

TO: ASPCA
 FROM: Karen Emmerson and Erin Wagner, Edge Research
 RE: Key Findings from Studies on Horse Adoption
 DATE: April 8, 2016

This memo summarizes some of the key findings and recommendations from the recent omnibus surveyⁱ on horse ownership and interest in horse adoption, as well as some data from a follow-up survey conducted onlineⁱⁱ. The data demonstrates a very strong interest by Americans in adopting horses at-risk of slaughter, and an ample number of homes available to do so.

HORSE OWNERSHIP AND INTEREST

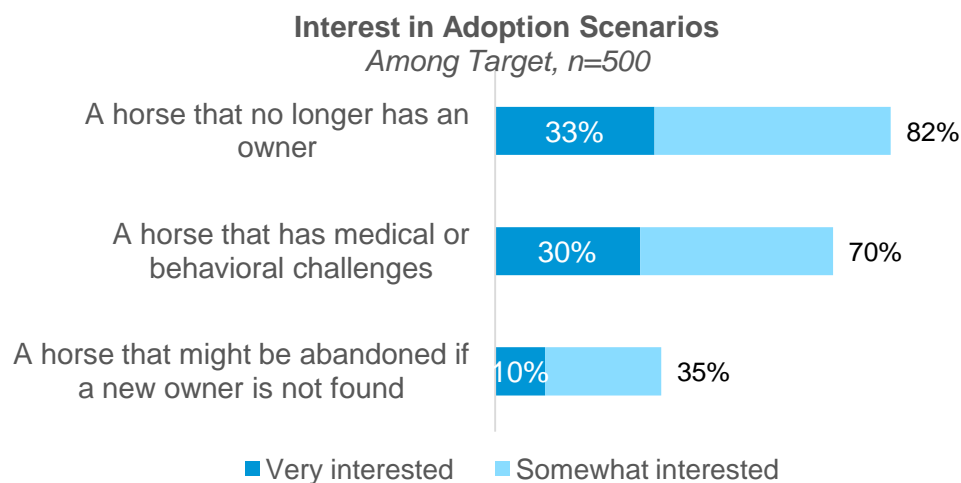
Among 3,036 U.S. adults contacted in a nationally representative omnibus survey, 4% currently own a horse, and another 4% have owned a horse in the past (only 14% of those owned one in the last 5 years).

Overall, 14% of those surveyed said they were interested in obtaining a horse at some point in the future (5% very interested).

Current horse owners, recent past horse-owners (last 5 years), and those who are interested in getting a horse in the future make up 17% of the general population and are the target audience for this issue. For the rest of the findings below, the “target” audience will refer to this subgroup.

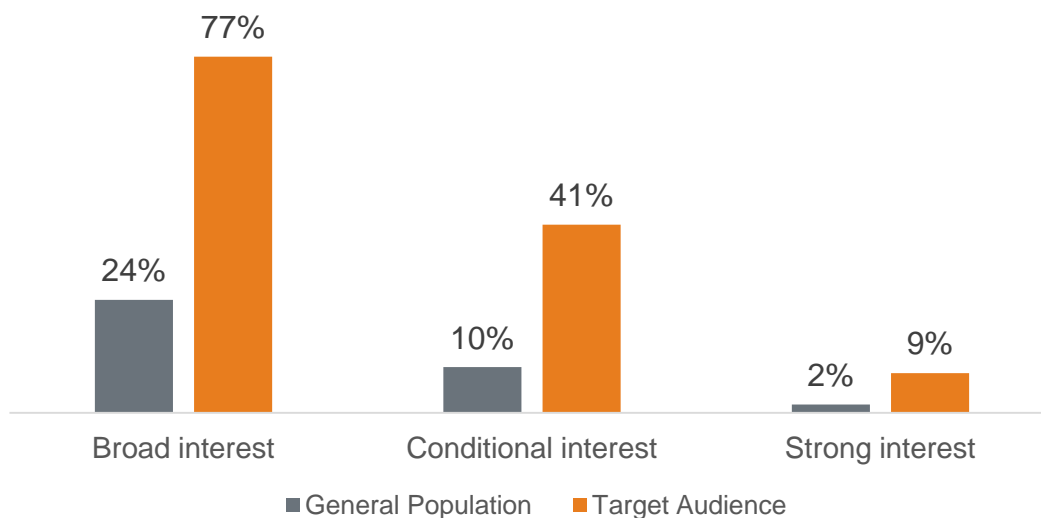
INTEREST IN ADOPTION SCENARIOS

Within the target group, interest in adoption was highest for a horse that no longer has an owner.



Among the total respondent pool, people are most interested in adopting a horse with medical or behavioral challenges (19% very/somewhat interested, compared to 14% for a horse with no owner), suggesting that the plight of a sick horse may actually increase the desire to help.

Overall Interest



Looking at individual responses across this set of questions, 77% of the target group showed broad interest, meaning they were very or somewhat interested in at least one of the adoption scenarios. About four-in-ten (41%) showed conditional interest (they were very interested in at least one of the adoption scenarios), and 9% showed strong interest (they were very interested in each of the scenarios offered).

Given a U.S adult population of 245,201,076¹, and assuming we look to only those who are current, past or future horse owners and strongly interested in adopting, **there are more than 3.7 million people who either currently have horses, have had a horse recently, and/or are interested in getting a horse in the future who are very interested in adopting a horse in all scenarios tested.**

CAPACITY TO ADOPT

Among those very or somewhat interested in adopting a horse under any of the given scenarios, 36% currently have the space and resources to care for that newly adopted horse on their own property or at a local barn or stabling facility. That number rises to 46% within the target audience.

Looking at interest and capacity together, there are an estimated 2.3 million people who are in the target audience and have both strong interest and capacity to adopt a horse.

¹ <http://quickfacts.census.gov/qfd/states/00000.html>

REASONS FOR ADOPTING

In the follow-up survey conducted online, which included current horse owners, recent past horse owners, and those who are very interested in getting a horse, we asked the target group more in depth questions around adoption and re-homing.

While helping animals in need was a motivator to adopt, **70% specifically noted their reasons were motivated by wanting to prevent a horse from being slaughtered.**



More than a third (36%) reported that it would be easy to adopt a horse because they had the space and resources, and 30% reported they were planning to get a horse anyway (72% among those with strong interest and capacity to house).

With an approximately 125,000 horses slaughtered in 2015, those numbers suggest there are enough owners and homes readily available to take in horses that might otherwise be slaughtered for many years to come.

ⁱ Edge Research designed this survey and it was conducted via phone by Caravan ORC International between Sept 24 and Oct 11, 2015. The sample of 3,036 adults included 500 respondents that own a horse, previously owned a horse, and/or are interested in obtaining a horse in the future. The margin of error for the total sample is +/- 3.1 percentage points.

ⁱⁱ Edge Research designed and conducted this survey using an online survey panel. The sample included 600 American adults who met at least one of the following criteria:

- Currently own a horse
- Have owned a horse in the last 5 years
- Are very interested in getting a horse in the future

The survey was conducted December 17-23, 2015 and January 4-13, 2016.