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“Experience is a hard teacher because she gives the test first, the lesson afterwards.” – unknown

After accepting this assignment, it dawned on me that I may have been targeted as a speaker more for my age than my breath of knowledge and experience. Regardless of the actual rationale (which I may never know for sure but hope it's the latter) the purpose of this presentation is important. What lessons, experiences, trends and/or occurrences have we experienced over the last several decades in the horse industry and can predictions be made from these as the industry moves forward in the new Millennium?

It is difficult, if not impossible, to present a review of major occurrences over the last several decades without first agreeing that there is, indeed, a “horse industry”. This concept may mean

different things to different people, but one can't ignore there is substantial activity employing significant capital and personnel, be it art, business or recreation related, that constitutes the "horse industry." Further evidence is verified by the Horse Industry Association of Alberta's "Industry Survey & Profile" conducted in 2003 from which many of this presentation's comments are based. In defining the horse industry, "recreational" horses cannot be undervalued as this segment is a significant consumer of products and services and should not be ignored as we attempt to predict the future.

Without question 'suburbia' has played a significant, if not predictable, role in the trends within the horse industry in North America. Changing demographic trends have influenced not only numbers of horses, but also management, behaviors, training methods, opinions, and economics.

In 1950, a major magazine article was published regarding the horse industry entitled, "The End of the Age of the Horse." Discussed at length were the three crucial roles of the equine for 4,000 years - transportation, warfare and agriculture. The author estimated that the population of the horse in North America, which had peaked at about 20 million before WW I, had fallen to fewer than one million between the end of WW II and 1950. He confidently stated, "It seems unlikely that there will ever be a demand for more horses than the current population: Some for racing, some for ranch work, a few for circuses, and a few for rich people to ride."

Almost before the ink was dry, there began an unprecedented and wholly unpredicted growth in the demand for horses – based on the utility of horses for non-traditional uses; namely, pleasure, entertainment and showing. This growth in demand continued unabated for 50 years.

As we near completion of the first decade of the new Millennium, it is my opinion that many of the same significant challenges that have faced the "horse industry" over the last five decades still exist. We need to ask to what degree have we successfully met and overcome these challenges. Have we really gotten anywhere?

Possibly the single most significant underlying question of this presentation will be, "How many horses are there?" Today, we continue to have only estimates. Whether any estimate of the current total number of horses in the United States is reliable is unknown because most estimates are not consistent in their approach. For instance, in the United States the number of horses on non-farm operations does not exist. On-farm equine estimates are conducted every five years as part of the "Census of Agriculture" in the United States. Something as seemingly

basic as determining the true size of the population, and of particular interest the demographics of that population, varies significantly depending on whom and for what purpose the numbers are generated.

For example, these sources for horse populations estimate the following: the American Horse Council, 9.2 million; the United States Department of Agriculture; 3.6 million horses and ponies; the American Pet Products Manufacturers Association, 13.8 million; the American Veterinary Medical Association, 5.1 million; Equine Canada, approximately 1 million; the Canadian Veterinary Medical Association, "We do not have those types of numbers". The bottom line is that almost none of these horses reported in population estimates will be used for transportation, warfare and agriculture, therefore, we must develop a mechanism to accurately monitor the number, and uses of, horses in the future.

In an attempt to "look back" at several historical occurrences that will continue to affect the horse industry as we "move forward", I have taken the liberty of arranging, in alphabetical order, seven (7) broad categories of some of the issues that should be pondered. This list is not all encompassing and more issues may exist that have significant merit unto themselves, but for sake of time these general areas will be discussed. There will be overlap, but categories of significance include:

1. Economics & The Competitive Environment

- Economics 101 – Supply and Demand
- Taxes and the Economy
- Competition for Entertainment \$
- Insurance
- Litigation
- Value of the Dollar
- Gaming

2. Industry Promotion and Advertising

- Funding
- Media and Equine Sport
- RFD Television
- Spruce Meadows

3. Market Trends

- Breed Demographics
- Breeder Incentive Funds
- Registering horses

4. Media Influence

- Proliferation of Programming
- Is All News Good News?

5. Psychography (the study of attitudes, beliefs and opinions within a population)

- Equine Processing
- Old School Horsemen
- Round Pen Evangelists

6. Science and Technology Changes

- Artificial Insemination, Shipped Semen, Frozen Semen
- Embryo Transfer, Cloning
- Computers and the Internet
- Diseases
- Equine Genetic mapping
- Equine Science Society

7. Sociological Changes

- Animal Activism
- Anthropomorphism
- Baby Boomers versus Generation X
- Entitlements
- Equine Veterinarians

As we move forward, let me borrow some words spoken by Jack Welch, admittedly embattled but none-the-less, former successful CEO of General Electric Corporation, "Control your own destiny or someone else will." What are the messages you should take home from this presentation?

1. Organize. Who speaks for you on horse related topics? Activity group, breed association,

provincial/state coalitions, government, or federal association. Is there consensus and coordination between them?

2. Research. What are your (your representative group's) opinions based upon? Facts, fiction or feelings?

3. Educate. What have you done proactively to educate your members and potential new owners? Lately? Have you become involved in the promotion of regulations and legislation favorable to the horse industry?

4. Implement. Have you become involved with your organization or have you left that to others only to complain about their lack of performance. Have you invested in the horse industry?

5. Evaluate. "There's a way to do it better -- find it!" -- Thomas A. Edison

It is my hope you found this presentation thought provoking and informative. And as always, it was my pleasure to return to the Alberta Horse Owners and Breeders Conference.