

MARYLAND HORSE FORUM 2014

FINAL REPORT



EXECUTIVE SUMMARY

OVERVIEW

On August 7, 2014, over 350 leaders from across the state and representing Maryland's more than 200 equine organizations and 35 different equestrian disciplines, as well as several state legislators and agency officials, convened at the Prince George's Equestrian Center & Showplace Arena in Upper Marlboro, Md. to assess the current state of Maryland's equine industry and to discuss major issues and brainstorm ideas to help shape it's future.

The 2014 Forum was the third in a series, representing Forums held every five years (2004, 2009 and 2014). The 2014 Forum was jointly hosted by the Maryland Horse Industry Board and the Maryland Horse Council, the industry's commodities and trade organizations, respectively, and sponsored by 28 different breed and trade organizations and associations, uniting all aspects of the industry, both from the racing and non-racing side.

To help guide and educate the group about national trends and initiatives, the assemblage heard from Patti Colbert, chair of the national marketing alliance of the American Horse Council; Todd Gralla, global designer of equestrian parks and consultant for the Maryland Horse Park System; and Steven Day, President and CEO of Dover Saddlery, one of the nation's largest equine retailers.

These speakers emphasized shifting demo-and-psychographics of the American public. They suggested ways in which the horse industry can develop marketing strategies and a change in attitudes to attract more folks to equestrian activities and grow the industry. In addition, they praised Marylanders for the initiatives that are already taking place and offered encouragement to let us know that we are headed in the right direction and in many ways are at the forefront of national trends and ideas.

Prior to the Forum, a survey was sent to nearly 2,000 horse folks of various equine organizations for suggestions on pressing issues that should be addressed at the Forum. From their responses, four topics involving eight sessions were organized:

- Marketing
- Business & Regulatory
- Going Green (Land & Greenways)
- Managing the Maryland Horse Population

Since the 2009 Forum, significant changes have taken place in the state's horse industry. They include:

- Publication of the *2010 Horse Census*, which showed there are 79,100 horses, ponies, mules, donkeys and burros in Maryland, reflecting a 9 percent decrease in the equine population since the first census in 2002. However, the value of the animals increased 5 percent to \$714 million and total equine related assets grew 8 percent to \$5.6 billion. The decrease in the equine population can be attributed to two major factors: 1. The impact of casino gambling at racetracks in neighboring states which eroded Maryland's horse-racing breeding industry as breeders left Maryland for neighboring states or stopped their activities altogether; and 2. the 2008 Recession.
- The publication of the Census and "doom and gloom" of the racing industry reflected at the 2009 Forum spurred the state's horse industry into action.
- The state's racing picture is now much brighter. Five casinos are up and running in Maryland and contributing tens of millions of dollars into racing purses, breeders awards and track improvements and operating expenses. A 10-year plan to maintain a year-round racing schedule has been reached by horsemen and track owners; and various disputes between segments of the racing industry have either been settled or tempered.
- The Maryland Horse Industry Board (MHIB) listened to suggestions from the 2009 Forum attendees and developed a strategic marketing plan. MHIB and its partner organizations are aggressively enacting numerous marketing initiatives to attract new and re-entry people to equestrian activities.
- The study to develop a major Maryland Horse Park, which for a variety of reasons was not acted upon in 2006, has evolved into a further study which is suggesting upgrades to existing equine facilities and incorporating them into a statewide Horse Park System. Modeled on the Olympic Plan, this network would distribute economic benefits statewide and not cannibalize existing facilities or competitions.
- The Maryland Horse Council has been proactive on a number of issues raised at the 2009 Forum, from creating the *Maryland Fund for Horses* to address the problem of unwanted horses; the *Farm Stewardship Committee*, to increase awareness about the environmental benefits of well-managed horse properties; the *Committee to Support Racing*, which has promoted efforts to bring more non-racing people to the tracks; the *Business Network*, to allow equestrian business and farm owners to learn and share ideas and experiences; and the *"Save the Horse Farms"* campaign to focus on overly restrictive county and local zoning rules.

Even though major issues persist, as evidenced by the following session reports on these pages, the theme of the 2014 Forum, titled *"Celebrating our Successes, Planning for our Future,"* showcased the new activities, new organizations, new owners and new participants that are contributing to an uptick in the state's equine industry.

This is evidenced by payroll increases (source: Maryland Insurance Administration), an increase in boarding and lesson stable activity (source: MHIB), increases in buying and selling horses and an increase in number of competitions and competitors (source: *The Equiery*) and an increase in the number of racing stallions, mares and foals (source: Maryland Horse Breeders Association, Standardbred Breeders' Fund).

Another very encouraging sign: 64 percent of the respondents to the Horse Forum Evaluation Questionnaire had not previously attended either the 2004 or 2009 Forums, indicating new interest from new industry participants.

The major point acknowledged at the 2014 Forum is that "Maryland is on the Move" although there is still much to be done. It is up to us to keep the momentum going by continuing to market aggressively, foster cross disciplinary cooperation, be vigilant on issues confronting the industry and upgrade facilities.

The following is a synopsis of the recommendations identified with each of the Forum sessions:

MARKETING & PROMOTION

Session I outlined current initiatives:

MHIB, in response to 2009 Forum Recommendations to establish a strategic marketing plan, which includes these components:

- Horse Pals affinity group (1,500 members of online community), providing farm tours and activities.
- Social media program (over 1,100 Facebook and 700 Twitter followers)
- Touch of Class Awards (recognizing more than 80 Maryland horses and people who have achieved national & international success resulting in increased positive media coverage)
- Development of 35 Horse Discovery Centers in 15 counties at existing stables, teaching folks about horses and horsemanship in a welcoming & knowledgeable environment
- Publication of new materials (Licensed Stable Guide, Annual Events Calendar, Census & Economic Impact brochure—coming in 2015: new trails brochure, trail rental stable brochure, Horse Discovery Center brochure, new edition Licensed Stable Guide)
- Horse History Projects. Capturing our equine heritage by telling our stories through programs, experiences and conversations. First Horse History Trail—"Horses at the Beach", two independent films in development: *Racing The Times*, *Ballad of Baltimore*
- Development of Horse Park System: Connecting major equine competition venues with Horse Discovery Centers, History Trails and other equine happenings to brand a *Total Maryland Horse Experience*.
- Development of Speaker Series, More Public Outreach Efforts, Website Improvement, More Legislative Outreach, increased advertising and public relations opportunities.

Partners Marketing Initiatives: Some examples--

- Md. Horse Breeders Assoc.: "Colts Are Back" campaign, *Racing The Times*, Md. Thoroughbred Club, etc.
- Sagamore Farm: Three Diamonds Club, Speakers Series & Farm Tours
- Licensed Stables: FaceBook, Groupon, Living Social, Twitter, YouTube, Camps, Clinics, etc.
- Friends of Md. Standardbreds: Racing Under Saddle Events, youth camps, etc.

- Md. Racing Commission: Loyola Marketing Study, *Racing the Times* support
- Steeplechase: US Pony racing demos, *Thundering Hooves* documentary
- Racetracks: Preakness, BESD, Decanter, special Race days, Canter For the Cure, etc.
- Affiliations with Charities/Foundations: Cystic Fibrosis, GBMC, Union Hospital, Johns Hopkins, Howard Community College, Wounded Warriors, Susan G Komen, etc.
- Publications: *The Equiery*, *Mid-Atlantic Thoroughbred*, *This is Racing*, etc.
- Plus many other projects developed by various breed organizations and associations

Session II

Suggestions and discussions on specific marketing initiatives

- Continue to expand current programs
- Design & implement an in-school program such as the Black Stallion Literacy Project
- Spark community interest with new show, demo, event or touring program
- Tout physical benefits of horseback riding
- Open houses/educational tours
- “By the hand” partnership—*bring a friend*
- Target those who attend non-horse event at horse facilities(i.e. *Medieval Times*)
- Target *Different aspects of industry may appeal to different audiences*
- Better representation of horse sports in media
- Ensure safety
- “Horse Around” *Utilize youth in industry to bring in new friends*
- “Back to the Track” *introduce horses to new audiences, use tours at tracks*
- Public Relations *maximize media coverage*
- Open facilities for One Day *Statewide Horse Open House*
- Explore purchase and use of mechanical horse

BUSINESS & REGULATORY

Session I

Insurance and Liability

Many horse businesses are increasingly burdened by the high cost of Workers’ Compensation Insurance premiums. In addition, protecting horse businesses from the threat of litigation is a key concern of the industry due to the unpredictability of horses themselves, and the unavoidable dangers of the farms or stables where they are kept.

Many equine businesses cannot afford the cost of a prolonged court case, or even the high cost of insurance for simply protecting their investments from unexpected, catastrophic loss.

Many equine businesses are also increasingly burdened by the high cost of workers’ compensation premiums.

Some suggestions to mitigate these issues are:

- Maintaining Maryland’s Contributory Negligence standard is of utmost importance.
- Continuing to study the issues associated with instituting a special interest Equine Limited Liability statute, and the risk such a law might have to existing standards of negligence.

- Encourage horse businesses to implement measures to protect their operations, including the use of signs, waivers, legal agreements and other business documents; and best management practices to ensure good safety records.
- Work to ensure that horse business owners are aware of the various employee classifications for workers' compensation premiums, and that they make sure that their employees are correctly classified.

Session II

Labor, Employment & Workers' Comp

The success of the Maryland horse industry depends largely upon individuals that are employed within it. With that in mind, the recommendations from the session are:

- Improve industry access to foreign worker programs
- Improve industry interaction with the available domestic labor force
- Develop and increase educational training for the workforce, including vocational and high school programs, horse industry specific Spanish and English classes, and improving the college and university management programs to provide more hands-on experience but also produce graduates more realistic about industry compensation
- Utilize the new MHIB Horse Discovery Centers to develop internship programs and worker education programs
- Work with the Maryland Insurance Administration and with various private insurers towards making workers' compensation insurance more accurately reflect the risks associated with various equine businesses, and the historical lack of claims
- Utilize State agencies to offer training on hiring foreign labor

GOING GREEN

Session I

Farm Stewardship

The issues and solutions raised at the "Going Green: Farm Stewardship" session fell loosely under four recommendations:

Keep Open Land Open

- Provide more funding for land preservation, including a possible tax check-off for open space funding
- Build political support for open space
- Engage the horse community early and often in zoning decisions and master plans
- Support both publically and privately owned open space
- Improve trail access and rights-of-way for horse trails
- Promote the creation of "urban wilderness" near urban areas, including stables
- Educate the public about the value of open green space
- Explore including walking paths on horse farms for non-riders
- Include the horse community in recreation planning
- Bring horse farm owners into farm preservation committees

Promote Horse Manure Composting and the use of Composted Horse Manure

- Provide information on how to compost

- Promote the use of horse manure as a natural, organic and renewable soil enhancement through marketing
- Explore establishing and/or expanding regional composting facilities
- Provide technical and financial assistance for manure management, including to small horse farms

Provide Technical and Financial Assistance for Land Management

- Offer information on nutrient management plans and regulations
- Provide more resources for public agencies assisting horse farms
- Collect more data on erosion, nutrient run-off and other environmental concerns on horse farms
- Provide horse-farm specific training for agricultural extension agents

Increase the Role of Horse Farm Owners in Setting Laws, Regulations and Codes Governing Horse Farm Management

- Maintain horse farms as agricultural land under Maryland law
- Establish building codes for farm buildings that are user-friendly
- Include horse farm owners in plans for zoning and land use
- Provide more information on existing laws and regulations, including state, county and local, governing horse farms
- Increase communication between the horse community and political representatives at the local, county, state and national level on horse farm management issues
- Improve communication between the various committees (e.g. agriculture, environment, energy) that influence policy on horse farm management

Session II

Public Lands, Wildlife Heritage Areas, Parks & Trails

Current Issues and Solutions

- Preserving common knowledge trails, especially those that run through private lands
 - a. GPS mapping applications on phones
 - b. MHC and MHIB could post trails on their website
- Staying informed on changes in trail regulations, important legislative votes, especially votes on Sunday hunting
 - a. TROT/MHC emails
 - b. Maryland Horse Council posts on their website
 - c. However, we could try to maintain a stronger social media presence through FaceBook, Twitter, etc.
- Continue to support/grow groups such as Foxhunting clubs, the Carriage Drives Association, the US Eventing Association, etc., which require large tracts of land for their events, especially in view of disappearing public lands
 - a. Groups should band together to petition for land
 - b. Sponsor events to fund raise and raise awareness
- Sharing land and responding to increased Sunday hunting
 - a. Work with other groups, including the Audubon Society and the Maryland Ornithological Society (the birders) to increase lobbying power

- b. Reach out to state and federal officials (especially their staff) to raise support for Sundays Safe for trail riding
 - c. Obtain state incentives, such as easements, to encourage private landowners to allow horses to have access
 - d. Raise awareness on trail etiquette
 - e. Develop better ways to inform and instruct safe hunting practices
- Opening more trails and dealing with the state's lack of funding
 - a. Volunteer trail clearers, working with other groups

MANAGING MARYLAND'S HORSE POPULATION

Session I

Breeding Horses in Maryland

Resolutions and Recommendations

- Currently, Thoroughbred breeding appears to be on the increase. The Maryland Horse Breeders' Association shared that new incentive programs are being put in place to reward successful Maryland-bred horses.
- Continue to increase programs and incentives to increase demand for Thoroughbred and Standardbred race horses for post-racing sport careers. The Retired Racehorse Project in Maryland and several other charities have been created since the last Horse Forum and are making good progress in promoting former race horses and rewarding those that are successful in non-racing equestrian sports.
- Increase educational opportunities for those interested in horse breeding, to include education for new breeders entering the industry, education about responsible breeding and the breeder's role in helping a horse to avoid becoming at-risk for abuse/neglect or becoming unwanted.
- Programs to educate and encourage breeders to geld young colts—including financial assistance where warranted.
- A program to track post-racing performance statistics and pedigrees of horses that retire from racing to a sport career. Sport horse breeders want to be able to access performance records for Thoroughbreds in non-racing sport to facilitate identifying stallions and their progeny that excel in equestrian sports.
- Encourage sport and performance horse breed associations to educate their membership about purpose-driven breeding, and to continuously strive to improve best qualities of the breed. Encourage breed associations and equestrian sport associations to collect, report and make public more data about the performance records of horses registered with breed associations.
- Support scientific research programs to develop new practices for equine birth control to reduce unintended overbreeding.

Session II

Coping With Surplus Horses

Resolutions and Recommendations

- Build a statewide network of people willing and qualified to help re-home or humanely euthanize/dispose of horses.
- Create and promote more horse management classes.
- Continue finding ways to reach more people with educational materials—particularly individuals and “backyard” owners not affiliated with any formal organizations that provide education.

- Create promotional and educational materials about horse ownership as a long-term commitment
- Find other avenues for re-homing horses in addition to rescues.
- Increase efforts to create programs to re-home horses that are more auction-prone (cart horses, working horses, mini horses) and horses that are not 100% sound.
- More networking/communicating across participants in the horse industry
- Incentives and programs to keep Maryland horses out of auction houses that sell horses to “kill buyers”—provide horse owners in trouble with better alternatives.
- Consider options such as licensing for breeders and horse dealers, microchip accepted as a basic veterinary service, microchip scanning required at auction houses, and inclusion of language more protective of equine welfare in sale contracts and auction contracts.
- Support research and expansion of composting programs as a means of carcass disposal.

