

2009 UNWANTED HORSES SURVEY

Creating Advocates for Responsible Ownership



A study commissioned by the Unwanted Horse Coalition.

PREFACE

About the sponsor of the study

The Unwanted Horse Coalition (UHC) grew out of a 2005 American Association of Equine Practitioners (AAEP) initiative, and is currently under the umbrella of the American Horse Council (AHC). It is financially supported by participating AHC organizations and is focused on education, communication and responsible ownership. Participating organizations include national, regional and local associations of veterinarians, breed registries, horse associations, breeders, performance groups, owners and equine publications. The mission statement of the Unwanted Horse Coalition is: "To effectively reduce the number of unwanted horses in the United States, and to improve their welfare through education and the efforts of organizations committed to the health, safety and responsible care of the horse."

Definition of the unwanted horse

Defined by the AAEP in 2005 and since adopted by the UHC: "Horses which are no longer wanted by their current owner because they are old, injured, sick, unmanageable, fail to meet their owner's expectations (e.g., performance, color or breeding), or their owner can no longer afford them."

2007 Estimation of Number of Unwanted Horses in the United States.

±170,000 each year

- ±58,433 processed in the USA*
- ±36,858 exported to Canada
- ±45,609 exported to Mexico
- ±21,000 unadopted feral horses in BLM sanctuaries**
- ±9,000 feral horses in BLM adoption pipeline
- Others neglected/abused

*USDA Veterinary Services **Bureau of Land Management

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INTRODUCTION

More questions than answers

Horse industry experts, horse owners, even the general media have speculated that the number of unwanted horses is increasing. Some believe the problem is growing larger due to the downturn in the economy, rising costs of hay, the drought that has affected many parts of the United States, the costs of euthanasia and carcass disposal, and the closing of the nation's horse processing facilities. However, few studies or surveys had been done to document the facts on a national scale.

In pursuit of nationwide facts

Since its inception in 2006, the Unwanted Horse Coalition (UHC) has focused on raising awareness and educating others about the problem of unwanted horses. As that education progressed, it became obvious there was a growing need to focus on developing solutions. The UHC had amassed a great deal of data and hypotheses about the unwanted horse issue, extrapolating many details from the USDA, breed registration trends, the *National Animal Health Monitoring System 2005 Report*, and the AHC's *Economic Impact of the Horse Industry in the United States* study. However, before solutions could be identified, the UHC needed to answer the following questions about unwanted horses:

What breeds are represented?

Is there a sex predilection?

What's their age?

How many are purebred vs. grade?

What was their most recent occupation?

What was their original value?

What is their current value?

Do they become neglected, abused, or processed for meat?

Who is responsible?

Much remained unknown. So in the fall of 2008, the UHC decided to conduct a nationwide study of the problem of unwanted horses in America.

From the beginning, the intent of the *2009 Unwanted Horses Survey* was to gather projectable national metrics that would be useful in identifying and/or creating solutions to the problem.

The way to do this would be to engage anyone and everyone involved with horses, as well as the general public. To ensure that the study would be comprehensive and unbiased, the UHC sought the independent aid of a marketing communications firm with a history of reaching out to many diverse segments of the horse industry and general audiences. A research consultancy group was contracted, as well, to develop, host, and analyze the online study.

The support of "distribution partner" groups and the media was enlisted to endorse and promote the study to their vast constituencies and audiences, which proved instrumental in gathering nationwide participation. These "partners" included more than 100 American Horse Council organizations, plus national veterinary associations, equine-related and social media, breed registries and horse associations, as well as equine product manufacturers.

Moving toward solutions

For the first time, voices from one coast to the other were being heard on the problem of unwanted horses, and feedback from a broad cross-section of the horse industry was captured. Speculating there is an alarming rise in the numbers of unwanted horses is one thing. Hearing that alarm sounded and confirmed by thousands of responses from all across the country is another. The results of this study help to document the magnitude of the problem and its effects — and are surprisingly consistent nationwide, with little to no variance by region. Eyewitness observations on a national scale also help to pinpoint conflicts and differences of opinions between the diverse groups that comprise the horse industry.

The Coalition will use these findings to identify common ground for all interested groups and lead to responsible decisions that will have a profound and lasting impact on the lives of unwanted horses and the horse industry at large.

A significant response

The response was greater than anyone anticipated when the survey site went live in November 2008. By the end of the first day, nearly 500 respondents had completed the survey. In a matter of weeks, there were 27,000 more responses and thousands of write-in comments.



METHODOLOGY

About The 2009 Unwanted Horses Study

The primary mission of the study was to gather metrics about unwanted horses on a national scale. Three objectives were defined:

1. *Develop a comprehensive assessment and magnitude of the unwanted horses problem.*
2. *Provide factual evidence for decisions relating to solution-based programs and policies.*
3. *Establish a baseline for measuring progress in generating awareness, education and action.*

Survey development

Two questionnaires, focused specifically on the problem of unwanted horses, were designed; one for horse owners, and a second for industry stakeholders.

Approach

The Internet was used as the most expedient vehicle to gain feedback from the many different people affected by, and involved with, horses on a nationwide scale. It also allowed respondents to participate quickly and cost-effectively.

Promotion of the survey

Survey “partners” supported the effort by reaching out and encouraging participation among horse owners, equine associations, veterinarians, breeders, state and local law enforcement, rescue/retirement facilities, and other facilities using horses.

To make it easy for those 1,000+ organizations and groups to spread the word to their members and constituencies, a set of integrated communication templates were created and made available as easy-to-download resources on a UHC micro site:

- ✦ *Targeted direct mail and e-mail campaigns*
- ✦ *Online micro site with downloadable support materials, which included banner ads, print ads, e-blast messages, and a news release for marketing partners*
- ✦ *Print advertising*
- ✦ *Online advertising*

Table 1: Survey Distribution Partners

	Target Sample Recruitment	Invitations/Promotion Via
American Horse Council Members	Encourage participation among those with whom they have opt-in-relations (e.g., veterinarians, breeders, trainers, owners)	Newsletters, Web sites, e-mail blasts, public notice
Publishers (e.g., statewide sheriff associations, PRIMEDIA Equine Network, BowTie Inc., Farm Radio Network)	Encourage readers/subscribers to participate in survey (<i>Horse Illustrated, Horse & Rider, Dressage Today, etc.</i>)	E-newsletters, Web sites, publication editorial
Product Manufacturers/Retailers (e.g., Farnam Companies, Purina Mills, Tractor Supply, SmartPak Equine, Fort Dodge Animal Health)	Encourage participation among horse owners with whom they have opt-in relations	E-newsletters, Web sites, retail outlets
Rescue/Retirement/Adoption Facilities (listed on UHC Web site)	Encourage participation among managers and operators	Public notice
Rescue/Retirement/Adoption Facilities (listed on UHC Web site)	Encourage participation	E-mail blast
Auction/Sale Barn Operators	Encourage participation	E-mail blast

National Scope

The response to the online survey site (which went live in November 2008) was tremendous:

- ✦ *By the end of the first day, nearly 500 respondents had completed the survey.*
- ✦ *In a matter of weeks, there were 27,000 more responses and thousands of write-in comments.*
- ✦ *The results bear no significant regional differences.*

Statistical accuracy

Response to the survey generated a statistical significance at 95% or higher, with less than a $\pm 0.6\%$ margin of error for the total sample.

- ✦ *Horse Owners (20,484 responses) $\pm 0.7\%$ margin of error*
- ✦ *Stakeholders (2,245 responses) $\pm 2.2\%$ margin of error*



EXECUTIVE SUMMARY

Magnitude of the problem

The 2009 Unwanted Horses Survey, based on thousands of respondent perceptions, indicates the problem is perceived to be growing on many fronts. More than 90% of participants believe the number of unwanted horses, as well as those neglected and abused, is increasing. Almost all participants (87%) indicate that in the past year, this has become “a big problem,” compared with only 22% who said the problem was an issue three years ago.

Respondents report that euthanasia is on the rise too, but at a slower pace.

Six out of 10 rescue facilities (63%) report they are at near or full capacity and, on average, turn away 38% of the horses brought to them. Capacity is clearly the issue in that almost as many horses stay for life as are adopted out.

Contributing factors

Participants believe the top contributors to the problem of unwanted horses are:

- *Downturn of the economy*
- *Closing of the nation’s processing facilities*
- *Change in breed demand/indiscriminate breeding*
- *High cost of euthanasia*

Other noted contributors to the problem include:

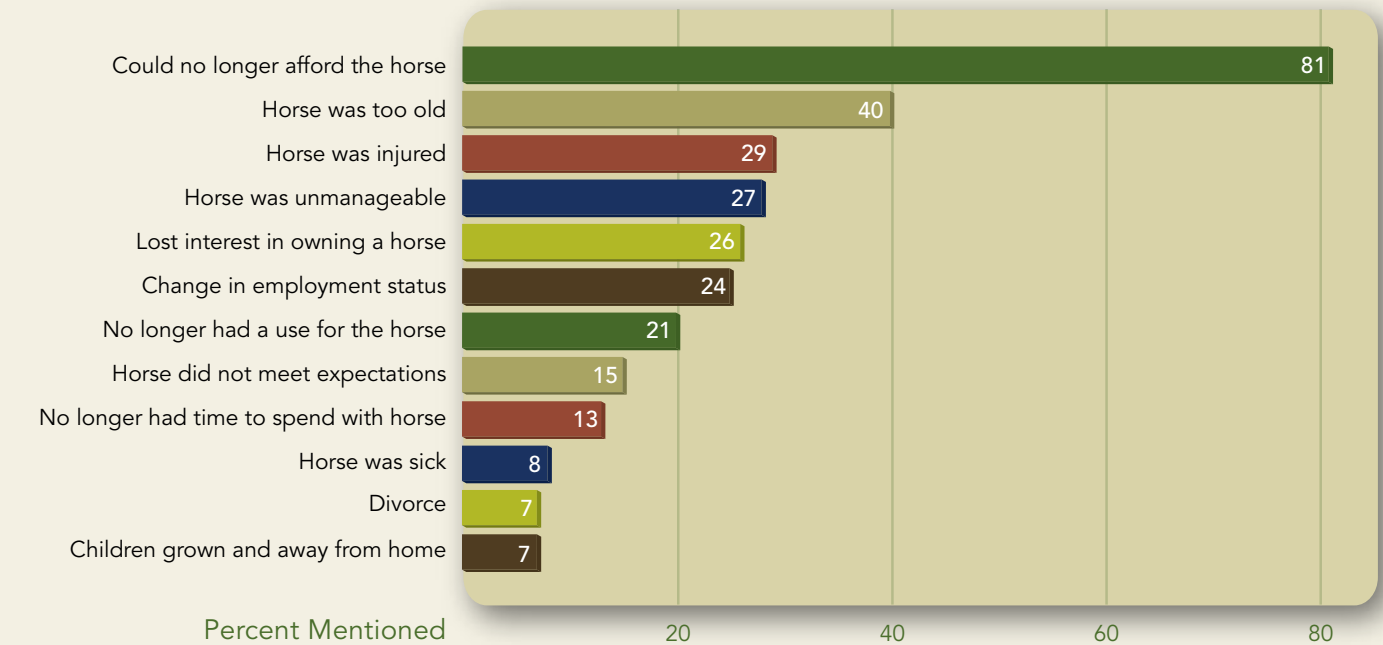
- *Inability to sell horse/lack of buyers*
- *Age of horse owner/physically unable to care for the horse*
- *Lack of responsibility/attitude of owner*

Reasons horses become unwanted

The reasons why respondents believe that horses become unwanted are varied. Among the top five reasons cited, three relate to a change in owner status, and two are attributed to the horse itself.

- *Economics (affordability) is the most commonly cited reason for why a horse becomes unwanted*
- *Old age/injury of the horse*
- *Loss of owner interest/use for the horse*
- *Unmanageability of the horse*
- *Change in owner employment status*

Chart 1: Common Reasons for Horses Becoming Unwanted



Solutions

Many solutions to the problem were offered. Four emerged as the solutions viewed as **MOST** appealing by the total population of respondents. These were:

- *Educate owners to purchase and own responsibly*
- *Increase ability of private rescue/retirement facilities to care for unwanted horses*
- *Reopen U.S. processing plants*
- *Increase options and resources to euthanize unwanted horses*

Solutions viewed as **LEAST** appealing by the total population of respondents included:

- *Expand legislation or regulation to control horse ownership*
- *Secure federal funding for carcass removal*
- *Increase awareness of animal welfare rights*
- *Secure federal funding to expand horse adoption*

MAGNITUDE OF THE PROBLEM

A growing problem

Perceptions that unwanted horses are a big problem have escalated dramatically in the past three years. More than 80% of respondents in every group perceived unwanted horses as a big problem in the past year — compared to less than 20+% who believe it was a big problem three years ago.

Table 2

Perceptions of The Unwanted Horse Problem				
	Stakeholders *n=2,245	Rescue/Adoption Facilities n=60	Horse Owners n=20,484	Non-horse Owners n=422
Number of Unwanted Horses Is Increasing	96%	93%	96%	93%
Feel Unwanted Horses Is a Big Problem in Past Year	86%	87%	88%	82%
Feel Unwanted Horses Was a Big Problem 3 Years Ago	22%	28%	20%	26%

Table reference: Study pg 26]
*NOTE: n=total number of respondents who answered the question.

NATIONWIDE PERCEPTIONS ABOUT THE PROBLEM

Familiarity and concern

Familiarity with the problem is very high among those closest to the issue — Stakeholders, Rescue/Adoption/Retraining Facilities and Horse Owners. Non-horse Owners, who are one step removed, are less familiar with the problem. Of those familiar, virtually all are highly concerned.

Table 3

Familiarity/Concern About The Unwanted Horse Problem				
	Stakeholders n=2,245	Rescue/Adoption Facilities n=60	Horse Owners n=20,484	Non-horse Owners n=422
Familiarity with Problem	77%	97%	82%	46%
Concern with Problem	95%	97%	95%	86%

[Table reference: Study pg 26]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

Causes of the problem

While all groups cite the Economy as the number one contributing factor, Horse Owners and Stakeholders agree Closing of Processing Facilities is a major contributor to the problem. Non-horse Owners and Rescue/Adoption/Retraining Facilities, on the other hand, rank Change in Breed Demand/Indiscriminate Breeding and Closing of Processing Facilities as secondary major contributors. All indicate High Cost of Euthanasia/Carcass Disposal as least important of the options given.

Table 4

Top Contributors To The Unwanted Horse Problem				
	Stakeholders n=2,245	Rescue/Adoption Facilities n=60	Horse Owners n=20,484	Non-horse Owners n=422
The Economy	73%	80%	73%	71%
Closing of Processing Facilities	56%	35%	61%	41%
High Cost of Euthanasia/ Carcass Disposal	22%	23%	25%	22%
Change in Breed Demand/ Indiscriminate Breeding	30%	53%	37%	42%

[Table reference: Study pg 26]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

Stakeholder perceptions

Stakeholders who responded to the study represent a variety of professions within the industry. Although their roles are diverse, the majority of Stakeholders (as shown in Table 5) report they are very familiar with the problem of unwanted horses (77%), especially Breeders (89%) and Veterinarians (89%). Stakeholders, in all subsets, indicated they are consistently concerned about the problem.

Table 5

Stakeholder Perceptions About Unwanted Horses						
	Total Stakeholders n=2,245	Veterinarians n=593	Horse Trainers n=173	Horse Breeders n=161	Boarding Facility Operators n=86	Equine Assoc. n=150
Familiarity with Problem	77%	89%	84%	89%	79%	78%
Concerned with Problem	95%	96%	96%	96%	98%	93%
Aware of Rescue Facility in Area	74%	82%	81%	–	–	86%
Contributing Factors to Problem						
Economy	73%	64%	72%	70%	69%	81%
Closing of Processing Facilities	56%	76%	57%	72%	69%	50%
High Cost of Euthanasia/ Carcass Disposal	22%	12%	28%	32%	27%	21%

[Table reference: Study pg 68-72]

*Not asked

NOTE: Lighter shading in table indicates areas of marked statistical differences.

- **Veterinarians** who responded are more familiar with the problem of unwanted horses; place more emphasis on the Closing of Processing Facilities as a primary contributor to the problem; less emphasis on the Cost of Euthanasia; and are more likely to know where a Rescue Facility is located.
- **Horse Trainer** respondents share a similar viewpoint about the unwanted horse problem as the majority of Stakeholders.
- **Horse Breeders and Boarding Facility Operators** indicated a greater emphasis on the Closing of Processing Facilities as a primary contributor to the unwanted horses problem.
- **Equine Associations** reported the Economy as the primary contributor to the unwanted horses problem, and indicated they are more likely to know where a Rescue Facility is located.

Neglect and abuse on the rise

One of the more disturbing observations by all respondents is that the number of horses that are neglected or abused has increased.

Table 6

Perceptions About Neglect/Abuse/Euthanasia				
	Stakeholders n=2,245	Rescue/Adoption Facilities n=60	Horse Owners n=20,484	Non-horse Owners n=422
Number of Neglected/Abused Horses Is Increasing	92%	85%	94%	93%
Number of Horses Being Euthanized Is Increasing	59%	50%	*	*

[Table reference: Study pg 28]

*Not asked.

Hundreds of write-in comments from respondents across the country support the spread of neglect and abuse with reports of horses being:

"Left to starve, abandoned or shot by owners."

"Turned out in the wild or other properties, even the freeways."

"Tied to a stranger's trailer."

"Let loose to die in the woods."

"Left to run wild or to die on the roadside."

"Just turned loose to fend for themselves."

"Starved to death."

"Abandoned."

"Just left to die without food or water."

PROFILE: An emerging picture of unwanted horses

"Horses are being left at auctions."

"Horses are being dumped off down our road left to die."

"Horses are showing up in the forest preserves."

As discussed earlier, The Unwanted Horse Coalition defines unwanted horses as: "Horses that are no longer wanted by their current owner because they are old, injured, sick unmanageable, fail to meet their owner's expectations, or the owner is no longer able to afford them."

The moment any owner decides to sell, donate, euthanize or abandon a horse, whatever the reason, that horse becomes unwanted. In fortunate cases, this decision turns into a new home, use and/or situation for the horse. In light of one of the worst economic downturns, more horses appear to be facing devastating alternatives. Three of the top five reasons why respondents believe a horse becomes unwanted are related to a change in the owner's status (including a change in employment and the ability to afford the horse), while two reasons pertain to the horse directly.

Why does a horse become unwanted?

When asked to select what they believed to be the three most common reasons horses become unwanted (from a list of 10), all groups, except Rescue/Adoption/Retraining Facilities, indicated "Could no longer afford the horse" as the number one reason. Rescue/Adoption/Retraining Facilities indicated the most common cause as "Horse was too old/injured" (94%).

Table 7

Common Reasons Horses Become Unwanted				
	Stakeholders n=2,245	Rescue/ Adoption Facilities n=60	Horse Owners n=20,484	Non-horse Owners n=422
Could No Longer Afford Horse	83%	72%	81%	82%
Horse Was Too Old/Injured	68%	94%	69%	61%
Lost Interest Or Use For Horse	53%	45%	46%	32%
Change In Employment Status	22%	25%	25%	27%
Horse Was Unmanageable	22%	23%	28%	18%

[Table reference: Study pg 28]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

In looking deeper at the reasons why horses are sold, donated or euthanized, it's helpful to examine secondary factors that emerged as respondents answered questions in four different categories about unwanted horses: Use, Breed, Age and Gender.

Unwanted Horses: What was their most recent occupation?

Horse Owners report that horses used for Recreational Riding are more likely to be euthanized. Horses used to Show/Compete are more likely to be sold, which reflects their market value, while those used for Racing are more likely to be donated for retraining.

Table 8: Use of Horse Sold, Donated or Euthanized

	Owners Use of Horse* %	Sold a Horse % (n=1,786)	Donated a Horse % (n=100)	Euthanized a Horse % (n=458)
Recreational	81	52	48	79
Show/Compete	53	31	20	13
Breeding	33	10	8	5
Racing	10	7	24	3

Table reference: Horse Owners Appendix pgs, Study pg 60]
*Multiple responses.
NOTE: Lighter shading in table indicates areas of marked statistical differences.

Unwanted Horses: What breeds are represented?

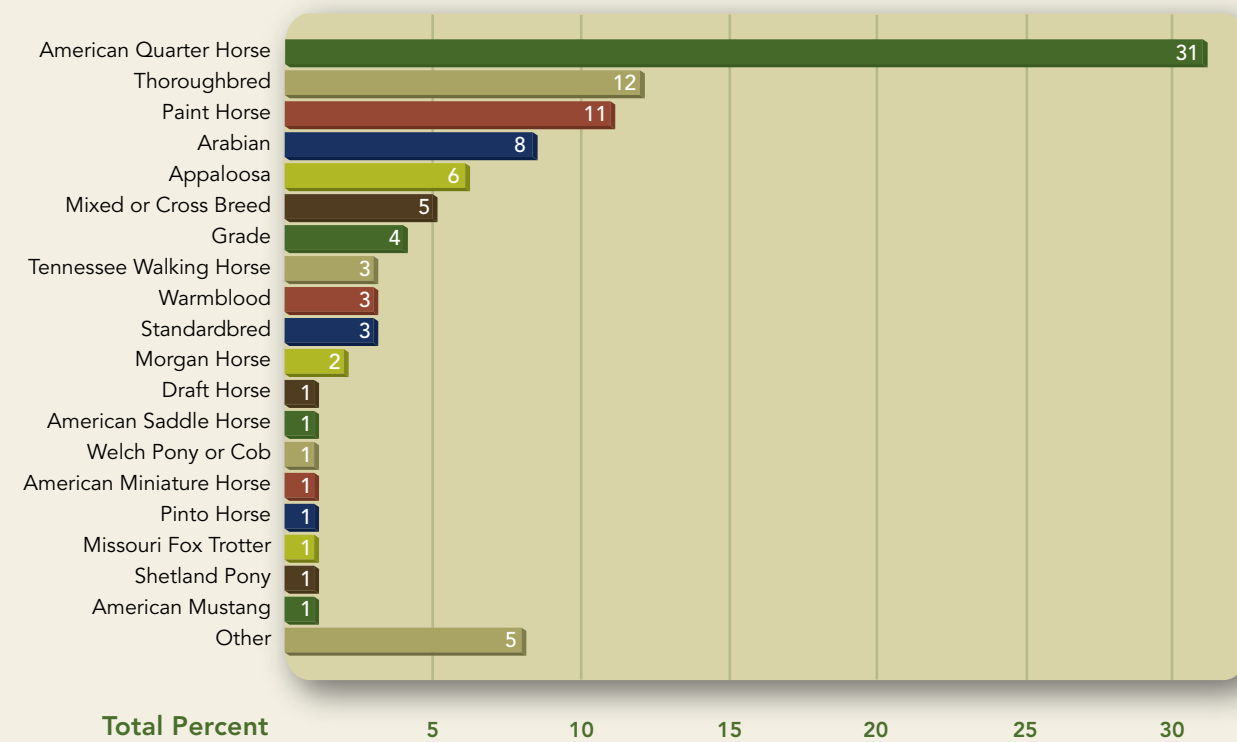
Horse Owners report horses that are sold or euthanized are more likely to be American Quarter Horses, which is consistent with the percentage of registered Quarter Horses in the United States. Horses that are donated are more likely to be reported as a Thoroughbred.

Table 9: Breed of Horse Sold, Donated or Euthanized

	Sold a Horse % (n=1,601)	Donated a Horse % (n=93)	Euthanized a Horse % (n=444)	% U.S. Horses Registered*
American Quarter Horse	41	32	38	50
Paint	20	6	8	13
Thoroughbred	10	46	20	14
Arabian	7	5	17	3
Appaloosa	6	3	9	2
Others (Registered and Non-Registered)	5	6	8	18

[Table reference: Study pg 60]
NOTE: Lighter shading in table indicates areas of marked statistical differences.
*Source: Horse Industry Directory, 2009, American Horse Council

Chart 2: Horse Breed That Was Sold/Donated/Euthanized (consistent with the % of horses registered)



[Chart reference: Appendix pg 11]

Unwanted Horses: What's their age?

Horse Owners report that horses under the age of 3 are most likely to be sold (rarely, if ever, donated or euthanized). Horses most likely to be sold have reached 3 to 15 years of age; while those most likely to be donated are from 3 to 21 years of age. Horses that are euthanized tend to be 6 years and up in age.

Table 10: Age of Horse Sold, Donated or Euthanized

	Sold a Horse % (n=2,320)	Donated a Horse % (n=126)	Euthanized a Horse % (n=240)
Weanling	5	0	0
Yearling	6	0	1
2-year-old	7	3	2
3 to 5	27	21	6
6 to 10	30	21	23
11 to 15	14	24	25
16 to 20	7	11	19
21+	3	20	25

[Table reference: Study pg 60]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

Unwanted Horses: What's their gender?

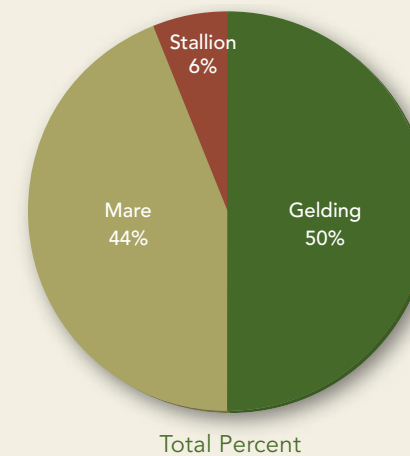
According to the majority of all respondents, stallions are rarely sold, donated or euthanized, which likely reflects the relatively small number of stallions in the horse population. Horse Owners report that geldings are the most likely to be 1) donated, 2) euthanized, and 3) sold. Mares are likely to be 1) sold, 2) euthanized, and then 3) donated for adoption or retraining.

Table 11: Gender of Horse Sold, Donated or Euthanized

	Sold a Horse % (n=2,322)	Donated a Horse % (n=126)	Euthanized a Horse % (n=650)
Mare	45	33	42
Stallion	7	3	3
Gelding	48	63	55

[Table reference: Study pg 60]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

Chart 3: Horse's Gender That Was Sold/Donated/Euthanized



[Chart reference: Horse Owners Appendix pg 13]

Horse registration

Three-fourths* of all Horse Owners indicate the horse that was LAST sold/donated/euthanized was registered at that time.

*This number may be inflated since most respondents were recruited from horse enthusiast media and breed/performance associations.



WHO IS RESPONSIBLE?

With the exception of Rescue/Adoption Facilities, all groups indicated the primary responsibility for solving the problem of unwanted horses falls on the shoulders of Horse Owners, followed closely by Horse Breeders. Rescue/Adoption Facilities place more emphasis on Horse Breeders (78%), Equine Associations (72%), then Horse Owners (68%).

While Stakeholders and Horse Owners report similar views about who is responsible, Horse Owners also indicate a willingness to step up and contribute funding for the additional resources needed to increase the ability of rescue/retirement facilities and other programs.

Table 12

Primary Responsibility To Solving The Problem				
	Stakeholders n=2,245	Rescue/Adoption Facilities n=60	Horse Owners n=20,484	Non-horse Owners n=422
Horse Owner	68%	68%	67%	74%
Horse Breeder	61%	78%	62%	67%
Equine Association	44%	72%	38%	46%

[Table reference: Study pg 27]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

Table 13

Horse Breeder Perceptions		
	Stakeholders n=2,245	Horse Breeders n=161
Parties Responsible		
Horse Owner	68%	55%
Horse Breeder	61%	44%
Equine Association	44%	30%
High Degree Contribution to Problem		
The Economy	73%	70%
Closing of Processing Facilities	56%	72%
High Cost of Euthanasia	22%	32%

[Table reference: Study pg 70]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

AWARENESS OF OPTIONS

Disposal activity

Horse Owners report that sales of unwanted horses have doubled in the past year, while donations and euthanasia have increased by 50%.

Table 14

Most Recent Horse Disposal Activity by Horse Owners			
	Sold an Unwanted Horse	Donated an Unwanted Horse*	Euthanized an Unwanted Horse
Within the past year	42	30	31
1-2 years ago	19	20	21
3+ years ago	37	48	47
Don't recall	2	3	1

[Table reference: Study pg 40]
*For adoption and/or retraining.

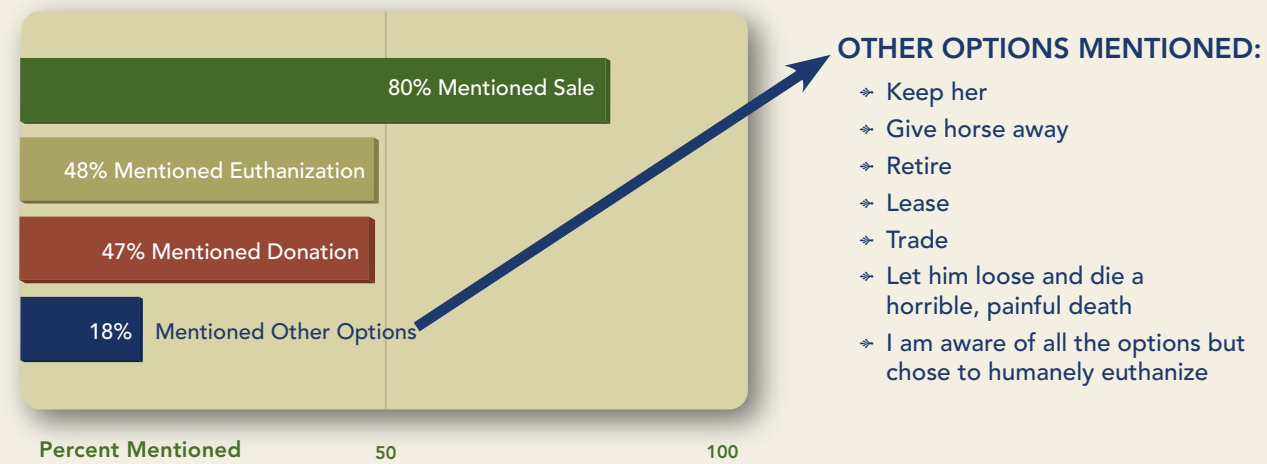
On further examination of stakeholders subsets, it becomes apparent that Horse Breeders differ from other stakeholders in their perception of who (and what) they believe is responsible for the problem. Horse Breeders are less likely to assume responsibility than Horse Owners, and they place considerably more emphasis on the Closing of Processing Facilities as the primary contributor to the problem.



Awareness of options

Horse Owners who sold/donated/euthanized a horse in the last year were asked what other options they were aware of at the time of their decision to dispose of an unwanted horse. A resounding majority emphasized selling the horse was top of mind. More than half of the Horse Owners indicated they were unaware of the options of donation and euthanasia.

Chart 4: Options Aware of For Horses



[Chart reference: Study pg 41]

Assets or liabilities?

Horse Owners perceive the value of their horse at time of departure as equal to the value at time of acquisition. Most horses are valued between the range of \$1,000 and \$5,000 at the time of acquisition.

In response to a question about horse revenue from sales, Horse Owners indicated they receive a broad range of revenues from sales of their horses:

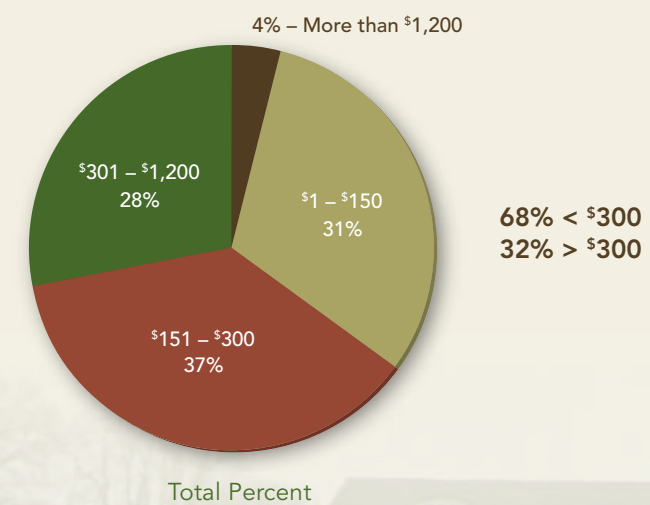
- ✦ 32% — \$1 to less than \$1,000
- ✦ 38% — \$1,000 to \$3,000
- ✦ 30% — \$3,001 to \$80,000

Costs of disposal

On the other side of the equation, Horse Owners indicated they spend up to \$1,200 for their horse to be euthanized or adopted, with the norm being between \$250 and \$485. This likely includes some of the following costs:

- ✦ \$300 to \$500 for carcass removal
- ✦ Veterinary costs for euthanasia or health record for adoption
- ✦ One to three months feed for adoption
- ✦ Transportation to adoption site
- ✦ Fee for adoption*

Chart 5: Cost for euthanization or donation



[Chart reference: Study pg 43]

The average cost of euthanasia and carcass disposal in the past 12 months is \$385, as reported by Horse Owners, while the average cost of donating a horse is reported to be more than \$1,000. This may seem out of line until you consider it's not unusual for certain requirements to be placed on donated horses, such as a veterinary examination, transportation costs, and several months boarding fees.

*An adoption fee is often charged by some rescue/retirement facilities and sanctuaries.

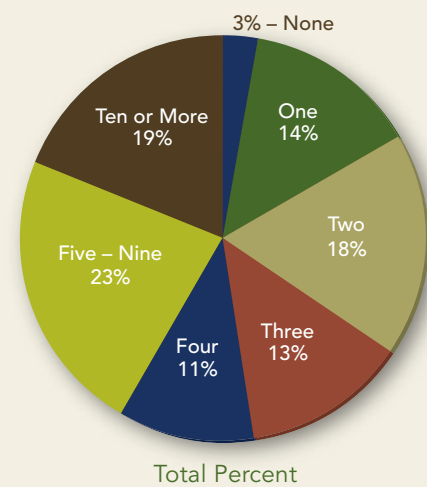
PROFILES: Horse Owners

Participants who responded to the Horse Owner version of the Unwanted Horse Survey included 20,484 Horse Owners, which far exceeds responses of all other respondent groups combined. This high number is also a function of population size, as well as the means by which participants were recruited.

Horse Owner Demographics: Ownership

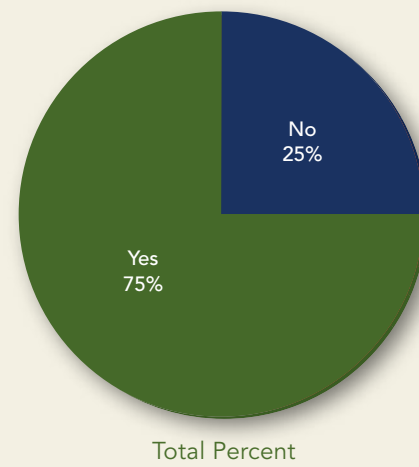
Based on answers to demographic questions, the average Horse Owner is more likely to live in a rural area and owns four horses. Three-fourths keep their horses on the property where they live.

Chart 6: Horse ownership



[Chart reference: Appendix pg 4]

Chart 7: Horses kept on property

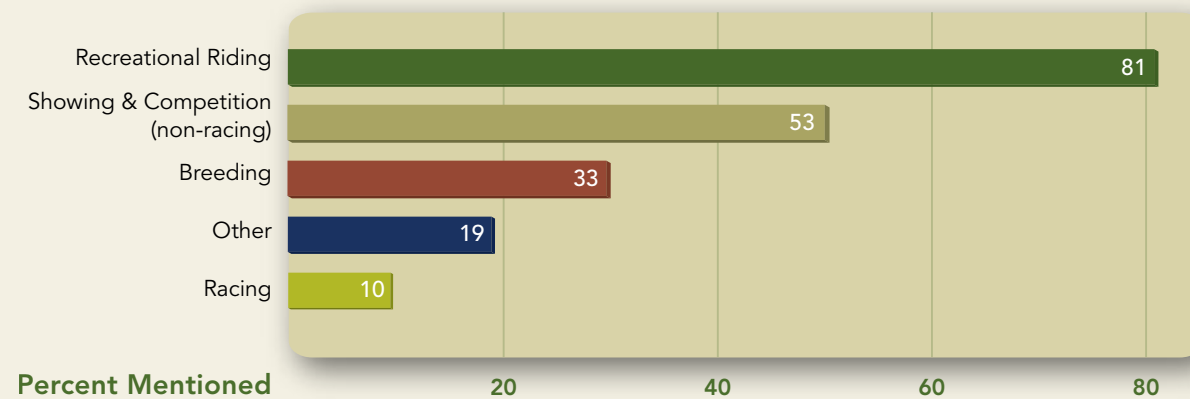


[Chart reference: Appendix pg 7]

Horse Owner Demographics: How are horses used?

When asked how their horses are used, Horse Owner responses indicated that most horses are used all or in part for recreational riding. Over half of all horses are shown or are in competition. Horse Owners indicated that one-third of their horses are used for breeding. The more horses an owner has, the more likely they are to Show, Compete, Breed and Race.

Chart 8: Horse Usage by Horse Owners



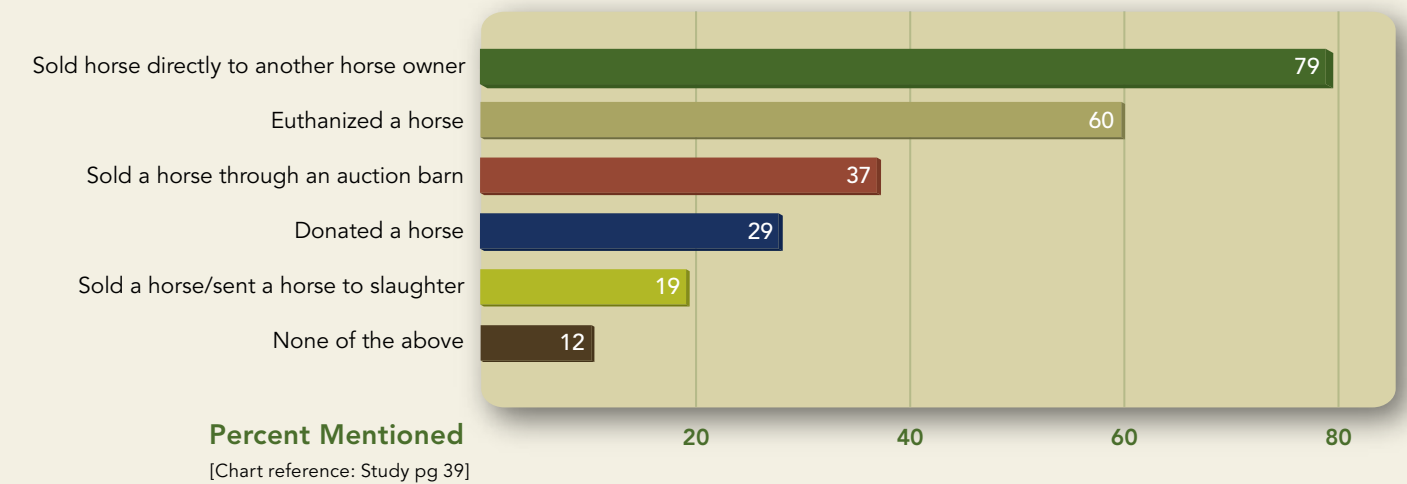
[Chart reference: Appendix pg 5]

20

Horse Owner Demographics: Experience with unwanted horses

Most Horse Owners reported they have been faced with the decision of selling, donating or euthanasia. Only 12% of Horse Owners indicated they have not yet experienced having to make one of these choices.

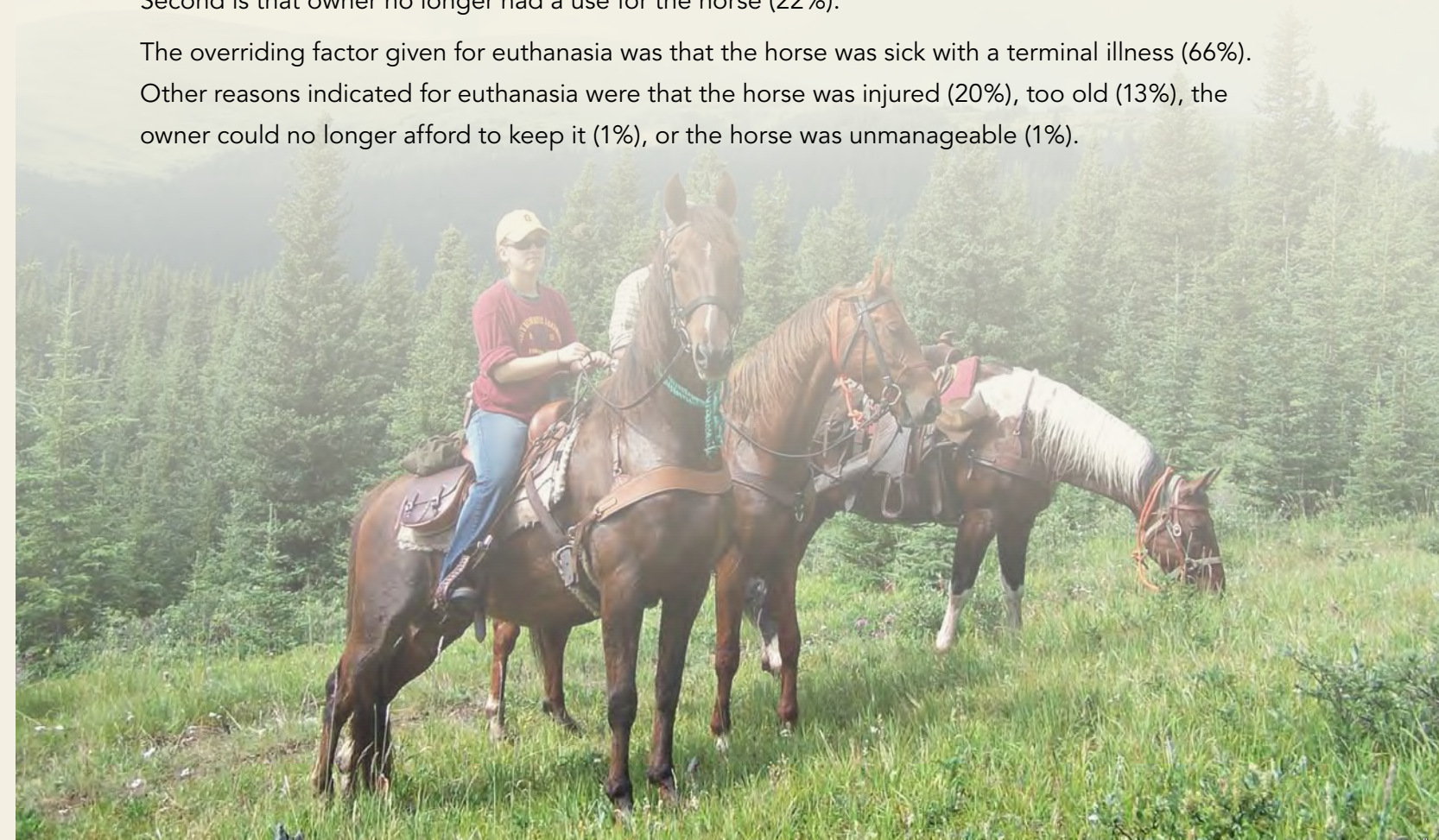
Chart 9: Horse Owner's Experience



The primary reason indicated for selling an unwanted horse is that the owner is in the business of buying and selling horses (37%); following closely is that the horse did not meet expectations (36%).

The primary reason reported for donating a horse is that the horse did not meet expectations (26%). Second is that owner no longer had a use for the horse (22%).

The overriding factor given for euthanasia was that the horse was sick with a terminal illness (66%). Other reasons indicated for euthanasia were that the horse was injured (20%), too old (13%), the owner could no longer afford to keep it (1%), or the horse was unmanageable (1%).



PROFILES: Stakeholders

Stakeholders Demographics: Horse industry experience

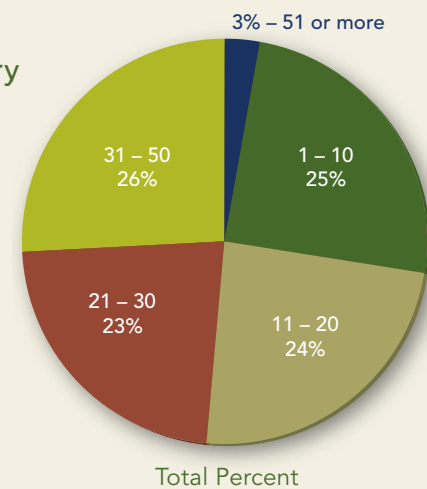
Participants who responded to the Stakeholder version of the Unwanted Horse Survey included 2,245 responses from a range of Stakeholders, including professionals and/or people involved in the horse industry.

- Industry professionals (e.g., trainers, breeders, boarding facility operators) (420)
- Equine veterinarians (593)
- Equine association directors/staff (150)
- Managers/owners of horse rescue/adoption facilities (61)
- Local sheriffs (13)
- Equine media publishers/editors (33)
- State agricultural and veterinary officials (68)
- Auction/sale barn operators (8)
- Unidentified (899)

Chart 10: Years involved in the equine industry

When asked how many years they have been active in the equine industry, Stakeholder responses are split evenly from 1 year to 50.

[Chart reference: Appendix pg 59]



Stakeholders Demographics: Community involvement

The level of participation in community activities reported by Stakeholders differs, depending on their region of the country. Stakeholders in the West (45%) were most inclined to write or call a politician at the local, state or national level compared to only 17% of Stakeholders in the Midwest. Stakeholders in the South (41%) were most likely to write a letter to the editor or call a live broadcast to express an opinion compared to 17% of Stakeholders in the Northeast.

PROFILES: Non-horse Owners

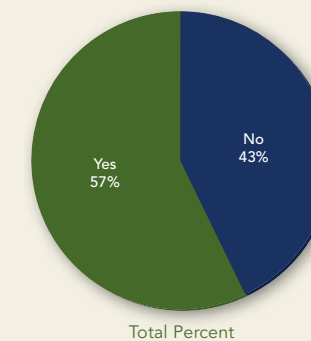
Participants who responded to the Horse Owner version of the Unwanted Horse Survey included 422 Non-horse Owners, who are defined as persons who currently do not own a horse, know or are related to a Horse Owner, and/or are friends of the horse industry.

Non-horse Owners Demographics: Horse industry experience

More than half of the Non-horse Owners (57%) report they have never owned a horse; 43% are former horse owners; and the rest are "friends" of the horse community.

Chart 11: Percentage of Non-horse Owners Who Have Ever Owned a Horse

[Chart reference: Appendix pg 8]



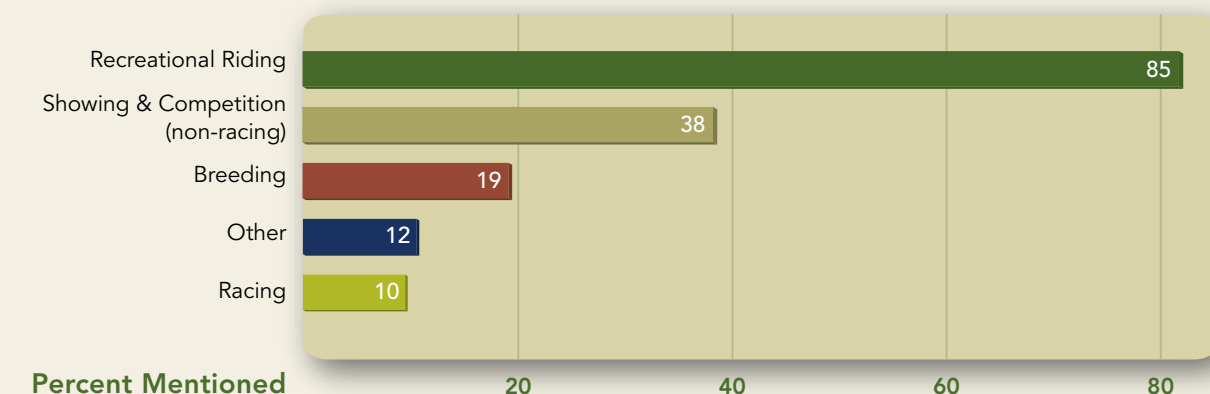
Non-horse Owners Demographics: Former horse use

Non-horse Owners who indicated they are former horse owners report they were far more likely to have used their horses for Recreational Riding than for Showing/Competition, Breeding, Racing or other activities.

Non-horse Owners who used to own horses were more likely to have sold their horse because of changes in lifestyle (e.g., time, divorce, children moved) compared to current Horse Owners.

One of the most noticeable differences between Non-horse Owners and Horse Owners is that two-thirds of Non-horse Owners indicate they do not live in a rural community.

Chart 12: Former Horse Owners Use of Horse*



[Chart reference: Appendix pg 9]
*Multiple responses

PROFILES: Rescue/Retirement/Adoption/Retraining Facilities

Of the 2,245 participants of the Stakeholder version of the Unwanted Horse Survey, 61 represented Rescue/Retirement/Adoption/Retraining Facilities. (The American Horse Defense Fund, the nation's largest non-profit horse welfare organization, lists 432 rescue facilities in its national database.)

Rescue/Adoption/Retraining Facilities Demographics: The rescue viewpoint

Given their role in the industry, Rescue/Adoption/Retraining Facilities witness the unwanted horse problem on a daily basis and see the issue from a unique vantage point compared to other Stakeholders. As voluntary caretakers, the owners and managers of these facilities indicate they are active and visible in their community, highly passionate about their rescue work, and likely to voice their concerns and opinions through the media or other public forums.

Rescue/Adoption/Retraining Facilities Demographics: Funding issues

Rescue/Adoption/Retraining Facilities are highly dependent on public and private donations. Respondents indicate that one-fourth of the financing needed to keep a facility in operation comes from the owner's personal income. Other sources of funding reported include:

- ➔ Public/Private Donations/Sponsors 58%
- ➔ Facility Owner's Personal Expense 25%
- ➔ Income/Fees from Facility* 12%
- ➔ Grants/Board Financing 5%

*Income from the facility varies but may include selling horses, boarding fees, riding fees, lessons, events and member dues.

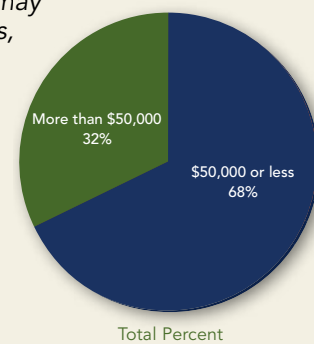


Chart 13: Sources of Funding

[Chart reference: Study, pg 56]

Rescue/Adoption Facilities Demographics: Current situation

To gain a clearer understanding of the current rescue/retirement situation, Rescue/Adoption Facilities were asked a series of questions about their maximum capacity, current occupancy rate, and the number of horses they've had to turn away. Rescue/Adoption Facilities report they are currently turning away an average of 38% of the horses that are brought to them.

Table 15: Current Rescue/Adoption Facility Situation

	Average # of Horses at Maximum Occupancy	Current Occupancy %	Average # of Horses Turned Away
1-10 horses	6	86%	11
11-20 horses	16	86%	6
21-30 horses	26	81%	26
31-50 horses	43	93%	58
51-100 horses	86	67%	54
100+ horses	290	70%	50
Average Per Facility	42	81%	26

[Table reference: Study pg 55]

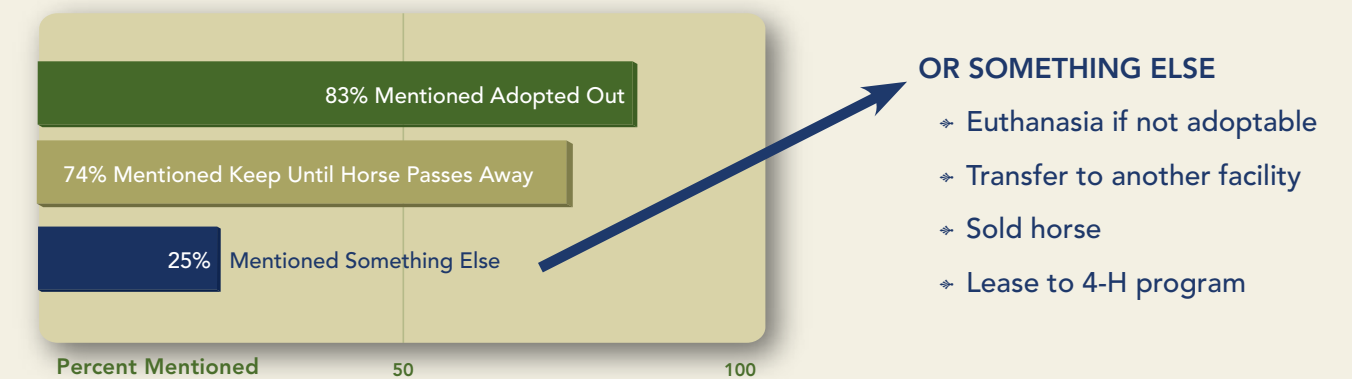
Further analysis suggests that funding Rescue/Adoption/Retraining Facilities from existing resources is not enough:

- ➔ 39% of facilities are at maximum capacity
- ➔ 30% are at 75% to 99% capacity
- ➔ 26% are at 50% to 74% capacity
- ➔ 6% are at 35% to 49% capacity

Rescue/Adoption Facilities Demographics: No vacancy

As shown in Chart 14, Rescue/Adoption/Retraining Facilities report almost as many horses stay at a facility for life (74%) as are adopted out (83%)*

Chart 14: Disposition of Horses at Facility



[Chart reference: Study pg 57]

*Percentage adds up to more than 100 as respondents were allowed to check all applicable options.

ESTIMATING THE ECONOMIC IMPACT

The cost in lost income

Hundreds of respondents to the survey who took the time to write in said: "We're in business to sell" or "We sell horses for profit." However, they also reported that changing economic conditions have made it more difficult for horse owners to care for their horse(s) or to find qualified buyers when they're ready to sell.

The cost of rescue

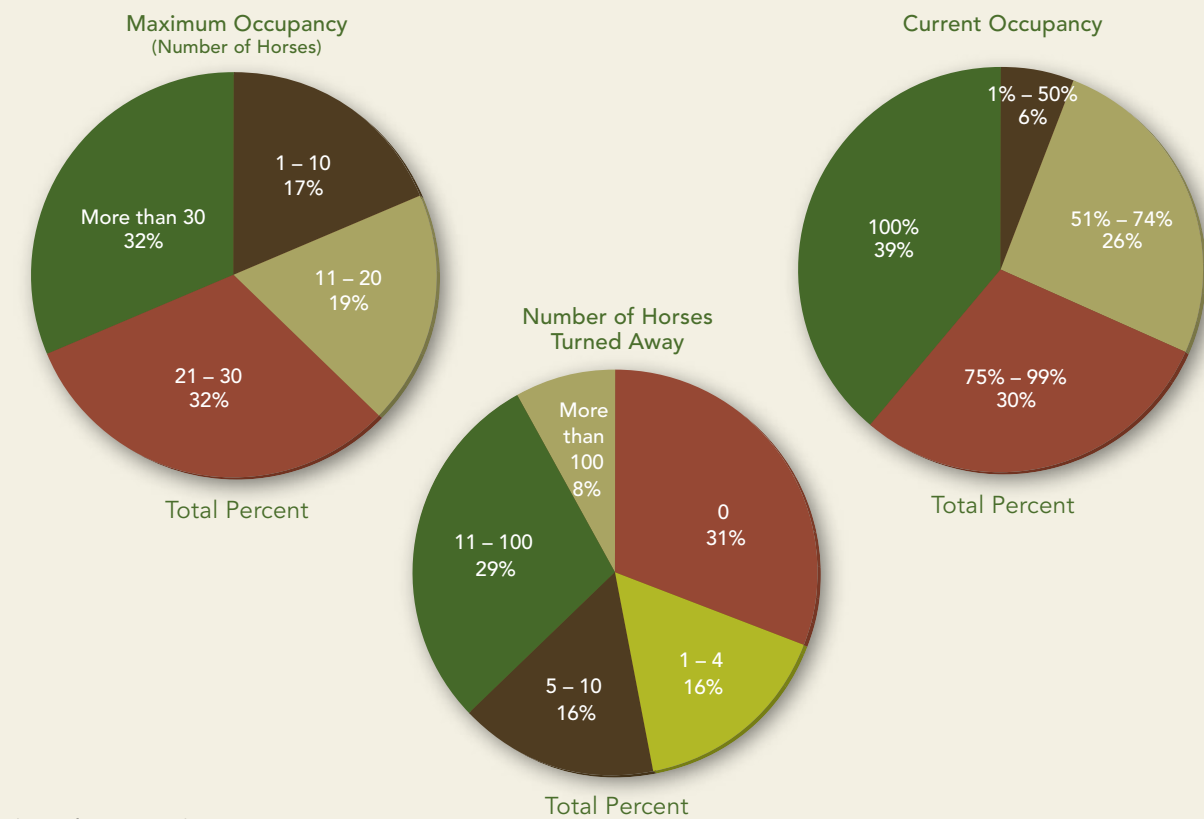
To fully understand the financial impact of the unwanted horse problem, it's imperative to look at the current situation faced by Rescue/Retirement/Adoption/Retraining Facilities. With an average annual budget need of \$2,300 to care for one horse, the industry will need a minimum of \$25,714,000 just to care for the horses that are currently being turned away.

Table 16

Current Situation At Rescue/Retirement/Adoption Facilities		
	Average Per Facility	Estimate 430* U.S. Facilities
Maximum Rate of Occupancy	42 Horses	18,060 Horses
Current Occupancy	81%	
Horses Turned Away	26 Horses**	11,180 Horses
Annual Operating Budget	\$73,000	\$31,390,000
Annual Budget per Horse	\$2,300	

[Table reference: Study pg 54]
NOTE: Lighter shading in table indicates areas of marked statistical differences.

Chart 15: Current Situation



[Chart reference: Study pg 54]

*The American Horse Defense Fund lists 432 facilities in its national database.
**Primary reason horses are turned away is due to individual facilities currently operating at maximum capacity.
Note that many try to find another facility to assist in the horse's care.

Key issues to be addressed as we move forward

- Beyond the funding needed to handle the numbers of unwanted horses currently being turned away, what will be the cost to the industry when there's absolutely no more room?
- How will the industry deal with the capacity of Rescue/Retirement/Adoption/Retraining Facilities (or other resources) to care for unwanted horses if the problem continues at its current pace?
- How will the industry educate owners about the need for responsible breeding to ensure the value of horses is protected?
- What resources are needed to educate the industry, as well as the general public, on the value of retraining horses that have outlived their current use?
- Can we develop programs to assist in the cost of disposal, and help to ease the pain experienced by horse owners?



IMPLICATIONS

The problem is perceived to be increasing

The 2009 Unwanted Horse Survey demonstrates the problem of unwanted horses is not only perceived to be increasing significantly, its detrimental effects are being noticed and felt across the country. Rescue facilities report they are turning horses away —39% are at full capacity and another 30% are near capacity. Respondents indicate the number of horses euthanized is increasing. The number of abused and neglected horses is increasing, as confirmed by hundreds of eye-witness reports of horses turned loose, abandoned and left to starve.

Different viewpoints

The magnitude of the problem appears to be staggering. It is further complicated by the intensity of different viewpoints and opinions throughout the horse industry (and beyond). The survey shed light on some of the areas of strongly held opinions.

➔ **Horse Owners and Stakeholders are most likely to share similar beliefs. Horses are not only an integral part of their lifestyle, the horse is a vital part of their livelihood.** Unlike Rescue/Adoption Facilities and Non-horse Owners, Horse Owners and Stakeholders are more likely to depend on horses and to employ horses in a variety of occupations and disciplines. Write-in comments from Horse Owners also convey their belief that the general public and media do not fully understand the challenges they face in feeding, caring for, training and maintaining horses.

“There’s a public disconnect from the reality of owning livestock and the truth of having the responsibility to deal with livestock that is no longer useful or healthy.” (pg 189)

➔ **Horse Owners are willing to contribute.** Horse Owners, more than other Stakeholders (particularly Horse Breeders), also indicate a willingness to step up and contribute funding for the additional resources needed to increase the ability of rescue/retirement facilities and other programs.

➔ **Non-horse Owners are former horse owners, know or are related to someone who owns a horse, are friends of the horse industry. The current opinions of Non-horse Owners are likely to be shaped by past horse ownership, family members and/or friends who own horses, and/or the media, rather than current experience.**

➔ **Owners and managers of Rescue/Retirement/Adoption/Retraining Facilities tend to be passionate about their work and are focused on the unwanted horses who come to them in need of care. They indicate a belief that equine associations and horse breeders are primarily responsible for solving the problem of unwanted horses. They also report a greater likelihood to take action and influence public opinion than other Stakeholders.**

- 59% have served as an officer of a club or organization
- 48% have served on a committee of a local organization
- 44% have written to an editor or called a live broadcast to express their opinions
- 38% belong to a humane/welfare rights organization

Rescue/Retirement/Adoption Facilities are more actively involved in their communities and their caretaker stories readily capture the attention of the local (in some cases, national) media.

Finding common ground for solutions

As with nearly everything related to horses, there are strongly held opinions, from many viewpoints, about the causes of horses being unwanted. There is also equally strong concern about the problem reported on all sides, and a willingness indicated to assist with solutions.

Respondents were asked to choose the “Most appealing solution to the problem of unwanted horses,” and to indicate “the least appealing solution.”

The top four “**Most Appealing Solutions**” are shown at the top of Table 17. These include:

- ➔ *Horse ownership education focused on buying and owning responsibly*
- ➔ *Increase ability of rescue/adoption/retraining facilities to care for unwanted horses*
- ➔ *Reopening U.S. processing plants*
- ➔ *More resources for humane euthanization*

Three of the four “**Least Appealing Solutions**,” highlighted at the bottom of Table 18, show a lack of interest in calling for federal funding and/or legislation. These least appealing solutions include:

- ➔ *Expand legislation or regulation to control horse ownership*
- ➔ *Federal funding for carcass removal*
- ➔ *Increase awareness of animal welfare rights*
- ➔ *Federal funding to expand horse adoption*



Table 17

INDEX*

Most Appealing Solutions to the Problem of Unwanted Horses					
	Total Respondents n=23,151	Stakeholders n=2,245	Rescue/Adoption Facilities n=60	Horse Owners n=20,484	Non-horse Owners n=422
Educate owners to purchase and own responsibly	133	230	203	122	121
Increase ability of private rescue/adoption facilities to care for unwanted horses	116	229	233	103	135
Reopen U.S. plants that process horses for meat	138	154	68	137	78
Increase options and resources to euthanize unwanted horses	112	164	143	107	65
Restrict breeding to reduce surplus of horses	89	144	167	83	84
Increase options to find free or low-cost feed for unwanted horses	70	152	177	61	66
Increase options to retrain unwanted horses	69	164	182	59	63
Increase ability of public animal shelters to take unwanted horses	63	139	137	54	76
Expand legislation or regulation to control horse breeding	60	96	127	56	65
Secure federal funding to provide low cost euthanasia	56	92	122	52	27
Secure federal funding to expand the number of retirement facilities	54	113	161	47	62
Secure federal funding to expand horse adoption	43	106	108	35	58
Increase awareness of animal welfare rights	36	84	80	31	46
Secure federal funding for carcass removal	30	56	61	28	10
Expand legislation or regulation to control horse ownership	25	51	61	22	38

[Table reference: Study pg 7]

*Results are shown as an indexed number, set to a value of 100. This indexing system allows for easier comparison of responses from different groups. Numbers above 100 represent Solutions perceived as "Most Appealing;" numbers below 100 represent Solutions perceived as "Least Appealing." NOTE: Lighter shading in table indicates areas of marked statistical differences.

The need for horse owner education is indicated as a top priority for all groups. Stakeholders and Rescue/Adoption/Retraining Facilities tend to agree that this, along with an Increase in the Ability of Rescues, are the two most important priorities. Leveraging this emotional connection could unite different groups through a shared commitment to educational efforts.

Horse owner education could become a common priority driven by many different groups throughout

the industry including Horse Owners, Horse Breeders/Trainers/Boarding Facilities, Horse Associations, Rescue/Adoption Facilities, Veterinarians/Associations, Humane Societies, Corporations (both in the equine and companion animal industries), State and Local Communities, Youth Organizations (4-H, FFA, Dude Ranches, Special Olympics), Universities (equine programs), Animal scientists, www.wehelpanimals.org, Media, and the general public.

Many educational efforts are already underway throughout the industry. It would be impossible to list or describe all of them here. Available resources currently provided by more than 20 UHC member organizations can be found at www.unwantedhorsecoalition.org. A listing of rescue/adoption facilities by state, is also provided at this site, along with a library of guidelines, articles, brochures and other downloadable tools.

Rescue/Adoption Facilities and Stakeholders emphasize the need to increase the ability of rescue/adoption facilities to care for unwanted horses — and Horse Owners are willing to contribute.

Horse Owners indicate they are willing to donate money, and this may bring in much of the necessary support for Rescue/Adoption Facilities and other programs.

Table 18: Potential Help from Owners

If the horse owners surveyed donated an average contribution of:

- \$50 (48% of Owners/Allies)
- \$250 (13% of Owners/Allies)
- \$500 (5% of Owners/Allies)

The contribution would amount to over \$1.7 MM
Assuming 2 million horse owners in the US* the total contribution would be \$163 MM

If Average Donation is:	%	n=20,900	Total Donation
\$50	48%	10,032	\$501,600
\$250	13%	2,717	\$679,250
\$500	5%	1,045	\$522,500
Donation:			\$1,703,350
If n=2,000,000			\$163,000,000

[Table reference: Study pg 50]

*American Horse Council Study 2005; Bureau of Land Management.

If the Horse Owners surveyed donated an average of \$50 (48% of Owners/Non-horse Owners), \$250 (13% of Owners/Non-horse Owners), and \$500 (5% of Owners/Non-horse Owners) — the contribution would amount to more than \$1.7 million. Assuming 2 million horse owners in the United States,* the total contribution would be \$163 million. This would still fall significantly short of raising the \$230 million needed (as estimated by the AAEP at \$2,300/horse) to care for, on average, 100,000 unwanted horses each year.

All groups indicate education is needed to help owners purchase and own responsibly. This is a top priority for Rescue/Adoption Facilities and Stakeholders.

Horse Owners and Stakeholders are proponents of reopening U.S. horse processing plants. Rescue/Adoption/Retraining Facilities and Non-Horse Owners are not.

While the study demonstrated a marked disparity in opinions about whether or not the processing plants should be reopened, the industry is united in addressing and resolving the unwanted horse problem. For example, the views of Stakeholders and Rescue/Adoption/Retraining Facilities differ on the issue of processing plants, and yet they share a strong agreement on the need to increase options and resources to humanely euthanize unwanted horses. In fact, the need to increase options for humane euthanasia is indicated as a priority by all respondent groups. More options and resources would likely require funding programs, as well as equine veterinarians with specialized skills.

The study demonstrated a marked disparity in opinions about processing plants, however, the industry is united in addressing and resolving the unwanted horses problem.

Many support the reopening of processing plants, however, this is a matter for federal and state officials. The issue, and pros and cons of federal or state legislation, is beyond the scope of this study, which is focused on documenting the magnitude of the problem of unwanted horses. Regardless of what happens at the legislative level, the horse industry still faces the problem of unwanted horses, and the UHC will continue to pursue its mission of educating the horse industry and general public about responsible horse ownership.

ACKNOWLEDGMENTS

Our thanks

The members of the Unwanted Horse Coalition and The American Horse Council would like to thank the many people who made this landmark national survey possible. This research effort was a large undertaking, which required the aid of unbiased professionals capable of planning and managing the entire process. We also needed to work with people who had a knowledge of the equine industry, along with experience in building awareness and creating response.

Our thanks go to the staff at Stephens & Associates, a communications firm with a history of reaching out to many diverse segments of the horse industry, as well as veterinary and general audiences. We also thank Market Directions, a research and brand performance consultancy group with extensive experience in the equine marketplace. Market Directions was instrumental in developing, conducting and analyzing the stakeholder surveys.

We are especially grateful to our many survey “partner” groups, which included more than 100 AHC organizations, national veterinary associations, equine-related and social media, and equine product manufacturers and retailers. Their support was invaluable in reaching horse owners, equine associations, veterinarians, breeders, state and local law enforcement, rescue/retirement facilities, and other facilities using horses, and encouraging their participation.

There is no end to our gratitude to the thousands of people, from coast to coast, who took time to respond to the survey and to write in with observations, opinions and suggestions. Their feedback is invaluable.

When the problem is so complex, far-reaching and emotional, perhaps the solution can come out of a new-found respect for the complexity of our relationships to the great animal at the center of the debate. The horse not only inspires a passionate following, it drives a multifaceted industry and supports the lives of millions of people. No single perspective or sole solution will resolve the problem. It is our hope that this research will lead to a greater understanding of different perspectives, as well as a unified commitment to develop as many productive solutions as it takes to resolve the problem of unwanted horses.



ABOUT



The Unwanted Horse Coalition (UHC)

The mission of the Unwanted Horse Coalition is to reduce the number of unwanted horses and improve their welfare through education and the efforts of organizations committed to the health, safety and responsible care and disposition of these horses. The UHC grew out of the Unwanted Horse Summit, which was organized by the American Association of Equine Practitioners and held in conjunction with the American Horse Council's annual meeting in Washington, D.C., in April 2005. The summit was held to bring key stakeholders together to start a dialogue on the unwanted horse in America. Its purpose was to develop consensus on the most effective way to work together to address the issue. In June 2006, the UHC was folded into the AHC and now operates under its auspices.



The American Horse Council (AHC)

Founded in 1969, the American Horse Council was organized to represent the horse industry before Congress and the federal regulatory agencies. The AHC promotes and protects all horse breeds, disciplines and interests by communicating with Congress, federal agencies, the media and the equine industry. The AHC is member supported by approximately 160 organizations representing every facet of the horse world, from owners, breeders, trainers, veterinarians, farriers, breed registries and associations to horse shows, racetracks, rodeos, commercial suppliers and state horse councils.

