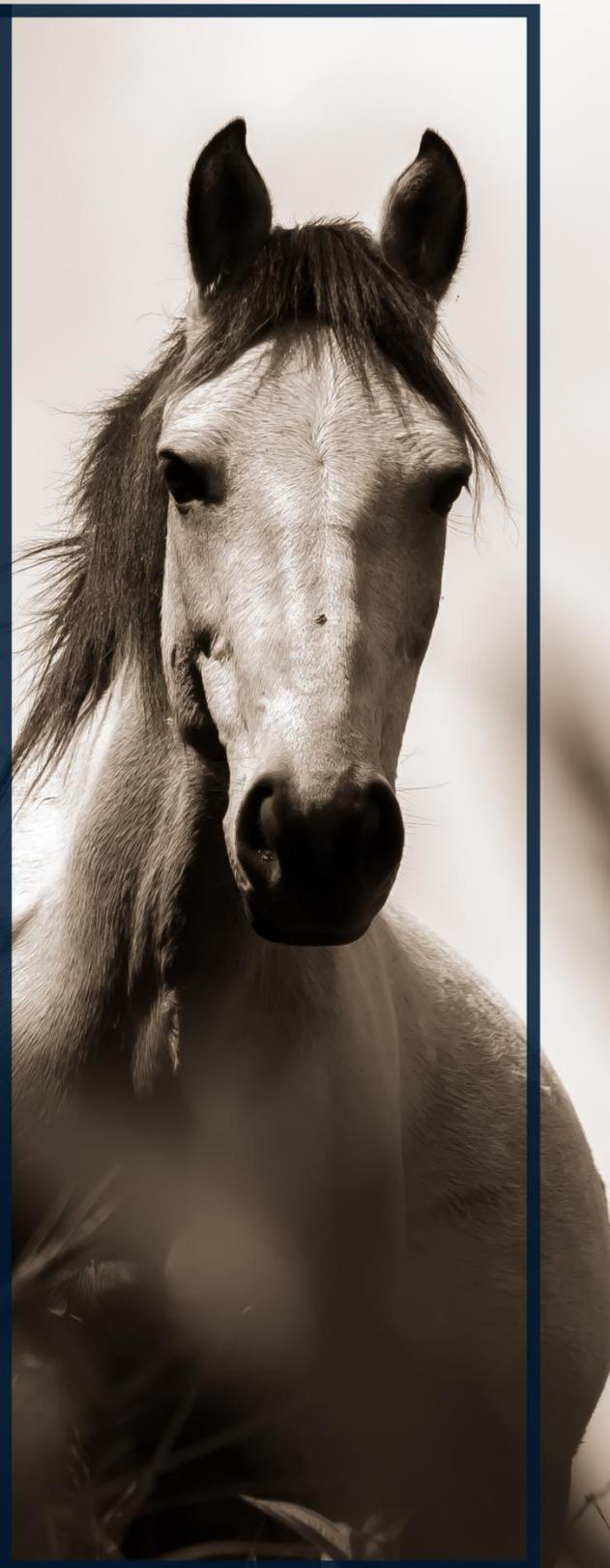


# The Canadian Equine Sector: *Socio-Economic Insights 2023*



**WILTON**  
CONSULTING GROUP



# Acknowledgements

## Project Leads

Jean Klosowicz  
Manager, Equine Traceability Business  
Development  
Equestrian Canada

Kristy Laroche  
Director, Active Equine  
Industry and Development  
Equestrian Canada



## Project Consultants

### Wilton Consulting Group

Dr. Bronwynne Wilton, Principal and Lead  
Consultant  
Dr. Andrea Gal, Consultant  
Krista Kapitan, Consultant  
Claire Coombs, Research Analyst  
Jessica Deveau, Junior Research Analyst



### Serecon

Bob Burden, Senior Director  
Harvey Bradford, Director  
Darren Haarsma, Consultant  
Armarn Roland, Consultant



## Project Advisory Committee

Akaash Maharaj – Sector Advocate  
Christine Ross – CanTRA  
Danie Glanc – Ontario Equestrian  
Doug Orr – Coach, Steward, Western Rider  
James Hood – Equestrian Canada  
Joel Lalonde – Wynbrook Stables  
Kelly Coughlin – Horse Council BC

Kristy Laroche – Equestrian Canada  
Mike King – Acera Insurance  
Mike Pownall – McKee-Pownall Equine  
Services  
Renée Lévesque – Cheval Québec  
Robyn Kurbel – Western Discipline

## Data Contributions

We gratefully acknowledge the data contributions from the Alberta Equestrian Federation and Horse Council British Columbia. The full studies are as follows:

Alberta Equestrian Federation. (2021.) *The Economic Impacts of Alberta's Equine Industry*.

Horse Council British Columbia. (2019.) *Equine Industry Economic Impact Study*.

## Funder

Department of Canadian Heritage, Sport Canada Branch  
Proceeds from the Recovery Fund were used for this study.



Canadian  
Heritage

Patrimoine  
canadien

## Executive Summary

The Canadian equine sector is a vibrant part of Canada's economy, contributing \$8.69 billion to Canada's Gross Domestic Product (GDP) annually. The sector also brings great social value to Canadians, as it supports health and well-being. The last sector-wide study of the economic and social impacts of Canada's equine sector was conducted in 2010. Given the sector's evolution, and the global impacts of the COVID-19 pandemic, it was timely to undertake a new socio-economic impact study.

Wilton Consulting Group and Serecon collaborated to conduct research on Canada's equine sector. The three goals of this study were to:

1. Increase the understanding of the current state of the sector, including the topics of inclusion, diversity, equity, and accessibility (IDEA);
2. Identify and articulate the economic and social impacts of sport and recreational participation and performance pathways within the sector; and
3. Develop strategic recommendations to ensure the sustainability and inclusivity of the sector in Canada.



These goals were achieved through the pursuit of two main objectives:

- ✓ Engage with industry members within the equestrian sport and recreation sector to gain a better understanding of the challenges and opportunities facing the equine sector; and
- ✓ Conduct qualitative and quantitative data analysis to assess the socio-economic impact of the equine sector across Canada.

## Research Methods

To achieve the objectives of the study, the research team conducted:

- A nationwide survey of 4,263 people, representing 19,491 individuals in the equine sector;
- An environmental scan of white and grey literature, as well as of popular equestrian publications;
- 40 key informant interviews; and
- An economic impact analysis.

## Key Results

### Economic Impacts

In 2022, the equine sector:

- Provided \$894 million in provincial and federal taxes, and
- Contributed 70,997 full time equivalent jobs.

### Equines are Good for People

- 96% of survey respondents agree or strongly agree that interaction with equines contributes to human health and well-being.
- Participation in riding can put children and youth on a positive course towards lifelong healthy habits.
- Equine-assisted services can be used to help people manage mental and physical disabilities.

### Equines are Good for the Economy

- Canadians spend more than \$8.3 billion on equine-keeping, helping to drive economic activity across the country.
- Larger equine sport venues serve as economic drivers in rural communities across Canada.
- Over 155,000 acres of land across Canada are used for equine facilities, farms, and/or ranches.

### Spotlight: Canada's Equine Population

- In 2021, Canada had 509,099 equines.
- Equines can have overlapping roles in the industry and are classified in 1 of 7 primary activities:
  - Recreation (28%),
  - Amateur sport (24.5%),
  - Working (19%),
  - Breeding (14%),
  - Professional sport (8%),
  - Elite sport (4%), or
  - Racing (2.5%).

## Equines are Good for the Environment

- Equine facilities provide environmental benefits including supporting ground-water recharge areas, soil fertility, surface water control and wildlife habitat.
- Over half (52%) of survey respondents agree or strongly agree that the Canadian equine sector connects rural and urban areas.
- Equine farms can play a buffering role between urban and agricultural land. These farms can help to increase urban awareness of normal farming activities.

## Impacts of the COVID-19 Pandemic

- The pandemic had a significant impact on the equine sector. Equine farms and facilities faced dire financial situations, causing concern for the health and welfare of the animals.
- The cancellation of equine shows and limitations on access to training facilities negatively impacted competitors' skills development.
- Pandemic restrictions and impacts led to reduced international clientele for equine activities. In contrast, more Canadians participated in the sector and the demand for riding lessons increased.
- The price of equines increased during the pandemic and has remained high.

## Challenges, Risks, and Opportunities Within the Equine Sector

The study identifies the challenges and risks the equine sector faces. The study also highlights opportunities to address these challenges and risks to help Canada's equine sector grow and flourish.

Barriers to Entry and Participation for Competitors and Equine Enthusiasts	
Challenges and Risks	Opportunities
<ul style="list-style-type: none"> <li>➤ The expenses and time commitment associated with participating in the equine sector can pose significant barriers.</li> <li>➤ Given these barriers, some individuals opt to take breaks in participating in the sector.</li> <li>➤ Equine sector participants have mixed views on the level of equity, diversity, and inclusion within the sector.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Strengthen support for grassroots activities and shift the sector culture by prioritizing youth, encouraging lifelong participation, and increasing diversity.</li> <li>➤ By prioritizing inclusion and diversity in messaging, people in the sector can help to make equine activities more welcoming.</li> </ul>

<b>Barriers to Sector Development</b>	
<b>Challenges and Risks</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>➤ Finding and retaining labour is difficult for employers in the sector.</li> <li>➤ Educational programs and resources can be difficult to access and are often cost prohibitive.</li> <li>➤ Training and compensation are challenges for event officials.</li> <li>➤ Equine activities require a large land base which can be challenging to find and expensive to access.</li> <li>➤ Access to support services such as coaches, officials and veterinarians can be limited in some parts of Canada.</li> <li>➤ Equine activities are not consistently recognized as agricultural activities which affects income taxes, property taxes, and access to government programs for the agricultural industry.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Explore collaborations with organizations supporting business management in the agricultural industry.</li> <li>➤ Develop an opt-in insurance program for small equine businesses.</li> <li>➤ Continue efforts to expand recognition of equine businesses as farm businesses.</li> <li>➤ Improve the competition circuit to increase grassroots competitions and youth engagement, improve communications and public engagement, and explore improvements to show logistics.</li> </ul>

<b>Ensuring High-Quality Equine Care</b>	
<b>Challenges and Risks</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>➤ Industry participants are concerned about the level of public trust about the welfare of equines.</li> <li>➤ Canada lacks a national traceability system for equines.</li> <li>➤ Although infectious diseases pose a significant risk, people involved in the industry do not always understand or comply with best practices for biosecurity.</li> <li>➤ Climate change could affect the equine health and safety, and the supply and cost of feed.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Build on currently available programs to strengthen equine care, including biosecurity and animal welfare.</li> <li>➤ Continue to promote tools for equine owners and caretakers to create biosecurity plans and to monitor risks.</li> </ul>

## Recommendations

The report identifies six recommendations for the equine sector that align with Equestrian Canada's Strategy 2022-2025: Building for a Better Future. By implementing these recommendations, the equine sector can support its sustainability and inclusivity.

1. Develop a plan to conduct a regular 'census' and economic impact study of the Canadian equine herd.
2. Lead opportunities to improve inclusion, diversity, equity, and access in the Canadian equine sector.
3. Collaborate with the Provincial/Territorial Sport Organizations (PTSOs) to support grassroots initiatives and youth participation to grow the love for equine sports and activities amongst Canadians.
4. Continue to work with multiple levels of government to ensure the classification of equines and equine barns as an active component of the Canadian agricultural industry.
5. Conduct a follow-up study to better understand the current state of the Canadian equestrian competition landscape, and to identify opportunities to strengthen the vibrancy and resiliency of this landscape.
6. Continue to champion increased traceability of equines within Canada to support biosecurity, and accurate and up-to-date population figures.



# Table of Contents

Acknowledgements .....	ii
Executive Summary .....	iii
1. Introduction .....	1
1.1 Context .....	2
2. Our Approach .....	3
2.1 Overview .....	3
2.2 Economic Impact Analysis Methods .....	6
2.3 Equine Population Estimates .....	7
2.4 Study Limitation: Sector Engagement .....	8
3. Results: About Canada’s Equine Sector .....	10
3.1 People in the Equine Sector .....	10
3.2 Equine Population .....	14
4. Economic Impact Analysis .....	17
4.1 Equine-keeping .....	17
4.2 Equine Activities .....	20
5. Strengths, Challenges, Opportunities and Risks .....	21
5.1 Strengths .....	22
5.2 Challenges and Risks .....	34
5.3 Opportunities .....	64
6. Concluding Remarks & Recommendations .....	75

## Table of Figures

<b>Figure 1.</b> Classification of the Canadian equine herd for the National Socio-Economic Study. .....	2
<b>Figure 2.</b> Approach to the National Socio-economic Impact Study. ....	4
<b>Figure 3.</b> Geographic distribution of interviewees (n=40). ....	5
<b>Figure 4.</b> Survey respondents' primary location for involvement in equine activities (n=4,211). ....	5
<b>Figure 5.</b> Categories of economic impact. ....	7
<b>Figure 6.</b> Approach used to determine equine population multiplier. ....	8
<b>Figure 7.</b> The percent of survey respondents' location for primary equine activity compared to the population distribution across Canada (n=4,211). ....	10
<b>Figure 8.</b> Equine sector involvement compared to the population of Canada by age (n=3,873). ....	11
<b>Figure 9.</b> Percentage of respondent's household annual after-tax income (n=3,823). ....	12
<b>Figure 10.</b> Highest level of education in survey respondents' households compared to that of the Canadian population (n=3,871). ....	12
<b>Figure 11.</b> Census of Agriculture reported equines by province in Canada between 2006 and 2021. ....	14
<b>Figure 12.</b> Estimated 2021 equine population by province. ....	15
<b>Figure 13.</b> Average Canadian annual equine-keeping costs in dollars in 2022. ....	19
<b>Figure 14.</b> Strengths, challenges, opportunities, and risks for the Canadian equine sector. .....	21
<b>Figure 15.</b> Number of clients that equine-assisted services providers worked with in 2022 who do not own or lease equines (n=101). ....	27
<b>Figure 16.</b> Level of agreement with the statement the equestrian community is welcoming to people of differing backgrounds (n=3,467). ....	40
<b>Figure 17.</b> Level of agreement with the statement the Canadian equine sector has access to sufficient well-trained workers (n=3,436). ....	43
<b>Figure 18.</b> Level of education related to the care and maintenance of equines of survey respondents who work in equine facilities (n=277). ....	45
<b>Figure 19.</b> Event officials' level of agreement with statements about being an event official. (n=169). ....	46
<b>Figure 20.</b> Level of agreement from event facility owners/managers and competition organizers with statements about the sector (n=186). ....	47
<b>Figure 21.</b> Survey respondents' level of concern with the availability of equine services in their areas (n=3,424). ....	49
<b>Figure 22.</b> Eligibility requirements for the Farm Property Class Tax Rate Program in Ontario. ....	51

**Figure 23.** Level of agreement with the statement the Canadian equine sector has sufficient methods for traceability and identification of equines (n=3,442)..... 55

**Figure 24.** Survey respondent’s level of agreement with the statements: “Generally, people who participate in equestrian activities...” (n=3,443)..... 57

**Figure 25.** Event officials’ estimate of spectator and participant numbers in 2022 compared to pre-pandemic years (n=171 and n=169, respectively). ..... 62

# List of Tables

**Table 1.** Canadian equine population according to the Census of Agriculture, 1991 to 2021. .... 14

**Table 2.** Percent of Canadian equines within each activity category. .... 16

**Table 3.** A breakdown of equine-keeping direct expenditures by category. .... 18

**Table 4.** Summary of the strengths of Canada's equine sector. .... 22

**Table 5.** Property sizes of survey respondents who own/operate equine facilities and/or farms/ranches (n=656). .... 31

**Table 6.** Challenges and risks for the Canadian equine sector. .... 35

**Table 7.** Percent change in farmland values in 2022. Adapted from: the 2022 Farmland Values Report (Farm Credit Canada). .... 48

**Table 8.** Range in value of cultivated and pastureland in Western Canadian provinces. Adapted from Farm Credit Canada’s 2022 Farmland Values Report. .... 48

**Table 9.** Anticipated changes facility owners/mangers or competition organizers plan on making in the next five years (n=97). .... 63

**Table 10.** Summary of opportunities in Canada's equine sector. .... 64

**Table 11.** Sample opportunities for collaboration with organizations supporting business management in the agricultural industry. .... 70

**Table 12.** Comments from event officials on how to improve training, the process for becoming an official, and compensation. .... 72

# 1. Introduction

This report is the first national study of the Canadian equine sector since 2010. The purpose of this study is to analyze the social and economic impacts (also known as the socio-economic impacts) of the equine sector in Canada. Social impacts include the effects on people and communities (e.g., well-being, social connections), while economic impacts include the effects on the economy (e.g., Gross Domestic Product).

The goals of the study are as follows:

- Increase the understanding of the current state of the sector, including the topics of inclusion, diversity, equity and accessibility (IDEA);
- Identify and articulate the economic and social impacts of sport and recreational participation and performance pathways within the sector; and
- Develop strategic recommendations to ensure the sustainability and inclusivity of the sector in Canada.

Wilton Consulting Group and Serecon Inc. conducted the research for this study. The methodology included a literature review, key informant interviews, a National Equine Survey, and an economic impact analysis.

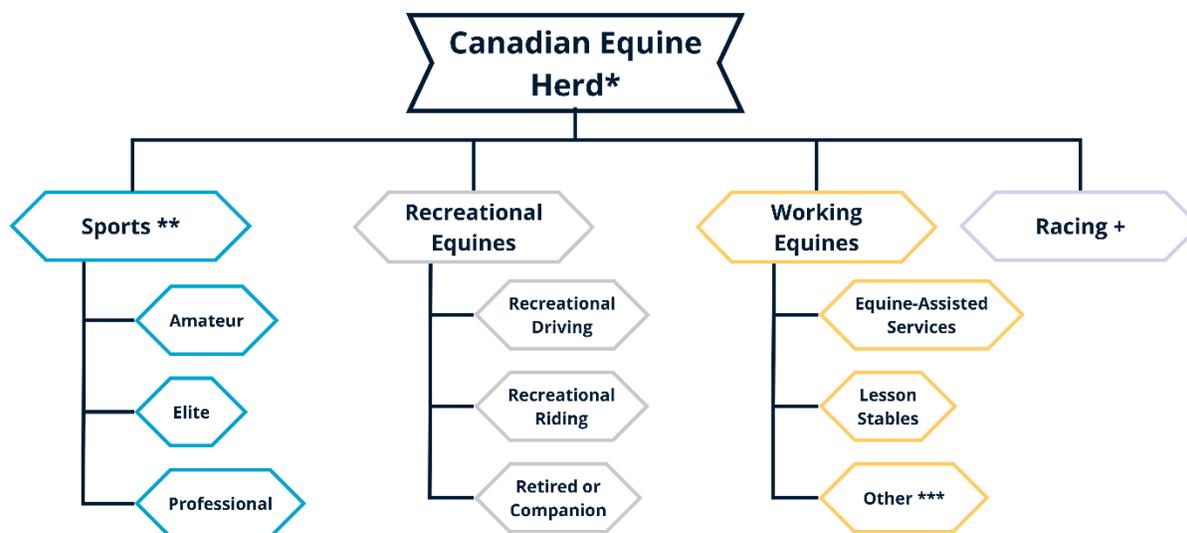
While interaction with equines benefits human health and well-being, many people involved in the sector perceive the cost to participate in equestrian activities – and, particularly, equestrian sport – to be unaffordable for the average Canadian. Some organizations and facilities already use innovative strategies to improve the accessibility of the sector. This report highlights opportunities for Equestrian Canada (EC) and other sector participants to advance this work.

This report includes an overview of the equine sector in Canada, including the strengths and challenges the sector faces. An economic impact analysis is presented outlining the role that the sector plays in the economy across Canada. Opportunities for the sector are discussed along with recommendations for policy, programs, and actions to ensure the long-term sustainability of the equine sector in Canada.

In 2010, Strategic Equine Inc. and Equine Canada released the 2010 Canadian Equine Industry Profile Study, which provided a helpful overview of the state of the sector at that time. Given differences in methodology between the two studies, and differences in Statistics Canada's definition of a census farm in 2006 and 2021, direct comparisons should not be made between the findings from the 2010 study and the current study (Appendix A).

## 1.1 Context

For the purpose of this study, the Canadian equine herd was classified into the categories of sport, racing, working, and recreation (Figure 1).



**Figure 1.** Classification of the Canadian equine herd for the National Socio-Economic Study.

\* This study does not include equines destined for slaughter for human consumption or pharmaceutical production.

\*\* This category includes breeding, training, competing, etc. Equines involved in professional sport are used by people who derive at least a portion of their income from such activities as training, coaching, and competing. Equines involved in elite sport include equines used by high performance teams, in the Olympics, and in the International Federation for Equestrian Sports (FEI).

\*\*\* This subcategory includes any activity where an equine is an essential component of the business (e.g., trail riding, carriage companies, working ranches, guided tours, etc.).

+ Racing focuses on costs associated with the equines; it excludes prizes and gambling.

Equines can participate in a variety of activities over their lifetimes. For example, a thoroughbred equine that is bred for racing may race for two to three years, often starting as a two- or three-year-old. It may retire from racing and become a sport equine for a number of years, before possibly ‘retiring’ again to become a recreational/companion animal. Other equines may thrive for years as competitive athletes in a variety of disciplines. Later, they may become ‘school equines.’

For the purpose of this study, equines were classified according to their primary activities.<sup>i</sup> Such a classification was necessary for the economic impact analysis.

<sup>i</sup> Respondents could select from the primary activities of recreation, amateur sport, professional sport, elite sport, working, racing, breeding and other. (If respondents selected other, they were asked to specify the activity.) Breeders were asked to estimate the percentage of their sales to the sport, recreation, working, racing, and other

To capture a more fulsome understanding of the social impact of the sector, National Equine Survey respondents could identify the multiple roles they hold within the sector, including recreational participant, amateur sport competitor, professional sport competitor, and elite sport competitor. Respondents could also identify their work roles within the sector.

Throughout the report, references are made to appendixes. This content can be found in the Supplementary Information document, which is available by request from Equestrian Canada.

## 2. Our Approach

### 2.1 Overview

As discussed in the Introduction, the overarching goals of this study were to:

- Increase the understanding of the current state of the sector, including the topics of IDEA;
- Identify and articulate the economic and social impacts of sport and recreational participation and performance pathways within the sector; and
- Develop strategic recommendations to ensure the sustainability and inclusivity of the sector in Canada.

These goals were achieved through the pursuit of two main objectives:

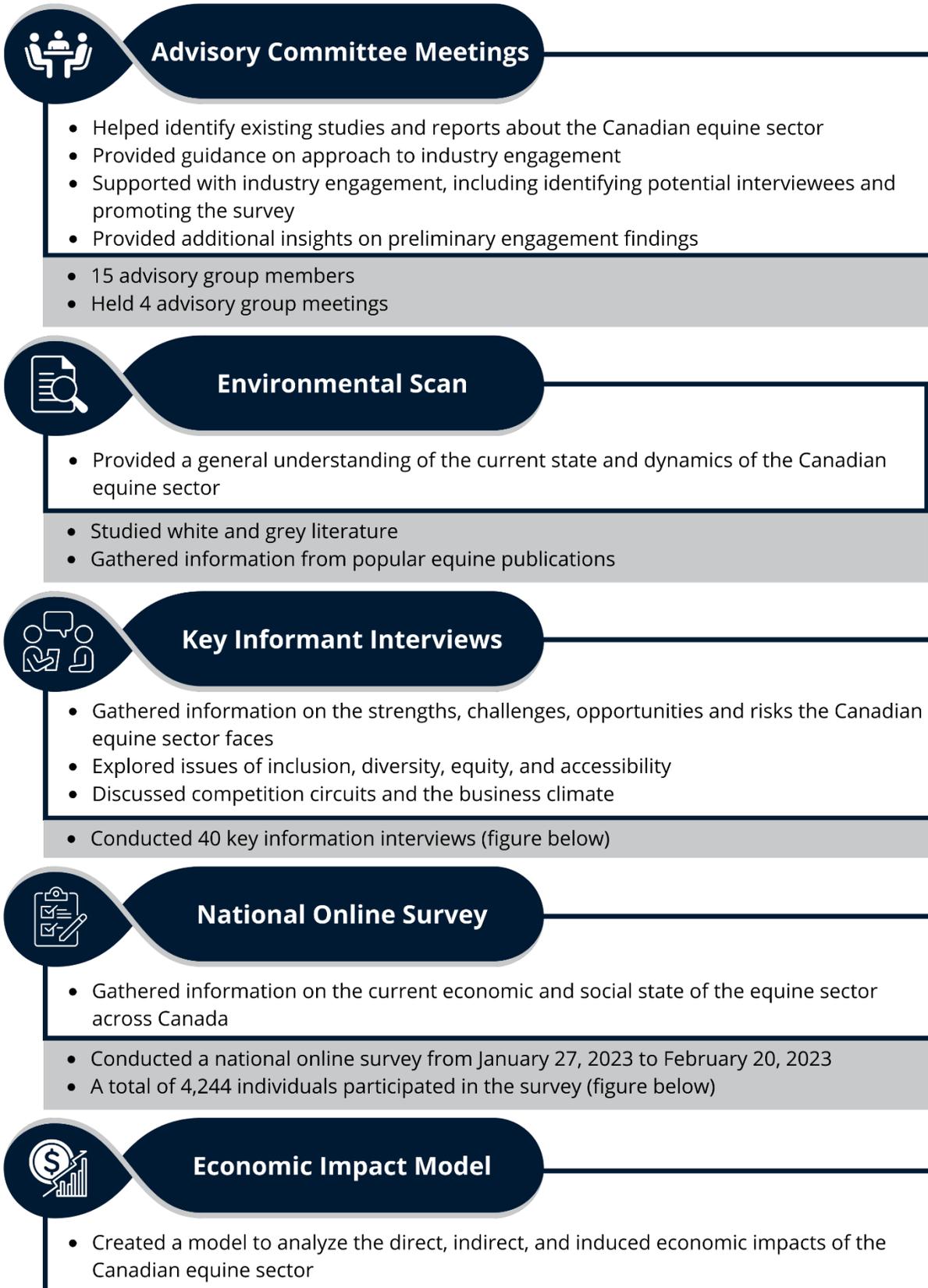
- Engage with people involved in the equestrian sport and recreation sector to gain a better understanding of the challenges and opportunities facing the equine sector; and
- Conduct qualitative and quantitative data analysis to assess the socio-economic impact of the equine sector across Canada.

Our methodology included engaging with participants across the sector through an online survey (known as the National Equine Survey), key informant interviews, an environmental scan, and a socio-economic impact analysis (Figure 2).<sup>ii</sup> The study explored strengths, challenges, opportunities, and risks related to the Canadian equine sector. The study also explored current perspectives on IDEA in the sector.

---

sectors. While a breeder might focus on the racing sector, for example, they can also sell equines into other sectors.

<sup>ii</sup> Interviewees were selected through consultation with the Advisory Group for this project. Outreach was also conducted with the Provincial/Territorial Sport Organizations (PTSOs). Finally, the researchers employed a snowball method, whereby interviewees identified other key individuals in the sector to contact for this project. The interview guide is available in Appendix B, and the survey questions are available in Appendix C.



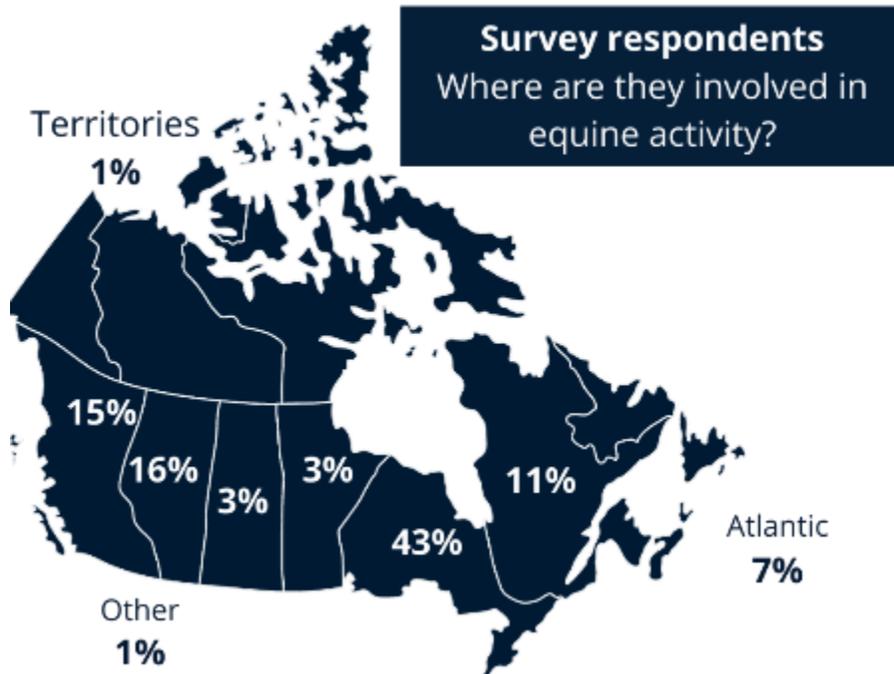
**Figure 2.** Approach to the National Socio-economic Impact Study.



**Figure 3.** Geographic distribution of interviewees (n=40).

Top 5 roles of key informant interviewees:

- Coach/trainer (19%)
- Provincial or territorial sport organization representative (16%)
- Competitor (14%)
- Equine facility owner (10%)
- Equine facility staff (10%)



**Figure 4.** Survey respondents' primary location for involvement in equine activities (n=4,211).

Top 5 roles of survey respondents:

- Recreational participant (69%)
- Amateur sport competitor (61%)
- Coach/trainer (23%)
- Equine facility owner and/or operator (15%)
- Farmer/rancher (12%)

Note: Respondents could identify all their roles in the sector; often, people participate in the sector in multiple ways.

## 2.2 Economic Impact Analysis Methods

This analysis uses Statistics Canada's Input/Output (I/O) Model.<sup>iii</sup> Because the equine sector is not directly represented within Statistic Canada's I/O Model, the most appropriate way to account for its economic impacts is to apply the expenditure approach. This approach, in contrast to the income approach which measures revenues, specifies the inputs relevant to the sector, helping to ensure the analysis captures the equine sector's particular economic activities. The inputs measured by this approach include the primary costs incurred by the sector. Double counting is avoided where services are provided between people in the sector. For example, equine owners' costs for veterinary services are not added to the costs veterinarians bear to provide their services.

Summarized costs incurred within each province and territory were input to the I/O Model which then computed the sector's required input of labour, domestically produced and imported goods and services, and total estimated sales. The summary of equine sector activities (direct), supporting provision of inputs (indirect), and household consumption resulting from direct and indirect wages earned (induced) were compiled to summarize the sector's economic impacts by a range of metrics.

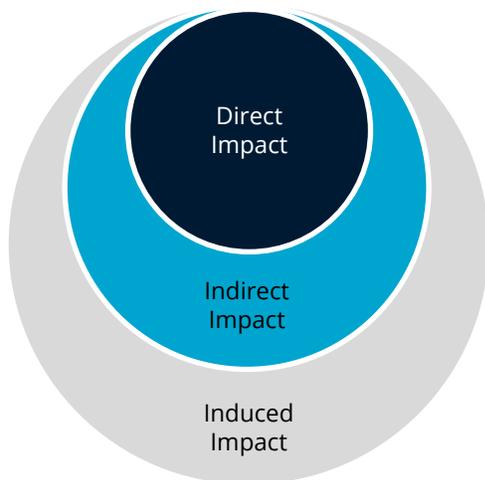
Economic impacts from a defined set of economic activities include direct, indirect, and induced impacts (Figure 5). The approach used in this analysis applied the direct expenditures (i.e., costs incurred by people involved in the sector) to estimate the upstream indirect impacts, and induced impact of the sector.

Direct expenditures for each province and territory were inputted into Statistics Canada's I/O Model to determine the indirect and induced impacts.

The results of the economic impact analysis were synthesized with the engagement and research activities to provide a complete socio-economic snapshot of Canada's equine sector.

---

<sup>iii</sup> For more information on the Input-Output model, please refer to [A Guide to Using the Input-Output Model of Statistics Canada](#).



**Figure 5.** Categories of economic impact.

**Direct Impacts:** Impacts from the sector – payments made to suppliers of labour, equipment, and services by the sector where the new economic activity takes place (i.e., payments by equine owners for feed, tack, fuel, etc.)

**Indirect Impacts:** Impacts on the backward-linked industries that supply inputs to the sector creating the new economic activity (e.g., fertilizer producers must increase production for equine feed primary production)

**Induced Impacts:** Impacts of spending the increased household income resulting from the new economic activity (e.g., spending by employees of the farm or equine operation and its upstream industries)

## 2.3 Equine Population Estimates

The Canadian equine sector lacks access to a reliable and current equine population estimate. The sector also lacks a national, mandatory traceability system for equines,<sup>1</sup> which could be the most straightforward source of information for a population estimate.

Nationally, the most robust source of equine population estimate is the Census of Agriculture, which is reported every five years. However, the Census of Agriculture only collects data from farms, as defined by Statistics Canada.<sup>iv</sup> As a result, equines are undercounted in the Census of Agriculture; equines often live on rural properties that do not qualify as farms under Statistics Canada’s definition.

To gain a more fulsome understanding of the Canadian equine population, sector-led initiatives, such as this study, are necessary.

This study developed a more accurate estimate of the Canadian equine population by determining the ratio of equines that are not counted through the Census of Agriculture. This ratio is referred to as a population multiplier.

The multiplier for this study was developed using the data collected in the 2023 National Equine Survey and supplemented by survey data from the Alberta Equestrian Federation’s [2021 study](#) and Horse Council of British Columbia’s [2019 study](#).

To arrive at the multiplier for the current study, the equine population excluded from the Census of Agriculture was estimated by first estimating the number of non-Census properties with equines using a Survey Property Ratio. Next, the number of calculated non-

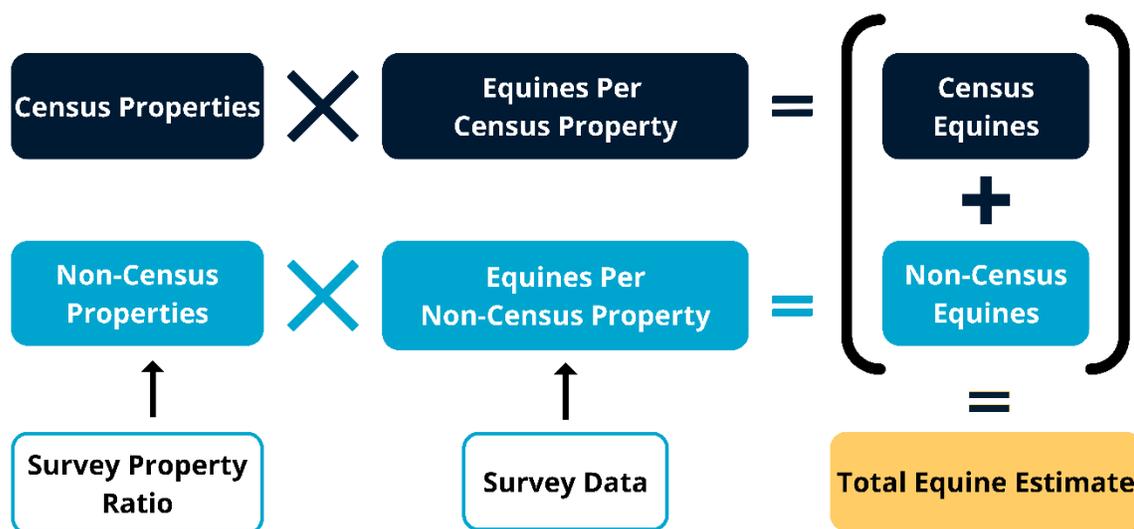
<sup>iv</sup> An agricultural operation is defined as a farm or agricultural holding that produces agricultural products and reports revenues or expenses for tax purposes to the Canada Revenue Agency. For a complete list of what is and is not consider an agricultural product, see the [2021 Census of Agriculture – Frequently asked questions](#).

Census properties was multiplied by the average number of equines per non-Census property where equines are kept (Figure 6). This method assumes the survey data includes a representative sample of all equine sector participants.

Population multipliers were developed at the provincial/territorial level, as well as at the national level. These provincial/territorial and national multipliers were used to estimate total equine populations. The national population multiplier for this study is 2.8.

Previous studies, including the 2010 Canadian Equine Industry Profile Study, also applied population multipliers to Census of Agriculture equine population estimates.

For every equine counted in the Census of Agriculture, Canada actually has 2.8 equines. This number can be described as a multiplier.



**Figure 6.** Approach used to determine equine population multiplier.

## 2.4 Study Limitation: Sector Engagement

Broad engagement is crucial to ensure the findings from national studies reflect the diversity of the sector.

To estimate the national socio-economic impacts of the equine sector, the scope of this study was necessarily far-reaching, both in terms of geography and the level of detail gathered. As such, the length of the National Equine Survey was comparable to the length of a census, rather than a short opinion poll. The survey included a notable amount of logic to effectively gather information from a wide variety of sector participants. The survey also asked for detailed financial estimates, which were required to calculate the economic impacts of the sector. Given the length, and level of detail, some people involved in the

sector reported and left evidence of survey fatigue. In some cases, survey fatigue likely negatively impacted the quality of response.

Ideally, the respondents to a survey will provide an accurate representation of the sector. To solicit this sample, the survey's promotional efforts focused primarily on digital channels, including social media, equestrian association contact lists, and [HorseJournals](#). While this outreach solicited a national sample with reasonable regional representation, it may have under-represented equine sector participants with lower formal involvement in sector activities. This limitation exists in many equine sector studies, which struggle to engage with segments of the sector that are less involved with equine associations.

Following concerted promotional efforts by EC and the support of the Advisory Committee, a reasonable segment of the Canadian equine sector was engaged to develop the findings of this study. It provides meaningful insights into the socio-economic impacts of the sector.

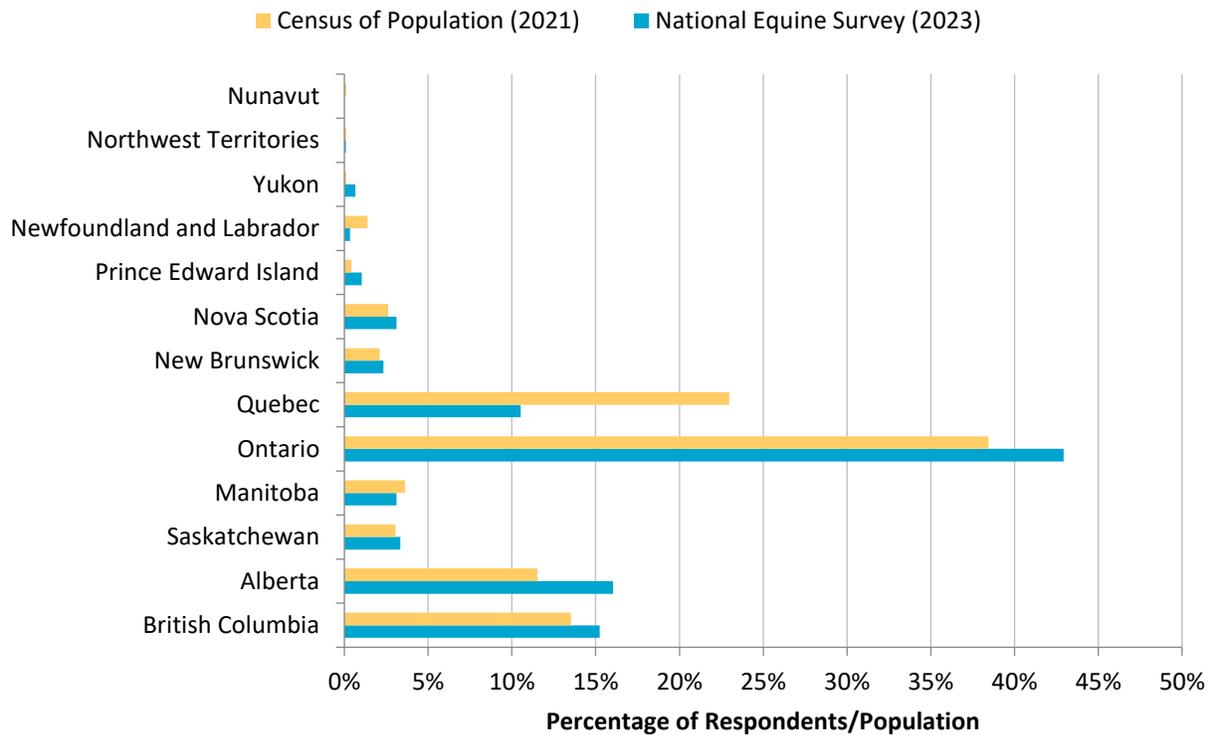


### 3. Results: About Canada’s Equine Sector

#### 3.1 People in the Equine Sector

A total of **4,263** people responded to the National Equine Survey in early 2023. Survey respondents identified how many people in their households participate in equine-related activities. In total, the survey represents **19,491** individuals participating in the Canadian equine sector.

People from across Canada responded to the survey. The distribution of survey respondents aligns quite well with the population distribution across Canada (Figure 7). Quebec was the only province that was underrepresented.



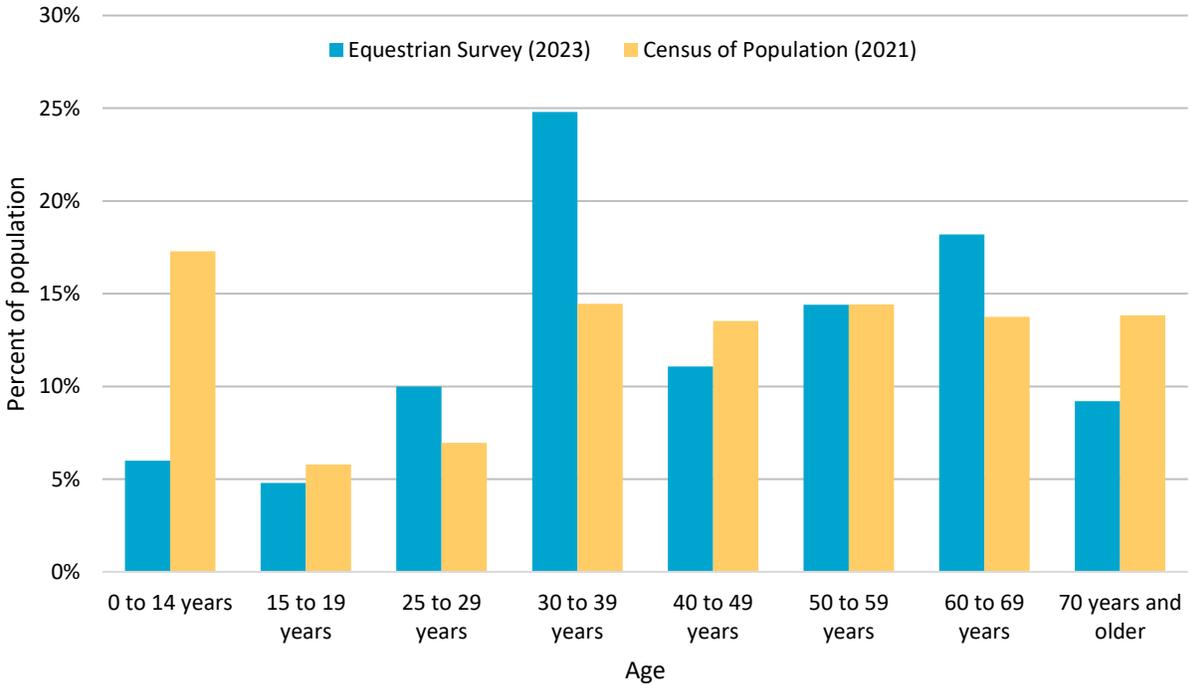
**Figure 7.** The percent of survey respondents’ location for primary equine activity compared to the population distribution across Canada (n=4,211).<sup>v</sup>

<sup>v</sup> No responses were collected from Nunavut. This graph includes all survey respondents based in Canada, as well as the survey respondents based in another country but who are actively engaged in equine ownership or activities in Canada.

Most survey respondents (92%) completed the survey in English. Of those respondents who completed the survey in French, most were in Quebec.<sup>vi</sup>

Most survey respondents are women (89%) who do not identify as a member of a racialized community (90%). In total, 6% of survey respondents identify as a member of a racialized community and 4% prefer not to say. 5% of survey respondents identify as Indigenous, First Nations, Metis, or Inuk (Inuit), which is consistent with the Canadian population.<sup>2</sup>

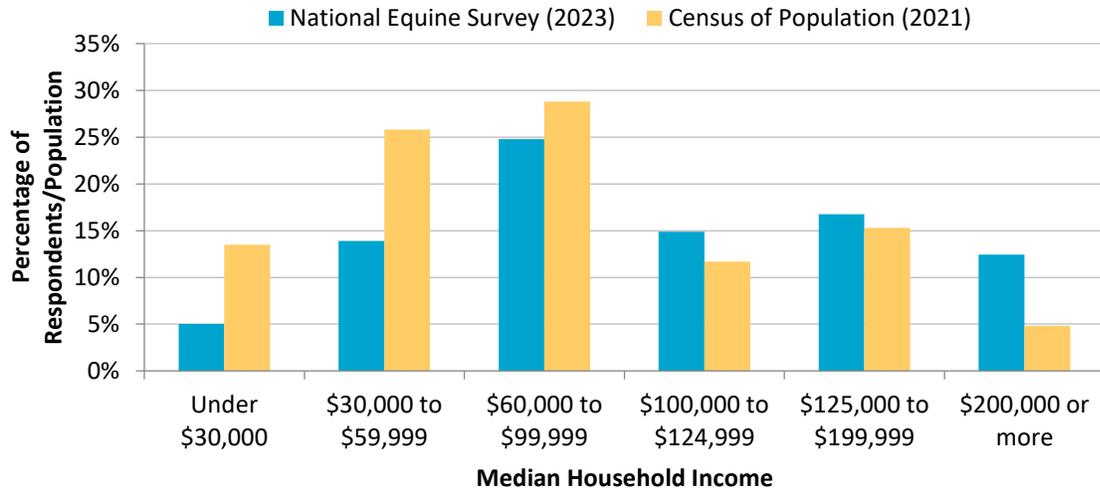
In terms of the age groups represented in the survey, youth (14 years and under) are underrepresented compared to the Canadian population (Figure 8). In contrast, the age brackets of 30-39 and 60-69 are overrepresented through the survey.



**Figure 8.** Equine sector involvement compared to the population of Canada by age (n=3,873).

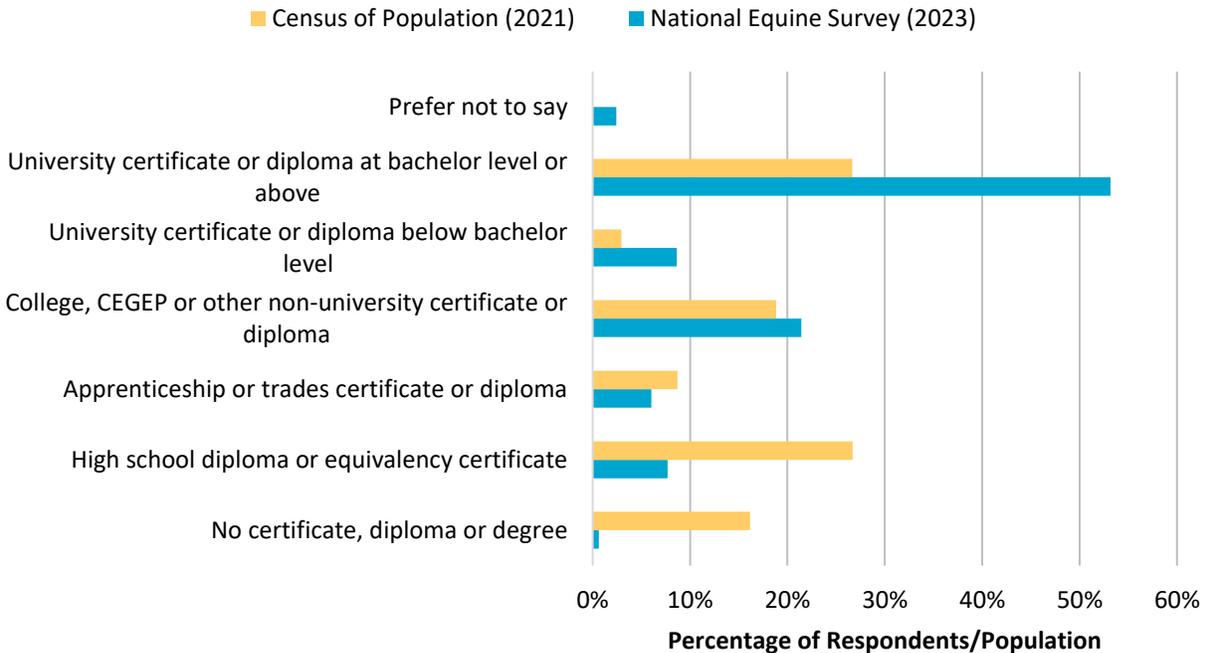
Survey respondents tend to fall in higher income brackets compared to Canadian averages. For example, only 44% of survey respondents have an after-tax household income of under \$100,000, compared to 68% of Canadians (Figure 9). In contrast, 12% of survey respondents have an income of \$200,000 or over, compared to only 5% of Canadians.

<sup>vi</sup> Some respondents in Alberta, British Columbia, New Brunswick, Nova Scotia, Ontario, Saskatchewan, and the Yukon also completed the survey in French.



**Figure 9.** Percentage of respondent's household annual after-tax income (n=3,823).

Survey respondents also tend to have a higher level of education compared to the Canadian population more generally. About half (53%) of respondents hold a university certificate or diploma at the bachelor level or above compared to 27% of Canadians (Figure 10).



**Figure 10.** Highest level of education in survey respondents' households compared to that of the Canadian population (n=3,871).

Survey respondents' most common roles in the equine sector are:<sup>vii</sup>

- Recreational participant (69%)
- Amateur sport competitor (61%)
- Coach/trainer (23%)
- Equine facility owner and/or operator (15%)
- Farmer/rancher (12%)
- Professional sport competitor (12%)
- Breeder (11%)
- Event organizer and/or event facility owner/operator (11%)
- Equine facility staff (11%)
- Other (e.g., volunteer, education sector, retired, parent to rider) (7%)
- Official (7%)
- Equine health practitioner (6%)



---

<sup>vii</sup> Respondents could select all roles that apply.

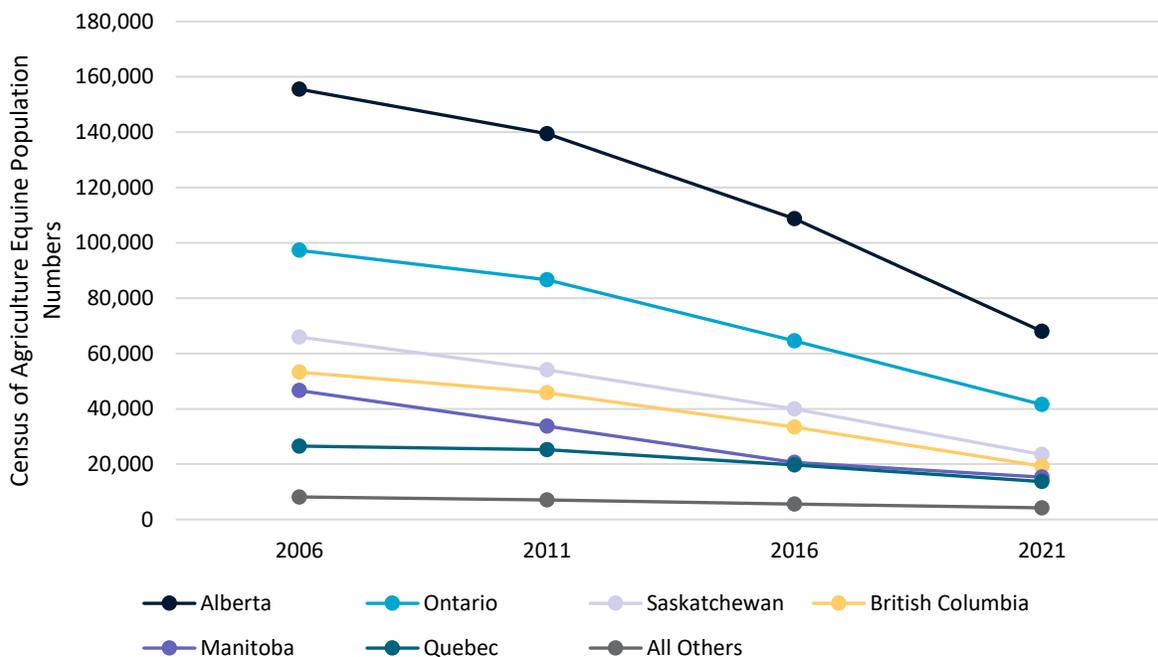
### 3.2 Equine Population

The Census of Agriculture has reported a decrease in the equine population across Canada since 2006 (Table 1). Between 2006 and 2021, an increase occurred in the rate of declining equine population kept on reporting farm properties.

**Table 1.** Canadian equine population according to the Census of Agriculture, 1991 to 2021.

	1991	1996	2001	2006	2011	2016	2021
Canada	356,204	443,889	460,569	453,965	392,340	291,561	183,733

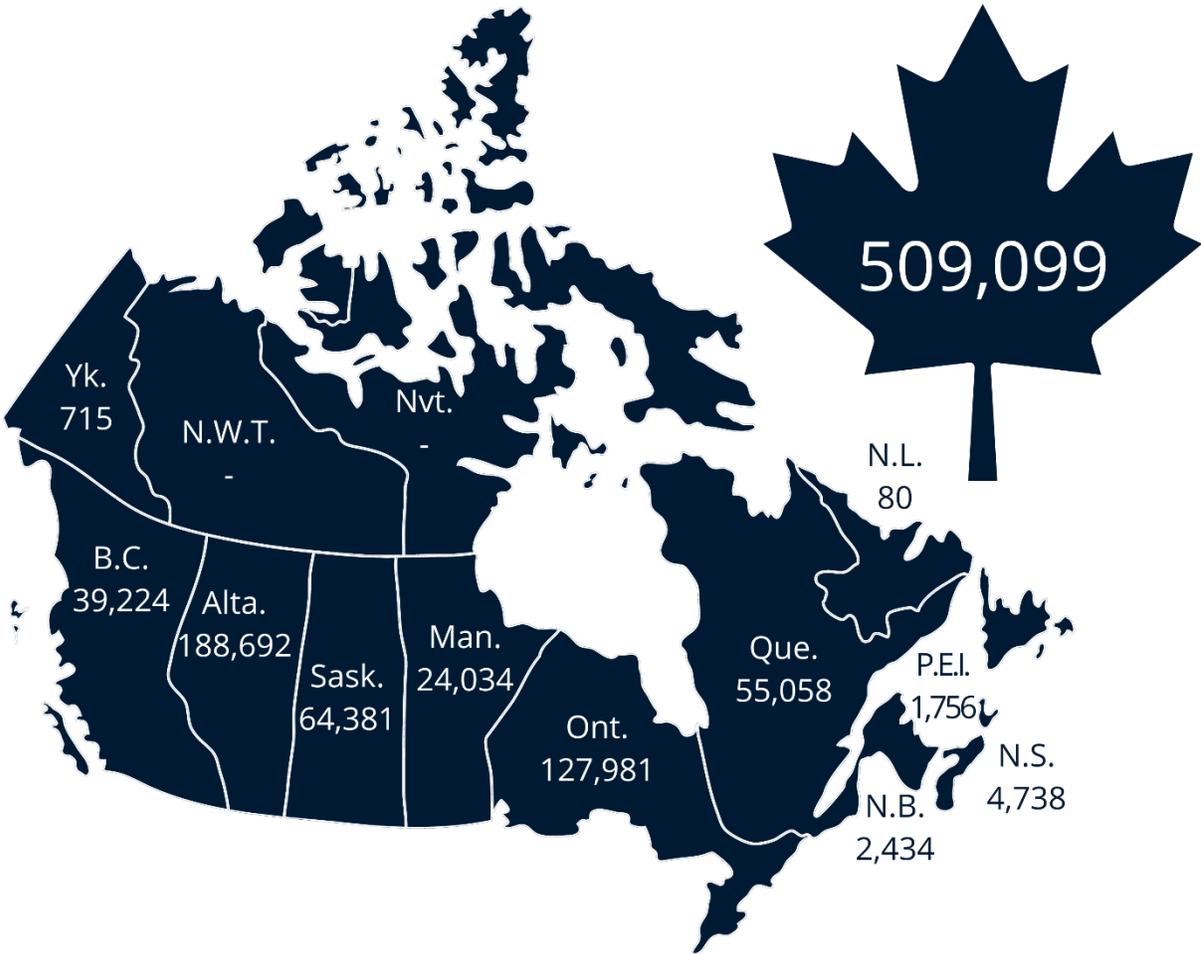
In 2021, Statistics Canada reported 183,733 equines on Census-defined farmland in Canada. Alberta reported the largest equine population of all provinces, followed by Ontario (Figure 11).



**Figure 11.** Census of Agriculture reported equines by province in Canada between 2006 and 2021.

However, the Census only captures part of the Canadian equine population. Compared to the 2010 Canadian Equine Industry Profile Study population multiplier of 2.3, the higher population multiplier for this study (2.8) indicates a shift towards more equines being kept on non-farm (Census defined) properties.

In total, including equines kept on farm and non-farm properties, Canada had an estimated **509,099** equines in 2021 (Figure 12).<sup>viii</sup> The provinces with the highest number of equines were Alberta, followed by Ontario, Saskatchewan, and Quebec.



**Figure 12.** Estimated 2021 equine population by province.

<sup>viii</sup> Given the survey response, the 95% confidence interval for the population estimate of this study is 478,269 to 545,136. In other words, 19 times out of 20, using a sample of industry respondents would result in an estimated equine population within the above range.

## Equine Population by Primary Activity

Though equines often hold overlapping roles (e.g., breeding, racing, and recreational activities), equines were classified in one of seven primary activities to allow for more detailed analysis (Table 2).

**Table 2.** Percent of Canadian equines within each activity category.<sup>ix</sup>

Primary Activity	% of Equine Population
<b>Recreation</b> e.g., trail riding, companion, pleasure driving, and other recreational uses	28%
<b>Amateur sport</b> Actively involved in regular riding lessons and training	24.5%
<b>Working</b> e.g., lessons, trail operations, ranching, carriage tours, etc.	19%
<b>Breeding</b>	14%
<b>Professional sport</b> Derive at least a portion of income from such activities as training, coaching, and competing	8%
<b>Elite sport</b> e.g., high performance teams, Olympics, International Federation for Equestrian Sports (FEI), etc.	4%
<b>Racing</b>	2.5%

The top three activities Canada’s equines participate in are recreation (28%), amateur sport (24%), and working (19%). In total, 36% of equines participate in amateur, professional, or elite sport.

See Appendix D for more equine sector statistics, including:

- ✓ Annual equine-keeping costs by primary activity and province;
- ✓ Average equine values by primary activity, province, and form of ownership; and
- ✓ Percentage of equine owners who compete in equine events.

<sup>ix</sup> See Appendix D for a detailed provincial breakdown of each primary activity category.

## 4. Economic Impact Analysis

The direct expenditures, or costs incurred by people involved in the sector, are used to estimate the upstream indirect impacts, and induced impacts of the sector. It is important to avoid including costs for industry activities that serve as inputs for each other. To do so would be counting some industry activity within both the direct and indirect impacts, which would be double counting economic activity. Double counting was avoided by considering equine-keeping costs and the costs of additional equine activities that do not serve as an input for equine owners.

To learn more about the economic impacts of the Canadian equine sector, see Appendix E.

### 4.1 Equine-keeping

Equine-keeping costs are incurred to maintain and train equines for their primary activities. Equine-keeping costs can be broken down into 16 cost categories.<sup>x</sup> These costs vary widely depending on the primary activity of the equine. For example, on average, an equine primarily used for amateur sports has twice the annual expenditures than working equines.

The total amount spent on equine-keeping costs for elite sport equines was almost three times higher than the costs for equines kept for breeding and working equines.

For all equines in Canada, the highest equine-keeping expenses are feed, travel, and other equine care products and service (Table 3).<sup>xi</sup> The total amount of money spent on equine-keeping in Canada in 2022 amounts to over \$8.3 billion in 2022.

The total amount spent on equine-keeping costs for elite sport equines was about two times higher than the costs for equines kept for recreation.

***~ More than \$1.1 billion was spent on feed for equines in 2022. ~***

---

<sup>x</sup> For a complete list and definition of the categories, see Appendix D.

<sup>xi</sup> Other equine care products and services includes all equine wellness services and product expenses not included with the feed or veterinarian and farrier care categories. These products and services include dewormers, various equine therapy services, and specialized training for sport and working equines.

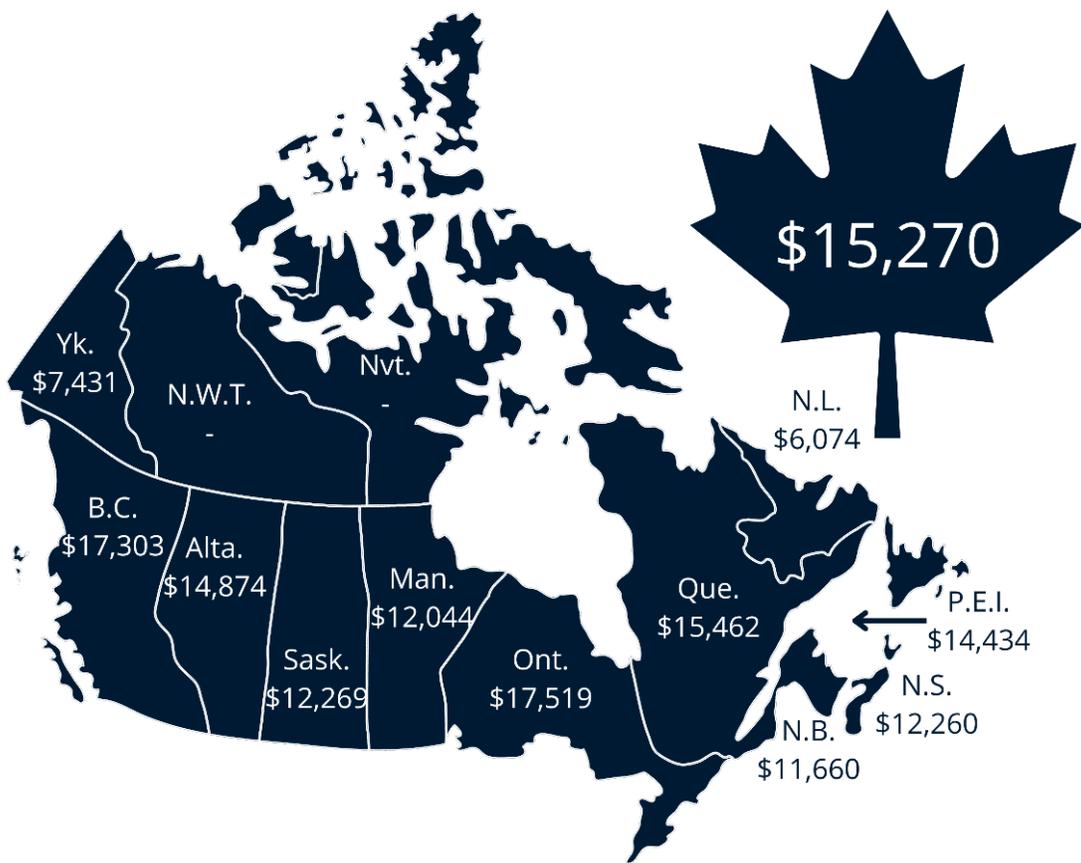
**Table 3.** A breakdown of equine-keeping direct expenditures by category.

<b>Expenditure category</b>	<b>Percent of total expenditure</b>
<b>Feed</b>	13%
<b>Travel (i.e., fuel and all vehicle and trailering costs)</b>	11%
<b>Other equine care products and services</b>	10%
<b>Veterinary care</b>	10%
<b>Hired labour</b>	8%
<b>Farrier care</b>	7%
<b>Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)</b>	7%
<b>Clothes, facility tools and supplies (e.g., wheelbarrows, brooms, etc.), and other (e.g., manure disposal, supplements)</b>	6%
<b>Equipment repair and maintenance (e.g., mowers, harrows, etc.)</b>	5%
<b>Annual capital costs for all buildings and fences</b>	5%
<b>Insurance</b>	4%
<b>Bedding</b>	4%
<b>Annual capital costs for all equipment required</b>	4%
<b>Tack</b>	4%
<b>Total direct expenditures</b>	<b>\$ 8,324,538,964</b>

Equine-keeping costs also vary notably across the country (Figure 13 and Appendix D). The highest average annual costs occur within Ontario and B.C. due, in part, by higher overall provincial costs consistent across the primary activity categories. The higher average costs are also driven by the greater portion of equines within these provinces that participate in amateur, professional, and elite sports, which raises the representation of these higher costs within the average provincial cost.

The average Canadian annual equine-keeping cost was over \$15,000 per equine in 2022.

On average, Canadians who board their equines spend anywhere from \$455 (in PEI) to \$897 (in Ontario) per month per equine, depending on province (Appendix D).



**Figure 13.** Average Canadian annual equine-keeping costs in dollars in 2022.

## 4.2 Equine Activities

For the purposes of this study, equine activities include major and minor equestrian events, riding lessons, camps, and equine-assisted services.<sup>xii</sup>

Equine events require expenditures by the event operators, participants, and spectators. For all equestrian events in Canada in 2022, the total direct expenditures were over \$662 million. Accommodations for attendance at these events accounts for about half of the total direct expenditures, while food accounts for about 45% of the expenditures.<sup>xiii</sup>



In 2022, Canadians spent over \$662 million on equestrian events. Most (95%) of this expenditure was on food and accommodations while attending the event.

Stables or other businesses offering riding lessons, camps, and equine-assisted services provide facilities and equipment specific to the service and use specialized labour to offer the service. Like events, a significant portion of the costs are for equine-keeping, which are accounted for within the equine-keeping direct expenditures. For equine-assisted services, riding lessons, and camps, direct expenditures can be grouped into three categories:

- Facility costs,
- Equipment costs, and
- Labour.

Total direct expenditures from riding lessons, camps, and equine-assisted services were over \$63 million in 2022.

***~ In 2022, labour contributed to 92% of total direct expenditures for equine-assisted services in Canada. ~***

---

<sup>xii</sup> Training and coaching costs do not require separate analysis as they have been captured within the equine-keeping expenditures for sport and working equines. Outfitting is an additional service not captured within this analysis. Neither reliable data on the number of service providers across Canada, nor adequate survey responses were available to defensibly estimate this contribution to the economic impacts of the industry. It was therefore left out of the estimate to ensure the economic impacts are conservatively and defensibly calculated.

<sup>xiii</sup> For a complete list of direct expenditures associated with events, please see Appendix E.

## 5. Strengths, Challenges, Opportunities and Risks

A strengths, challenges, opportunities, and risks assessment was conducted for the Canadian equine sector (Figure 14). While the sector faces a number of challenges and risks, it can leverage its strengths and opportunities.



**Strengths:** Positive characteristics that the sector has some level of control over

- Equines are good for people
- Equines are good for the economy
- Equines are good for the environment



**Challenges:** Issues that the sector has some level of control over and

**Risks:** Issues that are outside of the sector's ability to influence

- Barriers to entry and participation for competitors and equine enthusiasts
- Barriers to sector development
- Ensuring high-quality equine care
- The impacts of the COVID-19 pandemic



**Opportunities:** Factors that could give a sector an advantage

- Overcoming barriers to entry and participation for competitors and equine enthusiasts
- Overcoming barriers to sector development
- Strengthening equine care

**Figure 14.** Strengths, challenges, opportunities, and risks for the Canadian equine sector.



## 5.1 Strengths

The strengths of the equine sector can be categorized in three ways: equines are good for people, the economy, and the environment (Table 4). Industry participants highlighted the value of equines for the physical and emotional well-being of Canadians as one of the top strengths of the sector.

**Table 4.** Summary of the strengths of Canada's equine sector.

Theme	Strengths
<b>Equines are Good for People</b>	Equines are good for our health and well-being Equine-assisted therapy: A unique form of healthcare
<b>Equines are Good for the Economy</b>	Economic driver Value of land used for equestrian activities Rural sport and recreation
<b>Equines are Good for the Environment</b>	The equine sector provides ecological goods and services Equines connect urban and rural areas





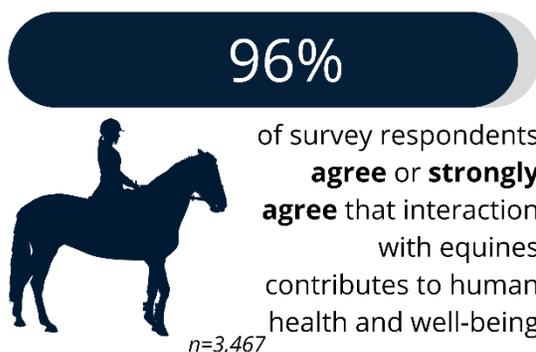
## Equines are Good for People

Equines are good for people's health and well-being. Equines have both physiological and psychological benefits that contribute to people's health and well being. For example, the American Heart Association lists six benefits of horseback riding on heart and overall health:<sup>3</sup>

- Good cardiovascular workout,
- Improves core strength,
- Burns calories (45 minutes of riding at a walk can burn up to 200 calories, and higher intensity riding techniques can burn approximately seven calories per minute),
- Lowers blood pressure (and consequently, reduce the risk of heart disease),
- Helps build decision-making skills, and
- Helps riders relax.

Participation in the equine sector encourages people to maintain their physical health; being physically fit enables riders to better participate in the sport and to continue their participation later in life.

The health benefits of riding extend beyond physical well-being. Involvement with equines can be a life-long activity that promotes social and mental well-being too. Benefits include spending time outside, interacting with sentient animals, and spending time with friends who share your interests.



When interviewees were asked how people benefit from participating in the equine sector, the top two themes were:

- The animal-human relationship (78%)
- The learning opportunities (e.g., responsibility, empathy, etc.) associated with relationships with equines (62%)





People participate in a range of equine associations or clubs, including:

- EC;
- Provincial/Territorial Sport Organizations (PTSOs); and
- Sport-specific, breed, or recreational associations or clubs.

Participation in EC and PTSOs provides interested individuals access to competitions. The benefits of participating in associations and clubs can be much further-reaching, too.

Participating in riding can put children and youth on a positive course towards lifelong healthy habits. Lifelong benefits of children and youth participating in sport include:

- Positive childhood development in areas like social skills and relationship building,
- Reducing risky and violent behaviours, and
- Relationship building with adult role models.<sup>4</sup>

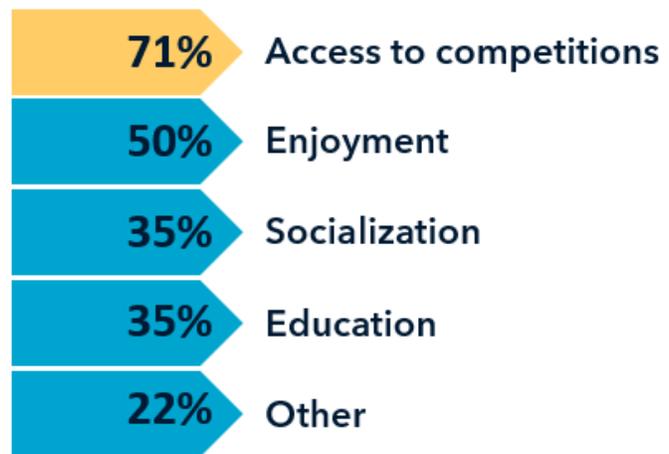
Participation in sports also supports children’s self-esteem and self-confidence.<sup>5</sup>

### The Urban Horse Project

The Urban Horse Project, located in Vancouver B.C., is a program based on the Cartier Equine Assisted Learning Model. Instructors bring equines into metro Vancouver for school-aged children to participate in weekly training and problem-solving activities. The program gives students a sense of connection to nature, helps build confidence and self-esteem and teaches valuable life skills like communication, teamwork, and empathy.



### Why survey respondents participate in equestrian associations and clubs



n=3,175



People can experience physical and emotional benefits by participating in the sector in many ways – each of which offer opportunities to interact with equines.

**~ See Appendix F to learn more about the various equestrian disciplines and equine-assisted services. ~**

“There are so many access points that are so diverse. You can volunteer, and you can ride competitively. There are different ways to ride an equine and be involved.”

- Interviewee

**Canadians have many opportunities to get involved in the equine sector, including:**

- RECREATIONAL ACTIVITIES**
- COMPETITIONS**
- VOLUNTEERING**  
at industry **SHOWS** and **EVENTS** or with **EQUINE-ASSISTED THERAPY** programs
- EMPLOYMENT**
- Attending shows and events as a **SPECTATOR**
- PARTICIPATING** in an equine-related, sport-specific, breed, or recreational **ASSOCIATIONS/CLUBS**



## Equine-Assisted Services: A Unique Form of Healthcare

Equine-assisted service providers help people manage mental and physical disabilities. Equine-assisted services can also be beneficial for people who are unable or do not want to participate in talk therapy.<sup>6</sup>

Equine-assisted services can help people:<sup>7</sup>

- Build physical strength,
- Escape from sensory overload,
- Improve mood by relaxing and calming,
- Feel a sense of empowerment and control,
- Build self-esteem and confidence,
- Identify and process feelings,
- Develop work ethic, and
- Learn to build trust.

Riders participating in equine-assisted services increase their “confidence, core strength and balance.” Participants also develop a feeling of accomplishment through their activities.

- Interviewee who is a Canadian Therapeutic Riding Association certified coach

Evidence suggests that equine-assisted services improve health and well-being<sup>xiv</sup> amongst specific populations, including:

- At-risk Indigenous youth and at-risk youth more broadly,<sup>8</sup>
- Children with behavioural challenges,<sup>9</sup>
- Youth with mental health disorders and/or learning disabilities,<sup>10</sup>
- People with autism,<sup>11</sup>
- Survivors of trauma and/or abuse,<sup>12</sup>
- Veterans,<sup>13</sup>
- People with substance abuse disorders,<sup>14</sup>
- People who are incarcerated,<sup>15</sup> and
- The elderly.<sup>16</sup>

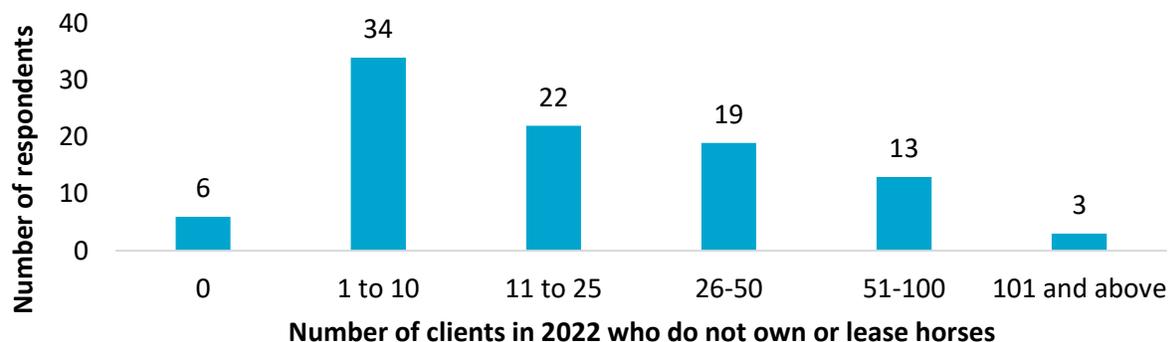
***~ Equine-assisted services can take many forms, including riding, grooming, petting, feeding, and walking alongside equines. ~***

---

<sup>xiv</sup> The definition of “health” and “well-being” varies by study.



Equine-assisted services can introduce people to equines who otherwise would not have access to these animals. On average, equine-assisted service providers work with 42 clients who do not own or lease equines (Figure 15).



**Figure 15.** Number of clients that equine-assisted services providers worked with in 2022 who do not own or lease equines (n=101).

A 2018 evaluation study on an equine-therapy program for veterans and their spouses found that couples engaged in equine-assisted therapy reported significantly fewer symptoms of:

- Depression,
- Stress, and
- Post-Traumatic Stress Disorder.

Source: Romaniuk M, Evans J, Kidd C. [Evaluation of an equine-assisted therapy program for veterans who identify as 'wounded, injured or ill' and their partners](#). PLoS One. 2018 Sep 27; 13(9).





## Vignette: The Canadian Therapeutic Riding Association & the Creston Valley Society for Therapeutic Horsemanship

In Canada, the Canadian Therapeutic Riding Association (CanTRA) serves as the governing body for therapeutic riding. Interested individuals can become certified CanTRA instructors, and centres can also achieve CanTRA accreditation.

The Creston Valley Society for Therapeutic Horsemanship, located in Creston, B.C. is one such CanTRA accredited centre. The Centre operates from the spring through the fall annually. Over the course of the year, the centre serves 90 individuals. The Centre offers both mounted and unmounted activities for people with physical, cognitive, and/or mental health conditions. At Creston, “mind, body and soul benefit from time with horses.”

The Centre offers in-house shows and competitions to make the activities accessible for its participants.

The Centre operates on a charity model to help ensure its programming is financially accessible.



CanTRA photo

### Key Takeaways

- Equine-assisted services are crucial to increasing the accessibility of equestrian activities.
- Charity and not-for-profit models help to ensure the affordability of equestrian programming.



## Equines are Good for the Economy

### Economic Driver

The economic contributions of equines go far beyond equines and riders. Several industries both support, and benefit from, the equine sector.

**49%** of survey respondents either agreed or strongly agreed that the Canadian equine sector is an economic driver.

Nationally, Canadians spend more than \$8.3 billion on equine-keeping expenses. This expenditure helps drive economic activity across the country.

The equine sector is also a part of the broader agri-tourism sector, which is a growing segment of local tourism and recreation across rural Canada.<sup>17</sup> Trail riding, for example, draws local and non-local visitors to explore parts of rural Canada with guided tours of natural areas by horseback.

Larger equine sport venues serve as economic drivers in rural communities across Canada. A ‘cluster’ effect is often evident; large competition venues often serve as a focal point for other equine facilities to be located nearby. Such “clustering” can be seen, for example, near:

On average, every dollar spent by equine owners and other industry participants on their equines or for equine activities results in \$2.66 of total product and service sales within the Canadian economy.

- Thunderbird Show Park in Langley, British Columbia;
- Spruce Meadows in Calgary, Alberta;
- Angelstone Tournaments in Erin, Ontario;
- Caledon Equestrian Park in Caledon, Ontario;
- Wesley Clover Parks in Ottawa, Ontario; and
- Bromont International in Bromont, Quebec.

When large competition venues host events, economic spin-offs are abundant.

### **Economic Impact**

In 2022, the equine sector contributed:

- \$24.21 billion to the Canadian economy
- \$8.69 billion to Canada’s GDP
- 70,997 full-time equivalent jobs to the Canadian economy
- Over \$894 million in tax revenue for provincial and federal governments

The equine sector represents about one in every 200 people employed in Canada.



### Vignette: Spruce Meadows

Thirty minutes south of downtown Calgary lies Spruce Meadows, an internationally renowned venue for show jumping tournaments for junior, amateur, and professional athletes. In addition to premier tournaments and events, Spruce Meadows hosts highly anticipated annual events such as the February Classic, Winter Farewell, Spring Welcome, and May Classic. Premier tournaments like the 'Continental,' 'Pan American,' 'North American' and 'Masters' can be seen at Spruce Meadows.

Spruce Meadows also hosts activities and events for the public. These events include the International Christmas Market, arts and crafts shops and local vendors, and a playground for children. Spruce Meadows also hosts private functions and events.

#### Within a 20-minute drive of Spruce Meadows:

- More than 40 restaurants, and
- 17 hotels.<sup>xv</sup>

#### Key Takeaways

- Premier equestrian event facilities serve as economic drivers in their communities.
- These facilities support a range of social and cultural activities, too.

<sup>xv</sup> This figure does not include bed and breakfasts or Airbnb options.

Calgary's Spruce Meadows Christmas Market 2022: Spectacular Displays, Entertainment and 300+ Vendors  
Published by To Do Canada On October 28, 2022. Leave a response



Start your Christmas shopping at the International Christmas Market sponsored by TELUS.



Spruce Meadows

#### World's best riders head to Spruce Meadows for penultimate show jumping major of 2022

SPORT NEWS 07-09-2022



#### This Calgary Christmas Market Was Ranked As One Of The Best To Visit In The World (PHOTOS)

You can even see some real-life reindeer.



Charlie Hart  
Calgary Staff Writer

0 comments

Nov 18, 2022, 4:00 PM





## Value of Land Used for Equestrian Activities

The land associated with equines also holds economic value. In 2022, for example, the value of pastureland in Western Canada increased in value by as much as 18.5% in Manitoba and 5.5% in Alberta.<sup>18</sup> However, the increasing value of land used for equestrian activities also poses risks for the sector. (See Section “[Land Availability and Cost](#)”).

Most equine facility owner/operator respondents (72%) have operations under 130 acres in size, and about half (55%) of the operations are less than 70 acres (Table 5).

**Table 5.** Property sizes of survey respondents who own/operate equine facilities and/or farms/ranches (n=656).

Property Size	Survey Respondents (%)	Census of Agriculture, 2021 (%) <sup>19</sup>
Under 10.00 acres	12%	7%
10.00 to 69.99 acres	43%	17%
70.00 to 129.99 acres	17%	12%
130.00 to 179.99 acres	9%	10%
180.00 to 239.99 acres	3%	5%
240.00 to 399.99 acres	5%	11%
400.00 acres and over	16%	36%

**Survey respondents who own/operate equine facilities and/or farms/ranches have a total of 155,185 acres. This total acreage is only slightly smaller than the [City of Toronto](#)!**

## Rural Sport and Recreation

Given the space necessary for equine sport and recreation, as well as the historical roots of many of the disciplines, this sector is largely connected with rural communities. Although some equine facilities are in urban areas, facilities are typically in rural, or near-urban areas.<sup>xvi</sup>



of survey respondents **agree** or **strongly agree** that the Canadian equine sector contributes to rural community sport and recreation



n=3,456

<sup>xvi</sup> Examples of facilities located in urban areas include the [Southlands Riding Club](#) in Vancouver, British Columbia, [Lancers](#) in Halifax, Nova Scotia, and the [Urban Horse Project](#) in Vancouver and Burnaby, British Columbia.



## Equines are Good for the Environment

### Ecological Goods and Services

Equine farms and facilities provide several environmental benefits, including:

- Pasture lands support ground-water recharge areas, soil fertility and surface water control; and<sup>20</sup>
- Pasture lands, hedgerows, and woodlots support wildlife habitat.

Equines pastured with cattle can support pasture, grassland, and parasite management. The two types of livestock eat different grasses, which decreases the need to mow pastures.<sup>21</sup> The presence of parasites is typically also decreased.<sup>22</sup>

Beyond ecological goods and services, equine facilities contribute to the visual aesthetic of rural communities. Equine facilities can play an important role in the cultural heritage of rural places.<sup>23</sup>

40%

of survey respondents **agree** or **strongly agree** that the Canadian equine sector provides ecological goods and services

*n*=3,456



### Connecting Urban and Rural Areas

Equine services and equine operations are a viable option for agricultural land, especially when a “sufficient” population density is within an easy travelling distance to the facility.<sup>24</sup> Studies in Ontario and parts of Europe (e. g., Ireland and France) have found that the density of equine facilities is higher in near-urban areas than in more rural and remote areas where other primary agricultural activities are more prevalent.<sup>25</sup>

52%

of survey respondents **agree** or **strongly agree** that the Canadian equine sector connects rural and urban areas

*n*=3,456





Using equine farms as a “buffer” between urban and agricultural uses could:

- Reduce land-use conflicts between agricultural and non-agricultural uses;
- Protect established farms from threats of urban sprawl and encourage intensification in built-up areas; and
- Increase awareness of normal farming activities.



Equine farms can play a buffering role between urban and rural areas as these farms are generally an unobtrusive and aesthetically pleasing land use. Conflicts between urban and rural residents often center on topics such as noise, smells, dust, trespassing, and nuisance complaints. Equine farms typically have limited use of heavy farm equipment and, if well-managed, maintain a permanent green cover in the form of pastures and hay fields. As a result, equine farms are generally positively perceived by urban populations, help maintain relationships between urban living and rural culture, and present fewer land use conflicts than between urban and production agricultural uses.<sup>26</sup>

People living in urban centres seek out horseback riding or therapeutic opportunities in the countryside. These activities can also have local economic spin-off effects for other farm businesses (e.g., roadside fruit and vegetable stands, farm stores) and local businesses (e.g., restaurants, tack stores, etc.).

As farmland loss continues to be a challenge for Canada’s agricultural industry,<sup>27</sup> some municipal planners and policymakers are searching for solutions to urban growth while protecting agricultural land. For example, the City of Kelowna’s Agricultural Plan recommends a transition-to-farming designation to reduce land use conflicts between urban and agricultural uses. In Kelowna, B.C., this designation is recommended for within urban boundaries, but within 300 feet of agricultural uses. A recent study published by the Town of Caledon in Ontario explores the opportunity to explore a similar transition-to-farming designation for the agricultural land that is just outside of urban boundaries. This transition zone could include forms of agriculture such as equine farms that co-exist well with non-agricultural uses.<sup>28</sup>

“There is disconnect between urbanites and all facets of agriculture. Equines have the potential to draw people in, educate them, and thus reconnect them to agriculture.”

– Survey respondent



## 5.2 Challenges and Risks

The challenges and risks the Canadian equine sector faces can be grouped into four themes (Table 6).

While challenges are internal to the sector and risks are external, overlaps can exist between the two types of issues. For example, a challenge might be insufficient standards for animal care, while a risk might be the public trust associated with animal care. The sector can set higher standards for animal care but has little influence over the public's perceptions of animal well-being. As a result, issues such as public trust and animal welfare are presented as both challenges and risks for the sector. In this context, public trust means that people outside of the equine sector believe sector participants properly care for equines.

People involved in the equine sector identified the cost of participation, coupled with the required time commitment, as the most pressing challenge. It also poses a risk to the sector due to the barrier to participation it creates.





**Table 6.** Challenges and risks for the Canadian equine sector.

Theme	Sub-Theme	Challenge	Risk
<b>Barriers to Entry and Participation for Competitors and Equine Enthusiasts</b>	Expense, access, and time	✓	✓
	Equity, diversity, and inclusion	✓	✓
	Availability of skilled labour	✓	✓
<b>Barriers to Sector Development</b>	Professional development and education (e.g., for barn owners, participants, coaches, etc.)	✓	
	Training, compensation, and availability of event officials	✓	
	Land availability and cost	✓	✓
	Access to support services (e.g., coaches, officials, veterinarians, etc.)	✓	✓
	Equine activities not recognized as agricultural activities	✓	✓
	Public trust and animal welfare	✓	✓
<b>Ensuring High-Quality Equine Care</b>	Traceability	✓	
	Biosecurity	✓	
	Climate change		✓
	Impact on skills development	✓	
<b>The Impacts of the COVID-19 Pandemic</b>	Change in clientele	✓	
	Equine sales	✓	✓
	Looking ahead in a post-pandemic world		✓



## Barriers to Entry and Participation for Competitors and Equine Enthusiasts

### Expense, Access, and Time

The expenses and time commitment associated with participating in the equine sector can present significant barriers.

Over half of respondents (55%) are extremely concerned about the impact of rising expenses on the future of the sector.

The time commitment and costs associated with participating in equestrian activities lead some individuals to take a break in participating in the sector. In total, 8% of survey respondents reported taking a break from participation.

Costs for participation in the sector vary depending on the specific activity. "If you just want to sign up for weekly lessons, it is comparable to most sports," one interviewee said. For example, the costs associated with starting horseback riding are consistent with learning tennis and a bit cheaper than hockey.<sup>29</sup>

However, the costs for competing can "become very expensive," the interviewee added. While many people

enjoy spending recreational time with equines, training and competition are also popular activities. (See Appendix G for a snapshot of equestrian competition in Canada.)

Equine sector participants are typically from higher socio-economic groups than the average Canadian.

44% of survey respondents had annual after-tax household incomes over \$100,000, in contrast to 32% of Canadians.

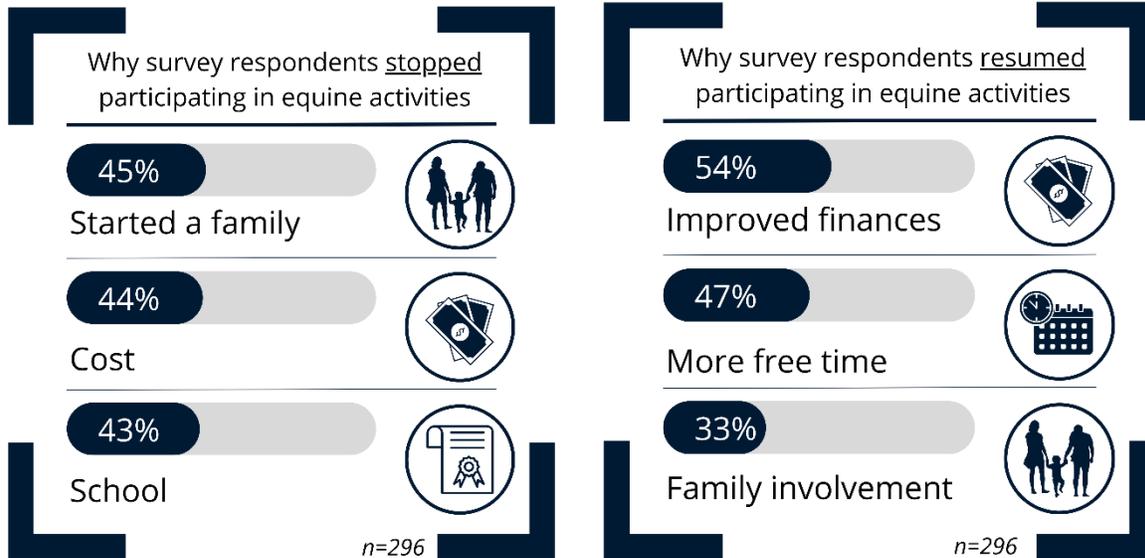
"If my parents hadn't been able to support me financially, I would have had to quit the sport a long time ago."

- Interviewee and equine sector competitor



n=3,467

of survey respondents **disagree** or **strongly disagree** that the cost to participate in equine activities is affordable for the average Canadian



Individuals from higher-income households may participate in more competitions and become more well-known to the judges.<sup>30</sup> Individuals from more wealthy families can also invest in the “best training, facilities, and equine partners,” and can devote more time to training and competition.<sup>31</sup>

**The 2022 rate of inflation in Canada averaged 6.8%, which was the highest increase recorded in 40 years.**

The equine sector must look for opportunities to help people continue to fully participate in equine activities despite the rising cost of living across Canada.

Another barrier to participation is access. It can be hard for people to get to equine facilities, as they are often located in rural areas without public transportation. One interviewee, for example, shared that she was able to take a bus to a farm in her area, but “these bus lines are not available everywhere.”

**Nearly 3 in every 4 Canadians live in one of Canada’s large urban centres.**

The equine sector should continue to identify ways to improve accessibility between rural facilities and urban participants.



## Vignette: Halifax Lancers

Halifax, Nova Scotia is home to Lancers, which is “Canada’s only urban non-profit riding school and equine therapy centre.” Since 1936, Lancers has made equines and riding accessible to people in Halifax. Lancers’ mission is to build better lives through horses.



The centre offers:

- A therapeutic riding program for 32 participants;
- Riding lessons for a diverse community of 170 juniors and adults;
- Equine-supported wellness programs;
- Public workshops and free community events such as pony rides and barn tours;
- A youth Musical Ride;
- 27 equines that are owned by the non-profit called the “Horses of Halifax;”
- National Coaching Certification Program-qualified instructors and EC Rider Level program curriculum; and
- Strong values: To develop skilled and capable horse people and shape riders into strong citizens who contribute to their community and the world. Horsemanship, Openness, Respect, Service, and Excellence (HORSE).

People of all ages are welcomed at Lancers; the centre has therapeutic riders as young as six, and other riders are in their mid-70s. Lancers’ adult beginner course enables people to learn to ride as seniors, which is uncommon in the industry.



Halifax Lancers photo

As Lancers are in downtown Halifax, transportation is not a barrier to participation. Many people take public transit, walk, and cycle to the stables. Lancers also strives to keep programs financially accessible. It offers bursaries for riders and employment opportunities for youth 14 years of age and older so that people from different incomes levels can enjoy the Horses of Halifax.

Lancers' programs help riders develop confidence, responsibility, and community-mindedness, and sustain their physical and mental health. Lancers empowers youth (primarily young females), teaches leadership, and fosters a sense of connection within the city. The programs Lancers offers are certainly popular, as they have a waitlist of over 1,000 people. To improve inclusion, diversity, equity and accessibility, management allocates spaces for individuals from traditionally marginalized groups and a fully funded rider. Then, management fills other spaces using a first come, first served approach.

At Lancers, the health and well-being of the equines is a top priority. The staff carefully select equines they think will be a good fit for the program and constantly monitor equines' happiness. If the city and school equine life is no longer suitable or positive for the equine, Lancers will find it an approved retirement home, often in the countryside. All the equines enjoy turnout two to four hours a day and are ridden a maximum of two hours per day. Two of the 27 equines are always on "vacation" in a rural setting. Staff rotate the equines to the rural setting on a schedule with the flexibility to give them extra breaks as needed. The entire herd also goes to a rural location for a summer camp with junior riders every August.

### Key Takeaways

- Innovative approaches to equine care can allow for the keeping of equine in more urban environments, which can increase the accessibility of the sector.
- An inclusion, diversity, equity, and accessibility lens should be used when welcoming new program participants.





## Equity, Diversity, and Inclusion

Equine sector participants have mixed views on the level of equity, diversity, and inclusion within the sector (Figure 16).

In terms of the equity and inclusion for different genders, sector participants commonly highlight that the “sport is as accessible to men as to women” and “that competition categories do not make gender distinctions.” However, sector participants also recognize that stigma exists around taking a break from competition to raise a family, for example.

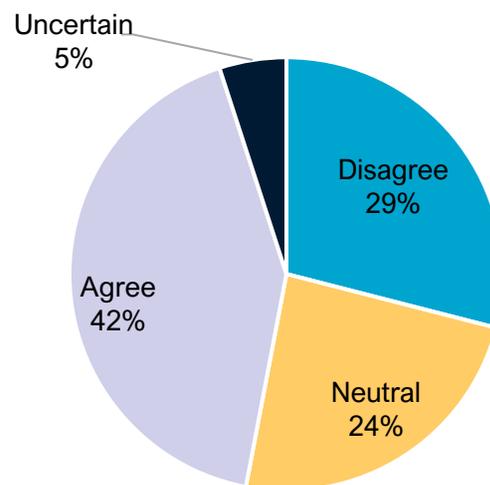
Both real and perceived barriers to entry exist. Some survey respondents, for example, noted that racial bias exists in the sector. The lack of diversity at competitions, as well as in sector publications and at events, can also make it difficult for traditionally underrepresented groups to picture themselves in the sector or to find mentors.<sup>32</sup>

“I wouldn’t say the sector is intentionally exclusive but, rather, historically elitist and uninviting.”

-Survey respondent identifying as a member of racialized community

The equestrian community is also not always welcoming of traditionally underrepresented groups and microaggressions occur.<sup>33</sup> For example, riding helmets might not be readily available for individuals who have their hair in micro braids or who wear hijabs, which can make people feel excluded. Membership forms may not include a non-binary option for gender.<sup>34</sup>

The sector is slowly working to increase its equity, diversity, and inclusion. For example, some survey respondents highlighted that the level of inclusivity can range dramatically depending on the specific stable, and that more diversity has been apparent at recent events.



**Figure 16.** Level of agreement with the statement the equestrian community is welcoming to people of differing backgrounds (n=3,467).



### **Current Equity, Diversity, and Inclusion Initiatives in the Canadian Equine Sector**

Increasingly, equestrian associations and people in the sector seek to address these challenges and ensure that the sector is more inclusive and accessible. EC is working on its Racial Equity, Diversity and Inclusion Initiative. Some provincial organizations, such as Horse Council BC, have implemented diversity and inclusion policies. Other organizations, such as the Manitoba Horse Council, have incorporated IDEA into their goals. Some organizations are also hosting education sessions. The Alberta Equestrian Federation, for example, held a webinar on increasing the inclusivity for the sector. Assessment tools are available to support LGBTQ inclusion in sports.



## Vignette: British Equestrian's Commitment to Equality and Diversity



British Equestrian, which is the United Kingdom's (UK's) governing body for equine sports, is one

organization striving to support IDEA in the equine sector. In June 2022, the organization released its British Equestrian and member body equality, diversity and inclusivity pledge.

British Equestrian's protected characteristics are:

- Age,
- Disability,
- Gender,
- Gender assignment,
- Marriage and civil partnerships,
- Pregnancy and maternity,
- Race,
- Religion or belief, and
- Sexual orientation.

The organization's IDEA initiatives and activities include:

- Equal Opportunities and Equality Policy which "seeks to encourage a more diverse participation and workforce." As part of this policy, British Equestrian will annually report on progress under its equality and diversity action plan. The organization will also complete an annual evaluation of the policy's effectiveness.
- Striving to achieve the Advanced Level of the Equality Standard: A Framework for Sport, which is a UK initiative to ensure equality for people with different characteristics.
- The development and enactment of a Diversity Action Plan, which outlines priorities for recruitment, engagement, and "developing a strong internal pipeline of diverse talent to populate decision-making" positions.
- Forming and leveraging the expertise of an Equality Engagement Group to help "improve equality and accessibility within equestrian sport."

### Key Takeaways

- Equine organizations around the world are serving as leaders in their communities in supporting IDEA.
- Pledges and policies are important steps in the pursuit of equality and inclusivity; these statements must be accompanied by tangible initiatives and activities to advance this work.



## Barriers to Sector Development

### Availability of Skilled Labour

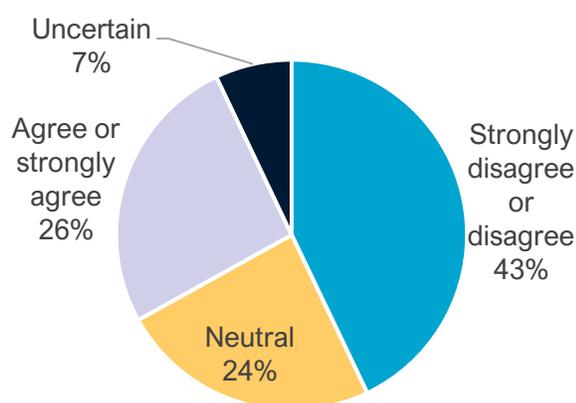
The Canadian equine sector faces challenges with staff recruitment and retention, and turnover is high.<sup>35</sup> Only about a quarter (26%) of survey respondents agreed the Canadian equine sector has access to sufficient well-trained workers (Figure 17); the largest grouping of respondents (43%) strongly disagreed or disagreed with this statement. Most interviewees who operate equine facilities and other equine businesses identified the ability to find and retain labour as a major challenge.

Caring for and training equines is labour intensive and physically demanding. Typically, pay is low and staff receive few benefits.<sup>36</sup> The pay does not justify the time and money individuals invest into relevant degrees, some interviewees said.

Workers often face the expectation of long hours without overtime or bonuses, and little vacation time; workers can feel “overworked and undervalued,” an interviewee said. It can also be challenging for workers to access the facilities, as many are not on public transit routes.

The regulatory protections for staff in the equine sector can be lower than the protections for individuals working in other sectors. In Ontario, for example, workers in stables are exempt from such Employment Standards Act provisions as regulations limiting work hours and guaranteeing lunch breaks.<sup>37</sup> Workforce challenges in the equine sector are not unique to Canada. Other countries, including the United Kingdom and Ireland, experience similar issues.

People involved in the sector highlighted the tight margins for equine facility owners and operators, as well as the high costs equine owners already pay for boarding, as “causing” the typically low wages. Several interviewees shared the importance of volunteers and discounted boarding rates in lieu of formally paying staff.



**Figure 17.** Level of agreement with the statement the Canadian equine sector has access to sufficient well-trained workers (n=3,436).

“Every equine facility, large or small, struggles to find reliable workers. With the near doubling of hay and feed costs, it is challenging to break even.”

- Survey respondent



Given the challenges associated with employment in the equine sector, people often work more than one job. For example, about two-thirds (68%) of survey respondents who work at equine facilities also work other jobs.<sup>xvii</sup>

### **The Ontario Equine Education & Employment Program**

To help address the labour shortage, the Ontario Equine Education and Employment Program began in January 2022. It involves a free six-week online training program, followed by a work placement. The Ontario government invested \$2.1 million in funding for the project, which was led by the Ontario Harness Horse Association with the assistance of Equine Guelph and local employers. The latter could receive wage subsidies to help cover training expenses for staff hired through the program.

The success of the program is demonstrated by “the high demand and overwhelmingly positive feedback from employers.”

### **Professional Development and Education**

The Canadian equine sector has a variety of educational offerings and resources to help people in the sector expand their knowledge base. Olds College, for example, offers an Equine Reproduction Technician Certificate, and students taking a Diploma in Technology Business Management at Dalhousie University can specialize in equine. At the University of Guelph, students can enroll in the Bachelor of Bio-Resource Management, which offers a specialization in equine management. The University of Guelph – Ridgetown Campus also offers a two-year associate diploma in equine care and management. EC’s offerings include its Coaching Program, as well the Learn to Ride/Drive program, which has streams for English and Western riding, as well as driving. Organizations such as the Horse Welfare Alliance of Canada, Olds College and Equine Guelph offer continuous learning opportunities to anyone interested in expanding their equine knowledge.

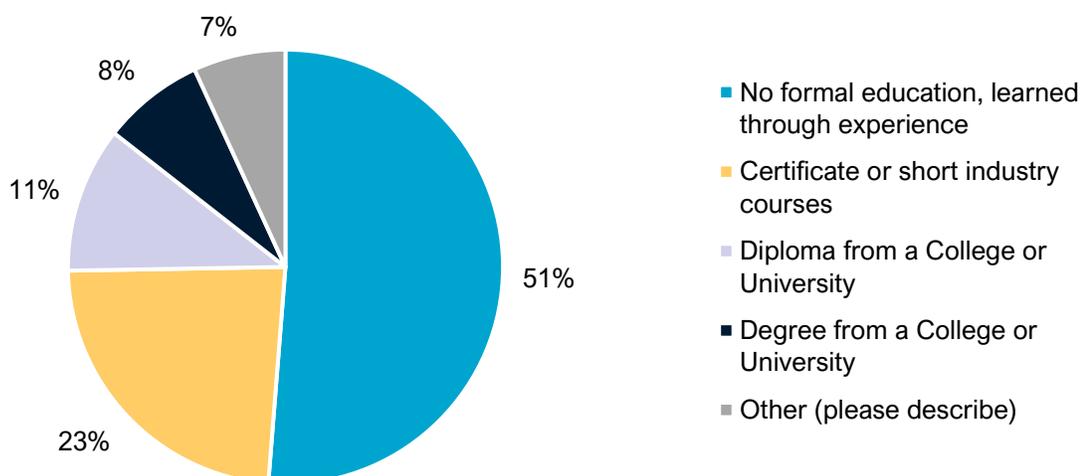
“I think the Canadian equine sector has made improvements toward standardizing education recently, such as the Learn to Ride and Coach Certification programs. But the cost and time commitment of these programs and the lack of availability of testers has made their impact very limited.”

- Survey respondent

<sup>xvii</sup> Over a third of respondents (38%) have full-time positions in addition to their work at equine facilities, while a quarter of respondents have part-time positions.



In addition to these formal learning opportunities, the Canadian equine sector has a tradition of passing knowledge from one generation to the next, survey respondents and interviewees said. For example, most survey respondents (51%) who work at equine facilities have no formal education related to the care and maintenance of equines (Figure 18). Rather, they learned through experience. While this informal approach to knowledge transfer can help to strengthen community, this approach can also lead people to be reluctant to change and apply the current scientific findings.



**Figure 18.** Level of education related to the care and maintenance of equines of survey respondents who work in equine facilities (n=277).

Individuals in more rural or less-populated provinces (e.g., New Brunswick) may have trouble accessing educational resources and in-person training, survey respondents said. The affordability of educational programs and resources is a barrier for many people, sector participants said. Even once someone completes their post-secondary education in an equine-related field, it may be difficult for them to recoup the costs. (See the section on the [Availability of Skilled Labour.](#)) Additionally, the large time commitment associated with some programs can serve as a deterrent.

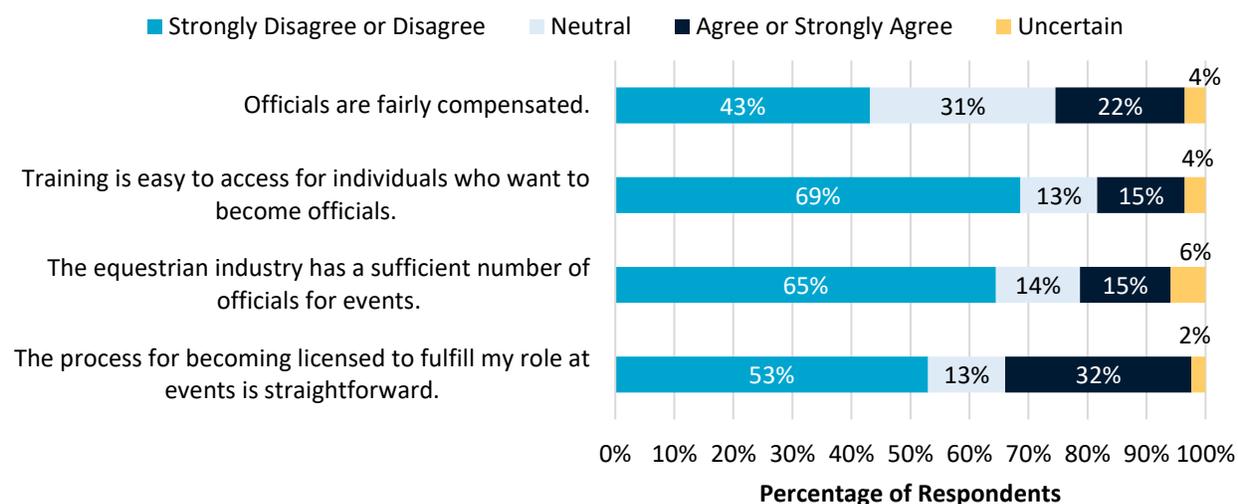
According to interviewees and survey respondents, priority areas for further education to support the sector include:

- Biosecurity practices,
- Horsemanship,
- Behaviour science,
- Animal welfare,
- Judging, and
- Business management.



## Training, Compensation, and Availability of Event Officials

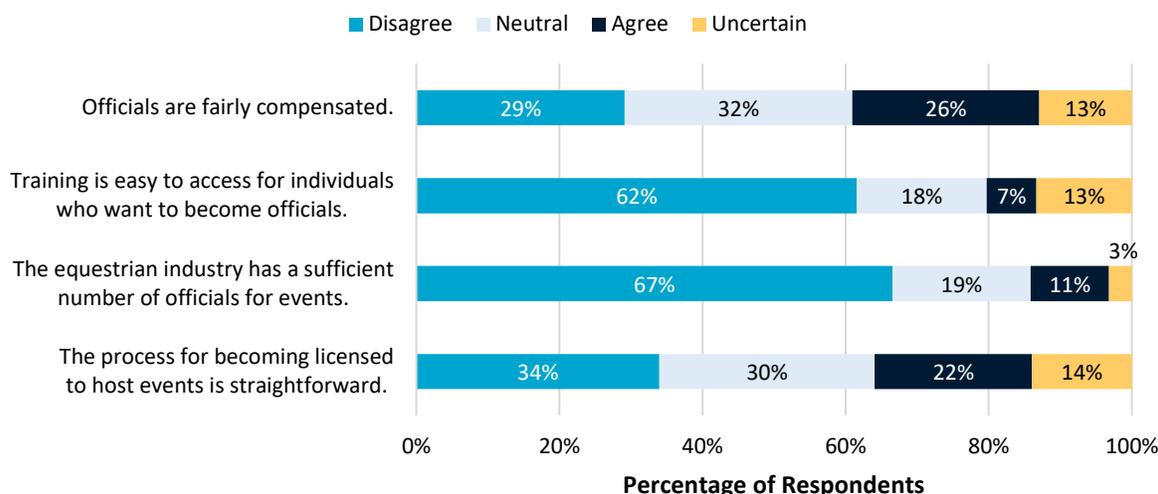
Event officials identified challenges related to training and compensation for this role. Most survey respondents who are officials disagree or strongly disagree that training is easy to access for individuals who want to become officials and that the process for becoming licensed to fulfill the role at events is straightforward (Figure 19). Only 22% of respondents agree or strongly agree that officials are fairly compensated. The concerns about training, compensation, and the licensing process might be contributing to the limited number of officials; only 15% of respondents feel that the equine sector has enough officials for events.



**Figure 19.** Event officials' level of agreement with statements about being an event official. (n=169).

Event facility owners/managers and competition organizers were slightly less critical; 29% of respondent either disagree or strongly disagree that officials are fairly compensated, while 45% are neutral or uncertain (Figure 20).





**Figure 20.** Level of agreement from event facility owners/managers and competition organizers with statements about the sector (n=186).

### Land Availability and Cost

Compared to other forms of recreation, equine activities require a larger land base. Equines need space for exercise, pastures, and housing. Participants in equestrian sport and recreation need access to riding arenas, training facilities, and trails. The land base associated with these activities can be challenging to find and expensive to access.

From 2021 to 2022, farmland values in Canada increased in every province (Table 7). The highest increases in values occurred in Ontario and Prince Edward Island.<sup>38</sup> Generally, farmland values increased in near-urban areas due to competition from other uses, including residential development.<sup>xviii</sup> This situation poses a particular challenge for entrants to the equine sector who seek to develop their businesses in proximity to urban areas.

Western Canadian provinces all recorded increases in pastureland value over the same period. Manitoba recorded the highest increase in pastureland value; the value of pastureland in the province increased by 18.5%.

Equine facilities thrive in near-urban settings, where they can draw on a larger customer base.

The high price of agricultural land in near-urban settings is a barrier for new entrants.

In all provinces, at least 90% of survey respondents had some level of concern about farmland loss and the rising cost of farmland (n=3,451).

<sup>xviii</sup> Increases were observed in Ontario, British Columbia, and Nova Scotia.



**Table 7.** Percent change in farmland values in 2022. Adapted from: the 2022 Farmland Values Report (Farm Credit Canada).

Province	Change in farmland value (Jan. 1, 2022 – Dec. 31, 2022)	Pastureland
British Columbia	8%	3.7%
Alberta	10%	5.5%
Saskatchewan	14.2%	2.8%
Manitoba	11.2%	18.5%
Ontario	19.4%	<i>Insufficient sales data</i>
Quebec	11%	<i>Insufficient sales data</i>
New Brunswick	17.1%	<i>Insufficient sales data</i>
Nova Scotia	11.6%	<i>Insufficient sales data</i>
Prince Edward Island	18.7%	<i>Insufficient sales data</i>
Newfoundland	<i>Insufficient sales data</i>	<i>Insufficient sales data</i>
Canada	12.8%	

Pastureland typically sells at a lower price than cultivated land (Table 8).

**Table 8.** Range in value of cultivated and pastureland in Western Canadian provinces. Adapted from Farm Credit Canada’s 2022 Farmland Values Report.

Province	Range in value (\$/acre) of pastureland*		Range in value (\$/acre) of cultivated land*	
	Low	High	Low	High
British Columbia	\$800	\$10,500	\$2,300	\$250,000
Alberta	\$700	\$6,300	\$1,500	\$20,200**
Saskatchewan	\$400	\$1,600	\$1,000	\$8,000**
Manitoba	\$200	\$1,000	\$1,100	\$12,800**

\*Values vary by region. For more detailed information by region see the 2022 Farmland Values Report.

\*\*irrigated regions.

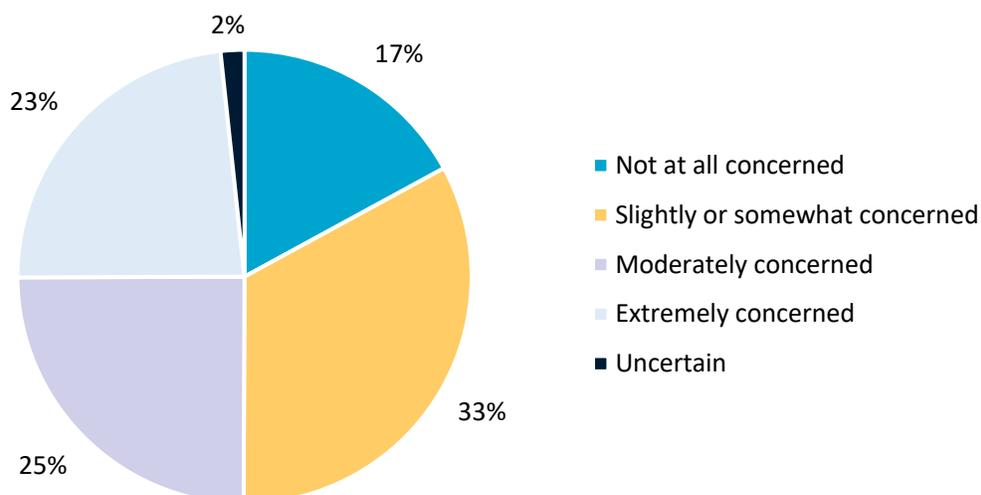
**In 2022, the value of agricultural land increased by 12.8%, marking the highest national average increase recorded since 2014. At the same time, total farm area is decreasing. For example, Ontario and Manitoba have observed alarming rates of farmland loss.**

The equine sector should advocate for the protection of farmland and explore ways to prevent further farmland losses amongst landowners with equines.



## Access to Support Services

In some parts of Canada, the equine sector faces limited access to support services, such as coaches, officials, and veterinarians. Only 17% of survey respondents were not at all concerned with the availability of equine services in their areas; 48% of respondents were moderately or extremely concerned (Figure 21).



**Figure 21.** Survey respondents' level of concern with the availability of equine services in their areas (n=3,424).

Respondents from Quebec, Northern Ontario, the interior of British Columbia and New Brunswick all expressed concern over lack of equine veterinarians, trained farriers, and coaches. For example, a survey respondent from Northern Ontario noted that their veterinarian, who is “well past retirement age,” covers hundreds of kilometers. The survey respondent worried about the lack of options for veterinary care once this vet is no longer practicing. This concern is seen in other countries as well. In the United States, for example, a 2021 survey found that concern exists across the country about the supply of equine veterinarians.<sup>39</sup>

“A vet shortage was and remains a significant concern for equine owners and people looking to buy.”

- Survey respondent

The proximity to metropolitan areas, or areas with higher populations (e.g., Southern Ontario) seems to alleviate some of these access concerns.



Event officials, and event facility owners/managers and competition organizers, say the sector lacks sufficient officials for events.

Similarly, a lack of qualified coaches is also a concern for individuals within the sector; 27% of interviewees (n=37) said the lack of qualified coaches is a top risk or challenge for the sector. While EC has a coaching program and a vision “to see every equestrian Coach in Canada hold licensed coach status by 2025,”<sup>40</sup> the sector currently has no mandatory education for coaches. Survey respondents would like to see increased uptake of available coaching programs and required training for coaches.

“I think it was a great step to have a mandatory EC coach level to go to an equine show. But it’s just a first step.”

-Survey respondent

### Equine Activities Not Recognized as Agricultural Activities

A lack of consistency exists across jurisdictions and government departments on the classification of equines; in some instances, they are considered livestock, while, in others, they are considered companion animals.<sup>41</sup> Similarly, government departments typically only recognize a portion of equestrian activities as agricultural activities. The Canada Revenue Agency (CRA), for example, only recognizes the maintenance of equines for racing and breeding as farming activities; most other equestrian activities, such as boarding, riding lessons, and dressage training, are not considered to be farming activities.<sup>42</sup>

The equine sector’s ambiguous status on the “outskirts” of the agricultural industry has notable implications on equine facilities and other equestrian businesses in terms of:

- Income taxes,
- Property taxes, and
- Access to government programs for the agricultural industry (e.g., AgriStability, which is a business risk management program for farmers).



Classifications of active equestrian facilities have implications for income taxes. Farming can be classified as either a hobby or business. CRA only recognizes the maintenance of equines for racing and breeding as farming activities; most other equestrian activities, such as boarding, riding lessons, and dressage training, are not considered to be farming activities.<sup>43</sup>

If an individual who cares for equines has a registered farm business (i.e., has a business number) they can claim farm expenses (e.g., veterinarian fees, building repairs and maintenance, salaries, wages, and benefits) as business expenses. The business owner can also deduct any net losses from their farm business from their income.<sup>44</sup> If the operation is not recognized as a business, the owner does not receive these income tax benefits.

While equine facilities and farmland may be classified as farmland in provincial or municipal property assessments, this land does not always qualify for a municipal, provincial, or territorial farm property tax rate programs. Rather, the farmland may be assessed at a higher property tax rate, such as a residential rate. The conditions for meeting “farm status” for property tax assessments may vary by province or territory and municipality.<sup>45</sup> In Ontario, for example, four program eligibility requirements must be met for farmland to be taxed at a lower rate (Figure 22).

Most survey respondents (69%) who own and/or operate equine facilities said their facilities or farmland are partially or wholly assessed as farmland. However, under half of equine facility owner/operator respondents (47%) partially or wholly qualify for municipal, provincial, or territorial farm property tax rate programs.

If not classified as farms, equine facilities can also be excluded from government programs for the agricultural industry.<sup>46</sup>

- ✓ **MPAC has assessed your property as farmland.**

---

- ✓ **Your property is used for a farm business.**

---

- ✓ **The farm business on your property has a valid Farm Business Registration (FBR) number.**

---

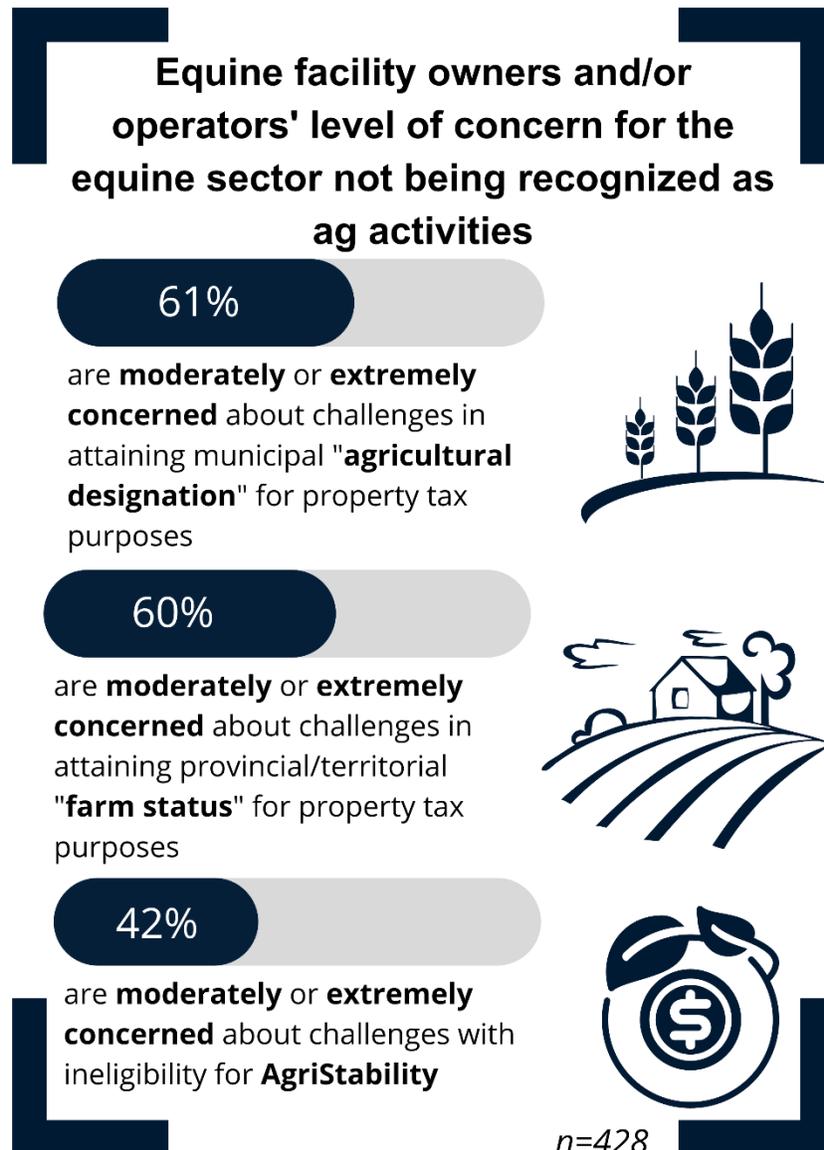
- ✓ **The property is owned by Canadian citizens or permanent residents.**

**Figure 22.** Eligibility requirements for the Farm Property Class Tax Rate Program in Ontario.

Source: Agricorp. [Farm Property Class Tax Rate Program](#).



Equine facility owners and/or operators are concerned that the sector is not recognized as being involved in agricultural activities.





## Ensuring High-Quality Equine Care

### Public Trust and Animal Welfare

The Canadian equine sector has the Code of Practice for the Care and Handling of Equines. The National Farm Animal Care Council led sector representatives in the development of the code, which includes both requirements and recommendations to ensure animal welfare. The Code addresses such topics as feed, housing, and husbandry practices.

EC also prioritizes the welfare of equines. In its Code of Conduct and Ethics, EC has a Statement of Principles – Horse Welfare. This statement includes a commitment to “upholding the welfare of the horse, regardless of monetary value, as a primary consideration in all activities.” The organization’s Horse Welfare Code of Conduct specifies EC’s zero tolerance policy for abuse. The Code outlines how EC will help to prevent abuse, how individuals can report instances of suspected abuse, and how the organization will address these cases.

Several institutions across Canada are conducting research to better understand animal welfare issues in Canada’s equine sector, and to identify opportunities to improve equine welfare. These institutions include:

- University of Calgary Faculty of Veterinary Medicine,
- Atlantic Veterinary College, and
- Equine Guelph (University of Guelph).

Organizations are also dedicated to sharing best practices with equine owners and the public. For example Equine Guelph offers certificates, short courses, and free webinars.

Despite the existence of the Code of Practice, ongoing research, and educational opportunities, people involved in the sector identify the limitations in public trust regarding the welfare of equines. For example, only about a third (36%) of interviewees describe the level of public trust positively. A slightly higher percentage (45%) of survey respondents agree or strongly agree that the Canadian equine sector upholds public trust in the welfare of equines.<sup>xix</sup>

“While there are Canadian standards, more needs to be done about being able to address people not treating their equines well.”

- Interviewee

Several sector participants specifically noted concerns about the welfare of equines at competitions. For example, survey respondents said welfare standards are not always enforced at events and shows. A few interviewees noted the lack of rules surrounding the number of classes an equine can compete in over the course of a single day, and the need

---

<sup>xix</sup> Another 29% of respondents responded neutrality to this statement and 22% disagreed. The remaining 5% were uncertain.



to ensure equines are not overworked. As more opportunities become available for beginners to compete at shows, the need for such rules is perhaps even more pressing, since multiple competitors may use the same school equine to compete.

Once equines reach an age or state of health where they are no longer fit to compete, perform, or work, they are usually retired. The care of these equines is also of concern for people involved in the sector. For example, 43% of survey respondents strongly disagree or disagree that the Canadian equine sector provides sufficient care for retired equines.<sup>xx</sup>

“I think that the countless ads for free retired equines across social media shows that there isn't a culture of providing sufficient care for retired equines yet.”

- Survey respondent

Several sector participants noted the care of retired equines was ultimately the owners' responsibility, and that more oversight and enforcement should exist to ensure sufficient care for these animals. Other survey respondents underscored a desire for “more support or options for retired and unwanted equines – especially those at risk of ending up in neglect situations or at processing plants.” Farms and ranches located across Canada serve as equine rescues and retirement facilities.

Ultimately, “the equine sector needs to be proactive on animal welfare in order to maintain social license to operate,” an interviewee said.

### **The Ontario Standardbred Adoption Society**

The Ontario Standardbred Adoption Society (OSAS) is an Ontario-based charitable organization that works with non-racing Standardbreds, or off-the-track Standardbreds. Volunteers help to retrain these equines for new activities and new homes. The organization also helps to find adoptive homes for companion equines.



---

<sup>xx</sup> Another 27% of respondents had a neutral view, while only 18% agreed with the statement. The remaining 11% of respondents were uncertain about this issue.

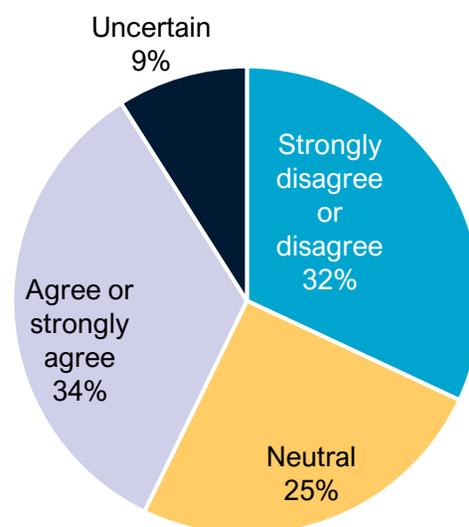


## Traceability

Some provinces have programs for equine traceability and identification. British Columbia and Alberta, for example, both require Premises Identification (Premises ID) numbers for all properties with at least one equine.<sup>47</sup> The Premises ID number is a unique identifier for a parcel of land, and the program allows the government to easily contact relevant individuals in the case of disease concerns or environmental disasters.

At a national scale, Canada lacks a national traceability system for equines.<sup>48</sup> Such systems are vital for ensuring proof of ownership, identifying pedigrees, identifying owners during natural disasters or other emergencies, and limiting and tracking disease outbreaks.<sup>49</sup>

As part of its Strategic Initiatives Plan, 2018-22, EC was exploring “a national traceability program for the health and welfare of the equine herd in Canada.”<sup>50</sup> The Canadian Equine Identification Program (CEIP) was designed to help address this sector need. The CEIP aimed to phase in an Equine Record, which would serve as a registration “passport” for equines, and the use of microchips. Participating owners or custodians could opt-in to receive information related to disease outbreaks, surveillance, and trace-back. Owners or custodians could also be contacted “for right of buy back or to reconnect with [their] equine in the event of an emergency, natural disaster, loss or theft.”<sup>xxi,51</sup>



**Figure 23.** Level of agreement with the statement the Canadian equine sector has sufficient methods for traceability and identification of equines (n=3,442).

Despite the gaps at the national level for equine traceability, sector participants have mixed views on the existing identification and traceability methods (Figure 23).

These mixed views may at least partially be the result of the “piecemeal” traceability initiatives that exist, providing sufficient traceability for some segments of the sector. For example, “if equines are not registered with their breed association or have

“Traceability of equines needs to step up and be on the same level as other livestock within Canada.”

- Survey respondent

<sup>xxi</sup> A right of buy back would apply for equines in feedlots, abattoirs, auctions, or rescues.



papers, they are not sufficiently traceable within the industry," a respondent said. Similarly, another respondent said the racing sector has "pretty good traceability/identification." This perception of the strength of traceability and identification within the racing sector is underscored by the fact that 42% of respondents (n=64) involved in this sector agreed or strongly agreed with the statement that the sector has sufficient methods for traceability and identification of equines.

In contrast, 47% of respondents who are equine/large animal veterinarians (n=59) disagreed with the statement, indicating more work must be done in this area.

## Biosecurity

Biosecurity is the principles and practices that are followed to decrease risks associated with pests and pathogens in animal and plant populations.<sup>52</sup> Biosecurity practices include handwashing, manure management, and quarantining equines as needed for infection control.<sup>53</sup> Strong biosecurity practices are vital to protect the health of individual equines and the national herd, as well as to protect Canada's ability to export equines.

Infectious diseases remain one of the biggest risks for the equine sector, and can lead to:

- Illness and death of equines,
- Increased financial costs for owners,
- Animal welfare concerns, and/or
- Human health risks.

Equines can travel extensively to participate in sector events and shows, which can lead to increased disease outbreaks.<sup>54</sup> Networks extend beyond simply the contact at the shows, as equines could carry diseases back to their home stables. Owners also move equines for such activities as trail rides, lessons, and community events.<sup>55</sup> Equines are increasingly moving internationally, too, which increases the risk of a global spread of diseases.<sup>56</sup>

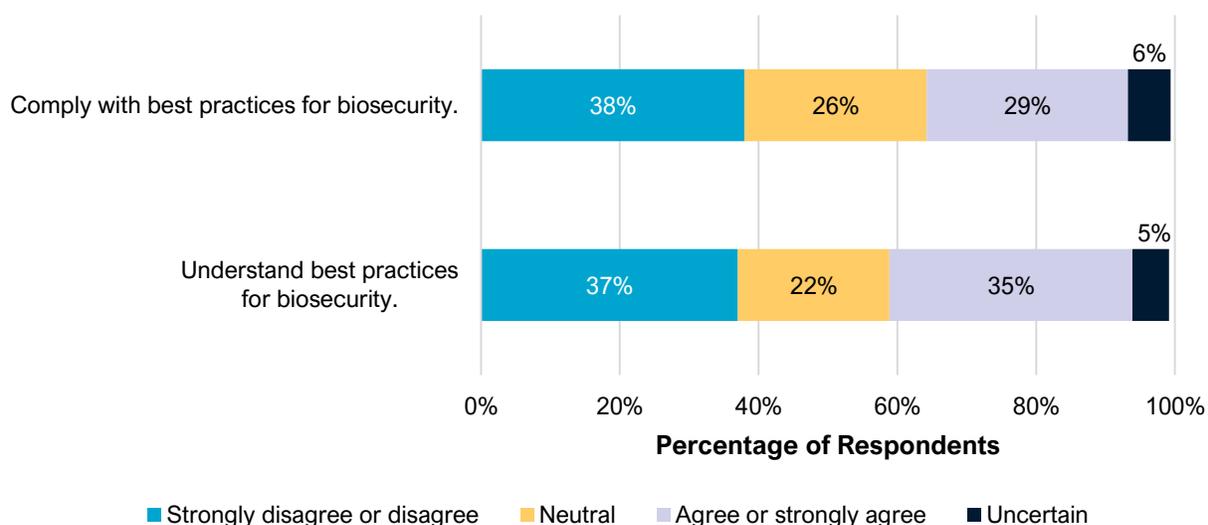
"I'm involved in another animal agriculture industry. Compared to that, I don't feel the equine industry is as informed of biosecurity practices."

- Survey respondent

Over a third of survey respondents disagree or strongly disagree that people who participate in equestrian activities understand and comply with best practices for biosecurity (Figure 24). New owners, for example, might not have the necessary biosecurity knowledge.<sup>57</sup> Children and teenagers participating in the sector might not understand the importance of biosecurity – especially if their parents are not involved in the sector, a survey respondent noted. Some sectors, such as racing and elite sport competitors, might have a stronger understanding of biosecurity than others, such as recreational riders.



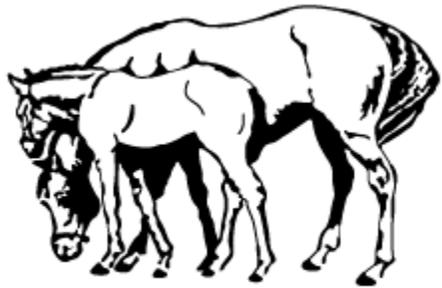
Compliance with biosecurity best practices also “varies due to financial and competitive priorities. Often, barns will cover up or skip steps to avoid penalty and loss of finances. The ability to drop out of show registrations would help biosecurity and welfare, but the venues cannot absorb these costs themselves,” a survey respondent said. Similarly, another respondent said, “people are more willing to take changes with biosecurity measures/exposures if it is not convenient or prevents them from competing.” Some survey respondents highlighted that biosecurity practices for equine shows are often based “on an honour system, unless vet certificates are required.”



**Figure 24.** Survey respondent’s level of agreement with the statements: “Generally, people who participate in equestrian activities...” (n=3,443).

New disease risks also continue to emerge. For example, the Old World West Nile virus is endemic in North America and a newer strain of equine herpesvirus-1 (EHV-1) causes worse neurological disease.<sup>58</sup> Several survey respondents pointed to concerns about EHV-1 and the need for greater uptake of best management practices, monitoring, and reporting.

A culture change is necessary for the equine sector to fully recognize the need for biosecurity and infection control, and to increase the use of best practices.<sup>59</sup> More education is necessary to increase awareness of the importance of biosecurity and best practices, survey respondents said.



**EQUINE GUELPH**  
helping horses for life™

### **Vignette: Equine Guelph's Sickness Prevention in Horses Online Short Course**

Equine Guelph, which is a not-for-profit centre at the University of Guelph, offers a two-week online course on Sickness Prevention in Horses. Through the course, participants learn how to keep their equines healthy. Participants also learn about beneficial management practices for biosecurity. The course is based on the *National Farm and Facility Level Biosecurity Standard for the Equine Sector*.

The course is intended for equine owners, owners and staff at equine facilities, and individuals involved in equine associations. Participants need to devote about 10 to 20 hours to the course, and the cost is minimal.

#### **Key Takeaways**

- Accessible educational opportunities are crucial to advance sector knowledge of biosecurity.
- Ideally, educational opportunities should include minimal costs and reasonable time commitments to encourage higher levels of participation from a diversity of people involved in the industry.





## Climate Change

Climate change presents several risks for the Canadian agricultural industry and, by extension, the equine sector. The risks vary by region.<sup>60</sup> Generally, climate change is resulting in more frequent and severe weather events including wildfires, extreme rainfall, flooding, and tornados.<sup>61</sup>

Concerns for livestock wellbeing related to a changing climate include:

- **Supply and cost of feed** (e.g., as a result of extreme weather events that limit productivity, cost of inputs required to produce feed),
- **Livestock safety** (e.g., due to dangers brought on by wildfire, flooding, hail, and other extreme weather events), and
- **Livestock health** (e.g., prevalence of pests and disease, health impacts of exposure to extreme heat and/or cold).

“One of the top risks for the industry is stable owners not taking action to protect their equines and themselves from extreme weather. There is an important role to get education out there about this information.”

- Interviewee





## The Impacts of the COVID-19 Pandemic

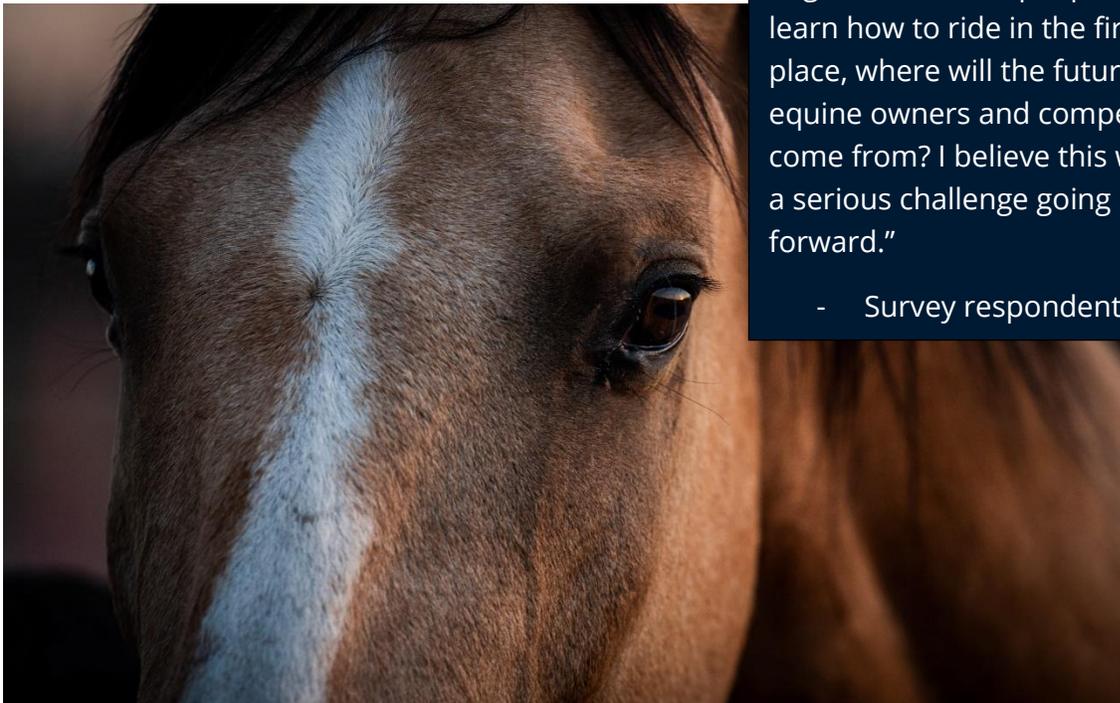
The COVID-19 pandemic was extremely impactful on the equine sector. Initially, during the pandemic lockdowns, most provinces did not permit riding lessons, competitions, or other group activities. Equine facilities' sources of income were often limited to boarding fees. As a result, many equine farms and facilities faced dire financial situations.<sup>62</sup> The problem was compounded by the fact that many equine facilities did not qualify for COVID-19-related income assistance programs, nor for support from Agriculture and Agri-Food Canada (AAFC).<sup>63</sup> The economic situation caused concern for the health and welfare of the animals, as well as the future business potential of the equine operations.

### Impact on Skills Development

The cancellation of equine shows and limitations on international travel during the pandemic negatively impacted competitors' skills development. The situation "caused significant delays in the development of students," a stable owner and competition organizer stated.

"Since the pandemic affected many lesson barn operations, very few places will now teach beginner riders. If people can't learn how to ride in the first place, where will the future equine owners and competitors come from? I believe this will be a serious challenge going forward."

- Survey respondent





## Advocacy and outreach

People and organizations involved in the equine sector tried to advocate for more support during the pandemic. For example, a 2020 study recommended that AAFC “accepts the position that active equines<sup>xxii</sup> are a viable component of Canada’s agricultural system and that the health and welfare of active equines fall within AAFC’s mandate at this time.”<sup>64</sup>

In response to the pandemic, EC created a list of resources on its website to help members navigate the ever-changing landscape of rules and regulations. These resources included information on financial supports, competition guidelines, and facility operations. For example, EC provided information on returning the sport horse to competition following a break in training and a policy for enhanced competition safety during the pandemic.

## Change in clientele

When provinces began to lift COVID-19 restrictions, riding lessons were some of the first activities allowed, since lessons can be held outside, and people can physically distance. Many facility owners saw an increased demand for lessons. New people became involved in the sector too. People from urban areas were interested in finding activities where they could get into more rural settings. This increased demand has continued post-pandemic. One equine facility owner, for example, stated that “they saw the largest growth during the pandemic, and it is still there.”

Some equine businesses that drew on international clientele had different experiences; they lost this clientele and their businesses have not yet recovered. One interviewee who operates a business offering equine riding excursions lost most of their international clientele, which accounted for 30% of their pre-pandemic business. While this operation has experienced an increase in local customers, they usually purchase shorter excursions, in contrast to their international counterparts.

---

<sup>xxii</sup> In its bylaws, EC defines active equines as “livestock specifically bred, raised and/or cared for in an active equine facility. The specific use of these equines may include pedigree development, sport and competition, youth and adult development and wellness, physical exercise, therapeutic use, and local agri-tourism. Active equines are key economic drivers that directly contribute to secondary revenue-generating activities and provide benefits to business and community. As business inputs and respected animals, active equines demand daily care that includes feeding, cleaning, movement, and social connection. This level of professional care and nurturing requires the services of animal care professionals (including veterinarians and farriers) and regular agricultural inputs (including hay, bedding and grains). An active equine is raised to be a valuable and useable asset throughout the course of its natural life. Active equines are not kept or raised for use in the processing industry or pharmaceutical industry.”



## Equine sales

As demand for riding lessons and other equine activities have increased, so too have equine prices, interviewees said. Reasons for this increase include inflation, higher feed costs, and increased demand. Relatedly, the demand for veterinarians and other service providers has also increased.

“We were afraid of not finding buyers for our foals. Luckily, everything went well. Breeding resumed at the right time and the demand for foals exploded. The increase in foal prices has allowed us to rebalance our production costs.”

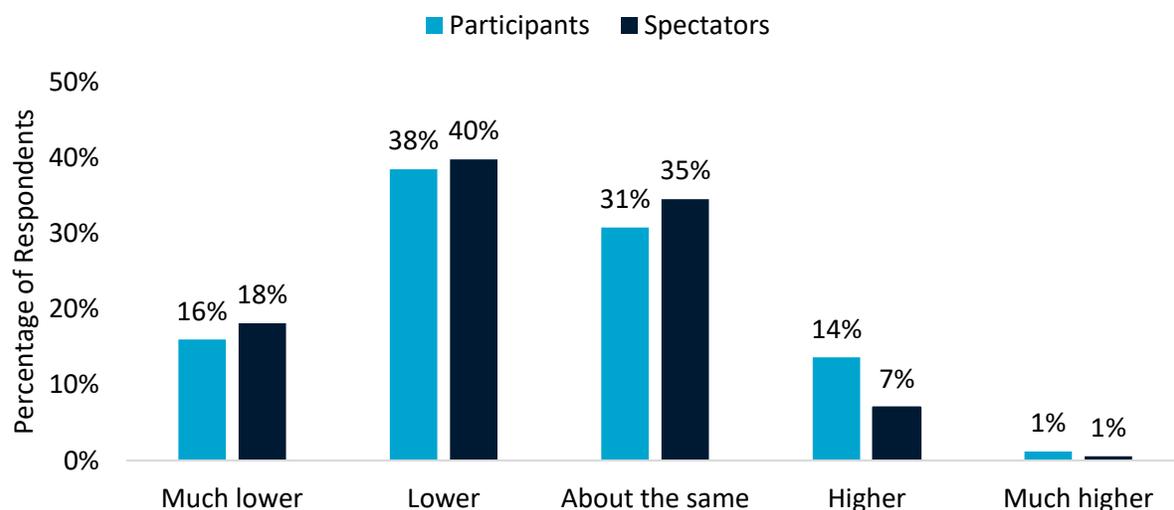
- Interviewee who breeds equines

## Looking ahead in a post-pandemic world

While the equine sector has started to recover in some areas, challenges remain in other areas. For example, over half of officials (54%), participants (54%), and spectators (58%) noted their 2022 event schedule was either lower or much lower than their pre-pandemic schedule. Event officials also estimated that the participation by participants and spectators was lower or much lower for both groups (54% and 58%, respectively) (Figure 25).

“COVID-19 really limited my travelling and competing since 2020.”

- Survey respondent

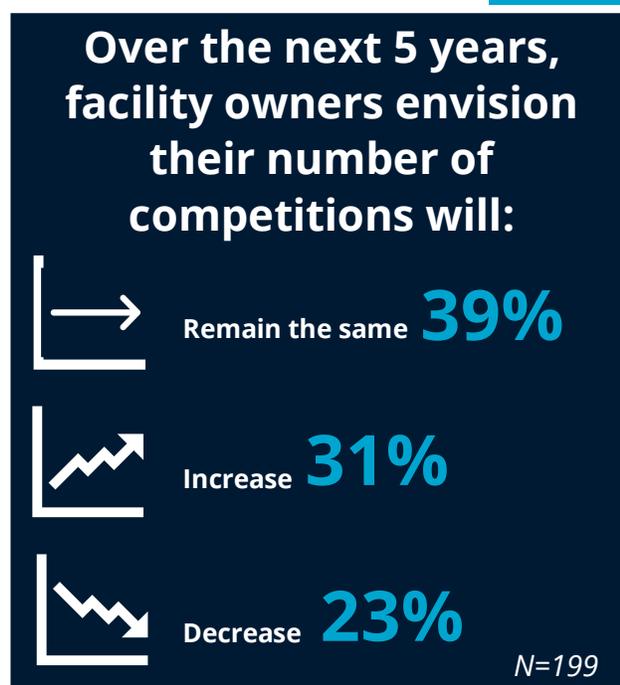


**Figure 25.** Event officials’ estimate of spectator and participant numbers in 2022 compared to pre-pandemic years (n=171 and n=169, respectively).



On a more optimistic note, 39% of competition facility owners and organizers envision that the number of competitions will remain the same over the next five years and 32% envision they will increase. In contrast, about a quarter (23%) of respondents envision that the number of competitions they offer will decrease. The reasons for this decrease include decreasing entries and increasing costs.

When asked what changes facility managers or competition organizers plan on making in the next five years, increasing the number of competitions, offering lower level and more flexible classes, and investing in their facilities were the most common responses (Table 9).



\*7% of facility owners stated that they were uncertain

**Table 9.** Anticipated changes facility owners/managers or competition organizers plan on making in the next five years (n=97).<sup>xxiii</sup>

- Increasing the number of competitions (e.g., *exploring new types of competitions*)
- Offering lower-level or 'grassroots' classes
- Improving facilities
- Reducing costs
- Increasing public engagement
- Increasing social media/communication

<sup>xxiii</sup> Other anticipated changes included hosting virtual competitions, increasing registration fees, and hosting fewer events.



## 5.3 Opportunities

The Canadian equine sector can leverage its strengths to alleviate its challenges and reduce its risks. The opportunities for the equine sector can be categorized using similar themes as the strengths, challenges, and risks (Table 10).

**Table 10.** Summary of opportunities in Canada's equine sector.

Theme	Strength, Challenge, or Risk	Opportunity
<b>Overcoming Barriers to Entry and Participation for Competitors and Equine Enthusiasts</b>	Expense, access, and time	Strengthen support for the grassroots & shift the sector culture
		Prioritize inclusion and diversity in messaging
	Equity, diversity and inclusion	Advance IDEA at an organizational/structural level
		Promote equine activity participation and IDEA online
<b>Overcoming Barriers to Sector Development</b>	Availability of skilled labour	Develop an opt-in insurance program for small equine businesses
		Business management learning opportunities
	Professional development and education	Deepen the understanding of officials' concerns & implement changes to improve their experiences
	Equine activities not recognized as agricultural activities	Continue efforts to expand recognition of equine businesses as farm businesses
<b>Strengthening Equine Care</b>	Public trust and animal welfare	Expand requirements in existing programming
	Traceability	Learn from animal agriculture sectors
	Biosecurity	Continue to promote tools for equine owners and caretakers to create biosecurity plans and monitor risks



## Overcoming Barriers to Entry and Participation for Competitors and Equine Enthusiasts

### Strengthen Support for the Grassroots & Shift the Sector Culture

The Canadian equine sector has an opportunity to prioritize:

- Getting more young people involved in the sector,
- Helping to encourage lifelong participation, and
- Welcoming a diversity of participants.

EC can play a central role in this work. Sector participants perceive EC focuses on elite athletes; the organization can increase collaboration with the PTSOs to better support the grassroots. Indeed, at the PTSO level, many initiatives exist to help introduce new riders to the equine sector and to encourage continued participation (Appendix H).

Study participants advocated for a shift in the culture within the sector to focus more on the health and well-being benefits of participation in equine activities, rather than simply prioritizing continuous improvements in skills and competition levels. Relatedly, people advocated for more fun, social, and community-focused events and activities.

Equine sector participants already plan and undertake initiatives in this field, including:

- Community events;
- Grassroots, lower-level competitions and schooling shows;
- “Kindergarten” or introductory activities to introduce people to new disciplines (e.g., eventing, distance riding);
- Grassroots clinics;
- Virtual shows; and
- Programs geared to older adults.

Study participants praised EC’s [Para-Dressage Video Competition Series](#), which allows para-dressage riders to compete nationally with their equines in their home stables.

EC could take a leadership role in helping to showcase the innovative initiatives underway across the country, and to help facilitate the launching of similar initiatives in other parts of the country. For example, EC could organize a regular webinar series where sector participants share their programming/initiative success stories and answer questions. EC could also support in the creation of toolkits (e.g., for launching a video competition series) that people involved in the sector could use. Such concerted efforts to share knowledge could increase the vibrancy of the sector.



### **Vignette: Canadian Pony Club**

Canadian Pony Club (CPC) is a registered charitable organization, run by volunteers, which seeks “to provide the opportunity for every person in Canada to have a positive experience with horses through providing opportunities: for education; to learn responsibility, sportsmanship and good citizenship; [and] for enjoyment and/or competitive success with horses.”<sup>65</sup> CPC provides an affordable way for people to participate in the sector.<sup>66</sup>

Since the 1990s, membership in CPC has declined; dropping from approximately 5,800 members in 2010 to about 2,000 members in 2022.<sup>67</sup> Potential reasons for this decline include:

- More young people are attending college or university, resulting in less time and money for equine activities;
- The increasing urbanization of the Canadian population (rural spaces are necessary for Pony Club activities); and
- Declining interest in volunteering (volunteers are vital to the success of the CPC model).

Pony Club membership remains much higher in other countries. In the UK, for example, Pony Club has over 30,000 members who participate in over 300 branches and almost 400 Riding Centres.<sup>68</sup> The United States has approximately 600 clubs and centers. The United States Pony Clubs, Inc. is considered the largest equestrian organization in the world.<sup>69</sup>

To attract more participants, Canadian Pony Club created opportunities for members to specialize in their area(s) of interest, including specific sports and/or stable management. CPC also launched Horsemasters in 2015 for people over the age of 21. Horsemasters provides an opportunity for parents to participate in fun activities alongside their children. This program also enables adults to pursue an activity that they may not have had the time or interest to participate in during an earlier stage in life.

Pony Club has served as an opportunity for youth to form friendships and develop their riding and horsemanship. Pony Club attempts to instill a passion for equines in its members. As one interviewee states, “children in Pony Club get to build leadership and independence in the sport.”

#### **Key Takeaways**

- Pony Club provides a low-cost way to introduce people to the equine sector.
- Points of entry to the sector should be available to people of all ages (e.g., children, youth, and adults).
- Opportunities exist for other equine organizations (e.g., EC and PTSOs) to support Pony Club, as Pony Club members could ultimately grow their involvement in the industry.



### Vignette: The Freedom to Belong Program

The Free Spirit Therapeutic Riding Association in Aylesford, Nova Scotia, runs the Freedom to Belong program. This 10-week subsidized program is open to adults over the age of 50.

Participants receive lessons in riding and stable management, and a program goal “is to build community around the horses.” The class sizes are small; typically, a class is a group of six. Groups often start to spend time together outside of the formal program, says Alissa Cue, the head coach of the Association.



The emphasis is on the social component of the program; the instructors take a flexible approach, recognizing that each participant may need a different amount of time to mount their equine and might not want to stay on their equine for the full lesson. As the facility is accessible for therapeutic riders, the setup also makes it easier for older adults to mount their equines. The popularity of the program is underscored by the fact that the Free Spirit Therapeutic Riding Association has a big waitlist for its programming.

#### Key Takeaways

- Consider the development of programming specifically for older adults.
- Prioritize the social elements of equine programs to attract a broader diversity of participants.

The Free Spirit Therapeutic Riding Association photo





### **Prioritize Inclusion and Diversity in Messaging**

Messaging in communications and advertising is also crucial to helping make the sector more welcoming. Images should showcase the diversity of participants – including the diversity of ages, skill levels, activities, ethnicities, and racialized communities. Messaging should celebrate the diversity of reasons people participate in the sector. EC and the PTSOs could extend and strengthen the [#RideForLife Awareness campaign](#). For example, #RideForLife could be featured prominently on the EC homepage, and an associated webpage could highlight ways people can get involved in equine activities.

Similarly, EC and the PTSOs could collaborate to develop a factsheet of best practices for inclusive communications and advertising. This factsheet could be targeted to equine facility owner/operators and event/competition organizers.

### **Advance IDEA at an Organizational/Structural Level**

EC, PTSOs, and other sector participants must continue to advance IDEA at an organizational and structural level. For example, EC and PTSOs should continue to offer educational opportunities related to IDEA. Such education should be mandatory for coaches and made available to all members of the equine community. Continued learning opportunities – for both organizational staff and sector participants – are crucial.

### **Promote Equine Activity Participation and IDEA Online**

EC can consider revisiting its menu bar on the homepage to help centre opportunities to participate in equine activities, and the work underway to increase IDEA within the sector. The homepage should be welcoming and easily accessible for people looking to learn about equine activities and opportunities to get involved. The website could also include an overview of participation pathways, highlighting both:

- The possible competition and rider level “stages;” and
- The benefits and opportunities associated with participating in equine activities for life, building on the #RideForLife Awareness campaign.

The content should also be welcoming for traditionally underrepresented groups, such as members of racialized communities and people with disabilities. For example, the website could include an overview and links of initiatives for traditionally underrepresented groups. The website could include a brief description of equine-assisted services, and a link to the CanTRA website so visitors could find [certified active instructors](#).

EC could also consider developing resources to help parents – particularly those individuals without prior experience in the equine sector – to “navigate” the sector. For example, EC could develop a factsheet outlining safety considerations for riders and families. EC could also develop a factsheet to help parents decide if/when to transition their child from a school equine to an equine owned or leased by the family.



## Vignette: Increasing Participation, Inclusion, and Accessibility in Canadian Sport

Other sport organizations across Canada are grappling with how to increase participation rates, and/or how to increase inclusion and accessibility within the sport. EC can learn from the experiences of other sport organizations engaged in such work.

### ***Golf Canada***

Golf has experienced a decline in participation in Canada,<sup>70</sup> but [Golf Canada](#) seeks to reverse this trend through its emphasis on IDEA. For example, in its [Long-Term Player Development](#) guide, Golf Canada encourages continual play through “Golf for Life.” Any player can “enjoy golf for what it is – a healthy, safe sport that brings friends and families together in communities across Canada,” the guide states.<sup>71</sup>



Golf Canada also has a page on [equity and inclusion](#) with links to resources and programs aimed at improving the inclusion of the sport and ensuring it is welcoming and accessible for all. For example, Registered Golf Canada members who are ages six to 18 automatically receive a [Youth On Course](#) membership, which allows members to play a round of golf for \$5 or less at participating courses.

### ***Tennis Canada***

In contrast to golf, tennis is popular; 18% of Canadians played tennis in 2018.<sup>72</sup> As with Golf Canada, [Tennis Canada](#) emphasizes the opportunity of Tennis For Life.<sup>73</sup> Tennis Canada also supports IDEA, such as by providing an overview of [wheelchair tennis](#) and links to associations across Canada. Through its [Game Set Equity](#) initiative, Tennis Canada has committed to advancing equity for girls and women in the sport.<sup>74</sup>



### **Key Takeaways**

- In addition to the highlighting sport disciplines on the EC website, consider highlighting the diversity of opportunities for participation in the equine sector.
- Emphasize the range of health, wellbeing, and social benefits associated with participation in equine activities.
- Develop programming through an IDEA lens.



## Overcoming Barriers to Sector Development

### Business Management Learning Opportunities

As equine business owners and operators seek to increase the resiliency of their operations, an opportunity exists to explore collaboration between EC, PTSOs, and organizations supporting business management in the agricultural industry (Table 11).

**Table 11.** Sample opportunities for collaboration with organizations supporting business management in the agricultural industry.

Organization	Mission	Sample opportunities for collaboration
<a href="#"><u>Farm Management Canada</u></a>	To be the national champion of farm business management by connecting industry partners, facilitating learning opportunities, and providing valuable resources.	<ul style="list-style-type: none"><li>• “Reframe” key tools and resources (e.g., introduction to business planning in the <a href="#"><u>National Farm Business Management Resource Centre</u></a>) for the equine sector.</li><li>• Develop an Equine Sector Financial Fluency Training Program, building on the success of the <a href="#"><u>Farm Financial Fluency Training Program</u></a>.</li></ul>
<a href="#"><u>Canadian Agricultural Human Resource Council</u></a>	Research, develop, and communicate solutions to human resource issues identified by Canadian primary agriculture.	<ul style="list-style-type: none"><li>• Develop an HR toolkit for equine facility owner/operators, building on the practical <a href="#"><u>AgriHR Toolkit</u></a>.</li><li>• Refine the <a href="#"><u>Human Resource Management Basics Course</u></a> to target the equine sector.</li></ul>

### Develop an Opt-In Insurance Program for Small Equine Businesses

Through the PTSOs, members typically have access to insurance programs. Many survey respondents even specified access to insurance coverage as one of the reasons they belong to equestrian associations and/or clubs. Such insurance coverage is typically a requirement for participating in shows and competitions, and some equine facilities require it too. Typically, this automatic and/or optional insurance for individual membership covers a mix of:

- Personal liability,
- Accidental death and dismemberment,
- Named perils horse mortality,
- Emergency life-saving survey,
- Tack and equipment, and
- Travel.

PTSO business memberships sometimes offer access to optional commercial insurance.<sup>75</sup>



Health and life insurance can be a valuable benefit for employees, but it can sometimes be challenging for small businesses to offer health and life insurance policies for their staff. In other industries, national or provincial organizations sometimes partner with insurance companies to offer “group” policies for small businesses. Ontario Federation of Agriculture members, for example, can opt into health and dental coverage for their families and employees through the [AgriHealth Insurance Program](#).

EC and/or the PTSOs could consider exploring the creation of a similar insurance program so that equine facility owners/operators could offer health and dental coverage to their staff.

### **Continue Efforts to Expand Recognition of Equine Businesses as Farm Businesses**

EC and the PTSOs have advocated for the recognition of equine businesses as farm businesses. For example, EC [advocated](#) for the establishment of a relief fund for equine farms during the pandemic. EC and the PTSOs should continue these efforts to work with all levels of government, with a particular focus on encouraging:

- The CRA to broaden its recognition of equine activities as farming activities, and
- AAFC to broaden eligibility for business risk management programs to include equine activities.

PTSOs could also consider the creation of a factsheet or simple landing pages directing members to the relevant tribunal or court for appealing property classification and assessment if declined farm status for property tax purposes.<sup>76</sup>

### **Deepen the Understanding of Officials’ Concerns & Implement Changes to Improve their Experiences**

Given the concerns about training, compensation, the licensing process, and the availability of officials for equine events, opportunities exist for more research on these topics. For example, the compensation levels for officials should be reviewed. Officials also shared suggestions of ways to address their concerns (Table 12).





**Table 12.** Comments from event officials on how to improve training, the process for becoming an official, and compensation.

Topic	Opportunities
Training	<ul style="list-style-type: none"> <li>Event officials appreciate the ability to update some credentials online and the availability of online entry-level certifications. Officials would like to see more online options for training and updating of credentials.</li> </ul>
	<ul style="list-style-type: none"> <li>Mentorship opportunities would help attract more officials to the sport. Officials feel “the onus is on individuals to find apprentice opportunities” and that officials are “aging out” without new, younger officials joining the profession.</li> </ul>
Process for becoming an official	<ul style="list-style-type: none"> <li>Offer more programs and courses in French.</li> </ul>
	<ul style="list-style-type: none"> <li>Develop clear, step-by-step instructions, written in point-form or checklist format, for becoming and advancing as an official. “A good, strong, consistent approach to common questions and issues that we can all follow” should be considered.</li> </ul>
	<ul style="list-style-type: none"> <li>Provide clear definitions for “licensed,” “registered” and “certified.”</li> <li>Update the <a href="#">EC Campus Dashboard</a> to improve user experience.</li> </ul>
Compensation	<ul style="list-style-type: none"> <li>Improve transparency of compensation for EC event officials to reduce inequities and disparities between officials.</li> </ul>
	<ul style="list-style-type: none"> <li>Find opportunities to reduce the cost of certification to improve access (e.g., online courses, facilitating mentorship opportunities, etc.).</li> </ul>
	<ul style="list-style-type: none"> <li>Prioritize hiring EC-licensed officials at EC shows.</li> </ul>



## Strengthening Equine Care

### Expanding Requirements in Existing Programming

An opportunity exists to build on the [EC Coaching Program](#) and the [Learn to Ride/Drive Program](#) to help strengthen equine care, including biosecurity and animal welfare.

The Coaching Program includes certification programs, as well as requirements for professional development. Currently, coaches are required to acknowledge EC policies. EC could consider adding additional requirements to the [certification program](#) to ensure all coaches have a baseline understanding of biosecurity and animal welfare best practices. EC could consider leveraging existing tools and resources, such as the Horse Welfare Alliance of Canada's [Equine Code of Practice training videos](#).

EC could also consider adding a category for [professional development activities](#) related to biosecurity and animal welfare best practices. Through the addition of this category, coaches could be encouraged to keep up-to-date on the latest research underway through agricultural and veterinary colleges across the country, as well as organizations such as [Equine Guelph](#).

The [Learn to Ride program](#) includes requirements for practical equine knowledge, which includes equine care such as bandaging and identifying sites of unsoundness. Similarly, the [Learn to Drive program](#) addresses equine care topics such as safety gear (e.g., leg protection) for equines when trailering them to a destination for a driving activity. The programs could be expanded to include graduated levels of knowledge related to biosecurity and animal welfare.

This more holistic approach to coach certification and riding levels could help to ensure sufficient care for both the human and equine athlete.

### Continue to Promote Tools for Equine Owners and Caretakers to Create Biosecurity Plans and Monitor Risks

Equine facilities, as well as everyone involved in the equine sector, must follow best practices for biosecurity. As each farm and facility has unique circumstances (e.g., management practices, extent of equine movement etc.), it should develop and implement a targeted biosecurity plan.

The Government of Canada and Equine Canada collaborated to develop the *National Farm and Facility Level Biosecurity Standard for the Equine Sector*, which provides recommendations and guidelines to help equine owners and caretakers in creating their biosecurity plans.<sup>77</sup> The *National Farm and Facility Level Biosecurity User Guide*, as well as provincial governments and provincial equine associations, provide a range of practical resources to assist in the creation of biosecurity plans.<sup>78</sup> The Canadian Animal Health



Surveillance System provides disease alerts and a resources library with content for the equine sector.

The International Collating Centre regularly reports on disease outbreaks at the country and regional levels.

By promoting the development of, and adherence to, biosecurity plans, the sector can help to better protect equine health, the resiliency of equine businesses, and the vibrancy of the sector.

### **Learn from Animal Agriculture Sectors**

Equine sector participants highlighted the good work underway in the animal agriculture sectors to implement biosecurity best practices at the farm level, as well as to ensure traceability.

As EC continues its work, it can consider consulting other organizations working on livestock traceability, such as:

- [The Canadian Cattle Identification Agency.](#)
- [The Canadian Pork Council's PigTRACE.](#)
- [The Canadian Sheep Federation's Canadian Sheep Identification Program,](#) and
- [The Canadian Bison Association.](#)

These organizations can share lessons learned for messaging to sector participants. In the longer-term, these organizations may also be able to share suggestions on the process for transitioning to full-scale traceability.



As of the spring of 2023, the Canadian Food Inspection Agency (CFIA) was proposing changes to regulations regarding the identification and traceability of livestock. For example, the CFIA proposed implementing traceability requirements for goats and cervids. CFIA also proposed mandatory reporting of movements of livestock within Canada. Equine sector organizations and participants could monitor the implementation of these proposed changes. Equine organizations could also continue to explore opportunities to be proactive regarding the identification and traceability of equines.

## 6. Concluding Remarks & Recommendations

The Canadian equine sector includes over 509,000 equines across the country participating in sport, recreation, working, racing, and breeding activities. The sector adds much social value to Canadian's communities and contributes significantly to the economy. The equine sector (excluding racing)<sup>xxiv</sup> contributes \$24.2 billion to the Canadian economy.

As a measure of value added, the sector contributed \$8.69 billion to Canada's GDP in 2022 and contributed 70,997 full-time equivalent jobs to the Canadian economy. Sector activities also contributed \$894 million to provincial and federal taxes.

Informed by engagement with participants across the sector, this study provides a thorough understanding of the current state of the equine sector.

The sectors' strengths can be categorized into three key themes:

- Equines are good for people,
- Equines are good for the economy, and
- Equines are good for the environment.

The sector can leverage these strengths to help manage its challenges and risks, including:

- Barriers to entry and participation for competitors and equine enthusiasts,
- Barriers to sector development,
- Ensuring high-quality equine care, and
- The impact of COVID-19.

While equines are good for people's health and wellbeing, participants in the sector recognize that equine activities are not accessible to many Canadians. Barriers to participation include costs, lack of transportation options to many equine facilities, and varying levels of commitment to IDEA. Ultimately, the equine sector must evolve and adapt to welcome new participants – and a broader diversity of participants – in both sport and recreational activities.

In addition to the opportunities identified in [Section 5.3](#), the following overarching recommendations align with EC's Strategy 2022-2025: Building for a Better Future.

---

<sup>xxiv</sup> This analysis of the economic impact of the sector focused on the operation of equine competitions and events, equine services, and the breeding, raising, training, and maintaining of equines for all activities other than racing.

1. **Develop a plan to conduct a regular ‘census’ and economic impact study of the Canadian equine herd.**
  - ✓ Explore opportunities to work with academic partners such as the University of Guelph or Olds College to develop a standardized survey that could be deployed every five years.<sup>xxv</sup>
2. **Lead opportunities to improve inclusion, diversity, equity, and access in the Canadian equine sector.**
  - ✓ Host a series of dialogues with PTSOs to determine opportunities to improve IDEA in the Canadian equine sector.
  - ✓ Initiate a brainstorming workshop with CanTRA to identify opportunities for collaboration on cross-promotion and IDEA initiatives.
3. **Collaborate with the PTSOs to support grassroots initiatives and youth participation to grow the love for equine sports and activities amongst Canadians.**
  - ✓ Support programs including the Canadian Pony Club, 4-H, and other youth-oriented opportunities.
4. **Continue to work with multiple levels of government to ensure the classification of equines and equine barns as an active component of the Canadian agricultural industry.**
  - ✓ Ensure equine operations can access relevant government programs for the agricultural industry (e.g., Business Risk Management programming, environmental sustainability programs, etc.).
5. **Conduct a follow-up study to better understand the current state of the Canadian equestrian competition landscape, and to identify opportunities to strengthen the vibrancy and resiliency of this landscape.**
  - ✓ Engage with a diversity of individual and organizations involved in planning, developing, hosting, and officiating equestrian competitions across Canada.
6. **Continue to champion increased traceability of equines within Canada to support biosecurity, and accurate and up-to-date population figures.**
  - ✓ Learn from the experiences of other livestock sectors.

As highlighted in the vignettes throughout the report, great initiatives are underway across Canada to overcome barriers to participation and increase IDEA within the sector. Through collaboration and knowledge sharing, equine organizations and facilities across the country can implement new strategies and programs to attract and retain participants. In the process, these organizations and facilities can help to ensure the success, vibrancy, and inclusivity of the sector, all of which will also strengthen its economic impact.

---

<sup>xxv</sup> For example, the American Horse Council conducts a regular [National Economic Impact Study](#).

- 
- <sup>1</sup> Alberta Government. (Sept. 2015.) *Traceability and the Equine Industry*.
- <sup>2</sup> Statistics Canada. 2023. (Table). Census Profile. 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released Feb. 8, 2023.
- <sup>3</sup> American Heart Association. (2021). 6 Health Benefits of Horses.
- <sup>4</sup> Canadian Centre for Ethics in Sport. (2022). Power of Sport: The True Sport Report 2022.
- <sup>5</sup> Hiremath, C. (2019.) "Impact of sports on mental health." *International Journal of Physiology, Nutrition, and Physical Education*, SP1: 14-18.
- <sup>6</sup> Donato, A. (July, 2019). Everything You Need to Know About Horse Therapy. Canadian Broadcasting Network.
- <sup>7</sup> Donato, A. (July, 2019). Everything You Need to Know About Horse Therapy. Canadian Broadcasting Network. And Scharff, C. (2017). The therapeutic Value of Horses. Psychology Today.
- <sup>8</sup> Haig, L and Skinner, K. (2022.) Use of Equine-Assisted Services to Improve Outcomes Among At-Risk and Indigenous Youth: A Scoping Review. *Front. Public Health* 10:730644.
- <sup>9</sup> Scharff, C. (March 10, 2016.) Children and Horses: Equine Activities Improve Lives. Psychology Today.
- <sup>10</sup> Borioni, N. et al. (2012.) "Effect of Equestrian Therapy and Ootherapy in Physical and Psycho-Social Performances of Adults with Intellectual Disability: A Preliminary Study of Evaluation Tools Based on the ICF Classification." *Disability and Rehabilitation*, 34(4), 279–287. And Burgon, H. et al. (2018.) "Hoofbeats and Heartbeats: Equine-Assisted Therapy and Learning with Young People with Psychosocial Issues: Theory and Practice." *Journal of Social Work Practice*, 32(1), 3–16. And Giagazoglou, P. et al. (2012.) "Effect of a Hippotherapy Intervention Program on Static Balance And Strength In Adolescents With Intellectual Disabilities." *Research in Developmental Disabilities*, 33(6), 2265–2270.
- <sup>11</sup> Borgi, M., et. al. (2015.) "Effectiveness of a Standardized Equine-Assisted Therapy Program for Children with Autism Spectrum Disorder." *Journal of Autism and Developmental Disorders*, 46(1), 1–9.
- <sup>12</sup> Herd, G. (2018.) Horses helping domestic abuse victims.
- <sup>13</sup> Romaniuk, M et al. (Sept. 2018.) "Evaluation of an Equine-Assisted Therapy Program for Veterans who Identify as 'Wounded, Injured or Ill' and their Partners." *PLoS One* 27; 13(9). And Johnson, R. A. et al. (2018.) "Effects of Therapeutic Horseback Riding on Post-Traumatic Stress Disorder in Military Veterans." *Military Medical Research* 5(1), 3 10.
- <sup>14</sup> Kern-Godal, A. et al. (2016.) "More Than Just a Break from Treatment: How Substance Use Disorder Patients Experience the Stable Environment in Horse-Assisted Therapy." *Substance Abuse: Research and Treatment*, 10, 98–108.
- <sup>15</sup> Bachi, K. (2013.) "Equine-Facilitated Prison-Based Programs Within the Context of Prison-Based Animal Programs: State of the Science Review." *Journal of Offender Rehabilitation* 52:1, 46-74.
- <sup>16</sup> Araujo, T. B. et al. (2011.) "Effect of Equine-Assisted Therapy on the Postural Balance of the Elderly." *Brazilian Journal of Physical Therapy/Revista Brasileira De Fisioterapia* 15(5), 414–419.
- <sup>17</sup> Agricultural Marketing Resource Center. (2020.) Equine Agritourism.
- <sup>18</sup> Farm Credit Canada. (2023.) 2022 Farmland Values Report.
- <sup>19</sup> Statistics Canada. (May 2022.) Table 32-10-0156-01 Farms classified by total farm area, Census of Agriculture historical data.
- <sup>20</sup> Elgaker, H., and Wilton, B.L. (2008.) "Horse Farms as a Factor for Development and Innovation in the Urban-Rural Fringe with Examples from Europe and Northern America." Retrieved from: Tanvig, H. W. (Eds.) 2008: Innovation Systems and Rural Development. Proceedings from 10th Annual Conference, Nordic-Scottish University for Rural and Regional Development. Forest & Landscape Working Papers No. 27-2008, 163 pp. Forest & Landscape Denmark, Hørsholm.
- <sup>21</sup> Bigot, G. et al. "Roles of Horses on Farm Sustainability in Different French Grassland Regions." In *EAAP Scientific Series*; Vial, C., Evans, R., Eds.; Wageningen Academic Publishers: Wageningen, The Netherlands, 2015; Volume 136, pp. 177–186. ISBN 978-90-8686-279-5. And Bigot, G. et al. "Management of Cattle and Draught Horse to Maintain Openness of Landscapes in French Central Mountains." In Proceedings of the 17th Meeting of the FAO-

---

CIHEAM Mountain Pasture Network, Pastoralism and Ecosystem Conservation, Trivero, Italy, 5–7 June 2013; pp. 72–75.

<sup>22</sup> Forteau, L. et al. (2019.) “Horses Grazing with Cattle Have Reduced Strongyle Egg Count due to the Dilution Effect and Increased Reliance on Macrocyclic Lactones in Mixed Farms.” *Animal* 1–7.

<sup>23</sup> Nassauer, J.I. (1997.) “Cultural Sustainability: Aligning Aesthetics and Ecology.” In: J.I. Nassauer (Ed.) *Placing Nature: Culture and Landscape Ecology*. Island Press, Covelo, California, pp. 65-83.

<sup>24</sup> Bailey, A., and Williams, N. (2000.) The Farmer as Service Provider: The Demand for Agricultural Commodities and Equine Services. *Agricultural Systems* 66(3): 191-204. And Ilbery, B.W. (1991.) “Farm Diversification as an Adjustment Strategy on the Urban Fringe of the West Midlands.” *Journal of Rural Studies* 7(3): 207-218.

<sup>25</sup> Elgaker, H., and Wilton, B.L. (2008.) “Horse Farms as a Factor for Development and Innovation in the Urban-Rural Fringe with examples from Europe and Northern America.” Retrieved from: Tanvig, H. W. (Eds.) 2008: Innovation Systems and Rural Development. Proceedings from 10th Annual Conference, Nordic-Scottish University for Rural and Regional Development. Forest & Landscape Working Papers No. 27-2008, 163 pp. Forest & Landscape Denmark, Hørsholm. And Younge, B., and Vial, C. (2012.) “Socio-economic Impact of Horse Production on Rural Areas: A Comparison Between Ireland and France.” In Saastamoinen, M., et al. (eds.) *Forages and Grazing in Horse Nutrition*, vol 132. Wageningen Academic Publishers, Wageningen.

<sup>26</sup> Rzekęć, A., et al. (2020.) “Green Assets of Equines in the European Context of the Ecological Transition of Agriculture.” *Animals*, 10(1), 106. MDPI AG. And Younge, B., and Vial, C. (2012.) “Socio-economic Impact of Horse Production on Rural Areas: A Comparison between Ireland and France.” In Saastamoinen, M. et al. (eds) *Forages and Grazing in Horse Nutrition*, vol 132. Wageningen Academic Publishers, Wageningen.

<sup>27</sup> Statistics Canada. (2022.) Canada's 2021 Census of Agriculture: A Story about the Transformation of the Agriculture Industry and Adaptiveness of Canadian Farmers. The Daily.

<sup>28</sup> Wilton Consulting Group. (2021.) The Road to 2051: An Agricultural Trends Study for Planning Policy in the Town of Caledon.

<sup>29</sup> Equestrian Canada. (August 2022.) “Canadian Equestrian Sport Organizations Unite to Tout the Benefits of Riding at any Age.”

<sup>30</sup> Raia, P. (Dec. 2020.) “Increasing Inclusion in Equestrian Sports.” Horse Illustrated.

<sup>31</sup> Coulter, K. (2013.) “Horse Power: Gender, Work, and Wealth in Canadian Show Jumping.” In *Gender and Equestrian Sport: Riding Around the World*, eds. Adelman, M. and Knijnik, J. p. 180.

<sup>32</sup> Klugman, E. (Feb. 2022.) “Getting To the Playing Field: Increasing Diversity in Horse Sports.” *Eventing Nation*. And Jones, E. (June 2020.) “The Barriers to Ethnic Diversity in Equestrian Sport – And How to Pull Them Down.” *Horse & Hound*.

<sup>33</sup> Evans, M. (Nov. 2020.) “Racial Bias and Ethnic Diversity in the Horse Industry.” *Horse Journals*.

<sup>34</sup> Clawson, J. (July 2021.) “USEF Hosts Panel Discussion on LGBTQIA Inclusion in Sports.” *The Chronicle of the Horse*.

<sup>35</sup> Coulter, K. (October 2018.) *Work in Ontario Horse Stables*, p. 1.

<sup>36</sup> Coulter, K. (October 2018.) *Work in Ontario Horse Stables*, p. 1.

<sup>37</sup> Coulter, K. (October 2018.) *Work in Ontario Horse Stables*, p. 15.

<sup>38</sup> Farm Credit Canada. (2023.) Farmland Values Report, 2022.

<sup>39</sup> Vigouroux, L. (April 2023.) “The Dwindling Supply of Equine Veterinarians.” The Horse.

<sup>40</sup> Equestrian Canada. (n.d.). “Coaching.”

<sup>41</sup> The Horse Welfare Alliance of Canada. (September 2018.) “Horses are Livestock: A Statement by the Horse Welfare Alliance of Canada.”

<sup>42</sup> Ontario Equestrian. (n.d.) “We must keep the conversation going – Equine Businesses and Farming Income.”

<sup>43</sup> Ontario Equestrian. (n.d.) “We must keep the conversation going – Equine Businesses and Farming Income.”

<sup>44</sup> Weslowski, K. (2013). “Tax talk for horse people.” *HorseJournals*.

<sup>45</sup> In Ontario, the tax rate for registered farm properties is up to 25% of the residential rate. The Residential rate varies by municipality.

<sup>46</sup> Ontario Equestrian. (n.d.) “Discussion: How does the CRA classify the Equine Industry?”

<sup>47</sup> Horse Council British Columbia. (n.d.) “Traceability & Identification.” And Alberta Government. (Sept. 2015.) *Traceability and the Equine Industry*.

<sup>48</sup> Alberta Government. (Sept. 2015.) *Traceability and the Equine Industry*.

- 
- <sup>49</sup> Equestrian Canada. (n.d.) *Canadian Equine Identification Program: Phase 1 Overview*. And Horse Welfare Alliance of Canada. (n.d.) "Traceability."
- <sup>50</sup> Equestrian Canada. (April 2020.) *Strategic Initiatives Plan, 2018-22*, 11.
- <sup>51</sup> Equestrian Canada. (n.d.) *Canadian Equine Identification Program: Phase 1 Overview*.
- <sup>52</sup> Canadian Food Inspection Agency. *National Farm and Facility Level Biosecurity Standard for the Equine Sector*, p. 9.
- <sup>53</sup> Animal and Plant Health Inspection Service. United States Department of Agriculture. (Nov. 2006.) *Equine Biosecurity and Biocontainment Practices on U.S. Equine Operations*.
- <sup>54</sup> Spence, K.L. et al. (2017.) "Descriptive and Network Analyses of the Equine Contact Network at an Equestrian Show in Ontario, Canada and Implications for Disease Spread." *BMC Veterinary Research* 13, no. 191, p. 2.
- <sup>55</sup> Spence, K.L. et al. (2018.) "A Longitudinal Study Describing Horse Demographics and Movements During a Competition Season in Ontario, Canada." *The Canadian Veterinary Journal* 59, no. 7, p. 787-88.
- <sup>56</sup> Dominguez, M. et al. S (2016.) "Equine Disease Events Resulting from International Horse Movements: Systematic Review and Lessons Learned." *Equine Veterinary Journal* 48, p. 641-653. And Fédération Équestre Internationale. (n.d.) Biosecurity.
- <sup>57</sup> Roberts, M.C. (2014.) "Biosecurity and Equine Infectious Diseases." *Encyclopedia of Agriculture and Food Systems*, vol 2, p. 61.
- <sup>58</sup> Roberts, M.C. (2014.) "Biosecurity and Equine Infectious Diseases." *Encyclopedia of Agriculture and Food Systems*, vol 2, p. 61.
- <sup>59</sup> Weese, J.S. (2014.) "Biosecurity and Infection Control." *Equine Veterinary Journal* 46, p. 654-60.
- <sup>60</sup> Agriculture and Agri-Food Canada. (2020.) Climate Change Impacts on Agriculture.
- <sup>61</sup> World Meteorological Organization. (Dec. 2022.) Environment and Climate Change Canada: Top 10 Weather Stories.
- <sup>62</sup> Equestrian Canada. (2020.) Response to COVID-19 for Canada's Active Equines: Summary Report.
- <sup>63</sup> Equestrian Canada. (2020.) Response to COVID-19 for Canada's Active Equines: Summary Report, p.6
- <sup>64</sup> Equestrian Canada. (2020.) Response to COVID-19 for Canada's Active Equines: Summary Report, p. ii.
- <sup>65</sup> Canadian Pony Club. (n.d.) "What is Pony Club?"
- <sup>66</sup> Millen, T. (April 2023.) "Canadian Pony Club: Then and Now." Horse Journals.
- <sup>67</sup> Millen, T. (April 2023.) "Canadian Pony Club: Then and Now." Horse Journals.
- <sup>68</sup> The Pony Club. (2019.) "Join the Pony Club."
- <sup>69</sup> Pony Club. (2023.) "Discover Pony Club."
- <sup>70</sup> Stinson, S. (July 2017.) "As Courses Close and Millennials Turn their Backs, Golf Reckons with Uncertain Future." *National Post*.
- <sup>71</sup> Golf Canada and the PGA of Canada. (2014.) Long-Term Player Development Guide Version 2.0.
- <sup>72</sup> Adrenalin. (n.d.) Tennis Participation in Canada.
- <sup>73</sup> Tennis Canada. (n.d.) Pathways.
- <sup>74</sup> Tennis Canada. (n.d.) Game. Set. Equity.
- <sup>75</sup> See, for example, Alberta Equestrian Federation. (n.d.) Businesses. And Horse Council British Columbia. (n.d.) Business Associate.
- <sup>76</sup> Weslowski, K.L. (May 2013.) "Tax Talk for Horse People." Horse Journals.
- <sup>77</sup> Canadian Food Inspection Agency. (June 2016.) *National Farm and Facility Level Biosecurity Standard for the Equine Sector*, p. 9.
- <sup>78</sup> See, for example, Canadian Food Inspection Agency. (June 2017.) *National Farm and Facility Level Biosecurity User Guide for the Equine Sector*. And Saskatchewan Horse Federation and Government of Saskatchewan. (n.d.) *Horse Biosecurity Guide*. And Alberta Veterinary Medical Association and Alberta Equestrian Federation. (n.d.) *Equine Biosecurity Principles and Best Practices*.