best describes the frequency with which you ride? Count = 487							
	1 to several times/year	1 to several times/month	1 to several times/week	Daily			
	74%	13%	10%	3%			
5. Gender: Count = 2368	Male	Female					
	63%	37%					
6. Age: Count = 2390	18-24	25-34	35-44	45-54	55-64	65+	
	3%	9%	16%	27%	21%	25%	
7. Employment Status: Count = 2345	Emp Full Time	Emp Part Time	Self Emp	Unemp	Retired	Other: <u>See Appendix C for Comments</u>	
	49%	7%	10%	2%	30%	2%	
8. Housing: Count = 2355	Own	Rent					
	91%	9%					
		0	1	2	3	4	5+
9. Adults (18+) in Household: Count = 2315			19%	69%	9%	3%	0%
10. Children in Household: Count = 2152		66%	13%	13%	5%	2%	1%
11. Household Income Range: Count = 2178	Under \$25,000	\$25,000-\$49,999	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000-\$199,999	\$200,000+	
	13%	30%	27%	16%	11%	3%	

Thanks for completing the survey!

Please return your survey by _____, 2007 to:
 Survey Research Center - University of Wisconsin - River Falls
 410 S. Third St. 124 Regional Development Institute
 River Falls, WI 54022-5001



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Appendix F: Quantitative Summary of Responses by Question

Wisconsin State Horse Council Horse Owners' Survey

1. How many horses do you currently own?		Ave = 5.1
2. What is the total estimated market value of your horses?		Ave = \$22,726
3. During 2007, how many horses did you	Ave # buy = 0.6	Ave # sell = 0.8
4. During 2007, what was the total value of horses you bought or sold?	Ave bought = \$2,894	Ave sold = \$3,946
5. Where do you keep your horse(s)?	Ave kept on property = 4.95 horses	Ave boarded out = 0.7 horses

6. How do you use your horse(s)? *(mark all that apply)*

78% Pleasure/Trail	10% Working	56% Showing/Other Competition
24% Breeding	1% Racing	17% Other

7. If you currently own any of the following breeds of horses, please indicate the number:

Type/Breed	Ave Number	Type/Breed	Number
Thoroughbred	1.5	Morgan	3.9
Quarter Horse	3.6	Saddlebred	2.1
Arab/Arab Cross	2.2	Paint	2.1
Warmblood	1.9	Appaloosa	1.8
Standardbred	1.7	Other	2.3

8. Which of the following best describes the frequency with which you ride?

5% Never	12% 1 to several times/year	20% 1 to several times/month	52% 1 to several times/week	11% Daily
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In the following questions we will ask you about REVENUES you earned from horse-related activities. Please answer the following on either a "\$ per month" or "\$ per year basis". (which ever is easier for you)

9. Approximately how much do you <u>earn</u> from your horse-related activities in an average year?	Ave Annual \$/Year
a. Purses and prizes	\$624
b. Stud fees	\$523
c. Horse sales	\$4,282
d. Boarding and training	\$5,928
e. Veterinary services	\$798
f. All other revenue from horse operation	\$2,350

In the following questions we will ask you about your annual COSTS of owning a horse. Please answer the following on either a “\$ per month” or “\$ per year basis”. (which ever is easier for you)

10. Approximately how much do you spend in an average year on your horse(s) for: **Ave Annual \$/Year**

Horse-related goods	
b. Board for horses	\$2,738
c. Feed (hay, oats, etc.)	\$2,689
d. Feed supplements (vitamins, minerals, etc.)	\$566
e. Tack (saddles, bits, etc.)	\$711
f. Barn supplies (bedding, insect repellent, etc.)	\$726
g. Barn equipment (wheel barrows, mats, forks, etc.)	\$340

Horse-related services	
h. Farrier services	\$1,124
i. Veterinary services/supplies	\$1,100
j. Stud fees	\$615
k. Show/Competition fees (including meals and lodging)	\$1,990
l. Training for your horse	\$1,500
m. Riding Lessons	\$427

General horse-related expenses	
n. Labor (for horse-related activities)	\$2,036
o. Cash value of any room, board, benefits provided to horse staff (including use of horse(s))	\$236
p. Utilities (water, electricity, etc.) for your horse(s)	\$621
q. Maintenance of barn, fences, and other horse facilities	\$917
r. Association Fees/Magazine Subscriptions	\$197
s. Clothing (used specifically with your horse(s))	\$410
t. Other business expenses (e.g. office supplies, phone, advert., etc.)	\$84
u. Other	\$2,054

Taxes paid on horse-related activities	
v. Federal Taxes	\$728
w. State Taxes	\$405
x. Local Taxes	\$387

11. During an average month in 2007, how many (if none, enter 0)

a. Full-time, year-round employees did you employ in your horse enterprise?	Ave = .04
b. Part-time, year-round employees did you employ in your horse enterprise?	Ave = .16
c. Seasonal employees did you employ in your horse enterprise?	Ave = .18

In the following questions we will ask you about your longer-term COSTS of owning a horse.

12. For the year 2007	Average original purchase price	Ave. year purchased	Ave approx miles used for horse enterprise
a. Truck	\$24,798	2003	11,678miles
b. Horse Trailer	\$13,388	2002	6,812miles

13. For the year 2007	Acres	Rent/Acre
a. Acres owned, used in horse enterprise	28.4	XXXXXXXXXXXXX
b. Acres rented, for horse enterprise	4.5	\$117

14. For the year 2007	Amount
a. How much does your horse enterprise buildings (barn, stable, shelters, etc.) add to the value of your property?	\$56,287
b. What is the approximate current value of your horse enterprise equipment (tractor, skid steer, etc.)?	\$23,297
c. If you replaced your horse enterprise equipment (tractor, skid steer, etc.) with new models, how much would it cost you?	\$35,387

Please give us the benefit of your opinion about the following:

15. Please indicate the extent to which you agree with the following statements.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
a. Zoning restrictions greatly limit where I can keep my horse	21%	23%	29%	16%	11%
b. Housing developments have reduced areas where I can ride	35%	26%	21%	12%	6%
c. I have easy access to a good local veterinarian	49%	37%	5%	7%	2%
d. I have difficulty finding a good local farrier	11%	24%	13%	34%	18%
e. There is a lack of local horse trails	24%	31%	21%	18%	6%
f. I have good access to local info about horse ownership/care	19%	43%	24%	12%	3%
g. Horse equipment is not available to me locally	9%	18%	18%	41%	14%
h. I have easy access to a good local horse trainer	19%	35%	22%	18%	6%
i. I am unable to locate a good local riding instructor	5%	16%	29%	32%	17%
j. Other	70%	9%	11%	0%	11%

16. Are there other issues you would like to raise about owning and using horses in Wisconsin?

See Comments (Appendix D)

Please tell us about yourself

17. Gender 22% Male 78% Female

18. Age 5% 18-24 7% 25-34 20% 35-44 36% 45-54 22% 55-64 10% 65+

19. Employment Status 50% Emp full time 21% Self Emp 12% Emp Part Time
13% Retired 2% Unemp 3% Other

20. Housing 92% Own 5% Rent 3% Other

21. Adults (18 or older) in household 23% 1 61% 2 12% 3 4% 4 0.5% 5 0.1% 6+

22. Children in household (under 18) 62% 0 20% 1 14% 2 3% 3 1% 4 0.3% 5+

23. Household Income Range 14% Under \$25,000 20% \$25 - \$49,999 29% \$50 - \$74,999
19% \$75 - \$99,999 20% \$100 - \$199,999 7% \$200,000+

24. Size of your community 22% under 1,000 34% 1,000–4,999 25% 5,000 – 19,999 9% 20,000 – 49,999
6% 50,000 – 99,999 3% 100,000 – 499,999 1% 500,000

25. What is your zip code? See map (Figure 10, page 14)

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