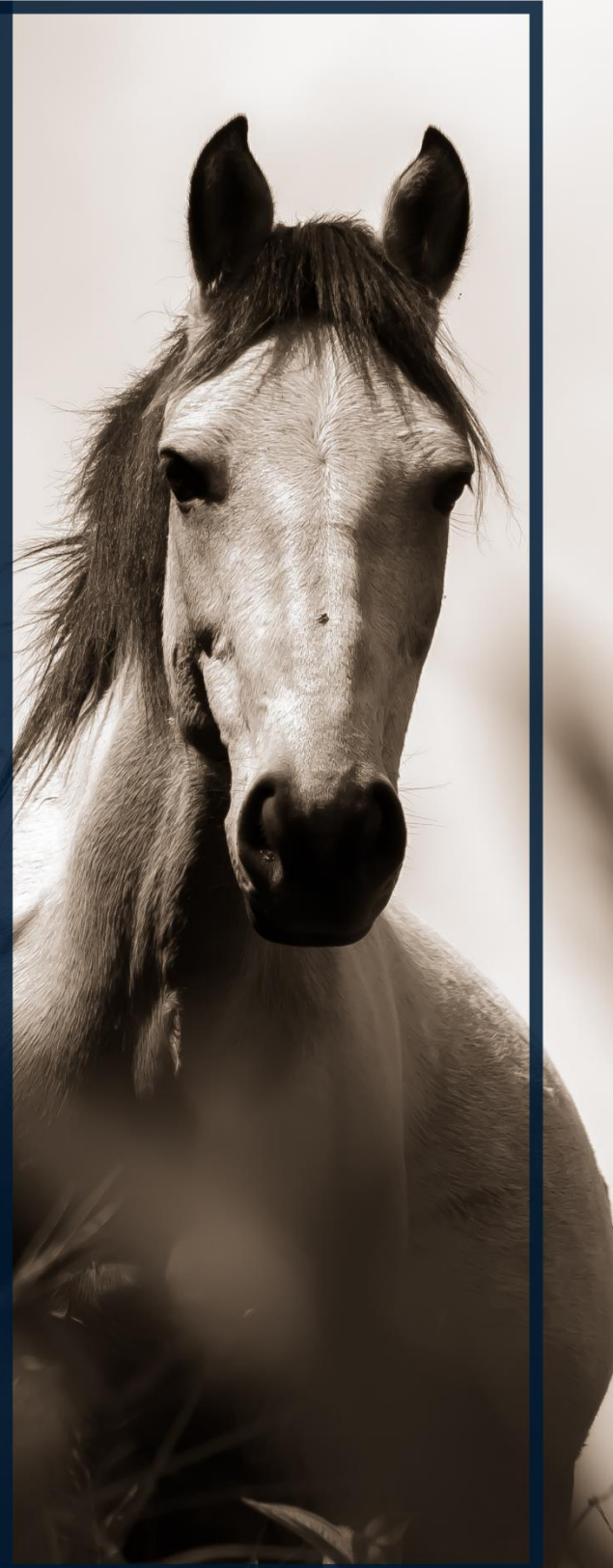


The Canadian Equine Sector: *Socio-Economic Insights 2023 Supplementary Information*



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Appendix A: 2010 Canadian Equine Industry Profile Study

In 2010, Equine Canada collaborated with Strategic Equine Inc. on the “2010 Canadian Equine Industry Profile Study: The State of the Industry.” This study paired sector data with findings from a telephone interview survey. Researchers randomly selected survey respondents from the following lists:

- Sport Licensees of Equine Canada, 2009,
- Adult members of provincial equestrian federations,
- Adult members of breed associations within Canada,
- Livestock Records Corporation registries,
- Publicly published lists of equine sector participants, and
- Catalogue mailing list contacts for tack and equipment products.¹

The 2010 study used a different engagement methodology than the 2022-23 study (Table 1).

Table 1. Differences in engagement methodology between the 2010 Canadian Equine Industry Profile Study and the 2022-23 study.

	2010 Study	2022-23 Study
Engagement Activities	2,566 telephone interviews	<ul style="list-style-type: none"> • 40 key informant interviews • 4,244 online survey respondents
Engagement Representation	6,862 sector participants	19,491 sector participants represented through the online survey
Engagement Approach	Questions requiring: <ul style="list-style-type: none"> • Yes/no responses • Numeric responses 	<ul style="list-style-type: none"> • Interviews with qualitative questions • Online survey with quantitative and qualitative questions

Differences exist in the definition of a census farm between 2006 and 2021, too. Prior to 2021, individuals in the territories who completed the census of agriculture could report horse outfitting and rigging, while people who lived in Canadian provinces could not report this activity. Beginning in 2021, Statistics Canada used the same “census farm” definition across the country.²

Given the differences in methodology, and the differences in Statistics Canada’s definition of a census farm, direct comparisons should not be made between the findings from the 2010 study and the current study.

The 2010 and 2022-23 studies also employed different economic impact methods. The author of the 2010 study similarly used the expenditure model approach to estimate direct,

indirect, and indirect impacts. However, the author did not use an input/output model of product and service flows within the Canadian economy. Instead, the author used direct estimates for each category of impact based on gathered data and assumed the direct impacts only those costs incurred on farms and properties where equines are kept. This method applied different categorization of direct, indirect, and induced impacts than in the 2022-23 study. As a result, the economic impact findings from the 2010 study should not be directly compared to the findings from the 2022-23 study.

Appendix B: Interview Guide

Preamble

Thank you for agreeing to take part in an interview for the Equestrian Canada's National Socio-Economic Impact Study.

Our team at Wilton Consulting Group is supporting Equestrian Canada in this work. The goals of the project are:

- To increase the understanding of the current state of the sector, including the topics of inclusion, diversity, equity and accessibility;
- To identify and articulate the economic and social impacts of sport and recreational participation and performance pathways within the sector; and
- To develop strategic recommendations to ensure the sustainability and inclusivity of the sector.

These interviews are intended to provide a clearer understanding of the complex sustainability needs for Canada's equestrian sport and recreation sectors. We will discuss the challenges and risks that the sector faces, as well as identify the strengths and opportunities. We will also explore the nature of the competition circuit and business climate.

This interview will be confidential and anonymous. Interview results will be synthesized into key themes for inclusion in the final report. Direct quotes may be used but the source will remain anonymous. The interview is expected to take approximately 45 minutes to an hour.

Initial Questions

What we want to learn:

- What led people to participate in the sector,
 - What pathways they take, and
 - What draws people back to the sector after a break.
1. Name. (Simply for internal tracking purposes.)
 2. Please tell us a little bit about yourself and your role within the equestrian sector.
 3. Can you please describe your pathway in the equestrian sector? For example, when did you begin participating in the sector? Did you take any breaks in your participation over the years?
 - a. *Potential prompts: Would you be willing to share what led you to take a break? And what encouraged you to return?*

Strengths, Risks, Challenges & Opportunities

What we want to learn:

- Strengths, risks, and challenges in the sector, including issues related to inclusion, diversity, equity, and accessibility;
 - The impacts of the COVID-19 pandemic and Russia's War in Ukraine;
 - The benefits of participation in the equestrian sector;
 - How to encourage lifelong participation; and
 - The desired future for the sector.
4. How do people benefit from participation in the equestrian sector? How do you think these benefits compare with participation in other sports or organized activities?
 - a. *Potential prompts: Please feel free to speak about your personal experiences or to share a broader reflection based on your interactions with others in the sector. Please reflect on benefits in a broad sense of the term – mental and physical well-being, business perspective, etc.*
 5. What do you see as the top 2-3 strengths of the sector? Why?
 6. What do you see as the top 2-3 risks or challenges for the sector? Why?
 - a. *Potential prompts: Please feel free to reflect on the sector more generally, or to think more narrowly in terms of your operation/business/sport.*
 - b. *Other interviewees have pointed to the farmland loss as a significant threat for the sector; could you share your perspective on this potential challenge?*
 7. How would you describe the inclusion, diversity, equity, and accessibility of the sector? How can sector stakeholders make the sector more welcoming for new entrants?
 - a. *Potential prompt: Do you see any barriers to participation? If yes, can you please elaborate?*
 8. How would you describe the state of the sector's social license or the level of public trust in the sector? Why?
 - a. *Potential prompt: What can the sector do to protect or improve this public trust?*
 9. How has the pandemic impacted the equestrian sector?
 - a. *Potential prompt: Please feel free to speak about your personal experiences or to share a broader reflection based on your interactions with others in the sector. Please feel free to reflect on the implications for mental and physical wellbeing, businesses (e.g., operating costs), owners' ability to care for active equines, etc.*
 10. Over the past few years, the world has also experienced social, economic, and geopolitical turmoil. How has this impacted the equestrian sector?

- a. *Potential prompt: Please feel free to speak about your personal experiences or to share a broader reflection based on your interactions with others in the sector. Please feel free to reflect on the implications for mental and physical wellbeing, businesses (e.g., operating costs), owners' ability to care for active equines, etc.*
11. How can we encourage lifelong participation in equestrian sports and recreation?
12. What role do you think volunteers play in the equestrian sector? How can the sector ensure it has sufficient volunteers?
- a. *Potential prompts: Please feel free to reflect on the sector more generally, or to think more narrowly in terms of your operation/business/sport.*

Questions for Competitors in Equestrian Sport

What we want to learn:

- The nature of the competition circuit and what motivates participation in the various types of events, and
 - The strengths, gaps and challenges associated with the competition circuit.
13. Please describe the types of events you compete in. Are they Equestrian Canada sanctioned? Are they domestic or international competitions?
- a. *Potential prompt: Why do you participate in these events?*
14. What are the 1-2 key strengths of the Canadian competition circuit?
- a. *Potential prompt: Please feel free to speak at the regional, provincial, or national level as relevant for your experiences.*
15. What are 1-2 gaps or challenges with the current competition circuit?
16. *Can you provide 1-2 suggestions of how to address these gaps or challenges?*

Questions for Business Owners, Employees, & Contracted Services in the Sector

What we want to learn:

- The impacts of government regulations, programs, and initiatives on equestrian businesses and contracted services; and
 - The connections between the Canadian equestrian sector and agricultural industry, as well as opportunities for increased collaboration.
17. Can you please share your thoughts on the availability of labour to support the sector?
18. Have government regulations, programs or initiatives influenced your operation? If so, how?

- a. *Potential prompts: Recognition (or lack thereof) as farms/agricultural businesses, import/export regulations, etc.*
19. How would you describe the relationship between the Canadian equestrian sector and the Canadian agricultural industry?
- a. *Follow up: Do you see opportunities for increased collaboration? If so, please describe.*
20. How would you describe the availability of farmland in your area? How is that impacting the sector?

Final Questions

What we want to learn:

- Interviewee leads, and
 - Any final thoughts.
21. In a perfect world, what would the equestrian sector look like in 2032?
- a. *Potential prompts: Who would be involved? How would you describe the business climate? How would you describe the competition circuits?*
22. Do you have any suggestions of another key sector stakeholder or two we should speak with?
23. Do you have any final thoughts you would like to share about the current state of the sector or opportunities for growth and improvement?

Appendix C: Survey Questions

Please see the survey questions beginning on the next page.

Thank you for taking part in this survey which will inform Equestrian Canada's National Socio-Economic Impact Study. You can learn more about this project [here](#).

We want to hear from people who are involved in the equine sector across Canada. We want to hear from you if you ride recreationally, compete, and/or work in the sector. We seek to hear from a diversity of perspectives. The goal of this survey is to gather information about the current social and economic status and impact of the equine sector in Canada.

Your survey responses will inform a report on the impact of the equestrian sector in Canada. Your responses will also inform strategic recommendations to promote the sustainability and inclusivity of the sector. The report will be used in advocacy efforts on behalf of the industry.

The survey is anonymous and should take approximately 15 minutes of your time. We appreciate your feedback!

Once you complete the survey, you can enter to win one of 6 Visa gift cards valued at \$50.

For more information, please contact:

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Principal and Lead Consultant

Wilton Consulting Group

[Darren Haarsma](#)

Consultant

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*** 1. As you answer this survey, please list all costs before any sales tax.**

For accuracy purposes, we ask all participants to only complete one survey per household.

Please confirm below:

- This is the first time my household is filling out the survey.
- Someone else in my household has already filled it out.

Disqualification

* 2. We ask for only one member of a household or business to respond to avoid duplication of data. Can you ensure your responses are not duplicates?

- Yes
- No

Location

* 3. In which Province or Territory are you primarily involved in equine activities or the equine industry?

Location

* 4. Did you complete the 2021 Alberta Equestrian Federation (AEF) Survey?

- Yes
- No
- Not sure

* 5. Did you complete the 2019 Horse Council BC (HCBC) Survey?

- Yes
- No
- Not sure

Location

* 6. Do you wish to submit updated Alberta cost estimates for 2022?

- Yes
- No

* 7. Do you wish to submit updated BC cost estimates for 2022? Please keep in mind that significant industry changes have occurred since 2019; we want to ensure we accurately represent the current state of the industry.

- Yes
- No

* 8. If you are not located in Canada, do you own horses in Canada or are otherwise directly involved in Canada's equine industry?

- Yes
- No

Survey Disqualification

Thank you for your interest in the Canadian Equine Industry. We are restricting the input for this survey to individuals actively engaged in equine ownership or activities taking place in Canada.

Location

* 9. In which Province or Territory are you primarily involved in the Canadian equine industry?

Demographics

10. Please indicate the number of family members, including yourself, in each age bracket who participate in equine-related activities.

0 to 14 years	<input type="text"/>
15 to 19 years	<input type="text"/>
20 to 29 years	<input type="text"/>
25 to 29 years	<input type="text"/>
30 to 39 years	<input type="text"/>
40 to 49 years	<input type="text"/>
50 to 59 years	<input type="text"/>
60 to 69 years	<input type="text"/>
70 years and older	<input type="text"/>
Prefer not to say	<input type="text"/>

11. Please select the bracket for your household's annual after-tax income.

12. Please select the highest level of education in your household.

13. Do you identify as a member of a racialized community?

14. Do you identify as Indigenous, First Nations, Metis, or Inuk (Inuit)?

15. What is your gender?

Socio-Economic Insights

* 16. How would you describe your length of involvement in the industry?

Socio-Economic Insights

17. You indicated you returned to participating after a break from equestrian activities. What led you to stop participating in equestrian activities? (Please select all that apply.)

- Career
- Cost
- School
- Started a family
- Other (please describe):

18. What led you to resume participation? (Please select all that apply.)

- My personal or professional schedule became flexible enough.
- I felt my finances could support my pursuits.
- I became involved alongside a younger family member.
- Other (please describe):

19. In the next five years, you expect your household's involvement in the equestrian industry will:

20. Does at least one member of your household hold one of the following memberships or licenses?

	Response
Equestrian Canada Sport licence	<input type="text"/>
Provincial/Territorial Equestrian Sport Association membership	<input type="text"/>
An equine-related, sport-specific, breed, or recreational association or club membership	<input type="text"/>

Socio-Economic Insights

21. Why does a member of your household participate in the association(s) and/or club(s)?
(Please select all that apply.)

- Access to competitions
- Enjoyment
- Socialization
- Education
- Other (please describe)

22. Please rate your level of agreement with the following statements. The Canadian equestrian industry...

	Response
Contributes to rural community sport and recreation.	<input type="text"/>
Is an economic driver.	<input type="text"/>
Connects rural and urban areas.	<input type="text"/>
Provides ecological goods and services (e.g., habitat for wildlife, beautifies rural landscapes).	<input type="text"/>
Has access to sufficient well-trained workers.	<input type="text"/>
Has sufficient methods for traceability and identification of horses.	<input type="text"/>
Upholds public trust in the welfare of horses.	<input type="text"/>
Provides sufficient care for retired horses.	<input type="text"/>
Has access to sufficient officials for events.	<input type="text"/>

Please add any comments:

23. Please rate your level of agreement with the following statements:

Generally, people who participate in equestrian activities...

	Response
Understand best practices for biosecurity.	<input type="text"/>
Comply with best practices for biosecurity.	<input type="text"/>
Support buying Canadian-bred horses.	<input type="text"/>
Have the necessary knowledge base for their role in the industry.	<input type="text"/>

Please add any comments:

24. Please rate your level of agreement with the following statements:

	Response
Interaction with horses contributes to human health and wellbeing.	<input type="text"/>
The cost to participate in equestrian activities is affordable for the average Canadian.	<input type="text"/>
The equestrian community is welcoming to people of differing backgrounds.	<input type="text"/>

Please add any comments:

25. Please rate your level of concern regarding the following issues for the future of the Canadian equestrian industry:

	Response
Rising expenses	<input type="text"/>
Access to public trails	<input type="text"/>
Ineligibility for AgriStability	<input type="text"/>
Decreasing number of local competitions and events	<input type="text"/>
Loss of Farmland/Rising Cost of Land	<input type="text"/>
Availability of equine services in my area	<input type="text"/>
Red tape (e.g., relating to imports/exports, international competition, etc.)	<input type="text"/>
Barriers for new entrants seeking to open an equine facility	<input type="text"/>
Challenges for equine facilities in attaining provincial/territorial "farm status" for income tax purposes	<input type="text"/>
Challenges for equine facilities in attaining municipal "agricultural designation" for property tax purposes	<input type="text"/>

Please add any comments:

* 26. In 2022, did you attend any equestrian events or competitions in Canada as a spectator?

- Yes
- No
- Uncertain

Equine Event Spectators Costs

27. On average, per event or competition, how much would you spend on each of the following?

Please use your best estimate. Please enter whole numbers; do not include a dollar sign or cents.

Travel (e.g., gas, taxis, train tickets, flights, etc.)

Food

Accommodation

Other (Please describe):

Horse Ownership

* 28. Do you or other members of your household own or lease horses? (Note: For the purpose of this survey, horses include ponies and miniature horses.)

Yes

No

Horse Population and Values

29. Which province or territory do you predominantly keep your horses in?

* 30. How many horses does your household **own**? (For the purpose of this survey, horses include ponies and miniature horses.)

31. Please estimate the total value of all the horses you own.

32. Do members of your household own any horses in partnership, or have fractional or syndicate ownership of any horses?

Horse Population and Values

33. How many horses do members of your household own in partnership, or have fractional or syndicate ownership of? Please also list the individual shares in decimal form.

(i.e. Own 50% share in one horse and 25% share in another = 0.5, 0.25)

34. Please estimate the total value of the horses you own in partnership, or have fractional or syndicate ownership of. When estimating, please think of the overall value of the horse(s), rather than simply your share of the value.

* 35. Do members of your household **lease** any horses?

- Yes
 No
 Uncertain

Horse Ownership and Values

* 36. How many horses do members of your household **lease**?

37. Please estimate the total value of the horses you lease.

38. In the next five years, your household's horse ownership will likely

* 39. Did you respond to the Census of Agriculture in 2021?

- Yes
 No
 Uncertain

Horse Ownership and Primary Activities

* 40. How many of the horses you **own or lease** did you count in the 2021 Census of Agriculture? (Note: any horses you board for others will be addressed in another section of the survey.)

41. Were any of the included horses owned in partnership or through a fractional or syndicate ownership?

- No
- Yes (please specify how many)

42. For the horses that you **own or lease**, please indicate how many fit within each primary activity? Leave a primary activity category blank if no horse fits within in, instead of entering a 0.

(If multiple horses are owned, please enter the number of horses below without double counting horses.)

Recreation (e.g., recreational riding or recreational driving)	<input type="text"/>
Amateur Sport (e.g., Para Equestrian, Western, English, or other disciplines)	<input type="text"/>
Professional Sport	<input type="text"/>
Elite Sport	<input type="text"/>
Work (e.g., lessons, equine-assisted services, outfitting, ranch, etc.)	<input type="text"/>
Racing (e.g., Thoroughbred, Standardbred, or Quarter Horse)	<input type="text"/>
Breeding	<input type="text"/>
Other (please specify)	<input type="text"/>

* 43. Excluding travel for shows and competitions, where does your household keep its horse(s)?

Boarding Expenditures

* 44. How many horses does your household board at a boarding facility (e.g. stable, farm, training facility, etc.)?

45. On average, how many months of the year does your household board its horses?

46. What is the average monthly boarding fee in 2022?

47. What is the total value of your large tack items (saddles, carriages, wagons, sleighs, etc.)

48. Please list any additional monthly fees for services in addition to the base boarding fees in 2022 for your household's boarded horse(s) (do not include training fees):

Individual feed (if an additional cost)	<input type="text"/>
Blanketing, boots, etc.	<input type="text"/>
Grooming	<input type="text"/>
Braiding	<input type="text"/>
Other, please describe	<input type="text"/>

49. Please enter your approximate **annual** expenditures in 2022 for a single boarded horse used for **recreation**:

Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Training or lessons	<input type="text"/>
Other horse care products and services (e.g., supplements, massage, chiro, etc.)	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Insurance	<input type="text"/>
Other	<input type="text"/>

50. Please enter your approximate **annual** expenditures in 2022 for a single boarded horse used for **amateur sport**:

Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Training or lessons	<input type="text"/>
Other horse care products and services (e.g., supplements, massage, chiro, etc.)	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Insurance	<input type="text"/>
Other	<input type="text"/>

51. Please enter your approximate **annual** expenditures in 2022 for a single boarded horse used for **professional sport**:

Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Training or lessons	<input type="text"/>
Other horse care products and services (e.g., supplements, massage, chiro, etc.)	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Insurance	<input type="text"/>
Other	<input type="text"/>

52. Please enter your approximate **annual** expenditures in 2022 for a single boarded horse used for **elite sport**:

Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Training or lessons	<input type="text"/>
Other horse care products and services (e.g., supplements, massage, chiro, etc.)	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Insurance	<input type="text"/>
Other	<input type="text"/>

53. Please enter your approximate **annual** expenditures in 2022 for a single boarded horse used for **work**:

Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Training or lessons	<input type="text"/>
Other horse care products and services (e.g., supplements, massage, chiro, etc.)	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Insurance	<input type="text"/>
Other	<input type="text"/>

54. Please enter your approximate **annual** expenditures in 2022 for a single boarded horse used for **breeding**:

Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Training or lessons	<input type="text"/>
Other horse care products and services (e.g., supplements, massage, chiro, etc.)	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Insurance	<input type="text"/>
Other	<input type="text"/>

Horse Expenditures

55. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **recreation**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

56. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **amateur sport**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

57. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **professional sport**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

58. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **elite sport**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

59. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **work**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

60. Please enter your approximate **annual** expenditures in 2022 for a single **breeding** horse (i.e., broodmare or stallion):

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

61. Please enter your approximate **annual** expenditures in 2022 for a **single foal or weanling**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

62. What is the total value of your large tack items (saddles, carriages, wagons, sleighs, etc.)

63. What are your total capital costs for all buildings and fences required to keep your horses?

64. What are the total capital costs for all equipment required to keep your horses?

Horse Expenditures

65. What is the average monthly boarding fee in 2022?

* 66. How many horses does your household board at a boarding facility (e.g. stable, farm, training facility, etc.)?

67. On average, how many months of the year does your household board its horses?

68. What is the total value of your large tack items (saddles, carriages, wagons, sleighs, etc.)

69. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **recreation**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

70. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **amateur sport**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

71. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **professional sport**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

72. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **elite sport**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

73. Please enter your approximate **annual** expenditures in 2022 for a single horse kept on your household's property/properties and used for **work**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

74. Please enter your approximate **annual** expenditures in 2022 for a single **breeding** horse (i.e., broodmare or stallion):

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

75. Please enter your approximate **annual** expenditures in 2022 for a **single foal or weanling**:

Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	<input type="text"/>
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	<input type="text"/>
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	<input type="text"/>
Feed	<input type="text"/>
Bedding	<input type="text"/>
Hired labour	<input type="text"/>
Veterinary care	<input type="text"/>
Farrier care	<input type="text"/>
Other horse care products and services	<input type="text"/>
Travel	<input type="text"/>
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	<input type="text"/>
Clothes	<input type="text"/>
Manure disposal	<input type="text"/>
Insurance	<input type="text"/>

Equine Industry Involvement

76. Please indicate your household's roles in the equine industry. Please select all that apply.

- Recreational participant (e.g., recreational driving, recreational riding, spending time with retired or companion horses)
- Amateur sport competitor
- Professional sport competitor
- Elite sport competitor
- Participant in the racing sector
- Coach/Trainer
- Equine-assisted service provider
- Equine facility (e.g., stable, breeding facility, equine-assisted service facility, etc.) owner and/or operator
- Equine facility staff
- Breeder
- Outfitter/Tourism Operator
- Farmer/Rancher
- Event organizer, and/or event facility owner/operator
- Official
- Equine/large animal veterinarian
- Farrier
- Equine health care practitioner (e.g., chiropractor, massage therapist, nutritionist, kinesiologist, first aid tech, vet tech, etc.)
- Owner or an employee in an affiliated business (e.g., equipment, tack, clothing, insurance, etc.)
- Manager of a not-for-profit organization or charity
- Other (please describe)

Recreational Participants

77. Please identify how many members of your household (including yourself) participate in each type of recreation.

Recreational driving

Recreational riding

Spending time with retired or companion horses

Other, please describe

Competitors

78. Please select the primary discipline each member of your household participates in.

	Discipline #1	Discipline #2	Discipline #3
Family Member #1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Family Member #2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Family Member #3	<input type="text"/>	<input type="text"/>	<input type="text"/>
Family Member #4	<input type="text"/>	<input type="text"/>	<input type="text"/>
Family Member #5	<input type="text"/>	<input type="text"/>	<input type="text"/>
Family Member #6	<input type="text"/>	<input type="text"/>	<input type="text"/>

79. On average, approximately how many equestrian competitions and events has your household participated in annually in the past five years?

80. How would you describe your household's distance to travel for competitions and events?
(select all that apply)

- Locally (up to 2 hours of travel)
- Within our province/territory of residence
- Across Canada
- Into the United States
- Internationally (further afield than the United States)

Please add any comments:

81. Please enter your average expenditures in 2022 per competition or event in Canada:

Transportation	<input type="text"/>
Accommodations for people	<input type="text"/>
Accommodations for horses	<input type="text"/>
Food	<input type="text"/>
Entry fees	<input type="text"/>
Clothing	<input type="text"/>
Equipment (stall guards, décor, etc.)	<input type="text"/>
Other (please describe)	<input type="text"/>

Racing Sector Participants

82. Please select the primary type of racing each member of your household participates in.

Quarter Horse	<input type="text"/>
Standardbred	<input type="text"/>
Thoroughbred	<input type="text"/>
Other, please describe:	<input type="text"/>

Coaches and Trainers

83. Please select the disciplines/sports you focus on in your business. (Select all that apply.)

- Barrel racing
- Breed sport
- Chuckwagon racing
- Cutting
- Dressage
- Driving
- Endurance
- Eventing
- General performance
- Hunter
- Mounted games
- Para equestrian
- Pole bending
- Polo
- Racing
- Reining
- Roping
- Show jumping
- Team penning
- Trail riding
- Vaulting
- Western pleasure
- Other (please describe)

84. Please estimate how many clients you worked with in 2022 who do not own or lease a horse.

Equine-Assisted Service Providers

85. Please select all services you offer through your business.

- Adaptive Riding
- Equine Assisted Learning
- Equine Assisted Therapy
- Hippotherapy
- Therapeutic Driving and Vaulting
- Therapeutic Riding
- Other (please describe)

86. Please estimate how many clients you worked with in 2022 who do not own or lease a horse.

87. Please estimate the **annual** cost for the specialized equipment, tack, etc. necessary for the operation of your business. (Please note: the costs for the care of your horses and the operation of your facility were addressed in an earlier section of the survey.)

Equine Facility Owners and/or Operators

88. What type of equine facility do you own and/or operate? (Please select all that apply.)

- Stable
- Breeding facility
- Equine-assisted service facility
- Other (please describe)

89. Including yourself, how many full-time, year-round staff does your business employ? *Please incorporate any part-time or seasonal staff into this number by estimating the portion of full-time hours they cover. (For example, three part-time employees who work 10 hours a week would be the equivalent of 0.75 full-time staff member.)*

90. Please indicate the average hourly wage for staff, including yourself, in 2022.

91. Including all grounds and pastures, how many acres is your equine facility?

92. In 2022, how many horses did you board for others?

93. Did you participate in the 2021 Census of Agriculture?

- Yes
- No
- Uncertain

Equine Facility Owners and/or Operators

94. How many of the horses you board for others did you count in the 2021 Census of Agriculture?

95. Is your equine facility or farm land partially or wholly assessed as farm class and/or commercial for property tax purposes?

Farm Class

Commercial

96. Does your equine facility or farm partially or wholly qualify for a municipal, provincial, or territorial farm property tax rate program?

97. What activity is the farm revenue based on? (Please select all that apply.)

- Equine
- Cattle/other livestock
- Crops
- Other (please specify)

98. Please rate your level of agreement with the following sentence: Government regulations hinder the operation of my equine facility.

Please add any comments:

99. We know the industry faces seasonal fluctuations in expenditures. For the purposes of this survey, please estimate your average **monthly** costs in 2022 for each of the following items: (Please leave a row blank if not applicable.)

Lease payment	<input type="text"/>
Property maintenance and repairs	<input type="text"/>
Equipment maintenance and repairs	<input type="text"/>
Property supplies (e.g., buckets, pitchforks, etc.)	<input type="text"/>
Bedding	<input type="text"/>
Feed	<input type="text"/>
Manure Management	<input type="text"/>
Utilities (e.g., electricity/hydro, gas, Internet, etc.)	<input type="text"/>
Insurance	<input type="text"/>
Labour	<input type="text"/>
Property taxes	<input type="text"/>
Other, please describe	<input type="text"/>

100. What is the approximate capital cost of your buildings and equipment used solely for boarding horses?
(Please note capital costs of buildings and equipment used for providing other services will be requested separately.)

101. What is the total capital cost for buildings and equipment (e.g., riding arenas) primarily used for lessons and training/coaching services offered?

Equine Facility Staff

102. Please indicate your work schedule at the equine facility.

103. What is your hourly wage?

104. What is your level of education related to the care and maintenance of horses?

105. In addition to your role at the equine facility, do you also work in another job?

Breeders

106. Please estimate your **per horse** costs in 2022 for the following expenses sometimes required for breeding horses:

Mare Reproductive Vet
Care

Stallion Reproductive
Vet Services

Other (please also
describe)

107. Please estimate your costs in 2022 for equine memberships and/or certifications:

108. Please think of your typical annual sales of your horses. Please provide the estimated percentage breakdown of your sales to each of the following sectors:

Sport (e.g., Western or
English)

Recreation (e.g.,
Trail/Casual Riding)

Work (e.g., Ranch or
Outfitting)

Racing

Other

Outfitters and Tourism Operators

109. What are the estimated daily expenses (e.g., gear required and transportation) for a pack trip or tourism activities in 2022?

110. How many days did your horses spend on horse pack trips or tourism activities in 2022?

111. How many people are employed by your outfitting or tourism business in 2022?

112. On average, how many days will they work in 2022?

113. Please indicate the average hourly wage for staff, including yourself, in 2022.

114. Please estimate how many clients you worked with in 2022 who do not own or lease a horse.

Farmers/Ranchers

115. How many acres does your farm or ranch operate on?

116. Please specify how many of your horses are used for farm/ranch work

117. Is your farm assessed with an agricultural designation for municipal property tax purposes?

118. Does your farm qualify as a registered farm business in your province/territory for income tax purposes?

Farmers/Ranchers

119. What activity is the farm revenue based on? (please select all that apply)

- Equine
- Cattle/other livestock
- Crops
- Other (please specify)

Event Officials

120. Please select the discipline(s) or sport(s) that you officiate (e.g. judge, course designer, technical delegate, safety officer, etc.). Please select all that apply.

- Dressage
- Driving
- Eventing
- Hunter/Jumper
- Racing
- Rodeo
- Western events
- Other (please specify)

121. In 2022, how many events do you anticipate officiating?

122. Please think about your 2022 event schedule. How does it compare to your pre-pandemic schedule?

123. Please think about the number of **participants** at each event in 2022. On average, how do these numbers compare to numbers in your pre-pandemic events?

124. Please think about the number of **spectators** at each event in 2022. On average, how do these numbers compare to numbers in your pre-pandemic events?

125. What is the average fee you charge for officiating an event in 2022?

126. Please rate your level of agreement with the following statements.

The process for becoming licensed to fulfill my role at events is straightforward.

The equestrian industry has a sufficient number of officials for events.

Training is easy to access for individuals who want to become officials.

Officials are fairly compensated.

Please add any comments:

Event Facility Owners/Managers, and Competition Organizers

127. Please select your primary role related to equine competitions.

- Competition facility owner/manager
- Competition organizer (host, organize, and/or run competitions at facilities owned or managed by others)

Event Facility Owner/Manager, and Competition Organizers

128. Please describe the facility ownership structure:

129. Please identify the types of competitions that you host or organize. (Please select all that apply.)

- Dressage
- Driving
- Eventing
- Hunter/Jumper
- Racing
- Rodeo
- Western events
- Other (please specify)

130. How many events are you hosting and/or operating in 2022?

131. What is the average number of equine participants per event this year?

132. What is the estimated average number of spectators for each event this year?

133. Please think about your 2022 event schedule. How does it compare to your pre-pandemic schedule?

134. Please think about the number of **participants** at each event in 2022. On average, how do these numbers compare to numbers in your pre-pandemic events?

135. Please think about the number of **spectators** at each event in 2022. On average, how do these numbers compare to numbers in your pre-pandemic events?

136. Please list average annual expenditures on the following items:

Facility maintenance

Facility upgrades (e.g.,
new rings, fencing,
footing, stalls, etc.)

Hired labour

Insurance

Marketing

Communications

Officials

Security

Show management
(e.g., registrations,
prizes, etc.)

Other, please describe

137. Over the next 5 years, you envision your number of competitions will:

138. Please describe any changes you anticipate making in the next five years to meet any changing interests in the sector.

139. What is the average registration fee you charge for competitors to participate in an event?

140. Please rate your level of agreement with the following statements.

The process for becoming licensed to host events is straightforward.

The equestrian industry has a sufficient number of officials for events.

Training is easy to access for individuals who want to become officials.

Officials are fairly compensated.

Please add any comments:

Veterinarians, Farriers, Health Care Service Providers, Affiliated Businesses, etc.

141. Please select which services you provide. (Please select all that apply.)

- Veterinary
- Dental services
- Farrier
- Massage
- Chiropractor
- Kinesiologist
- First aid tech
- Vet tech
- Tack store
- Equipment supplier
- Clothing store
- Insurance provider
- Other (please specify)

142. Please estimate the percentage of your work hours in 2022 spent with horses or the equine industry more generally.

143. Including yourself, how many full-time, year-round staff does your business employ? Please incorporate any part-time or seasonal staff into this number by estimating the portion of full-time hours they cover. (For example, three part-time employees who work 10 hours a week would be the equivalent of 0.75 full-time staff member.)

144. Please indicate the average hourly wage for staff, including yourself, in 2022.

145. Over the last 5 years, how would you describe the state of your business in the equestrian sector?

146. What do you see as the prospects for your business in the equestrian sector over the next 5 years?

147. Approximately what **percentage** of your annual expenses are allocated to each of the following cost categories?

Labour

Facility lease or capital ownership costs

Equipment (lease or ownership costs)

Utilities

Supplies

Other

Not-for-profit Organizations or Charities

148. Please describe the type of not-for-profit or charity organization you operate.

149. Including yourself, how many full-time, year-round staff does your organization or charity employ?

Please incorporate any part-time or seasonal staff into this number by estimating the portion of full-time hours they cover. (For example, three part-time employees who work 10 hours a week would be the equivalent of 0.75 full-time staff member.)

150. Please indicate the average hourly wage for all staff, including yourself, in 2022:

Horse Trailer Costs

* 151. Do you own a horse trailer?

Yes

No

Horse Trailer Costs

* 152. Did you include depreciation and fuel costs for your truck and trailer into your previously entered annual travel expenses?

Yes

No

153. What is your estimated total truck and trailer mileage for all equine activities in 2022?

Final Questions and Thank you!

Thank you for completing this survey. Your insights will help the project team to better understand the current state of the industry, and also to develop actionable recommendations to support the sustainability and inclusivity of the sector.

154. Please share any final thoughts on the strengths or challenges of the Canadian equestrian sector

155. Please share any final thoughts on the opportunities or risks of the Canadian equestrian sector

156. If you would like to enter to win 1 of 6 Visa \$50 gift cards, please enter your contact information below. Your contact information will only be used for the purpose of the draw.

Name

Email Address

157. Would you like the executive summary of the report sent to the above email address when it is finalized? By selecting yes, you give us permission to contact you to share only this information.

Yes

No

Appendix D: Equine Sector Statistics

Provincial Equine Populations by Primary Activity Categories

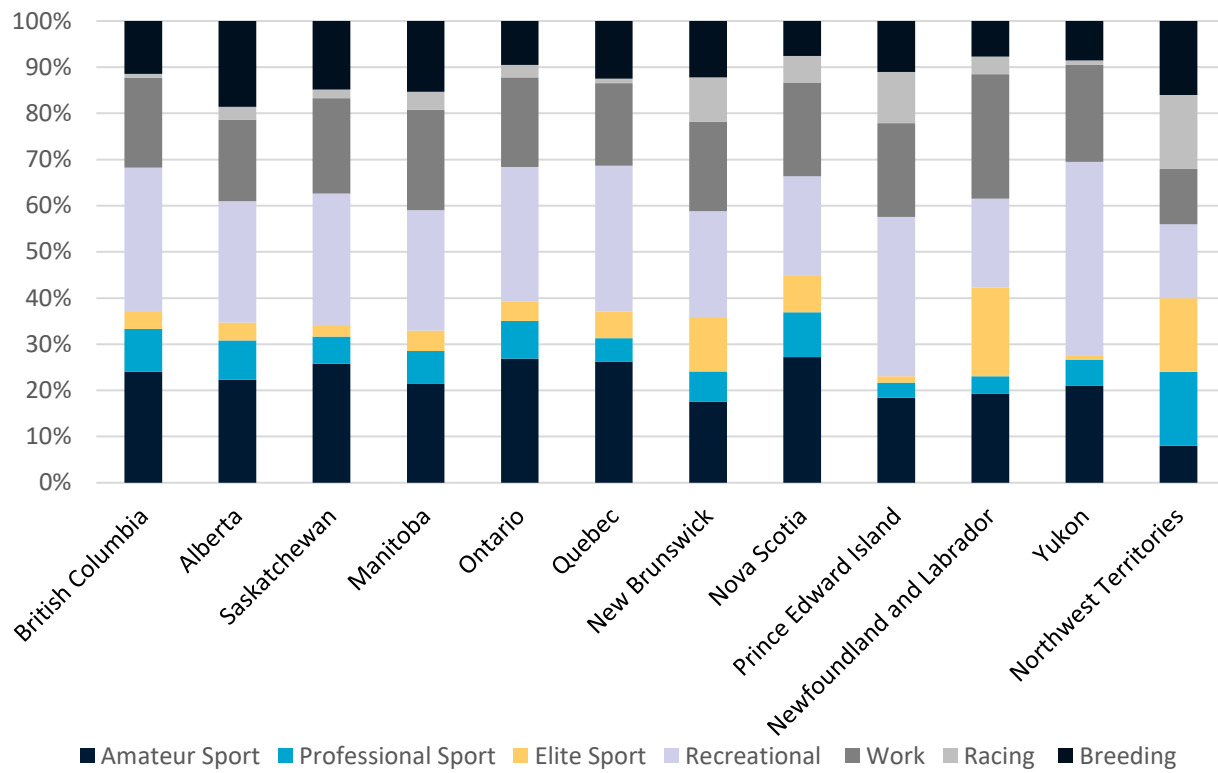


Figure 1. Portion of equine population within each primary activity category, 2021.

Table 2. Equine population within each primary activity category, 2021.

Geography	Amateur Sport	Professional Sport	Elite Sport	Recreation	Working	Racing	Breeding
Canada	126,036	39,806	21,053	145,654	97,647	12,761	73,439
British Columbia	9,414	3,661	1,423	12,277	7,644	312	4,494
Alberta	42,040	16,160	7,229	49,633	33,352	5,194	35,084
Saskatchewan	16,588	3,800	1,608	18,342	13,300	1,169	9,573
Manitoba	5,140	1,723	1,066	6,261	5,222	930	3,691
Ontario	34,419	10,413	5,401	37,305	24,844	3,413	12,185
Quebec	14,448	2,771	3,178	17,404	9,829	554	6,873
New Brunswick	426	161	286	559	471	234	297
Nova Scotia	1,291	457	383	1,013	964	272	358
Prince Edward Island	324	57	24	607	356	194	194
Newfoundland and Labrador	15	3	15	15	22	3	6
Yukon & Northwest Territories	151	42	8	300	151	8	62

Equine-Keeping Costs

[Equine-Keeping Expenditure Categories](#)

Equine-keeping expenditures were categorized as follows:

- **Buildings and Equipment** – Annual repairs and maintenance as well as amortized capital expenditures for all facilities and equipment used for boarding, feeding, exercising, practicing, or otherwise maintaining an equine are included. Includes fencing, stables, mowers, harrows, carriages, sleighs, and other large tack items.

Equipment used for feeding, equine care, transporting, breeding, or end-of-life services are included within those categories.ⁱ

- **Facility Tools and Supplies** – Small consumables and items used to maintain stables, training and exercise areas, and others not captured within the ‘Equine Care Products and Services.’
- **Feed and Bedding** – All expenses for feed, supplements, bedding, and the equipment costs for delivering each to the equines. The labour for delivering from storage to the equines is included in the ‘Hired Labour’ expenditure category.ⁱⁱ
- **Veterinarian and Farrier Care** – Regular expenses and irregular veterinarian care expenses, dental care, and all farrier services including trimming, shoeing, and others including reproductive services.ⁱⁱⁱ
- **Hired Labour** – All hired labour for maintaining equines, maintaining equine boarding facilities and practicing grounds or arenas. Labour expenses for hired services such as veterinarian, farrier, repair (e.g., buildings and equipment, tack), and others are included in the respective expenditure categories.
- **Other Equine Care Products and Services** – All equine wellness services and product expenses not included with the feed or veterinarian and farrier care categories. These expenses include dewormers, various equine therapy services, and others. Also includes specialized training for sport and working equines.
- **Travel** – All vehicle expenses for trucks and trailers transporting working equines and equines for recreational, sport, or other uses. This category includes direct expenses and a measure of vehicle depreciation based on mileage travelled.
- **Tack** – Expenses for all small equipment used to ride, handle, and care for equines. Large tack items such as saddles, carriages, wagons, and sleighs are included within the ‘Buildings and Equipment’ expenditure category.
- **Clothes** – Expenses for all clothes, boots, and headgear purchased for equestrian and animal care purposes.
- **Insurance** – All costs incurred to insure the equines and equine-keeping facilities.

ⁱ In the equine-keeping expenditure tables, buildings and equipment are divided into four categories: (1) annual capital costs for buildings and fences, (2) annual capital costs for equipment, (3) facility repair and maintenance, and (4) equipment repair and maintenance.

ⁱⁱ In the equine-keeping expenditure tables, feed and bedding are presented as separate categories.

ⁱⁱⁱ In the equine-keeping expenditure tables, veterinary care and farrier care are presented as separate categories.

- **Other** – Costs for manure disposal, including all equipment and disposal expenses, supplements, and miscellaneous expenditures not easily categorized.

Annual Equine-Keeping Costs

Table 3. Equine-keeping annual costs by primary activity and province, 2022 (in dollars).

Region	Recreation	Amateur sport	Professional sport	Elite sport	Working	Breeding	Average
British Columbia	13,193	19,119	23,138	30,191	13,453	8,144	17,303
Alberta	11,261	18,034	18,756	24,630	6,706	8,247	14,874
Saskatchewan	12,172	13,461	11,011	19,102	6,357	6,815	12,269
Manitoba	9,995	12,994	12,121	18,735	6,778	9,785	12,044
Ontario	13,038	20,447	23,666	26,208	11,192	9,501	17,519
Quebec	11,667	16,789	25,926	28,773	11,035	9,312	15,462
New Brunswick	10,965	10,850	15,203	7,684	9,687	10,532	11,660
Nova Scotia	9,094	18,266	16,775	-	7,727	5,998	12,260
Prince Edward Island	11,801	13,590	17,700	23,500	7,273	15,653	13,434
Newfoundland and Labrador	6,738	6,745	-	-	5,120	-	6,074
Yukon	7,738	5,250	10,700	-	8,108	-	7,431
Canada	11,975	17,770	19,883	24,607	8,828	8,451	15,270

Boarding Costs

Slightly less than half of equine owners across Canada boarded at least one of their equines for at least part of the year at a stable or under informal boarding arrangements. Boarding rates varied across the country (Table 4); B.C. and Ontario had the highest rates. Across Canada, the average surveyed monthly boarding rate was \$818.

Table 4. Canadian equine boarding rates, 2022.

Region	% of equine owners that board at least 1 equine	Average monthly boarding fee (in dollars)
British Columbia	39%	872
Alberta	42%	723
Saskatchewan	25%	742
Manitoba	30%	616
Ontario	57%	897
Quebec	45%	620
New Brunswick	38%	497
Nova Scotia	33%	624
Prince Edward Island	24%	455
Newfoundland and Labrador	33%	693
Yukon	53%	-
Canada	47%	818

[Equine-Keeping Expenditures by Canadian Province, 2022](#)

Table 5. British Columbia annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	551	599	751	2,291	1,084	1,333
Per equine, annual capital costs for all equipment required	665	716	733	1,280	869	760
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	1,467	1,596	1,114	1,365	1,357	631

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	825	709	978	1,160	1,128	421
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	362	243	368	610	488	127
Feed	3,161	2,899	4,994	3,190	3,043	2,239
Bedding	489	377	642	747	632	443
Hired labour	481	506	1,580	2,680	932	682
Veterinary care	1,481	1,737	2,112	3,252	1,306	1,693
Farrier care	1,132	1,717	2,147	2,200	1,275	617
Other equine care products and services	1,261	3,456	3,006	5,248	796	243
Travel	1,073	2,208	2,482	5,422	1,048	430
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	617	861	1,814	1,342	511	76
Clothes	354	552	599	510	240	53
Other (manure disposal, supplements)	65	195	168	145	265	30
Insurance	425	749	1,134	2,321	431	461
Total	13,193	19,119	23,138	30,191	13,453	8,144

Table 6. Alberta annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	448	589	594	1,014	414	829
Per equine, annual capital costs for all equipment required	571	626	365	779	744	726
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	1,045	1,029	653	840	386	828
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	891	768	612	1,232	271	398
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	249	312	316	515	349	233
Feed	2,417	2,179	3,460	2,041	1,717	2,078
Bedding	262	425	611	749	362	318
Hired labour	672	876	673	3,828	319	701
Veterinary care	1,288	1,890	1,882	1,866	805	1,419
Farrier care	936	1,271	1,357	1,589	616	530
Other equine care products and services	985	3,209	2,171	3,319	454	297
Travel	1,527	2,591	2,986	4,371	570	709
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	465	863	1,612	1,255	404	70
Clothes	201	597	666	960	157	86

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Other (manure disposal, supplements)	40	144	564	634	92	350
Insurance	285	664	1,192	1,430	204	230
Total	11,261	18,034	18,756	24,630	6,706	8,247

Table 7. Saskatchewan annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	356	415	1,586	2,670	228	1,255
Per equine, annual capital costs for all equipment required	526	725	490	314	341	591
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	1,941	598	714	1,350	427	487
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	922	458	538	1,100	314	298
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	460	249	232	200	134	179
Feed	2,805	2,185	2,518	2,500	1,527	1,985
Bedding	433	282	395	500	248	257
Hired labour	285	46	-	7,500	77	61
Veterinary care	1,222	1,425	1,312	717	919	1,298
Farrier care	842	902	919	1,333	560	444

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Other equine care products and services	1,086	1,577	730	850	437	196
Travel	1,039	2,628	2,069	2,002	1,056	1,290
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	491	751	460	467	322	110
Clothes	255	676	470	250	136	63
Other (manure disposal, supplements)	72	113	385	100	-	-
Insurance	319	433	270	233	201	148
Total	12,172	13,461	11,011	19,102	6,357	6,815

Table 8. Manitoba annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	456	303	916	337	471	720
Per equine, annual capital costs for all equipment required	692	580	754	799	950	685
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	1,069	900	1,750	2,233	578	692
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	748	511	1,450	1,200	551	394
Facility tools and supplies (e.g.,	397	254	983	1,550	316	292

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
wheelbarrows, brooms, etc.)						
Feed	1,600	1,982	1,592	1,733	1,128	1,079
Bedding	542	573	617	1,667	300	627
Hired labour	333	384	850	833	325	573
Veterinary care	1,196	1,231	1,705	2,534	593	1,705
Farrier care	427	950	708	800	608	815
Other equine care products and services	697	2,114	590	1,959	885	1,187
Travel	1,153	1,314	437	1,582	786	844
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	477	621	410	800	185	490
Clothes	361	449	213	778	123	414
Other (manure disposal, Supplements)	124	35	108	204	96	70
Insurance	871	794	708	861	304	605
Total	9,995	12,994	12,121	18,735	6,778	9,785

Table 9. Ontario annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	418	330	1,311	655	589	573
Per equine, annual capital costs for all equipment required	505	534	751	751	543	475
Facility repair and maintenance (e.g.,	1,417	1,305	1,408	1,868	801	795

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
door replacement, fencing, water lines, etc.)						
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	1,048	972	1,134	1,037	970	600
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	387	333	525	448	396	273
Feed	2,382	2,263	3,242	2,400	1,918	1,869
Bedding	838	1,007	1,512	1,708	820	1,015
Hired labour	589	836	2,213	2,081	1,385	965
Veterinary care	1,498	2,214	2,740	3,871	1,130	1,729
Farrier care	1,061	1,616	1,851	2,208	1,051	694
Other equine care products and services	1,726	4,051	3,436	3,425	979	313
Travel	752	2,123	2,625	3,399	638	553
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	490	1,118	931	1,047	370	148
Clothes	338	774	639	734	223	105
Other (manure disposal, supplements)	68	86	126	169	82	89
Insurance	444	886	1,282	1,811	430	354
Total	13,038	20,447	23,666	26,208	11,192	9,501

Table 10. Quebec annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	533	688	1,080	901	873	1,058
Per equine, annual capital costs for all equipment required	640	776	545	722	475	1,333
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	1,528	1,026	2,146	1,844	1,219	756
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	976	773	2,319	2,225	478	346
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	307	368	1,015	1,491	198	189
Feed	2,137	2,025	4,183	2,539	1,872	1,872
Bedding	735	1,027	2,369	1,902	668	1,064
Hired labour	563	875	2,854	944	806	508
Veterinary care	1,324	1,516	1,916	3,047	1,420	1,797
Farrier care	794	1,264	1,319	1,752	787	477
Other equine care products and services	1,078	2,204	1,851	3,863	1,091	562
Travel	716	1,906	1,891	4,401	550	635
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	448	858	1,033	1,397	319	230
Clothes	377	704	738	1,433	407	234

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Other (manure disposal, supplements)	131	70	527	337	350	51
Insurance	552	707	1,766	1,600	870	591
Total	11,667	16,789	25,926	28,773	11,035	9,312

Table 11. New Brunswick annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	498	183	472	-	191	368
Per equine, annual capital costs for all equipment required	476	361	928	87	171	602
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	869	852	1,191	100	825	819
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	1,206	454	307	200	375	321
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	253	384	128	300	445	403
Feed	2,255	1,765	2,178	500	1,900	2,000
Bedding	869	532	1,085	600	1,050	705
Hired labour	620	1	1,485	800	250	275
Veterinary care	1,001	913	1,208	527	492	1,485
Farrier care	746	1,181	956	633	632	545

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Other equine care products and services	857	2,059	2,417	833	500	1,113
Travel	817	1,031	2,500	800	783	1,058
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	265	526	600	671	575	311
Clothes	356	213	683	644	325	371
Other (manure disposal, supplements)	115	2	200	475	133	415
Insurance	736	394	267	600	1,402	712
Total	10,965	10,850	15,203	7,684	9,687	10,532

Table 12. Nova Scotia annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport*	Working	Breeding
Per equine, annual capital costs for all buildings and fences	606	748	203	203	1,025	1,242
Per equine, annual capital costs for all equipment required	740	824	246	246	1,146	1,142
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	927	2,365	1,075	1,075	1,309	388
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	645	701	1,063	1,063	381	214
Facility tools and supplies (e.g.,	253	293	738	738	319	106

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport*	Working	Breeding
wheelbarrows, brooms, etc.)						
Feed	1,753	2,523	2,975	2,975	1,533	1,466
Bedding	542	834	1,075	1,075	344	588
Hired labour	267	451	875	875	306	222
Veterinary care	1,124	2,248	1,800	1,800	831	1,539
Farrier care	853	1,346	1,200	1,200	650	484
Other equine care products and services	919	2,201	550	550	323	139
Travel	826	1,751	2,025	2,025	942	786
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	342	676	2,340	2,340	177	11
Clothes	186	613	280	280	178	38
Other (manure disposal, supplements)	98	74	100	100	78	-
Insurance	359	619	680	680	357	18
Total	9,094	18,266	16,775	16,775	7,727	5,998

*Insufficient elite sport owners, so the professional sport costs were applied.

Table 13. Prince Edward Island annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Per equine, annual capital costs for all buildings and fences	383	595	11	2,500	1,035	445
Per equine, annual capital costs for all equipment required	370	352	320	1,000	466	411

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport	Working	Breeding
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	796	890	500	7,500	250	1,413
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	764	390	500	1,000	300	688
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	419	460	500	750	100	225
Feed	2,579	1,996	3,000	3,000	3,240	3,470
Bedding	690	758	300	2,000	350	1,031
Hired labour	493	930	4,000	-	1,800	875
Veterinary care	1,093	1,379	900	1,000	283	1,150
Farrier care	812	1,079	500	1,000	267	600
Other equine care products and services	850	1,536	300	750	167	1,463
Travel	1,815	1,454	2,900	3,500	107	1,823
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	513	987	2,000	750	233	813
Clothes	541	407	1,000	750	-	625
Other (manure disposal, supplements)	41	193	700	-	20	138
Insurance	397	185	600	1,500	156	1,342
Total	11,801	13,590	17,700	23,500	7,273	15,653

Table 14. Yukon, Northwest Territories, and Newfoundland and Labrador annual equine-keeping expenditures, per equine, 2022 (in dollars).

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport*	Working	Breeding
Per equine, annual capital costs for all buildings and fences	606	748	203	203	1,025	1,242
Per equine, annual capital costs for all equipment required	740	824	246	246	1,146	1,142
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	927	2,365	1,075	1,075	1,309	388
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	645	701	1,063	1,063	381	214
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	253	293	738	738	319	106
Feed	1,753	2,523	2,975	2,975	1,533	1,466
Bedding	542	834	1,075	1,075	344	588
Hired labour	267	451	875	875	306	222
Veterinary care	1,124	2,248	1,800	1,800	831	1,539
Farrier care	853	1,346	1,200	1,200	650	484
Other equine care products and services	919	2,201	550	550	323	139
Travel	826	1,751	2,025	2,025	942	786
Tack (excluding large purchases such as saddles, carriages, wagons, sleighs, etc.)	342	676	2,340	2,340	177	11

Expenditure Category	Recreation	Amateur Sport	Professional Sport	Elite Sport*	Working	Breeding
Clothes	186	613	280	280	178	38
Other (manure disposal, supplements)	98	74	100	100	78	-
Insurance	359	619	680	680	357	18
Total	9,094	18,266	16,775	16,775	7,727	5,998

*Insufficient Elite Sport owners, so the Professional Sport costs were applied.

Transportation and Equine Trailer Ownership

Transportation costs incurred for participating in various equine activities are significant, ranging annually from \$1,050 per equine in Manitoba to \$1,975 per equine in Alberta. The expenditure is captured within the equine-keeping costs presented in the [Equine-Keeping Costs section](#). The extent of trailer ownership and average distance travelled was also surveyed to ensure the fuel and depreciation costs of truck and trailers were appropriately included.

About 7 out of 10 equine owners in Canada own an equine trailer (Table 15). Distances traveled annually for equine activities varied between provinces, and distances traveled for sport equines increased with level of competition.

Table 15. Equine participant 2022 travel statistics.

Region	% of equine owners that own equine trailers	Average km traveled for equine activities in 2022			
		Recreation	Amateur sport	Professional sport	Elite sport
British Columbia	71%	4,749	5,200	7,673	13,084
Alberta	73%	5,133	6,737	7,813	6,811
Saskatchewan	70%	5,531	6,710	6,957	8,233
Manitoba	68%	5,183	7,036	26,400	31,250
Ontario	75%	5,429	6,530	10,092	12,354
Quebec	72%	5,262	6,545	14,466	18,466
New Brunswick	75%	6,065	3,725	6,682	10,000
Nova Scotia	79%	3,073	8,849	8,500	-
Prince Edward Island	79%	6,583	7,420	30,000	6,000
Newfoundland and Labrador	67%	-	-	-	-
Yukon	79%	1,446	325	-	-
Canada	73%	5,095	6,451	9,993	12,773

Equine Values

In addition to the equine-keeping costs, the purchase price of equines varies widely depending on the primary activity, the form of ownership, and province they are purchased in.^{iv}

The average value of a fully owned equine in each province varies significantly between \$5,256 in Yukon Territory to \$27,072 in British Columbia (Figure 2).

^{iv} All the values leveraged within this study are self-reported and do not reflect fair market values. As such, they should be taken as an indication of relative value, but should not be considered as a summary of actual values.

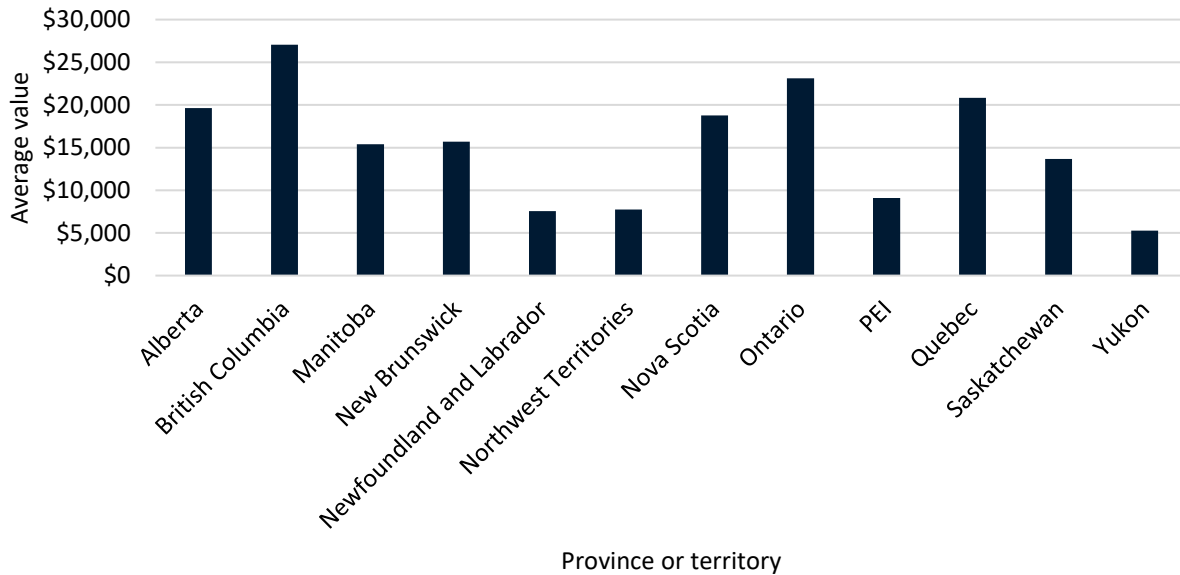


Figure 2. Average owned equine value in each Canadian province and territory, 2021.

Equine Values by Primary Activity

Equine values vary significantly depending on the primary activity of each animal (Figure 3). Nationally, the average equine primarily used for recreation had a value of \$14,417. The average value of sport equines increased as the level of competition increased: amateur (\$21,201), professional (\$32,690), and elite (\$56,840). The value of working equines was a bit lower than recreation at \$13,512 and the value of breeding equines was a bit lower than amateur sport equines at \$18,548.

A wide variance also exists between the provincial average equine values within each primary use activity. Broadly, Ontario is the only province mostly above average, and the values drag the average national price up. Alberta, Quebec, British Columbia, and Nova Scotia are near average, and the rest of the provinces and territories are below average.

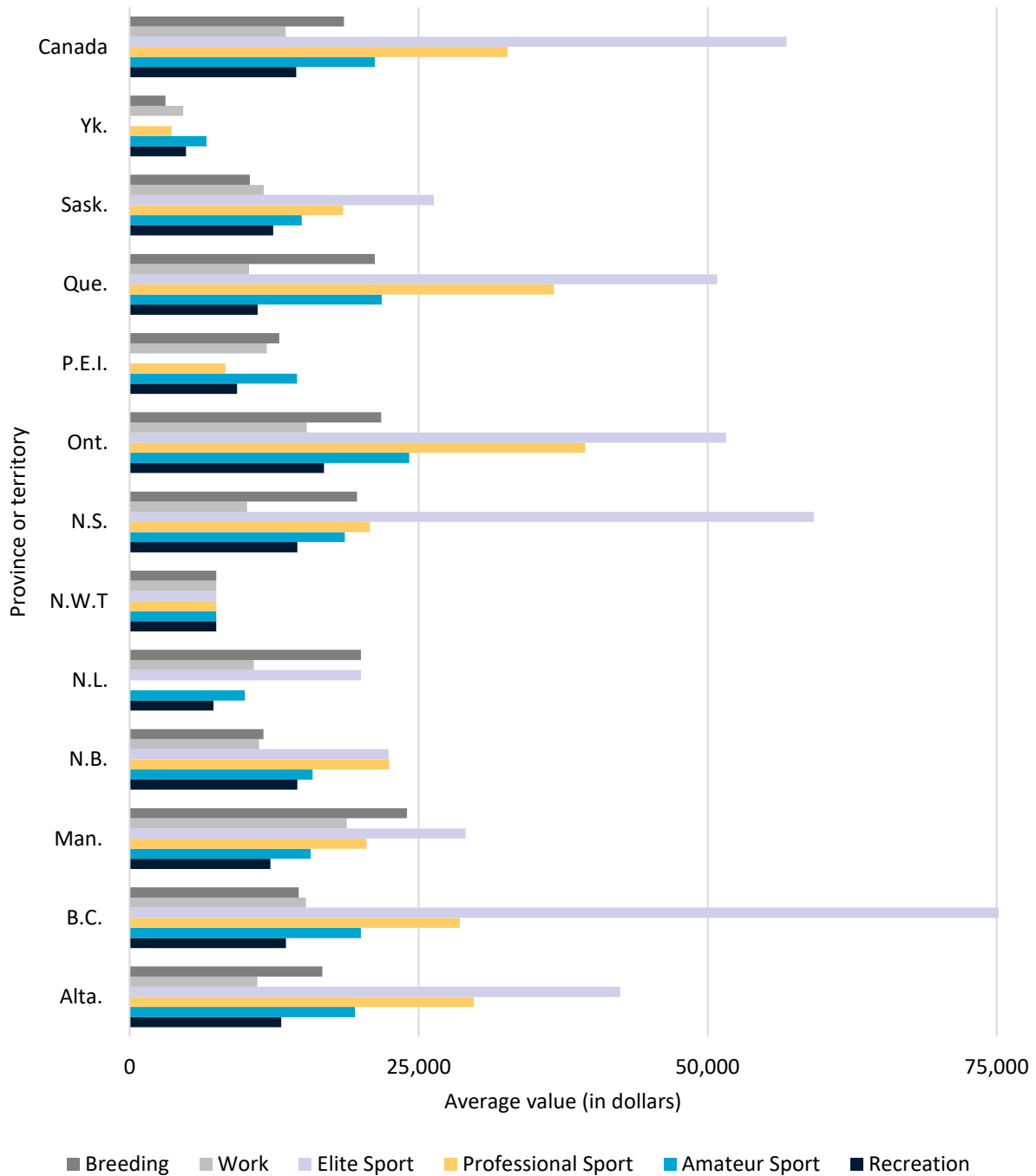


Figure 3. Equine values by province and primary activity.

Equine Values by Form of Ownership

Equine values also differ greatly by whether an equine is outright owned, owned fractionally or in partnership, or leased. The average value of a fully owned equine in Canada was \$21,662, and the average value of a leased equine was \$24,874. In contrast, the average value of a fractionally owned (or owned in partnership) equine was \$101,146.

Sector Participant Estimate

Equines are owned, co-owned, and leased, which provides a variety of avenues for participation in the sector. As with equine population estimates, this complexity also poses a hurdle to accurately estimating the number of participants within the equine sport and recreation sectors. People who do not own equines can also get involved in the sector through riding lessons and participating in equine-assisted services. Finally, some people only spectate at events and competitions.

Form of Equine Ownership

Canadian equine sector participants mostly fully own their equines (87%). Another 7% of equines are leased, while 6% are fractionally owned (or owned under another form of partnership) (Figure 4).

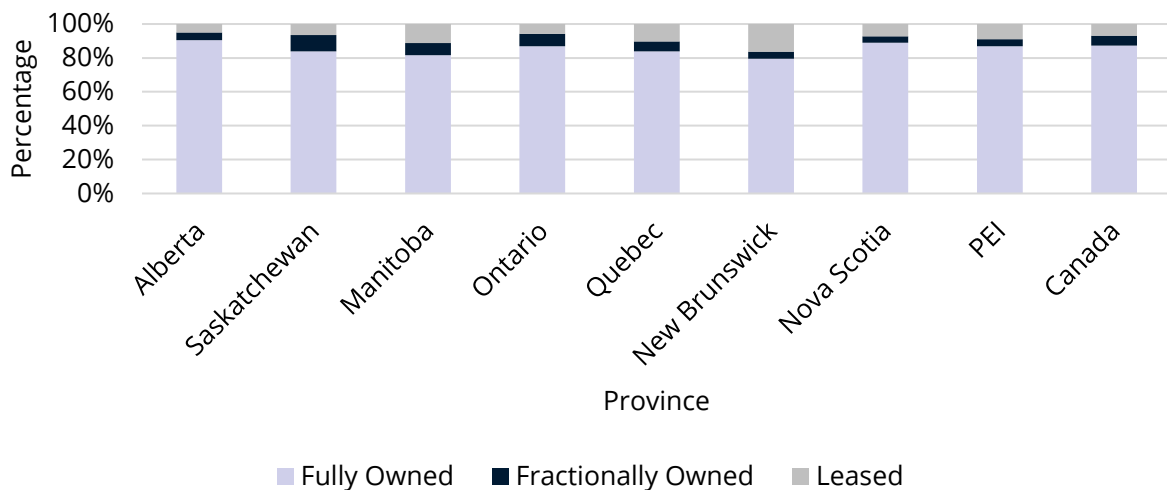


Figure 4. Percentage of equines under differing forms of ownership, 2022.

Event Participation

Across Canada, about 40% of equine sector members who own equines participate in equine events or competitions. The rate of participation differs across the country; higher rates of participation occur in Alberta, British Columbia, Ontario, Quebec, and Prince Edward Island (Figure 5).

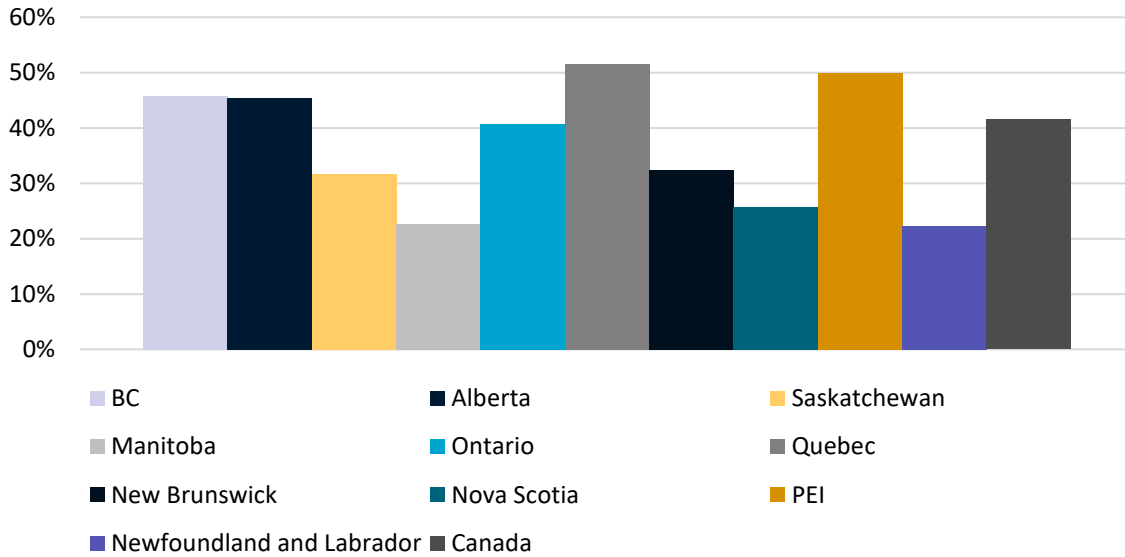


Figure 5. Percentage of equine owners who compete in equine events, 2022.

Canadian equine competitors travel locally, nationally, and internationally. Elite and professional competitors are most likely to travel internationally, although a significant portion only compete within their province or locally (Figure 6).

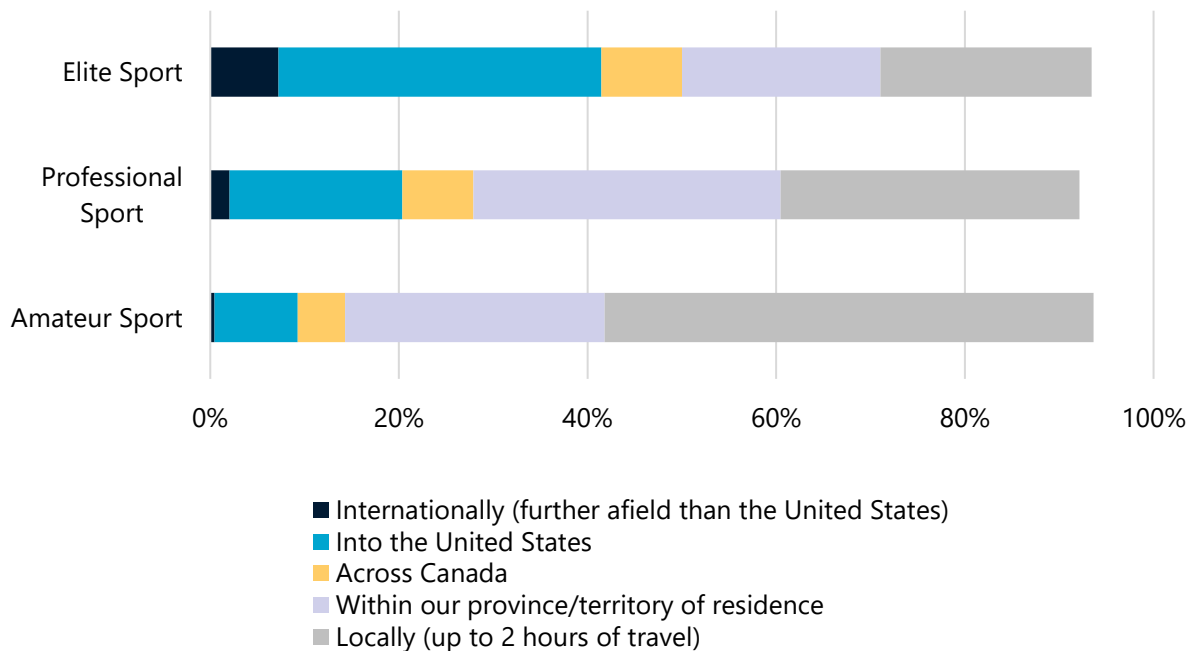


Figure 6. Sport competitors' maximum level of travel for equine competitions and events.

Equestrian Events and Competitions

Equestrian events are numerous, and the expenditures of hosts, participants, and spectators contribute significantly to the equine sector's total economic impact. Events are wide ranging and include Western and English disciplines. The scale of events also varies, with the number of competitors ranging from about 10 to 1,000 and the number of spectators ranging from 0 to 300,000.

A complete directory of equestrian events is not available nationally, nor within each province. Event and competition data were manually gathered within Ontario, Alberta, and British Columbia to extrapolate the number of events held in the balance of province and territories. The extrapolation leveraged the ratio of sport equines to events in two scale categories: major and minor. Major events attract more than 1,000 spectators, and minor events include all other smaller events.

Major Events and Competitions

Major equestrian events are held in most provinces with a range in participants of 90 to more than 1,000, and a range in spectators from 1,000 to approximately 300,000. The average ratio of equines primarily used for sport to major events was 1 event for every 2,892 equines.

An estimated 63 major equestrian events occurred in 2022, with over 11,000 cumulative participants and over 2,000,000 cumulative spectators (Table 16). The estimated cost of operating each major event is \$376,277.

Table 16. Major equestrian events within Canada, 2022.

Geography	Major events held in 2022	Cumulative annual participants	Cumulative annual spectators
Canada	63	11,564	2,043,762
British Columbia	5	1,100	66,000
Alberta	7	490	689,000
Saskatchewan	7	1,295	228,791
Manitoba	3	507	89,600
Ontario	33	6,732	715,800
Quebec	7	1,304	230,489
Nova Scotia	1	136	24,082

Minor Events and Competitions

Minor events (i.e., equestrian events with less than 1,000 spectators) are also widely varied in the number of participants and spectators. Between 5 to 150 individuals participate in minor events, and the average number of participants is 37. The average ratio of equines used primarily for amateur sport to minor events was 1 event for every 115 equines.

Minor events and competitions attracted an average of 68 spectators for the estimated 1,084 events held in 2022 (Table 17). When comparing cumulative totals to major events, a far higher number of participants, and much lower number of spectators, take part in minor events across Canada. The estimated cost of operating each minor event is \$9,854, comprised mostly of hired labour and facility costs. In 2022, competitor fees averaged \$131 and ranged from \$5 to \$500.

Table 17. Minor equestrian events within Canada, 2022.

Geography	Minor events held in 2022	Cumulative annual participants	Cumulative annual spectators
Canada	1,084	40,051	65,581
British Columbia	165	6,848	12,801
Alberta	222	8,074	13,049
Saskatchewan	145	6,222	8,278
Manitoba	45	833	1,821
Ontario	362	12,449	17,528
Quebec	126	5,974	9,681
New Brunswick	4	161	117
Nova Scotia	11	417	2,114
Prince Edward Island	3	141	192
Yukon, Northwest Territories, and Newfoundland & Labrador	1	48	-

Event Officials

Officials are highly involved in the equine sector. Slightly less than half (48%) of officials judge or officiate two or more disciplines or sports. On average, individuals had a role in seven events or competitions in 2022 (Table 18).

Table 18. Average number of events judged by Canadian equine officials, 2022.

	Driving	Eventing	Hunter/ jumper	Racing	Rodeo	Other Western	Average
Events	7	7	8	17	20	8	7

Equine Services

Many services are provided for the maintenance and training of equines, which has been indirectly addressed within the equine-keeping costs section. For the purposes of this study's economic impact analysis, these services (e.g., veterinarian and farrier services) are not assessed separately. The equine sector provides non-equine keeping services including riding lessons, camps, equine-assisted services, and outfitting. Most of these services are offered out of equine facilities or stables which often offer multiple services.

Manual research of stables, and their offered services, was conducted for Alberta and Ontario to provide average rates of service provision from the conservatively estimated provincial stable totals. The manual research only counted confirmed stables with an online presence, and so is sure to underrepresent the total number of stables.

Table 19. Stables and major services provided, 2022.

Geography	Total	Training/ coaching	Riding lessons	Equine- assisted services	Camps
Canada	1,884	687	971	159	294
British Columbia	177	290	91	29	28
Alberta	318	86	212	11	42
Saskatchewan	127	44	65	5	20
Manitoba	65	349	33	51	10
Ontario	631	285	277	36	106
Quebec	423	24	218	3	66
New Brunswick	36	42	19	5	6
Nova Scotia	62	17	32	2	10
Prince Edward Island	25	10	13	1	4

Geography	Total	Training/ coaching	Riding lessons	Equine- assisted services	Camps
Yukon, Northwest Territories, and Newfoundland & Labrador.	20	13	10	1	3

Coaching/Training & Riding Lessons

An estimated 36% of stables provide coaching and training, and 51% of stables offer riding lessons. The disciplines with the greatest portion of coaching services were dressage, hunter, and show jumping, based on the information provided by 649 coach and trainer survey respondents. Significant overlap exists between offerings; the average coach/trainer offers services for 2.7 disciplines.

Table 20. Percentage of Canadian equine coaches/trainers offering each discipline or sport, 2022.

Discipline/sport	Coaches/trainers offering (%)	Discipline/sport	Coaches/trainers offering (%)
Barrel racing	6%	Para equestrian	4%
Breed sport	6%	Pole bending	4%
Chuckwagon racing	1%	Polo	1%
Cutting	3%	Racing	2%
Dressage	49%	Reining	7%
Driving	7%	Show jumping	44%
Endurance	4%	Roping	2%
Eventing	22%	Team penning	2%
Hunter	36%	Vaulting	3%
Mounted games	5%	Western pleasure	13%
General performance	32%	Trail riding	19%

Equine-Assisted Services

Equine-assisted service providers use equines to aid clients in learning and with various forms of therapy. The most offered service is equine-assisted learning (Table 21). Strong specialization exists in the form of equine-assisted services; the average provider offers 1.5 services.

Table 21. Canadian equine-assisted services offered, 2022.

Service	Equine-assisted providers offering (%)
Adaptive riding	17%
Equine-assisted learning	63%
Equine-assisted therapy	26%
Hippotherapy	12%
Therapeutic driving and vaulting	9%
Therapeutic riding	24%

Appendix E: Additional Information on the Economic Impacts of the Equine Sector

Total Equine-Keeping Direct Expenditures in Canada, 2022

Table 22. Total equine-keeping direct expenditures in Canada, 2022.

Expenditure Category	Thousands of dollars
Annual capital costs for all buildings and fences	383,448
Annual capital costs for all equipment required	326,935
Facility repair and maintenance (e.g., door replacement, fencing, water lines, etc.)	561,739
Equipment repair and maintenance (e.g., mowers, harrows, etc.)	435,566
Facility tools and supplies (e.g., wheelbarrows, brooms, etc.)	202,730
Feed	1,118,818
Bedding	366,858
Hired labour	697,488
Veterinary care	851,296
Farrier care	566,444
Other equine care products and services	870,543
Travel	938,097
Tack	324,213
Clothes	218,392
Other (manure disposal, supplements)	95,113
Insurance	366,859
Total Direct Expenditures	8,324,538

Direct Expenditures for Equestrian Events

Equine events require expenditures by the event operators, participants, and spectators. Specific expenditures considered for the economic impact analysis include:

- Facility building costs, repairs & maintenance;

- Facility equipment costs, repairs & maintenance;
- Hired labour (officials, security & miscellaneous);
- Insurance;
- Marketing & communications;
- Show management (registrations, prizes, etc.);
- Accommodations;
- Food and Beverage; and
- Travel^v

The surveyed average expenditure for each cost category of major and minor events was applied to the number of events estimated to be held within each province to produce the national estimates (Table 23).

Table 23. Equestrian events direct expenditures, 2022.

Expenditure Category	Thousands of Dollars
Facility building costs, repairs & maintenance	6,493
Facility equipment (e.g., rings, fencing, footing, stalls, outhouses, etc.)	11,647
Hired labour (officials, security & miscellaneous)	9,805
Insurance	2,945
Marketing	515
Communications	406
Show management (e.g., registration, prizes, etc.)	2,570
Food	298,623
Accommodation	329,362
Total Direct Expenditures	662,370

^v Removed travel from this portion of the analysis to avoid double counting with the full equine activity travel costs reported within the equine-keeping expenditures.

Direct Expenditures for Equine Services

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(s). As with events, a significant portion of the costs associated with equine services are for equine-keeping, which are accounted for within the equine-keeping direct expenditures. Specific expenditures included within this component of the analysis are as follows:

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

The average for each expenditure was applied to the provincial estimations of equine businesses offering each service to produce the national estimates (Table 24).

Table 24. Equine-assisted service and riding lessons expenditures in Canada, 2022.

Expenditure Category	Equine-Assisted Services (in thousands of dollars)	Riding Lessons & Camps (in thousands of dollars)
Facility building costs	236	5,738
Equipment costs	1,242	8,929
Labour	16,120	31,288
Totals	17,598	45,955

Economic Impacts

The summarized direct expenditures for each province and territory are input to Statistics Canada's I/O model to determine the indirect and induced impacts. Results from this application of the I/O model account for interprovincial trade within the provincial summaries.

Economic impacts are summarized in terms of direct impacts, GDP (gross domestic product), full-time equivalent (FTE) jobs, total jobs, provincial and federal tax revenue, and total output (Table 25).

Table 25. Equine sector economic impacts, 2022.

(Direct impacts, GDP, tax revenue and total output are presented in thousands of Canadian dollars.)

Geography	Direct Impacts	GDP	FTE Jobs	Total Jobs	Tax Revenue	Total Output
Canada	9,097,969	8,687,579	70,997	116,102	894,213	24,214,808
British Columbia	863,813	875,115	7,562	12,368	100,859	2,341,855
Alberta	3,126,639	2,568,414	19,382	33,639	202,213	7,559,718
Saskatchewan	977,614	836,479	6,458	13,555	96,319	2,312,297
Manitoba	345,877	379,350	2,980	4,496	49,327	1,104,166
Ontario	2,512,080	2,780,493	22,813	36,182	289,692	7,301,679
Quebec	1,139,104	1,104,423	10,360	13,839	139,662	3,195,175
New Brunswick	25,798	40,639	407	553	4,798	115,550
Nova Scotia	69,805	62,911	672	950	7,236	177,412
Prince Edward Island	28,994	19,680	231	322	2,498	61,244
Yukon, Northwest Territories, and Newfoundland & Labrador	8,246	19,262	128	194	1,579	44,294

Appendix F: Definitions

English Riding Disciplines

Dressage: Equines perform precise movements that require balance, flexibility, and good communication with the rider. Judges assess routines based on accuracy of completion and flexibility, and equine suppleness. Freestyle dressage routines incorporate music.³

Eventing: Eventing is often described as an equestrian triathlon, featuring three types of tests (dressage, cross-country, and jumping), spread over three days at the upper level of competition and one day for entry to mid-level competition. While the dressage and show-jumping phases are similar to those individual disciplines, the unique aspect of eventing is the cross-country phase which consists of a course of solid obstacles specially constructed from materials such as wooden logs and stone walls with natural elements, including ditches and water, to increase the technical difficulty.

Hunter: In this jumping-related discipline, a variety of factors such as the equine's style, movement, jumping technique, and conformation (depending on the class) are judged subjectively. Hunter divisions include over fences classes (i.e., jumping obstacles) and hack classes (i.e., gaits, including walk, trot, and canter).

Polo: A team sport in which players on horseback use wooden mallets to direct a ball into the other team's goal.⁴

Show jumping: A timed discipline in which equines jump over obstacles. Exceeding the time limit, knocking down an obstacle, and refusing to jump are all faults that add to a penalty score. Scoring incorporates time of completion and a calculation of faults. The lowest score wins the competition.⁵

Mounted games: This sport is like relay races on horseback. Equine and rider duos compete as individuals, pairs, or in teams of four to complete a set of "games" in a speed class. The games consist of a variety of challenges such as pole-bending, equipment movement, hand-offs, and vaulting.

Western Riding Disciplines

Barrel racing: A timed rodeo competition requiring the equine and rider to weave around three barrels positioned in a triangle around the arena.⁶

Cutting: In this event, an equine and rider are judged on their ability to separate a calf from a cattle herd and keep it away for a short period of time. Judges award competitors points for style and deduct points for losing a calf or quitting it in certain circumstances. Riders are also more successful if their equines cut cattle with minimal direction and steering.⁷

Pole bending: An equine and rider weave between a line of poles.⁸

Reining: Equines perform patterns of a set of skills, including sliding stops, large fast circles, small slow circles, spins, backups, roll backs, and flying lead changes. Judges score competitors based on how well an equine performs the pattern skills.⁹

Roping: While on horseback, the rider uses a rope to catch a calf. Then, the rider dismounts and holds the calf in place.¹⁰

Team penning: In this timed team event, three mounted team members collaborate to separate three marked cattle from a 30-cattle herd and usher them into a pen on the opposite side of the arena.¹¹

Western pleasure: In this discipline, judges score equines on their dispositions, manners, and calmness of gait.¹²

Other Disciplines

Para equestrian: Para Equestrian sports are performed by riders with physical and/or visual disabilities.¹³ Competition category is assigned among individuals who are assessed to have a similar degree of disability.¹⁴

Endurance: Equines and riders must complete a set trail within a time limit. Races are typically between 80 and 160 kilometers per day and last one to three days.¹⁵

Trail riding: Trail riding can be a recreational, competitive, or commercial activity (i.e., with a paid guide) that can be done in a group or as an individual. In competition, trail routes include obstacles, such as gates for the equine to open and streams they must cross.¹⁶

Driving: In this discipline, equines are driven from a carriage instead of ridden. One, two, or four equines can be hitched per carriage. Equines and drivers can compete in dressage, marathon, and obstacle classes.¹⁷

Vaulting: The performance of gymnastics movements on horseback.¹⁸

Equine-Assisted Services

Equine-assisted services are the group of activities, with different levels of guidance and instruction, that bring about physical and/or psychological improvements in participants. Therapy activities can include groundwork with the equine or riding. The most common forms of equine-assisted services are listed below.¹⁹

Therapeutic horseback riding: In this practice, a riding instructor trains the student in maneuvering an equine on horseback as well as on the ground. This therapy helps build muscle and balance, as well as self-confidence.²⁰

Equine-Assisted Learning (EAL): EAL is divided into personal development, professional development, and education. Working with an equine allows students to learn non-verbal communication skills and build self-awareness. This type of learning occurs with the support of an Equine Assisted Learning Facilitator.²¹

Equine-Assisted Psychotherapy (EAP): Mental health professionals use interaction with equines to help participants learn about themselves and improve emotionally, socially, behaviorally, and cognitively. EAP can be exclusively provided by licensed mental health professionals.²²

Hippotherapy: This practice leverages the physical motions of equines to bring about healing in various areas. A handler guides the equine in different directions, cadences, and speeds to activate specific postures and muscle groups in the rider. Hippotherapy can be applied to the rehabilitative fields of physiotherapy, occupational therapy, and speech pathology.²³

Appendix G: Equestrian Competition in Canada – A Snapshot

While many people enjoy spending recreational time with equines, training and competition are also popular aspects of the sector.

For this study, the strengths and challenges of the competition landscape – including competitions, officials, and venues – in Canada were explored through the interviews and the National Equine Survey. This appendix provides a snapshot of the Canadian equestrian competition landscape. To achieve a deeper analysis on this topic, the authors recommend a follow-up study that would include targeted engagement with a range of individuals and organizations involved in planning, developing, hosting, and officiating equestrian competitions across Canada.^{vi}

Distribution of Participation in Competition Disciplines

Survey respondents who compete in equestrian activities were fairly evenly distributed between dressage, show jumping, hunter, and a combination of western events (Table 26). In total, 13% of respondents compete in trail riding. Together, the English disciplines of dressage, show jumping, hunter, and eventing accounted for 55% of the survey respondents who compete.

Most event officials surveyed officiate hunter/jumper (53%), dressage (39%), and other types of competitions (24%). The latter category included breed-specific competitions, general performance, endurance events and working equitation.

^{vi} A comprehensive analysis of the equestrian competition landscape in Canada should include key informant interviews with individuals involved in all aspects of competitions across the full range of equestrian disciplines. This level of detail was beyond the scope of this study.

Table 26. Primary equestrian disciplines for competitors (n=1,841), coaches/trainers (n=613), and event officials (n=176) who responded to the National Equine Survey.

	Event Officials	Coaches and Trainers	Competitors
Hunter/Jumper	53%	28%	30%
Dressage	39%	17%	18%
Eventing	22%	7%	7%
Western riding disciplines ^{vii}	22%	13%	12%
Driving	1%	2%	4%
Racing	4%	1%	2%
Trial riding	N/A	7%	13%
General performance	N/A	11%	7%
Other ^{viii}	24%	14%	7%

Strengths and Challenges

Most interviewees (88%) felt that a key strength of the Canadian competition circuit is the number of opportunities for people to be involved (Table 27). “There is a place for everyone. There are people at grassroots up to high level,” one interviewee said.

Table 27. Identified strengths of the Canadian equestrian competition circuit from interviewees (n=18).

➤ Lots of opportunities
➤ Sanctioned events are run well (i.e., rules are followed)
➤ Spectator sport and lots of visibility
➤ Grounds and venues are beautiful
➤ Other (e.g., great staff/volunteers/community, good history, a lot of financial support)

^{vii} Western riding disciplines include Western pleasure, reining, barrel racing, roping, cutting, pole bending, team penning, and rodeo.

^{viii} Other includes breed-specific competitions, general performance, endurance, mounted games, polo, para equestrian, vaulting, and working equitation.

In terms of challenges, all interviewees (n=18) consider the current competition circuit to be cost prohibitive and time consuming (Table 28).

Table 28. Identified gaps/challenges for the current competition circuit from interviewees (n=18).

➤ Very expensive and time consuming
➤ Lack of promotion or communication with public; need fun events to bring people in
➤ Level of competition is mismatched (e.g., people competing in the wrong level)
➤ Geographic barriers (e.g., need to travel too far)
➤ Lack of structure across the competition circuit (e.g., unsanctioned events, historical animosity between the levels)
➤ Not enough places to compete
➤ Safety issues and rules not being followed
➤ Other (e.g., lack of prizes, diversity issues)

Access to competitions varies by location. In Ontario, for example, one interviewee stated that “we are blessed to be in the market that we are in. Everything is in driving distance.” Another interviewee highlighted the Royal Horse Show at the Royal Winter Fair, which takes place in Toronto annually, as a great opportunity for competitors located near the Greater Toronto Area. For other competitors, however, travel costs can be prohibitive. Interviewees from Quebec and New Brunswick also expressed concern over the lack of shows within a close distance.

Opportunities to Improve the Competition Circuit

Interviewees and survey respondents who identified gaps and challenges associated with the current competition circuit also provided some suggestions on how to address these gaps (Table 29).

Table 29. Opportunities to improve the equine sector’s current competition circuit.

Topic	Opportunity
Grassroot Competitions and Youth Engagement	Ensure lower-level competitions are being supported as they help bring new people into the sector
Communications and Public Engagement	<p>Advertise and promote competitions on social media to attract spectators</p> <p>Add value for spectators at equine shows by providing additional attractions such as local food and goods vendors</p> <p>Provide information and education for spectators about the competitions</p> <p>Hire commentators who are good at explaining the competition to improve the spectator experience</p>
Explore improvements to show schedules, packages, sponsorships, and prize money	<p>Increase accessibility for competitors (e.g., lower costs for registration, plan event schedules so that competitors can take less time off work, etc.)</p> <p>Review how equine show packages are sold and encourage a more inclusive way of getting these packages out to people</p> <p>Explore opportunities to attract more sponsors to the sector</p> <p>Study other jurisdictions to gather ideas and best practices for competitions</p>

“Locally, there seemed to be a shift with greater participation in fun events and a lower participation in competitive events. A great opportunity exists to shift what is offered to the equestrian to enjoy their equine in a non-competitive event and to learn new skills.”

– Survey respondent

Appendix H: Sample Program Offerings at the PTSO Level

At the provincial level, many initiatives exist to help introduce new riders to the equestrian sector and to encourage continued participation (Table 30).^{ix}

Table 30. Sample program offerings at the PTSO level.

Provincial Association	Program	Description
Alberta Equestrian Federation	<u>Rookie Riders</u>	<ul style="list-style-type: none"> Program for 6- to 12-year-olds to learn skills to prepare for riding lessons
Cheval Québec	<u>P'tit Trot</u>	<ul style="list-style-type: none"> Program for young riders to learn how to care for equines, as well as about the English and Western disciplines
Equine Association of Yukon	<u>Learn to Ride</u>	<ul style="list-style-type: none"> Participants purchase the relevant English or Western manual, train for the exam, and then complete it
Horse Council British Columbia	<u>Pony Tails Kids Club</u>	<ul style="list-style-type: none"> Free program through which kids can learn about equines
Manitoba Horse Council	<u>Ride & Drive</u>	<ul style="list-style-type: none"> Program that encourages recreational riders and drivers to spend more time riding/driving through the attainment of rewards
Newfoundland and Labrador Equestrian Association	<u>Long Term Equestrian Development Program</u>	<ul style="list-style-type: none"> Bursaries to support amateur athletes with their skills development
New Brunswick Equestrian Association	<u>Rider Level Funding</u>	<ul style="list-style-type: none"> Provides subsidies for Western and English riders who successfully complete applicable rider level tests
Nova Scotia Equestrian Federation	<u>High School Personal Development Program</u>	<ul style="list-style-type: none"> High school students can earn school credits by completing approved instructor coaching certification programs
Ontario Equestrian	<u>Ticket to Ride</u>	<ul style="list-style-type: none"> New riders can get a no-cost introduction to equines at a participating riding school
Prince Edward Island Horse Council	<u>KidSport PEI</u>	<ul style="list-style-type: none"> Grants for children to participate in organized amateur sport, including horseback riding

^{ix} This listing is intended to serve illustrative purposes only; it is not exhaustive. Some programs are offered in multiple provinces. Check the website of your provincial/territorial organization to learn what programs are available in your area.

Provincial Association	Program	Description
Saskatchewan Horse Federation	<u>Dr. Byrnrne Rothwell Memorial Scholarship</u>	<ul style="list-style-type: none"> Scholarship for members with a passion for the sector who are entering a post-secondary institution

EC continues to search for, and implement, programs and initiatives to help offset the costs of high-performance equestrian sport. These programs and initiatives include funding from private donors and the Horse Maintenance Program, which provides tax receipts to Canadians who own national team equines.²⁴

¹ Equine Canada. "2010 Canadian Equine Industry Profile Study: The State of the Industry, Ver. 2," p. 2-3.

² Statistics Canada. (December 22, 2022.) "Census Farm."

³ Manitoba Horse Council. (2022.) "What is Equestrian...?"

⁴ Manitoba Horse Council. (2022.) "What is Equestrian...?"

⁵ Manitoba Horse Council. (2022.) "What is Equestrian...?"

⁶ Manitoba Horse Council. (2022.) "What is Equestrian...?"

⁷ Manitoba Horse Council. (2022.) "What is Equestrian...?" And L. Brown. (Oct. 2016.) "Riding Horses – Cutting Herd of Cattle." Horse Canada. And Horse Rookie. (2020.) "What is a Turn Back Horse?"

⁸ Manitoba Horse Council. (2022.) "What is Equestrian...?"

⁹ Manitoba Horse Council. (2022.) "What is Equestrian...?" And American Quarter Horse Association. (April 2018.) "Reining 101."

¹⁰ Manitoba Horse Council. (2022.) "What is Equestrian...?"

¹¹ Manitoba Horse Council. (2022.) "What is Equestrian...?"

¹² Manitoba Horse Council. (2022.) "What is Equestrian...?"

¹³ 2022 Canadian Paralympic Committee. (2022.) "Para Equestrian."

¹⁴ Equestrian Canada. (2016.) "Para-Dressage."

¹⁵ Manitoba Horse Council. (2022.) "What is Equestrian...?" And Ontario Competitive Trail Riding Association. (2022.) "Endurance." And K. Blocksdorf. (Dec. 2019.) "An Introduction to Endurance Riding." The Spruce Pets.

¹⁶ Manitoba Horse Council. (2022.) "What is Equestrian...?"

¹⁷ Equestrian Canada. (2016.) "Driving." And Alberta Equestrian Federation. (n.d.) "Driving Competitors."

¹⁸ Manitoba Horse Council. (2022.) "What is Equestrian...?"

¹⁹ D. Shaw and K. Benzio (2022.) "What are the Different Kinds of Equine-Assisted Therapy?" Honey Lake Clinic.

²⁰ D. Shaw and K. Benzio (2022.) "What are the Different Kinds of Equine-Assisted Therapy?" Honey Lake Clinic.

²¹ D. Shaw and K. Benzio (2022.) "What are the Different Kinds of Equine-Assisted Therapy?" Honey Lake Clinic. And Horse Therapy Centre of Canada Inc. (n.d.) "Equine Assisted Learning Facilitator Certification."

²² D. Shaw and K. Benzio (2022.) "What are the Different Kinds of Equine-Assisted Therapy?" Honey Lake Clinic. And Horse Therapy Centre of Canada Inc. (n.d.) "Equine Assisted Learning Facilitator Certification."

²³ Canadian Therapeutic Riding Association. (2018.) "Hippotherapy." And D. Shaw and K. Benzio (2022.) "What are the different kinds of equine-assisted therapy?" Honey Lake Clinic.

²⁴ Jennifer Anstey. (August 2022.) "At The Worlds: James Hood, EC's High Performance Director." Horse Sport.