

PEOPLE IN THE INDUSTRY IN 2010

PEOPLE IN THE INDUSTRY ... HIGHLIGHTS

- There are an estimated 855,000 people active in the horse industry in 2010 – 556,000 living in horse-owning households and an additional 350,400 involved using horses owned by others
- There are more adults participating than children in 2010 – participation is 59% adult / 41% children
- There are 45,500 people licensed to participate in the horse-racing sector in 2010
- There are an estimated 117,000 adults and 225,250 children participating in sport competition in 2010
- There is the equivalent of one full-time job for every 32 horses in the country – directly for the care of horses

3. THE CANADIAN PARTICIPANT

The previous chapter of this report identifies the number of horses in Canada in 2010, and the number of sites on which horses are kept in the country. This chapter provides an estimate for the number of people participating in the industry in Canada and a profile of their participation.

For the purposes of this study, individuals were considered to be industry participants if they met one of three criteria:

- They ride or drive horses in Canada, or
- They own one or more horses either directly or through an ownership syndicate, or
- They are responsible for the care of one or more horses belonging to other people (i.e. they participate as a trainer, or boarding facility operator)

Those who own or care for horses represent the *visible sector* of the industry. They are relatively quantifiable, through their membership in breed or discipline associations, magazine subscription lists, horse product catalogue mailing lists, etc. – the source of names for the random sample pool from which survey respondents were selected.

Those who are involved in the *visible sector* are, in turn, responsible for the involvement of many other non-horse owning participants. This is a group of participants who are often not easily accessible through the standard industry communications channels – the *invisible sector*, if you will.

This *invisible sector* is the group that traditionally forms the entry point into participation with horses – those who start out participating using horses belonging to others, and then move into full participation as horse owners in the future. They represent the customers of horse owners – customers for riding lessons and/or coaching services and the potential future customers for the purchase of horses.



3.1. NUMBER OF INDUSTRY PARTICIPANTS

For the purposes of identifying the current level of participation in the Canadian horse industry – and the potential for future growth or decline in participation in the near future – questions were asked to develop data on the size of both the *visible* and *invisible* participation sectors during summer 2010. Participants can be qualified into the following categories:

- Those who own horses, and live at sites where their horses are kept
- Horse owners who keep their horses on a site (or location) other than where they live (those who board their horses)
- Adults or children in horse-owning households who ride or drive
- Adults or children in horse-boarding households who ride or drive
- Employees (non-family members) involved in the care of horses
- People (either adults or children) who ride or drive horses that belong to other people

As reported in the previous chapter, analysis of survey data identified an estimated 226,500 horse-owning households in Canada in 2010, and a total of 145,000 premises with resident horses in Canada. Calculations for the number of industry participants were completed based on analysis of participation by those living in horse-owning households, and analysis of participation by those living on properties with horses, and those who board their horses on a property belonging to someone else.

Table 3.1 reports the estimated number of industry participants in the visible sector represented by the 225,500 households in the ten Canadian provinces (excluding Yukon/Northwest Territories from the analysis). Data analysis reports an estimated 550,000 people participating in the visible sector of the industry.

Table 3.1: Number of People Participating in Horse-Owning Households – Visible Sector

Participation From Horse Owning Households	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Horse Owning Households	225,500	32,700	62,300	18,600	7,100	60,100	36,500	3,780	2,000	1,200	1,220
Adults in Household Who Ride/Drive	325,136	45,878	91,706	28,644	11,090	82,938	54,604	4,782	2,852	1,435	1,207
Children in Household Who Ride/ Drive	225,250	35,316	59,185	22,097	8,492	47,118	47,852	3,160	980	245	805
Total # of Participants	550,386	81,194	150,891	50,741	19,582	130,056	102,456	7,942	3,832	1,680	2,012
Average # of adults per household	2.3	2.3	2.3	2.2	2.2	2.3	2.2	2.3	2.3	2.3	2.3
% of Adults who ride/drive	63%	61%	64%	70%	71%	60%	68%	55%	62%	52%	43%
Average # of children per household	1.8	1.8	1.9	1.8	2.3	1.6	1.9	1.1	1.4	1.2	1.5
% of children who ride/drive	57%	60%	50%	66%	52%	49%	69%	76%	35%	17%	44%

The 226,500 horse-owning households in Canada in 2010 represent 550,000 adults and children participating in the industry.

PEOPLE IN THE INDUSTRY IN 2010

Estimates of the number of people participating in the *invisible sector* of the industry are based on:

- The number of other people (other than owners or family members) who regularly ride/drive the horses owned by survey participants, and
- The number of horses in the country in use for riding lessons, competition, trail-riding, or other tourist activities.

Data analysis reports an estimated 667,500 horses in use by riders other than their owner.

Table 3.2 provides an estimate of the number of people active in the industry using horses owned by others. Data analysis reports an estimated 304,336 people active in 2010, riding horses owned by others.

Table 3.2: Participants Riding Horses Belonging to Others – The Invisible Sector

Invisible Sector Participants	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
% of Horses Ridden by Other People	8%	11%	5%	2%	2%	10%	9%	10%	16%	5%	16%
# of Horses Ridden by Other People	67,582	12,760	15,675	2,176	1,120	21,250	11,655	1,250	1,280	200	216
Avg. # of Riders Per Horse	9.54	5.76	3.16	5.60	3.81	4.65	5.04	1.71	2.63	5.88	2.86
# of Other People Participating	304,336	73,498	49,533	12,186	4,267	98,813	58,741	2,138	3,366	1,176	618

In 2010, there were more than 304,000 people riding horses that belong to other people ... the **Invisible Sector** of the industry.

Based on the research, it is estimated that a total of 855,000 people were actively participating in the horse industry in Canada in 2010 – 556,000 living in horse-owning households, and an additional 350,400 people actively involved using horses owned by others.

Of note, the data analysis reports that in all provinces, there are more adult participants (those 18-years-of-age or older) than children participating. The general percentage ratio for the country is 59% adult participants, 41% children participating, with Table 3.3 reporting the ratio of adult/child participation in each province.

Table 3.3: Ratio of Adult to Child Participation by Province

% Participation By Adults & Children	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Total # of Participants	854,722	154,692	200,424	62,927	23,849	228,869	161,197	10,080	7,198	2,856	2,630
% Adult Participants	59%	57%	61%	56%	57%	64%	53%	60%	74%	85%	60%
% Child Participants	41%	43%	39%	44%	43%	36%	47%	40%	26%	15%	40%
# of Adult Participants	504,286	88,174	122,259	35,239	13,594	146,476	85,434	6,048	5,327	2,428	1,578
# of Children Participating	350,436	66,518	78,165	27,688	10,255	82,393	75,763	4,032	1,871	428	1,052

This calculation for industry participation is based on a fairly narrow definition for a *participant*. It includes only those who are involved directly in using, or caring for, horses in Canada. This calculation does not include a large group of individuals who could also be considered participants or industry stakeholders through their roles as:

- Providers of services for horse owners (veterinarians, farriers, equine therapists, etc.)
- Employees at horse-related facilities in Canada, such as veterinarian clinics, racetracks, or horse show facilities
- Employees of horse-related industry associations in Canada
- Suppliers, manufacturers or distributors of horse-related products and equipment – tack shops, saddle manufacturers, horse trailer manufacturer/distributors, etc.

Strategic Equine research studies completed during 1998, 2003 and 2010 show a trend for significant decrease in the number of horses that are in use by other riders between 1998 and 2003, with an increase in number of horses in use by others between 2003 and 2010. However, multi-year trends from the three research studies show a corresponding continuous decrease in the number of “other riders” participating during the 1998 through 2010 period.

Table 3.4 shows the reported data for number of horses and number of participants from the three national studies.

Table 3.4: Horses in Use by Other Riders and Non-Owning Riders 1998, 2003 and 2010

Non-Owning Participation	Horses In Use by Other Riders			# of Other Riders			Average # of Riders Per Horse		
	1998	2003	2010	1998	2003	2010	1998	2003	2010
Canada	100,769	58,561	67,582	921,151	647,077	304,336	9.1	11.0	4.5
British Columbia	16,577	12,862	12,760	149,915	231,519	73,498	9.0	18.0	5.8
Alberta	25,196	7,865	15,675	66,309	75,502	49,533	2.6	9.6	3.2
Saskatchewan	5,899	2,046	2,176	16,170	24,552	12,186	2.7	12.0	5.6
Manitoba	2,824	3,774	1,120	14,119	24,341	4,267	5.0	6.4	3.8
Ontario	37,590	25,268	21,250	563,852	252,576	98,813	15.0	10.0	4.7
Quebec	8,060	5,640	11,655	82,208	28,200	58,741	10.2	5.0	5.0
New Brunswick	3,128	735	1,250	22,523	7,348	2,138	7.2	10.0	1.7
Nova Scotia	322	296	1,280	4,260	2,069	3,366	13.2	7.0	2.6
Prince Edward Island	1,014	37	200	1,158	632	1,176	1.1	17.1	5.9
Newfoundland	159	38	216	637	338	618	4.0	8.9	2.9

Where in 2003 the majority of non-owning riders were children, data from the 2010 study reports that the majority of non-owning participants are adults.

Table 3.5 reports the percentage ratio of adults to children in the non-owning participation group.

Table 3.5: Adult/Child Percentage of Non-Owning Participants 2003 and 2010

Percentage Adult/Child "Other Riders"	2003			2010		
	Total Other Riders	% Adult Riders	% Child Riders	Total Other Riders	% Adult Riders	% Child Riders
Canada	647,077	31%	69%	304,336	59%	41%
British Columbia	231,519	41%	59%	73,498	57%	43%
Alberta	75,502	39%	61%	49,533	61%	39%
Saskatchewan	24,552	38%	62%	12,186	56%	44%
Manitoba	24,341	44%	56%	4,267	57%	43%
Ontario	252,576	45%	55%	98,813	64%	36%
Quebec	28,200	42%	58%	58,741	53%	47%
New Brunswick	7,348	44%	56%	2,138	60%	40%
Nova Scotia	2,069	19%	81%	3,366	74%	26%
Prince Edward Island	632	50%	50%	1,176	85%	15%
Newfoundland	338	31%	69%	618	60%	40%

Industry participation in 2010 was 60% adult and 40% children ... the opposite ratio to 2003 (31% adults and 69% children).

3.2. DEMOGRAPHIC PROFILE – INDUSTRY PARTICIPANTS IN 2010

The typical Canadian industry participant as:

- Female (79% of those interviewed)
- *Baby-boomer* generation (median age 50 – 59 years of age)
- Well-educated (84% with some post secondary education)
- Living on a large agricultural property, where their horses are resident
 - For horse owners, 64% reported living on the same property as their horses, with an average size per property of 275+ acres
- Internet user – with 88% of those interviewed reporting that they use the Internet on a regular basis. Of the Internet users reported, 80% have access to high-speed Internet, and 47% regularly use the Internet to purchase horse-related products
- Living in households with a median annual income of \$60,000 - \$80,000
- Living in households with two or more adults, 63% of whom ride or drive horses. For owners interviewed, 28% reported one or more children in the household (under age 18), of whom 57% ride or drive horses
- Own many pets (84% of households with dogs, cats or other pets)
 - 1.9 dogs per household
 - 2.4 cats per household, and
 - 3.6 other pet (7% of horse-owning households)
- Experienced rider/driver (80% reported that they have been riding or driving for more than ten years)

Table 3.6: Demographic Profile – Industry Participants in 2010

Demographic Profile	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	YT/ NT
Gender: % Male	21%	15%	20%	26%	19%	25%	8%	48%	36%	45%	35%	11%
Gender: % Female	79%	85%	80%	74%	81%	75%	92%	52%	64%	55%	65%	89%
Median Age	50 to 59	50 to 59	50 to 59	50 to 59	50 to 59	50 to 59	40 to 49	50 to 59	50 to 59	50 to 59	40 to 49	50 to 59
Median Household Income	\$60 to \$80k	\$60 to \$80k	\$80 to \$100k	\$60 to \$80k	\$60 to \$80k	\$80 to \$100k	\$40 to \$60k	\$60 to \$80k	\$40 to \$60k	\$40 to \$60k	\$80 to \$100k	\$100k +
% with post-secondary education	84%	82%	82%	95%	71%	77%	87%	85%	67%	77%	100%	100%
Avg. # of adults in the household	2.3	2.3	2.3	2.2	2.2	2.3	2.2	2.3	2.3	2.3	2.3	2
Avg. # of children in the household	1.8	1.8	1.9	1.8	2.3	1.6	1.9	1.1	1.4	1.2	1.5	1
Own property where horses reside	64%	66%	60%	79%	84%	57%	53%	66%	81%	76%	42%	78%
Avg. # of acres per horse-property	274	71	432	908	548	81	79	96	83	80	11	57
% who own dogs, cats or other pets	84%	86%	79%	83%	87%	85%	85%	81%	80%	66%	87%	100%
Avg. # of dogs owned	1.9	1.9	1.9	2.0	1.9	1.8	1.7	1.6	2.3	1.5	2.4	1.7
Avg. # of cats owned	2.4	2.1	2.6	2.4	2.5	2.5	2.7	2.2	2.6	3.2	4.4	2.3
Avg. # of other pets	3.6	3.5	3.5	2.5	3.9	4.8	2.7	1.0	2.2	5.0	7.5	--
% of participants who own horses	91%	89%	95%	91%	94%	90%	85%	94%	96%	86%	83%	100%
Average # of horses per owner	7.6	4.3	8.2	13.1	25.1	5.8	3.8	6.3	6.1	5.8	2.3	4.4
Don't ride or drive horses	7%	4%	4%	9%	5%	10%	3%	13%	13%	24%	17%	0%
Riding/Driving Horses < 5 Years	3%	4%	2%	4%	1%	2%	7%	5%	5%	3%	4%	0%
Riding/Driving Horses 5 to 10 Years	7%	10%	4%	6%	4%	5%	11%	8%	4%	7%	26%	0%
Riding/Driving Horses 10+ Years	80%	79%	87%	79%	87%	80%	78%	67%	72%	62%	48%	100%

Those provinces which have shown growth in participation during the 2003 through 2010 period (Quebec and Newfoundland), report a lower median age for participants (40 to 49 years of age) compared to other provinces.

Table 3.7: Industry Participation by Age Range By Province

Participation by Age Category	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	YT/ NT
18 to 19	2%	3%	0%	2%	1%	2%	5%	0%	0%	3%	0%	0%
20 to 29	12%	10%	15%	8%	10%	12%	21%	10%	7%	3%	26%	0%
30 to 39	11%	9%	11%	15%	8%	10%	21%	8%	8%	0%	13%	11%
40 to 49	21%	24%	23%	18%	17%	20%	22%	27%	13%	24%	22%	0%
50 to 59	28%	33%	26%	28%	35%	26%	20%	25%	36%	28%	17%	44%
60 to 69	17%	15%	16%	19%	21%	20%	8%	17%	21%	24%	13%	33%
over 70	7%	5%	7%	9%	8%	8%	3%	11%	12%	17%	0%	11%

The provinces reporting the highest percentage of participation by those over 60 years of age include New Brunswick, Nova Scotia, Prince Edward Island and the North (Yukon & Northwest Territories).

For the majority of participants, activities with horses are not the primary source of personal income or household income ... i.e. they make their living through some other sector or activity. Table 3.8 reports the percentage of industry participants reporting the majority of their personal, or household income, generated from activities with horses.

Table 3.8: Percentage Reporting Majority of Income from Horse Related Activities

Contribution to Participants' Income	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	YT/NT
Represents 50%+ of personal income	14%	14%	11%	6%	13%	18%	15%	8%	11%	21%	13%	11%
Represents 50%+ of household income	8%	7%	7%	3%	8%	11%	7%	5%	5%	14%	0%	0%

Of the 2,566 people interviewed, 91% were invested as horse owners, with an average of 7.6 horses per owner. The majority of horse owners own less than five horses per owner, and have owned horses for 10-years-or-more. Table 3.9, identifies the horse ownership profile for those involved in the industry in 2010, including percentage of horse owners in each province owning five-horses-or-less, six-horses-or-more and the number of years of horse ownership experience.

Table 3.9: Horse Ownership Profile

% Horse Owner Profile	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Avg. # of horses per owner	7.6	4.3	8.2	13.1	25.1	5.8	3.8	6.3	6.1	5.8	2.3
% of Owners with < 5 horses	71%	81%	64%	52%	46%	72%	85%	76%	74%	68%	95%
Avg. # of horses per owner	2.3	2.2	2.4	2.7	2.7	2.2	2.2	2.0	2.9	2.1	2.1
% of Owners with 6+ horses	29%	19%	36%	48%	54%	28%	16%	24%	26%	32%	5%
Avg. # of horses per owner	20.3	12.9	18.6	24.6	44.4	15.1	12.4	20.0	14.9	14.1	6.0
Owned horses < 5 Years	9%	11%	5%	7%	3%	6%	21%	17%	7%	4%	16%
Owned horses 5 to 10 Years	13%	15%	10%	10%	3%	16%	14%	14%	8%	4%	26%

Of those owning six-or-more horses, 19% reported that horse-related activities represent 50% or more of their annual personal income, and 14% reported that horse activities represent 50% or more of the annual household income.

3.3. PARTICIPATION PROFILE – INDUSTRY PARTICIPANTS IN 2010

Those surveyed were asked to define the different activity categories in which they participate in the industry, as defined by the following question:

“In which of the following horse-related activities do you participate ...?”

- You are active in horseracing (as a trainer, driver, jockey, groom)
- You are a coach, riding instructor or horse trainer (for non-racing sport)
- You are a farm manger, stable manager or ranch manager
- You are a breeder
- You are an industry service provider (veterinarian, farrier, equine dentist, equine therapist, course designer)
- You are a show organizer, judge, official
- You ride or drive in competitions (other than horse racing)
- You are a pleasure rider or driver
- You provide products to the industry (tack show owner, feed mill manager, sell other products)
- You are an owner (and other people ride/drive your horses)

The resulting data (Table 3.10) reports a total percentage of participation of 291%. On average, people participate in at least three different categories, i.e. they wear at least three different “hats”. Those surveyed were also asked:

- *“Please pick a single category that best describes your participation in the horse industry ...”*

Of those interviewed, only 96% were prepared to select a single category Table 3.10 reports the percentage participation in each category, and the estimated number of participants by activity category, based on primary category of participation.

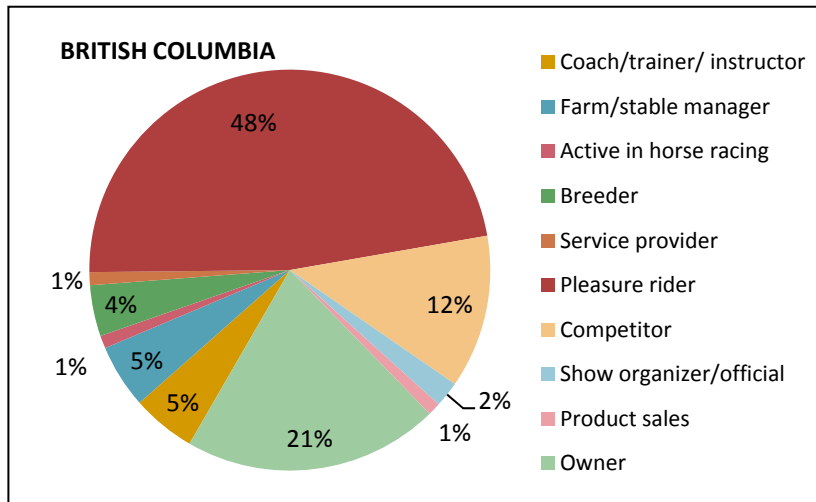
Table 3.10: Adult Participation by Category

Adult Participation by Category	% that Participate	Est. # of Participants	% that are Primarily Participating	Est. # of Participants Primary Industry Role
Coach/trainer/riding instructor	17%	55,273	6%	19,508
Farm/stable/ranch manager	27%	87,787	4%	13,005
Active in horse racing	8%	26,011	5%	16,257
Breeder	20%	65,027	7%	22,760
Service provider	7%	22,760	2%	6,503
Pleasure rider	75%	243,852	30%	97,541
Competitor	37%	120,300	16%	52,022
Show organizer/judge/official	15%	48,770	2%	6,503
Product sales	5%	16,257	1%	3,251
Owner	80%	260,109	23%	74,781
Total % all categories	291%		96%	312,131

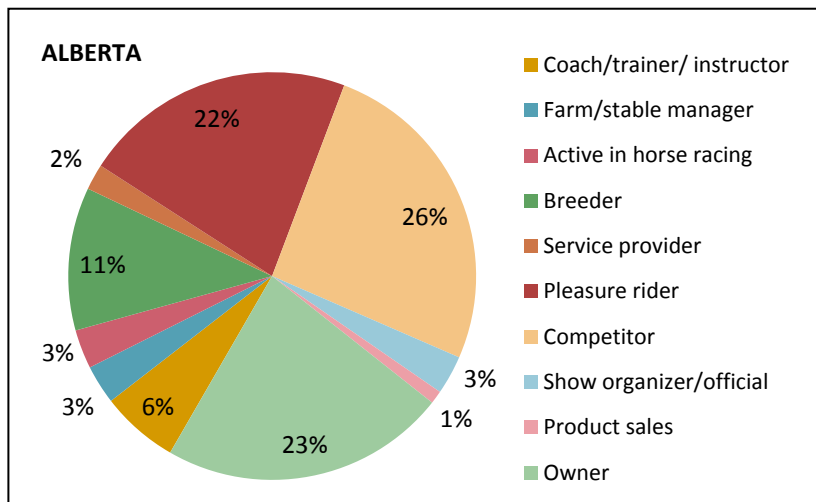
Tables 3.11 (and graphs) report the estimated number of adult participants in each province, defined by principle activity category.

Those participating in the horse industry generally wear three-or-more different hats ... participate in three different types of activities.

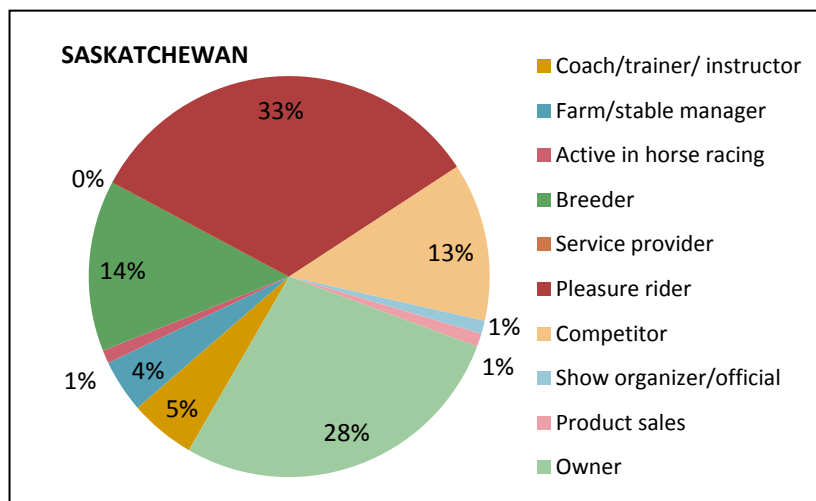
Table 3.11: Adult Participation by Primary Activity Category by Province



BC Adult Participants	Participants
Coach/trainer/riding instructor	2,294
Farm/stable/ranch manager	2,294
Active in horse racing	459
Breeder	1,835
Service provider	459
Pleasure rider	21,104
Competitor	5,505
Show organizer/judge/official	918
Product sales	459
Owner	9,176
Total all categories	44,503

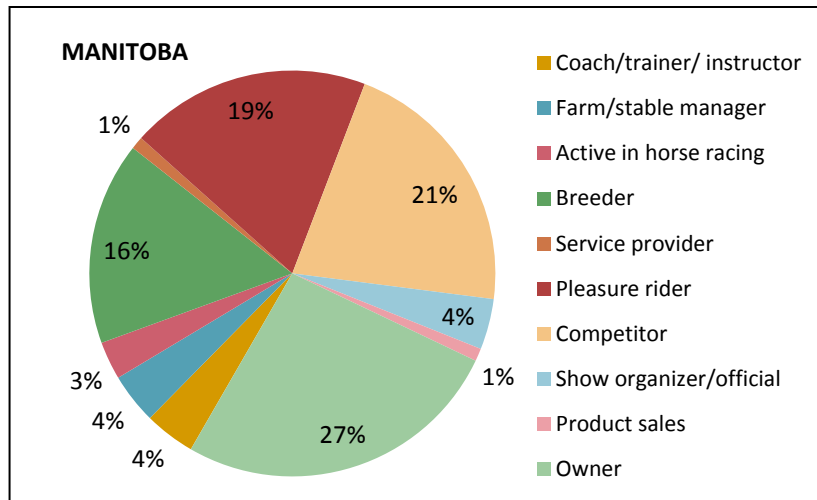


AB Adult Participants	Participants
Coach/trainer/riding instructor	5,502
Farm/stable/ranch manager	2,751
Active in horse racing	2,751
Breeder	10,088
Service provider	1,834
Pleasure rider	19,258
Competitor	22,927
Show organizer/judge/official	2,751
Product sales	917
Owner	20,175
Total all categories	88,954

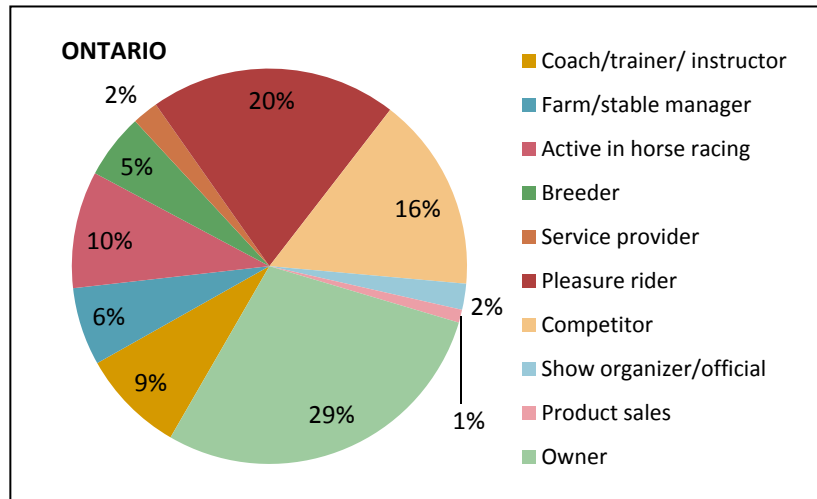


SK Adult Participants	Participants
Coach/trainer/riding instructor	1,432
Farm/stable/ranch manager	1,146
Active in horse racing	286
Breeder	3,724
Service provider	-
Pleasure rider	8,880
Competitor	3,437
Show organizer/judge/official	286
Product sales	286
Owner	7,447
Total all categories	26,924

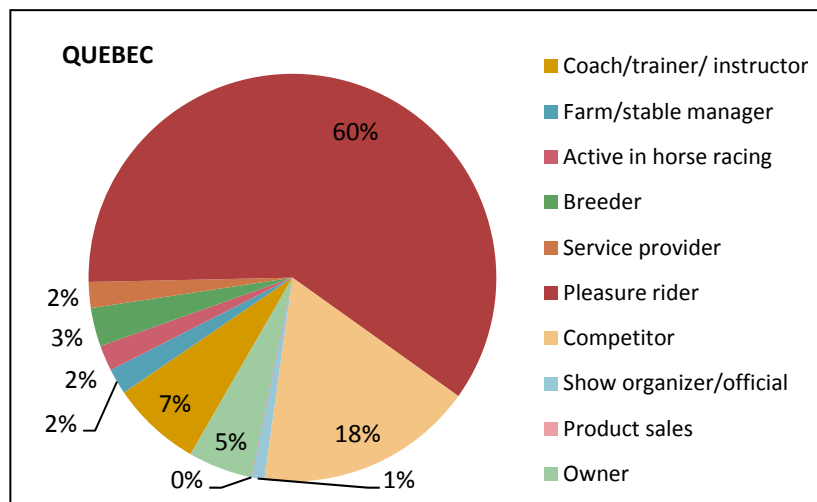
MB Adult Participants	Participants
Coach/trainer/riding instructor	444
Farm/stable/ranch manager	444
Active in horse racing	333
Breeder	1,774
Service provider	111
Pleasure rider	2,107
Competitor	2,329
Show organizer/judge/official	444
Product sales	111
Owner	2,883
Total all categories	10,980

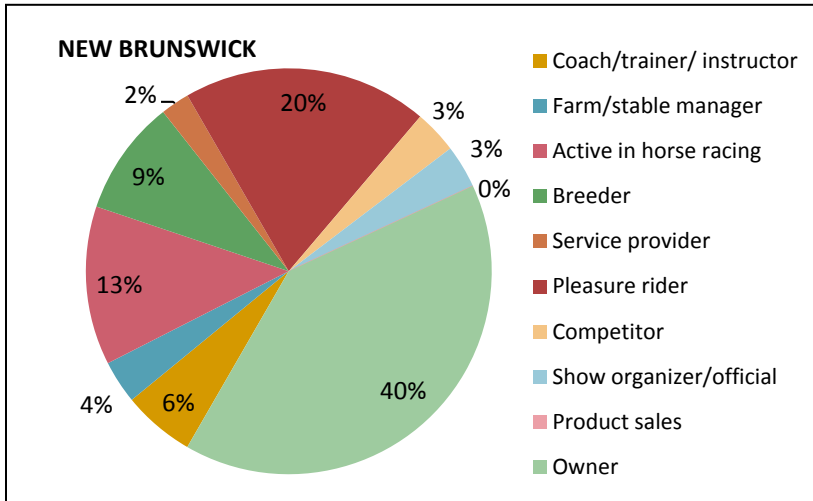


ON Adult Participants	Participants
Coach/trainer/riding instructor	6,635
Farm/stable/ranch manager	4,976
Active in horse racing	7,464
Breeder	4,147
Service provider	1,659
Pleasure rider	15,758
Competitor	12,441
Show organizer/judge/official	1,659
Product sales	829
Owner	22,393
Total all categories	77,961

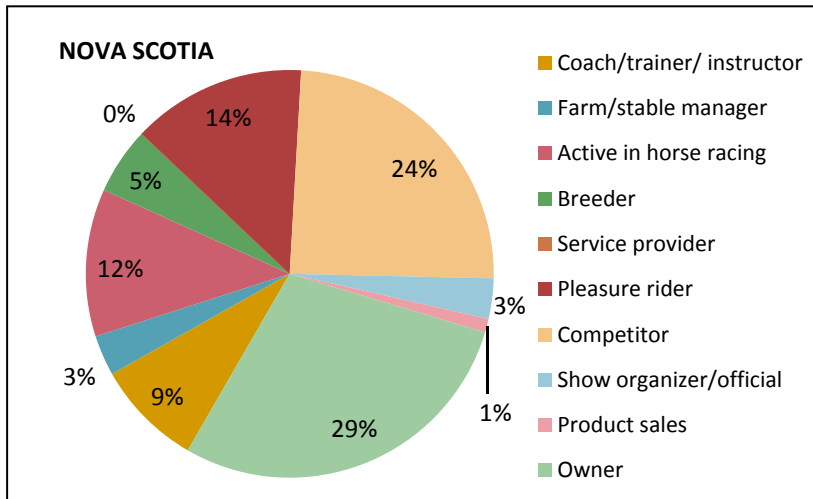


QC Adult Participants	Participants
Coach/trainer/riding instructor	3,822
Farm/stable/ranch manager	1,092
Active in horse racing	1,092
Breeder	1,638
Service provider	1,092
Pleasure rider	32,216
Competitor	9,283
Show organizer/judge/official	546
Product sales	-
Owner	2,730
Total all categories	53,511

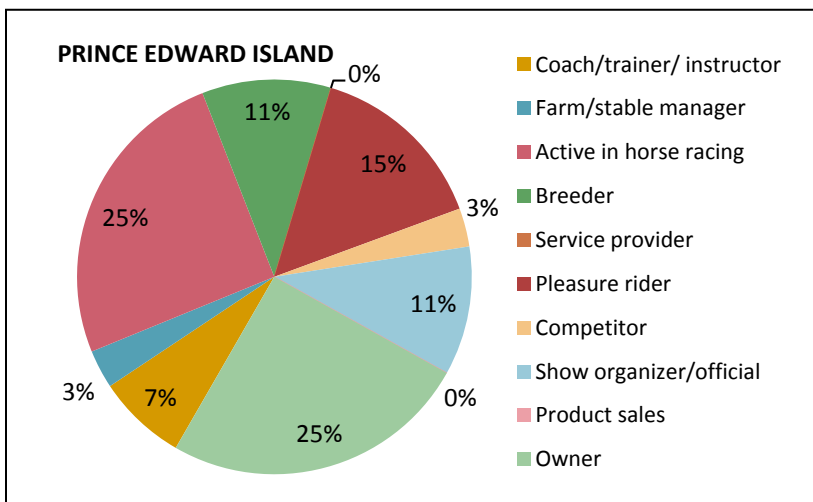




NB Adult Participants	Participants
Coach/trainer/riding instructor	239
Farm/stable/ranch manager	143
Active in horse racing	526
Breeder	383
Service provider	96
Pleasure rider	813
Competitor	143
Show organizer/judge/official	143
Product sales	-
Owner	1,674
Total all categories	4,160

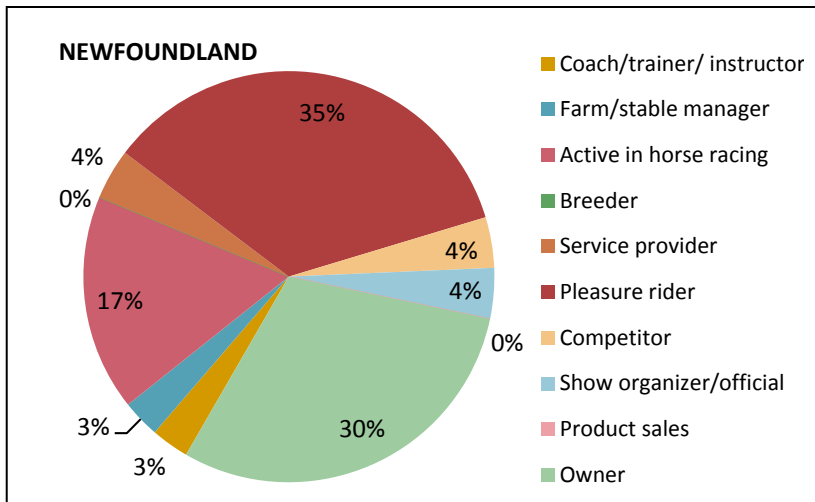


NS Adult Participants	Participants
Coach/trainer/riding instructor	228
Farm/stable/ranch manager	86
Active in horse racing	314
Breeder	143
Service provider	-
Pleasure rider	371
Competitor	656
Show organizer/judge/official	86
Product sales	29
Owner	770
Total all categories	2,683



PE Adult Participants	Participants
Coach/trainer/riding instructor	100
Farm/stable/ranch manager	43
Active in horse racing	344
Breeder	144
Service provider	-
Pleasure rider	201
Competitor	43
Show organizer/judge/official	144
Product sales	-
Owner	344
Total all categories	1,363

NL Adult Participants	Participants
Coach/trainer/riding instructor	36
Farm/stable/ranch manager	36
Active in horse racing	205
Breeder	-
Service provider	48
Pleasure rider	422
Competitor	48
Show organizer/judge/official	48
Product sales	-
Owner	362
Total all categories	1,205



3.3.1. PARTICIPATION IN THE HORSE RACING SECTOR

Live horseracing in Canada in 2010 was conducted at 47 racetrack venues in all ten provinces. The Canadian horseracing sector is segmented into breed-specific racing for three breeds – Thoroughbreds, Standardbreds and Quarter Horses (or “speed racing” which may include Paints, and Appaloosas in some races).

In 2010, there were 2,564 days of racing held nationwide – 500 days of Thoroughbred racing, 1,936 days of Standardbred racing and 577 days of Quarter Horse (or mixed breed) racing. Table 3.12 reports racing opportunities for each breed racing sector.

Table 3.12: Racing Opportunities in Canada in 2010

Thoroughbred			Standardbred			Quarter Horse (Mixed Breed)			Total All Breed Sectors		
Race Days	# of Races	# of Horses	Race Days	# of Races	# of Horses	Race Days	# of Races	# of Horses	Race Days	# of Races	# of Horses
500	4,539	7,588	1,936	22,194	14,236	128	577	917	2,564	27,310	22,741
Gross Purses	\$117,075,136		Gross Purses	\$187,660,836		Gross Purses	\$7,367,043		Gross Purses	\$312,103,015	
Avg. Purse Per Race	\$25,793		Avg. Purse Per Race	\$8,455		Avg. Purse Per Race	\$12,768		Avg. Purse Per Race	\$11,428	

Racing opportunities in Canada have shown an overall steady decrease during the past decade, from a highpoint of 3,035 race days in 2004, to the level of 2,564 days of racing in 2010.

Participation in racing is controlled in each province by the regulatory body assigned by the provincial government to manage the sector. Under the regulatory framework, all participants active at racetracks in Canada are required to be licensed by their provincial regulatory body. Table 3.13 reports the number of licenses issued by category for each regulatory body responsible for racing in Canada in 2010.

Table 3.13: Licensed Participants in Horse Racing in 2010 – by Province

Participation in Racing By Province in 2010	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Licensed Participants – All Breed Racing Sectors	45,400	2,887	4,850	1,148	1,895	28,622	296	1,222	1,981	2,018	481
Licensed Trainers – All Breed Sectors	5,020	133	479	113	177	3,830	14	59	95	97	23

The appendices to this report include a complete report on racing activity for each breed sector for the 2000 through 2010 period, reported by province.

For Thoroughbreds, 500 races were offered in 2010, running for an average purse of \$25,793 -- generally at par with 2005 values for average purse.

For Standardbred racing, the significant change for 2010 is the marked decrease in Standardbred racing opportunities in Quebec from 69 days of racing in 2009 to 26 days in 2010. Total number of races dropped from 578 in 2009 to 223 in 2010.

There has been significant expansion in Quarter Horse racing in Ontario, starting in 2007. Quarter Horse racing opportunities in Ontario have shown steady increase from 25 days in 2006 to 45 in 2010, with corresponding increases in average purse per race from \$2,228 in 2005 to \$14,745 in 2010.

For those surveyed who are involved in racing reported an average of 5 horses per participant active in 2010, with horses racing for an average 10 days per active horse. Those active in racing in 2010 were asked an additional series of questions regarding their participation, the results of which are reported in Table 3.14.

Table 3.14: Participation in Racing in 2010

Participation in Racing By Province in 2010	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Avg. # of Horses per Participant in 2010	5.01	3.63	3.33	1.00	10.50	5.99	3.83	2.06	3.92	3.30	5.25
Participants Reporting More Horses in 2010	20%	25%	24%	50%	50%	18%	17%	25%	8%	15%	20%
Participants Reporting Less Horses in 2010	20%	25%	18%	25%	0%	20%	33%	25%	17%	23%	0%
Participants Reporting Same # of Horses in 2010	57%	50%	53%	0%	50%	60%	50%	50%	75%	54%	80%
Avg. # of days of racing in 2010 per horse	10	12	10	20	3	9	13	14	12	10	23
% of race days in province	85%	100%	81%	78%	56%	93%	0%	60%	66%	74%	100%
% of race days in other provinces	9%	0%	19%	25%	41%	0%	100%	29%	33%	17%	0%
% of race days out of country	1%	0%	0%	0%	0%	1%	0%	0%	1%	9%	0%

To test for potential future levels of participation in 2011, the question was asked:
 “Do you expect to have more, less or the same number of horses in racing next year (2011)?”

Table 3.15: Expectation by Owners for Horses Active in Racing in 2011

Expectation for Participation in 2011	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Expect more horses in racing	25%	0%	29%	50%	25%	27%	50%	19%	17%	0%	40%
Expect less horses in racing	13%	0%	0%	0%	25%	9%	0%	38%	25%	31%	0%
Expect same # of horses active in racing	58%	50%	65%	25%	50%	61%	50%	44%	58%	62%	60%

3.3.2. PARTICIPATION IN THE BREEDING SECTOR

For those participating in the 2010 telephone survey, 20% reported that they were active in the breeding sector, with 7% reporting breeding sector as their primary participation category. Table 3.16 reports participation in the breeding sector by province for those reporting breeding as their primary area of participation.

Table 3.16: Participation in the Breeding Sector

Participation in Breeding By Province	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
% who participate in breeding sector	20%	13%	27%	27%	33%	21%	9%	17%	27%	45%	4%
Est. # who participate in breeding sector	66,727	5,964	24,761	7,734	3,660	17,417	4,914	813	770	646	48
Est. # of breeder participants per province	23,876	1,835	10,088	3,724	1,774	4,147	1,638	383	143	144	0
% of participants owning stallions at stud	61%	47%	63%	78%	68%	58%	31%	100%	71%	33%	-
Est. # of stallion owners	14,774	862	6,355	2,905	1,206	2,405	508	383	102	48	0
% owning mares of breeding age	46%	54%	56%	55%	48%	30%	54%	27%	35%	46%	-
Est. # of owners of mares of breeding age	31,764	3,221	13,866	4,254	1,757	5,225	2,654	220	270	297	0
Avg. # of mares per owner	13	32.94	8.85	11.97	17.96	6.61	5.54	6.33	5.43	2.83	-
% of mares registered with pedigree registry	64%	14%	97%	89%	98%	93%	100%	100%	100%	88%	-

Owners of mares of breeding age were asked to report the percentage of mares bred in 2010, and whether breedings were higher, lower or about the same as 2009. Additional questions were asked to identify the expectation for breeding more, less or the same number of mares in 2011 (compared to 2010 breeding activity).

Table 3.17: Percentage of Mares Bred 2010, and Expectation for Breedings in 2011

Mare Owners Reporting Mares Bred	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
% of mares to be bred in 2010	41%	9%	52%	62%	82%	53%	61%	32%	37%	29%	-
% reporting more mares bred in 2010	23%	19%	18%	31%	16%	27%	46%	0%	29%	0%	-
% reporting less mares bred in 2010	35%	31%	46%	31%	36%	34%	15%	0%	14%	50%	-
% reporting same # of mares bred in 2010	42%	50%	34%	39%	48%	39%	38%	100%	57%	50%	-
% reporting expectation to breed more in 2011	19%	25%	13%	22%	16%	20%	23%	33%	14%	17%	-
% reporting expectation to breed less in 2011	20%	19%	21%	33%	28%	9%	23%	0%	14%	0%	-
% reporting expectation to breed same # in 2011	59%	47%	64%	44%	56%	70%	54%	67%	71%	83%	-

3.3.3. PARTICIPATION IN THE COMPETITION SECTOR

The competition sector of the industry involves both adults and children competing in a range of different competition sport disciplines. For the purposes of analysis, competition in the province has been categorized into racing (those involved in Thoroughbred, Standardbred or Quarter Horse racing), and non-racing sport competition. Non-racing sport competition has been categorized by sport discipline, into four groups: -- FEI-sanctioned sport disciplines (including reining), Western-style sport disciplines, Breed Sports (competitions specific to a breed of horse), and Other equestrian sport activities.

Of the 854,000 active industry participants in the Canadian equine sector, approximately 343,000 people participate in equestrian sport activities. These participants include approximately 117,000 adults and 225,000 children (under 18 years of age).

ADULTS COMPETING

Of the 2,566 adults interviewed for the 2010 telephone survey, 37% reported that they participated in competition, with 16% of those interviewed reported competition as their primary activity category. Those reporting participation in competition were asked to identify all sport disciplines in which they participate, as well as reporting in which sport discipline they *most often* compete.

On average, those who compete will participate in competitions for 1.65 different sport disciplines. For the 117,000 adult competitors active in 2010, Table 3.18 reports the estimated number of people participating in each of the four categories.

Approximately 343,000 people participate in equestrian sport activities – 117,000 adults and 225,000 children.

Table 3.18: Adults Active in Sport Competition

Adult Competitors – All Sport Discipline Categories		% of Sample	Estimated #		% of Sample	Estimated #
FEI Sport Disciplines (Est. # 129,000)	Hunter / Jumper	50%	58,525	Reining	5%	5,852
	Dressage	33%	38,626	Endurance Riding	2%	2,341
	Eventing	11%	12,875	Vaulting	<1%	120
	Driving	9%	10,534			
Western Sports (Est. # 34,000)	Rodeo	1%	1,170	Roping	2%	2,341
	Team Cattle Penning	3%	3,511	Western Pleasure	17%	19,898
	Barrel Racing	5%	5,852	Cutting	1%	1,170
	Chuck Wagon Racing	<1%	220			
Breed Sports (Est. # 12,000)	Halter/Line Classes	5%	5,852	Breed Competitions	5%	5,852
Other Sports (Est. # 21,000)	Gymkhana	4%	4,682	Competitive Trail	4%	4,682
	Polo	<1%	320	Other Sports	8%	9,364
	Saddleseat	<1%	341			
Total all sport disciplines		165%				

Table 3.19 reports the number of people participating in each sport discipline, based on responses from those interviewed, to the question: “Please pick the single sport discipline in which you most often compete ...”

For adults competing in 2010, 64% compete in one of the FEI disciplines, 19% most often compete in Western sport disciplines, 6% in Breed Sports and 12% in “other” sport competition disciplines.

Table 3.19: Adult Competitors by Primary Sport Discipline

Adult Competitors – By Primary Sport Discipline Categories		% of Sample	Estimated #		% of Sample	Estimated #
FEI Sport Disciplines (Est. # 74,910)	Hunter / Jumper	27%	31,603	Reining	2%	2,341
	Dressage	20%	23,410	Endurance Riding	1%	1,170
	Eventing	7%	8,193	Vaulting	<1%	-
	Driving	7%	8,193			
Western Sports (Est. # 22,238)	Rodeo	1%	1,170	Roping	1%	1,170
	Team Cattle Penning	2%	2,341	Western Pleasure	10%	11,705
	Barrel Racing	4%	4,682	Cutting	1%	1,170
	Chuck Wagon Racing	<1%	-			
Breed Sports (Est. # 7,023)	Halter/Line Classes	2%	2,341	Breed Competitions	4%	4,682
Other Sports (Est. # 14,044)	Gymkhana	3%	-	Competitive Trail	1%	1,170
	Polo	<1%	-	Other Sports	7%	8,193
	Saddleseat	<1%	-			

Those active in competition were asked an additional series of questions to report on their level of competition activity. Table 3.20 reports the average number of competitions, show days, and percentage of competition days for adults surveyed.

Table 3.20: Adult Competitors, Competitions and Show Days in 2009

Adult Competitors by Province	Avg. # of Competitions in 2009	Avg. # of Show Days in 2009	% of Show Days Other Provinces	% of Show Days Out of Country
Canada	5.98	14.70	8%	11%
British Columbia	7.62	17.13	4%	17%
Alberta	6.13	18.68	8%	13%
Saskatchewan	4.59	9.72	23%	3%
Manitoba	5.78	12.90	6%	1%
Ontario	6.09	13.54	6%	10%
Quebec	5.15	11.53	11%	8%
New Brunswick	4.21	11.71	23%	8%
Nova Scotia	4.58	13.88	29%	0%
Prince Edward Island	2.00	10.00	0%	0%
Newfoundland	3.29	5.43	39%	0%
Yukon/Northwest Territories	2.50	2.50	0%	0%

Adult competitors were asked to report their expectation for level of competition in 2010 (compared to 2009), in response to the question: "This year (2010) do you expect to compete in MORE, LESS or the Same number of competitions as you did in 2009?"

Table 3.21 reports the percentage of adult competitors who reported an expectation for competition in 2010.

Table 3.21: Expectation for Adult Competitor Participation in 2010

% of Adults Competing by Province	Expect to Compete in More Competitions in 2010	Expect to Compete in Fewer Competitions in 2010	Expect to Compete in Same # of Competitions in 2010
Canada	35%	28%	36%
British Columbia	36%	30%	33%
Alberta	33%	32%	34%
Saskatchewan	40%	29%	29%
Manitoba	35%	28%	38%
Ontario	36%	28%	36%
Quebec	37%	21%	42%
New Brunswick	37%	21%	26%
Nova Scotia	39%	18%	42%
Prince Edward Island	33%	0%	67%
Newfoundland	14%	14%	71%
Yukon/Northwest Territories	0%	50%	50%

CHILDREN COMPETING

Adults interviewed during the telephone research study were asked to identify the number of children in the household active in sport competition, and the sport disciplines in which they compete. Those interviewed reported that 85% of the children in the household were active in equestrian sport competition – representing an estimated 225,000 children in Canada. Children active in equestrian sport generally participate in competitions for 1.35 different sport disciplines each year.

Of children active in competition in 2009, the majority (73%) competed in one-or-more of the FEI sport disciplines, 30% competed in Western sport disciplines, 6% in breed-specific competitions, and 26% in other sports (including gymkhana, Pony Club and 4H Club competitions).

Table 3.22 reports the percentage of child competitors active in all sport discipline categories, as well as the estimated number of children participating.

Table 3.22: Children Competing

Child Competitors All Sport Discipline Category		Estimated #	% of Sample
Children Who Participate in Sport Competition		225,250	135%
FEI Sport Disciplines – Estimated # of Participants 85,445 73% of Total	Hunter / Jumper	53,843	46%
	Dressage	21,069	18%
	Eventing	5,852	5%
	Driving	3,511	3%
	Reining	1,170	1%
Western Sport Disciplines – Estimated # of Participants 35,114 30% of Total	Rodeo	2,341	2%
	Team Cattle Penning	2,341	2%
	Barrel Racing / Pole Bending	7,023	6%
	Roping	1,170	1%
	Western Pleasure	22,239	19%
Breed Specific Competitions – Estimated # of Participants 7,022 6% of Total	Halter/Line Classes	5,852	5%
	Breed Specific Competitions	1,170	1%
Other Sports – Estimated # of Participants 30,342 26% of Total	Gymkhana	8,193	7%
	Pony Club	5,852	5%
	Saddleseat	2,341	2%
	4H Club Competitions	4,682	4%
	Other Sports	9,364	8%

It was reported that children active in sport competition attended an average of 5.34 competitions in 2009. Those interviewed were asked to report the expectation for level of competition activity for children in 2010 as reported in Table 3.23.

Table 3.23: Expectation for Children Participating in Competition in 2010

% of Children Competing by Province	Avg. # of Canadian horse shows (per child competing) in 2009	Expect to Compete in More Competitions in 2010	Expect to Compete in Less Competitions in 2010	Expect to Compete in Same # of Competitions in 2010
Canada	5.30	36%	18%	46%
British Columbia	4.81	40%	13%	47%
Alberta	5.30	42%	18%	39%
Saskatchewan	5.31	34%	16%	50%
Manitoba	4.36	46%	38%	15%
Ontario	6.86	29%	22%	49%
Quebec	4.36	24%	24%	53%
New Brunswick	4.11	50%	13%	38%
Nova Scotia	6.33	0%	0%	100%
Prince Edward Island	1.00	0%	0%	100%
Newfoundland	1.00	100%	0%	0%

3.4. EMPLOYMENT IN THE INDUSTRY

Of the 2,392 horse owners and/or caregivers interviewed, it was reported that an average of 784 person hours spent per year on the care of each horse in their custody. For horse owners/caregivers nationally, 91% of the time spent on care of horses is provided by the owner, or family members in the owner’s household. Table 3.24 reports the average number of hours per year (per horse) spent on care of horses, and the percentage of care provided by the owner or the owners’ family.

Table 3.24: Hours Spent on Care of Horses

Employment in the Care of Horses	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
% of owners providing care for horses	91%	91%	89%	92%	87%	88%	102%	87%	94%	89%	100%
Average hours per horse per year	784	960	498	236	388	1,339	862	2,111	571	1,360	1,960
Total # of horses	963,500	116,000	313,500	108,800	56,000	212,500	129,500	12,500	8,000	4,000	1,350
Est. # of FTE jobs (@ 2000 hrs per year)	375,248	55,680	78,062	12,838	10,864	142,269	55,815	13,194	2,284	2,720	1,323
% of owners reporting paid employees	9%	6%	8%	3%	5%	12%	2%	9%	12%	6%	<1%
Avg. hourly wage	\$ 13.84	\$18.97	\$14.38	\$10.94	\$23.70	\$13.20	\$ 21.00	\$ 6.50	\$ 9.15	\$ 8.65	
# of horses per FTE jobs	2.6	2.1	4.0	8.5	5.2	1.5	2.3	0.9	3.5	1.5	1.0
# of Paid FTE jobs	30,326	3,341	6,245	385	543	17,072	1,116	1,187	274	163	
# of horses per Paid FTE jobs	32	35	50	283	103	12	116	11	29	25	

Note FTE = Full Time Equivalent ... a full time job estimated at 2,000 person hours per year

There is the equivalent of one full-time job directly for the care of horses, for every 2.6 horses in Canada. The majority of this work is unpaid labour for the care of horses contributed by the owner or members of the owners’ family/household. There is the equivalent of one paid full-time job caring for horses, for every 32 horses in Canada – an estimated 30,326 FTE jobs for the country.

3.5. SERVICE PROVIDERS

Additional employment is generated in the industry through the services provided by horse owners to other horse owners, and non-owning industry participants. Survey participants were asked to define the volume and types of services that they provide to industry participants, such as rider coaching services, horse boarding services, or horse training services.

Table 3.25 reports the percentage of industry participants that offer services to other industry stakeholders (reported by province).

Table 3.25: Service Providers by Province

Service Providers by Province	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
% who provide boarding services	11%	11%	9%	11%	10%	14%	12%	8%	20%	14%	9%
Est. # of horse boarding sites	16,326	2,376	3,965	1,618	598	4,796	2,323	173	330	101	46
Avg. # of horses boarded	9.2	8.8	11.4	8.5	8.7	11	5.8	7.4	5.5	3.3	2.5
% who provide horse training services	13%	10%	11%	12%	8%	17%	13%	10%	20%	7%	5%
Est. # of horse trainers	29,315	3,270	6,853	2,232	568	10,217	4,745	378	400	84	61
Horse trainers – racing sector	5,020	133	479	113	177	3,830	14	59	95	97	23
% who provide coaching/riding lessons	12%	10%	12%	12%	12%	13%	13%	8%	13%	7%	3%
Est. # of coaches/instructors	27,060	3,270	7,476	2,232	852	7,813	4,745	302	260	84	37
Avg. # of students per instructor	43.81	40.00	23.55	17.11	18.94	82.98	25.33	7.33	14.40	10.00	7.25

3.6. COMMUNICATIONS CHANNELS FOR INDUSTRY PARTICIPANTS

Those interviewed were asked a series of questions to identify possible communications channels within industry sectors. Questions included:

- “Do you belong to an industry association or club?”
- “How many different associations/clubs do you belong to?”

- “Do you use the Internet?”
- “Do you have an email address?”
- “Do you have access to high speed Internet?”
- “Do you regularly purchase horse-related products over the Internet?”

Table 3.26 reports the resulting responses by province.

In addition, those surveyed were asked to identify where they would most often seek (and receive) information on industry issues, through the following questions:

- “Where do you get most of your information on horse industry news, or information about horses...?”
- “If there was a contagious disease in your area, how would you find out?”
- “If there were new government regulations affecting horses, how would you find out?”

More than 80% of industry participants have access to high speed Internet, and 96% of participants have an email address.

Table 3.26: Communications Channels By Province

Percentage of Participants By Province	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	YT / NT
Belong to Horse-Related Association or Club	96%	95%	97%	97%	96%	96%	99%	94%	96%	97%	96%	100%
Avg. # of Associations per Participant	2.39	2.21	2.56	2.16	2.44	2.63	2.06	2.54	2.41	1.90	1.70	1.78
Have access to the Internet	88%	90%	90%	80%	90%	89%	89%	78%	87%	86%	100%	100%
Have access to high speed Internet	80%	87%	80%	74%	69%	77%	72%	92%	85%	92%	100%	78%
Have an email address	96%	99%	97%	95%	97%	96%	86%	94%	92%	96%	100%	89%
Purchase products for horses over the Internet	47%	49%	50%	52%	49%	45%	34%	49%	54%	36%	70%	56%

When asked to identify where an individual would source information, responses were categorized as follows:

- From reading industry magazines
- From reading industry newspapers
- From the Internet
- From (my) an association
- From word-of-mouth
- From Veterinarian
- Other sources

More than 42% of industry participants would expect to learn about a contagious disease through “word-of-mouth”.

Table 3.27: Source for Participants for Most Information About Horses and the Industry

Get most of their information about horses & the industry	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	YT / NT
From reading industry magazines	37%	32%	33%	42%	45%	41%	43%	33%	20%	31%	13%	44%
From reading industry newspapers	5%	2%	8%	7%	6%	5%	5%	3%	5%	3%	0%	11%
From the Internet	37%	33%	34%	30%	42%	42%	41%	35%	35%	48%	52%	22%
From my association	19%	18%	19%	23%	10%	18%	20%	17%	21%	28%	22%	11%
From word-of-mouth	27%	27%	25%	27%	23%	27%	38%	16%	16%	10%	22%	22%
From Veterinarian	4%	3%	3%	6%	9%	4%	3%	3%	4%	3%	9%	0%
Other Sources	8%	6%	6%	12%	9%	8%	13%	3%	4%	10%	0%	0%

Table 3.28: Source For Information on Contagious Disease

Would expect to learn about a contagious disease...	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	YT / NT
From reading industry magazines	1%	1%	1%	0%	1%	0%	2%	0%	1%	0%	0%	0%
From reading industry newspapers	2%	1%	2%	5%	3%	1%	3%	0%	3%	3%	4%	11%
From the Internet	6%	5%	5%	2%	12%	6%	8%	6%	9%	14%	0%	0%
From my association	10%	15%	11%	8%	6%	8%	11%	3%	4%	10%	17%	22%
From word-of-mouth	42%	46%	43%	49%	37%	41%	31%	38%	37%	38%	39%	33%
From Veterinarian	30%	26%	28%	25%	31%	31%	39%	38%	32%	21%	22%	33%
Don't Know	2%	1%	2%	2%	3%	2%	1%	0%	0%	3%	0%	0%
Other	6%	1%	7%	8%	4%	7%	4%	8%	8%	10%	17%	0%

Table 3.29: Source For Information on Government Regulations

Would expect to learn about new regulations	Canada	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	YT / NT
From reading industry magazines	7%	5%	4%	7%	7%	8%	10%	3%	4%	10%	0%	11%
From reading industry newspapers	4%	3%	5%	7%	8%	2%	6%	3%	9%	10%	4%	11%
From the Internet	12%	9%	12%	8%	19%	13%	14%	5%	15%	14%	9%	11%
From my association	33%	43%	36%	24%	22%	32%	30%	25%	32%	31%	22%	22%
From word-of-mouth	23%	24%	22%	25%	15%	21%	27%	29%	20%	17%	26%	11%
From Veterinarian	8%	7%	7%	7%	15%	10%	5%	21%	5%	3%	22%	0%
Don't Know	5%	5%	7%	9%	8%	4%	1%	2%	3%	0%	0%	22%
Other	6%	2%	5%	10%	5%	7%	8%	6%	7%	14%	17%	11%