

Equestrian Venues Data and Horse Count Estimates – Wellington, Florida

Introduction

The Equestrian Preserve Committee presented the Equestrian Plan of Action to Council in November 2018. The Plan highlighted the need for additional venue data, to better aid in defining the industry's impacts on Wellington. The following summary is an attempt to add and combine some of the equestrian industry data that was not included in the initial Plan of Action, while summarizing the equine data that is currently available for Wellington and Palm Beach County.

Many factors can contribute to the annual fluctuation in the industry's participation and growth. The economy, competition from venues outside Wellington, recurring events such as the Olympics, and the increasing popularity of equestrian sports both nationally and internationally are all factors that contribute to these fluctuations. In addition to these annual fluctuations, Wellington's equine industry varies from month to month due to its seasonal nature. Understanding these fluctuations can help the Village determine what factors have the greatest influences on this industry over time and aid in planning the Equestrian Preserve Area for the near-term and long-term needs.

Combining this equestrian venue data with existing stall count data and livestock waste reports, which the Village has been tracking for the last eight years, will also help to give a better understanding of how the horse population moves in and out of Wellington during the year. Being able to hone-in on the number of horses in Wellington year-round, and how many more come to compete in Wellington during season, can provide insight to the economic impact of the equestrian industry in Wellington and the region.

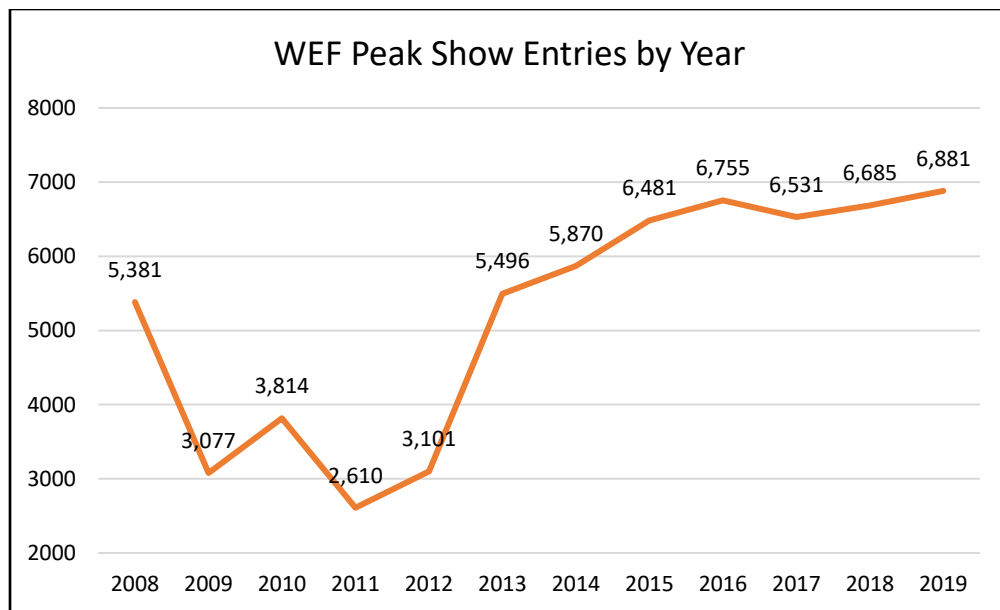
Equestrian Venue Entry Numbers

To begin to get an idea of how competitions and the number of horses entered in those competitions have changed recently, EPC members Annabelle Garrett and Dr. Kristy Lund obtained horse show entry numbers from the local venues over the last 10 years. These numbers came from entry information posted on venue websites and from information requests of equestrian associations. Following is a summary of the data received so far¹.

Winter Equestrian Festival (WEF)

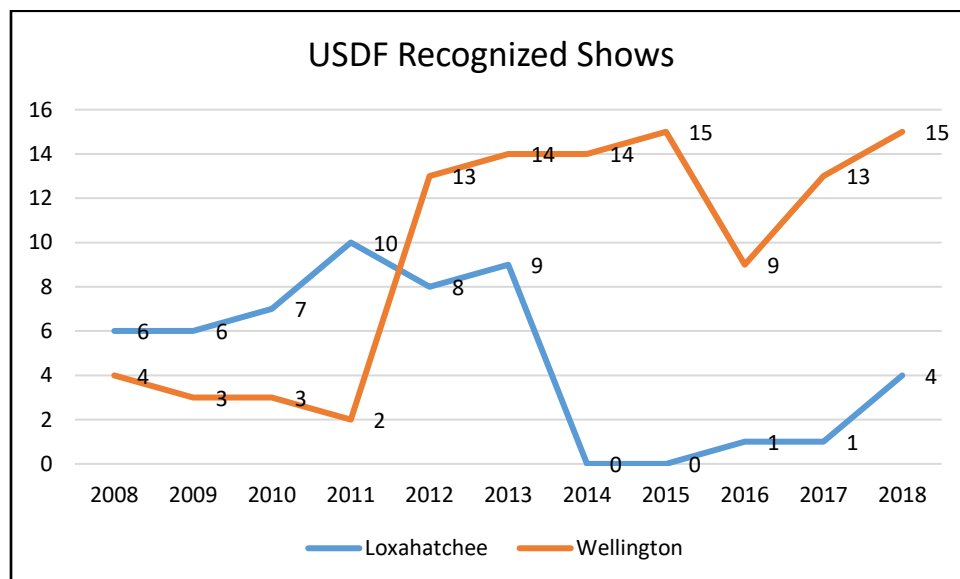
According to the Palm Beach International Equestrian Center webpage <https://pbiec.coth.com>, the number of WEF entries (horses) has grown steadily since a decline during recession and post-recession years 2009 – 2012. The below graph depicts the highest number of entries for any single WEF event annually, from 2008 – 2019. The lowest number of peak entries occurred in 2011, when WEF Week 5 topped out at 2,610 entries. The number of peak entries increased to 3,101 in 2012, and has increased almost every year since. The highest number of peak entries occurred in WEF Week 11, 2019.

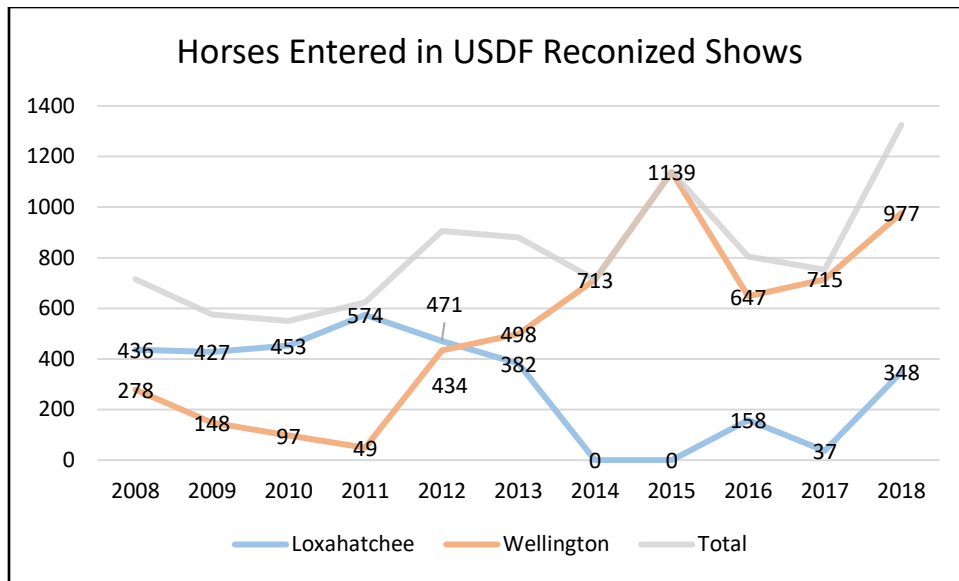
¹ See Exhibit 'A' for the entire data set relating to the equestrian venue entry numbers from the last 10 years.



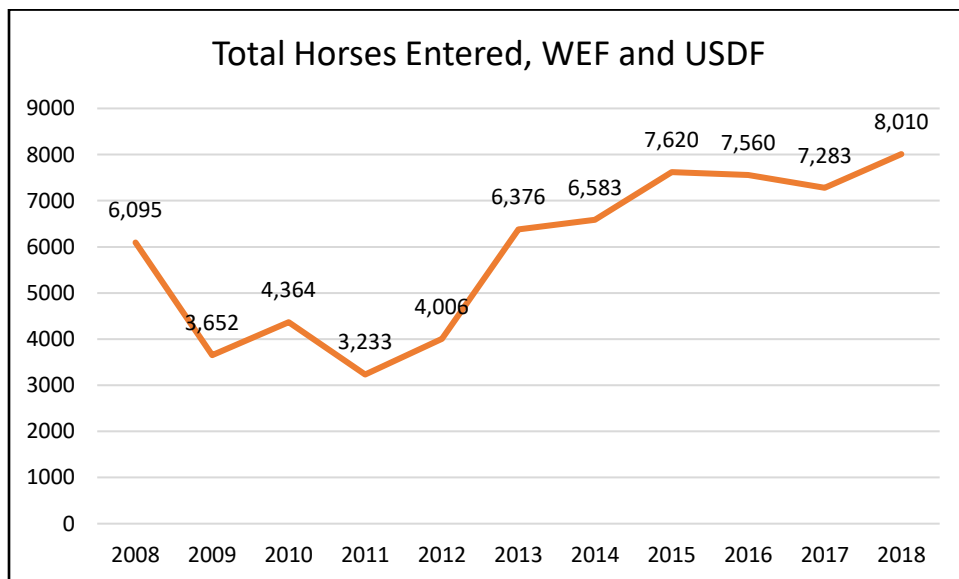
United States Dressage Federation (USDF) Venues

The Village obtained USDF horse entries and show numbers for recognized shows in Loxahatchee and Wellington through an information request to the USDF. The response did not include the Jim Brandon Equestrian Center (JBEC), only Loxahatchee and Wellington shows. The Village has requested separate information for JBEC, but does not have it yet. The below graphs depict the number of USDF recognized shows and the number of horses entered in those shows from 2008 – 2018. The pattern for the USDF shows and horses is similar to the WEF entries in that the numbers are lowest from 2008 – 2011. There was a large increase in 2012 with 905 horses entered in 21 recognized shows. The number of horses and shows remained high from 2013 – 2018, with 2018 having the highest number of horses entered at 1,325. One exception was 2016 when the number of horses and shows decreased to 805 and 10 respectively. Note that 2015 was the lead up year to the 2016 Olympic year.





Below is a graph depicting the combined number of horses entered in WEF and USDF recognized shows from 2008 – 2018. It shows a steady increase in the horse entry numbers from 2012 – 2018, which had the highest amount of entries at 8,010.



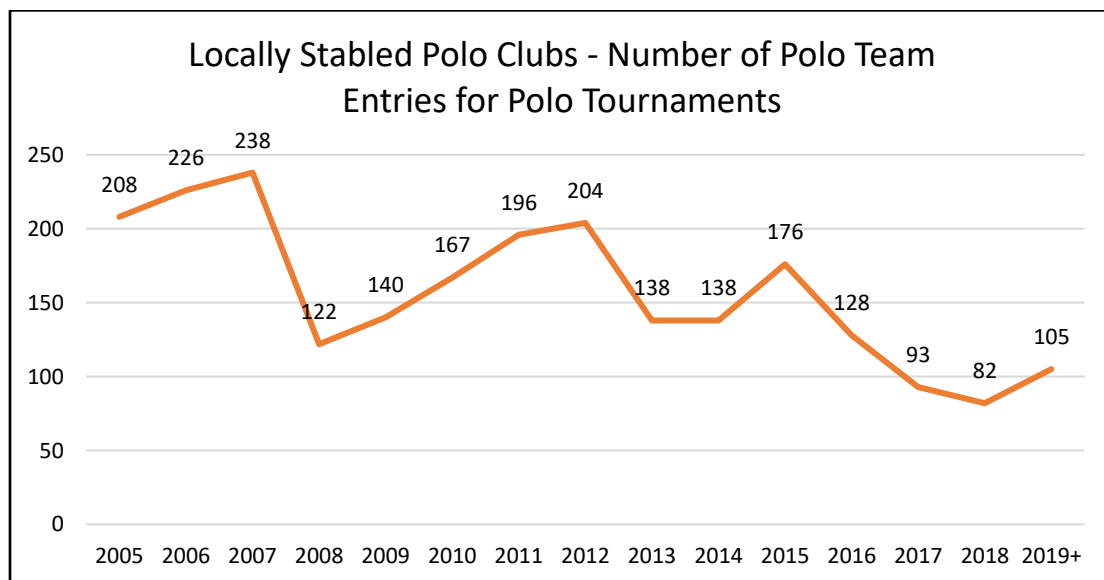
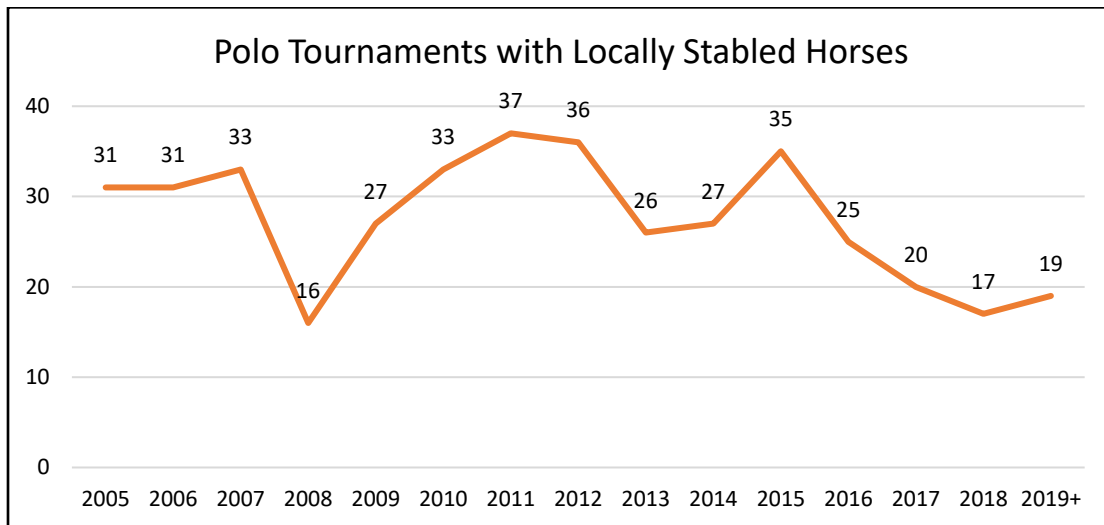
United States Polo Association (Area Polo Clubs)

Locally Stabled Polo Clubs	
Grand Champions	PBP&HC
Gulfstream	Port Mayaca
Hobe Sound	Royal Palm
IPC	Santa Clara
Outback	The Villages
Palm City	

EPC member Annabelle Garrett obtained polo tournament data through a request to the United States Polo Association. This data includes National, Circuit, and Sanctioned Tournaments at 15 polo clubs throughout Florida dating back to 2005. Of the 15 polo clubs, 11 of the clubs are assumed to have horses stabled locally or regionally. It is hard to estimate the

number of horses from a polo tournament because the number of horses per team can vary greatly. For example, it is estimated that a high-goal polo team can have anywhere from 50-200 horses per team whereas a medium to low goal team may have half this number. The data provided tracks the number of tournaments and number of team entries at each club annually.

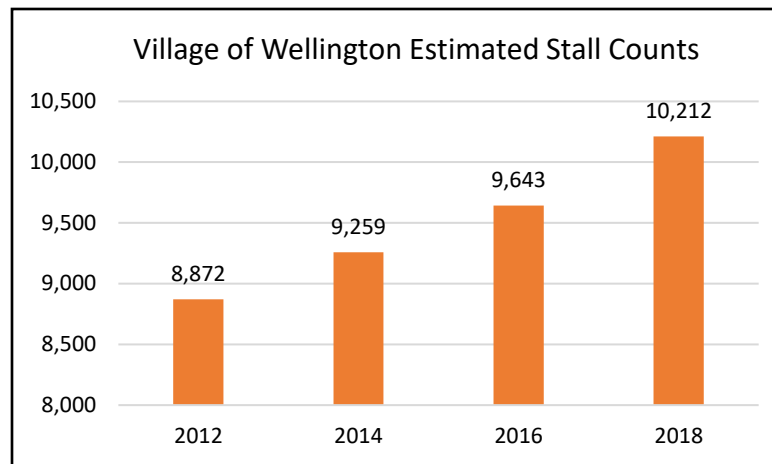
The polo charts below show a similar graph as the other equestrian disciplines with a low point occurring in 2008. However, polo tournaments and the number of team entries began recovering and grew steadily from 2009 – 2012. This contrasts the WEF and USDF numbers, which remained low from 2009 – 2011. The polo numbers then declined again in 2013 and 2014, before a quick spike in 2015. This was followed by another decline from 2016 – 2018. The number of polo tournaments and polo team entries in the region clearly vary more than the other disciplines on an annual basis. However, as previously stated, that is not necessarily in direct relation to the number of horses stabled for polo tournaments because of the variation in team sizes. If more high-goal polo is being played, it would make sense that the number of horses would at least remain the same even if there are fewer tournaments.



Stall Counts and Livestock Waste Disposal Amounts Reported

The Village of Wellington has been tracking the estimated number of permanent and temporary stalls in Wellington since the 2011-2012 equestrian season. Using aerial photos and Village of Wellington Building Permits issued, the Village has estimated 9,259; 9,608; 9,643; and 10,212 permanent stalls annually from 2014 – 2018 (there was no stall count in 2017). On average,

approximately 3,000 temporary stalls are also permitted each year. When you include these additional 3,000 stalls, it increases the stall count range during these years to 12,259 – 13,212. Assuming one stall equates to one horse, that would mean more than 13,000 horses are currently stabled in Wellington during the peak season.



Note: to the assumption that one stall equals one horse, there is evidence that horse owners will use stalls for tack and feed storage. This is typically a temporary usage and may alter the overall equine count.

Another means of estimating the amount of horses in Wellington at a given time is through livestock waste disposal reports. The Village tracks the amount of livestock waste coming from Wellington farms through registered Village of Wellington livestock waste haulers. The haulers are required to provide quarterly reports showing how much waste they have disposed of each month.

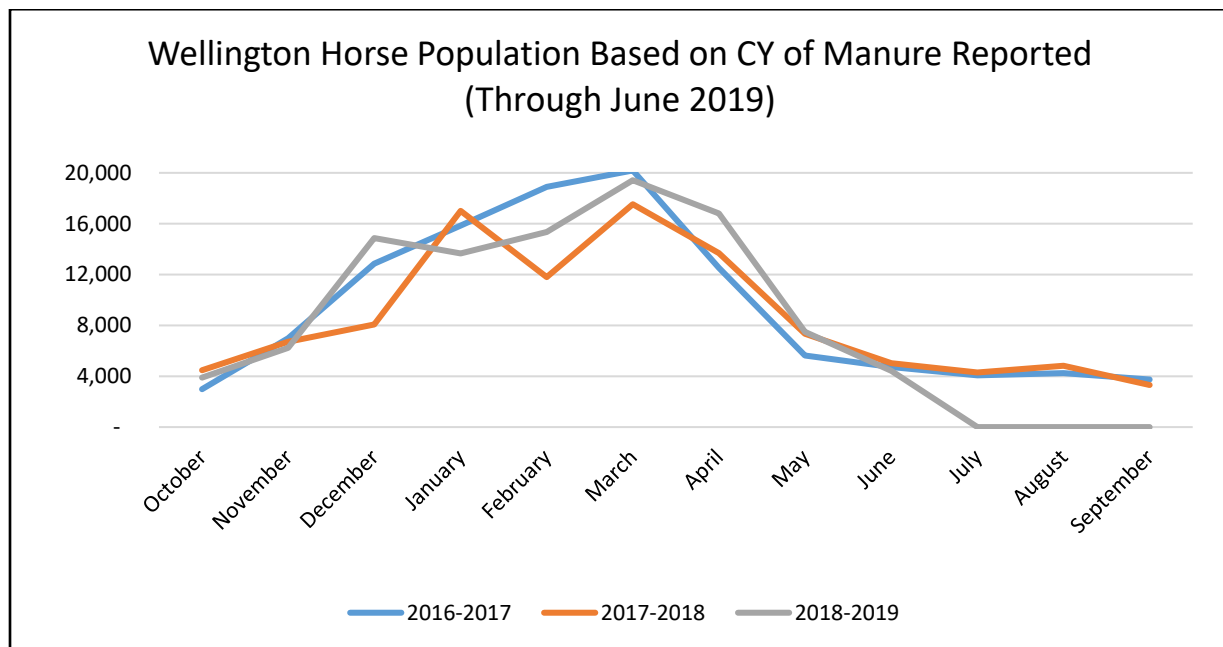
According to the haulers, a cubic yard of waste equates to approximately 600 pounds. Using the industry standard of a 1,000-pound horse generating around 50 pounds of waste per day, it takes 12 horses to generate one cubic yard of waste. The Village has livestock waste reports broken down by month. Therefore, using the equation $\text{horses} = (\text{cubic yards of livestock waste} \times 12) / 30$, one can estimate the number of horses based on the amount of livestock waste disposal being reported. Below are the number of horses estimated using this equation for the years 2017 – 2019, as of the end of June 2019.

Month	Cubic Yards	Horses	Month	Cubic Yards	Horses	Month	Cubic Yards	Horses
October	7,451	2,980	October	11,205	4,482	October	9,743	3,897
November	17,446	6,978	November	16,751	6,700	November	15,597	6,239
December	32,112	12,845	December	20,168	8,067	December	37,174	14,870
January	39,630	15,852	January	42,539	17,016	January	34,149	13,660
February	47,248	18,899	February	29,498	11,799	February	38,338	15,335
March	50,476	20,190	March	43,829	17,532	March	48,549	19,420
April	31,350	12,540	April	34,216	13,687	April	42,044	16,818
May	14,095	5,638	May	18,328	7,331	May	18,706	7,482
June	11,809	4,724	June	12,578	5,031	June	11,060	4,424
July	10,175	4,070	July	10,728	4,291			
August	10,641	4,256	August	12,041	4,816			
September	9,353	3,741	September	8,276	3,310			
2016-2017			2017-2018			2018-2019		

Estimating the number of horses this way helps in tracking the change in horses throughout the year. However, it also raises a few observations and questions, both in the data being reported itself, and in relation to the stall count data.

First, there are certain months that do not seem to be reported as highly as would be expected based on other years. For example, December 2017-2018 is reported much lower than December for the other years. The same is true for February 2017-2018. This would lead one to believe that in these months, and in other similar cases (January – February 2019), the true amount of livestock waste disposal was not reported.

However, taking into consideration that some of the data may not be fully reported, some generalizations can still be made. For example, it seems clear that the number of horses begins to increase greatly in December and drops considerably after April. Also, based on the past three seasons for which the livestock waste disposal records are most accurate, it seems the season is expanding with more horses arriving in December and remaining through April.



If there are as many as 17,000 – 20,000 horses in Wellington in March as the manure disposal records indicate, would it seem accurate to assume the 7,000 horses greater than the Wellington stall count estimate (13,000) are stabled outside of Wellington, in Palm Beach County or in the region?

The Village has contacted the Palm Beach County Property Appraiser's Office to obtain more information on the amount of acres dedicated to equestrian uses in Wellington and the rest of the county. For 2019, the property appraiser's office counted 8,698 acres dedicated to equestrian uses in all of Palm Beach County. Of those acres, 5,030 acres are located in Wellington, and 3,668 are outside of Wellington. According to the property appraiser's office, the amount of acres included in these counts are only the acres directly related to the boarding, breeding, or training of horses. Going forward, it may be helpful if the Village can obtain specifics on the equestrian related structures outside Wellington, if that data is available.

Comments and Questions for Consideration

Based on the preceding analyses of equestrian venue data, stall counts, and livestock waste disposal reports, some comments and questions are provided.

1. The more accurate data the Village can get, the better off it will be in determining the flow of horses into and out of Wellington. Thus, the Village will be in a better position to assess the economic and environmental impacts of the equestrian industry. It can also plan better for future fluctuations.
2. Do the equestrian venue numbers obtained for the years reported (2008-2018) seem to reflect accurately what has been seen through the years? Are there gaps or other venue numbers that should be reported?
3. There were a combined 8,010 horses entered in WEF and recognized dressage shows in Wellington and Loxahatchee in 2018. The number of polo horses is not yet known, but there were 17 USPA reported local tournaments and these tournaments had anywhere between two and 13 teams entered. With 13,000 estimated peak season stalls in Wellington, and an estimated 20,000 peak season horses based on livestock waste amounts, do these numbers make sense?
4. There are approximately 20,000 horses in Wellington during peak season, according to livestock waste report estimates. With 13,000 stalls in Wellington during peak season and the equestrian acreage amounts provided by the property appraiser's office, does 7,000 horses coming in from the surrounding area sound reasonable?
5. Despite increased competition from venues outside Wellington, the amount of entries for WEF and USDF recognized shows has increased almost every year since 2011.