Cool Season Hay Attributes of Primary Importance to Nevada Horse Owners

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Introduction

In the fall of 2005, a study was conducted to survey horse owners throughout the state of Nevada in an effort to determine what aspects of cool season hays appeal most to local horse owners. Cool season hays, such as Timothy hay, are often used as rotation crops in alfalfa fields by Nevada producers, and may be marketed to horse owners in the state, who comprise a potentially valuable niche market.

A survey of horse owners across Nevada was conducted by mail, and 325 surveys were returned by horse owners identifying themselves as boarders/trainers, breeders, companion horse owners, racehorse owners, and ranchers. As part of the survey, horse owners were given a list of hay attributes and were asked to rate them based on their importance in a cool season hay purchase decision. The attributes were rated from "not important" to "extremely important." While a total of 16 attributes were rated, this fact sheet only presents the five attributes given the highest rating by all horse owner types, as well as by each owner group. A full description of study results can be found in the UNCE Special Publication SP-07-02, "Do Producers and Horse Owners Agree on Important Characteristics of Cool Season Hays."

The following paragraphs provide a brief definition/description of the rated attributes that made the top five for one or more of the horse owner groups. We hope that this information will help producers to ensure repeat customers or potentially increase their market share.

Hay Attributes

Cost

Cost refers to the price paid for the hay by the horse owner. As horses are a big investment, horse owners in general are going to want to take very good care of their investment and might be willing to pay a premium for hay of high quality. The importance of cost may be directly influenced by the type of horse they own and/or the function that horse performs.

Consistent Service

Consistent service refers to the hay supplier providing the horse owner with consistent service over time and from purchase to purchase. This may include such aspects as
consistent quality of hay, consistent pricing, timely delivery, etc.

**Digestibility**

Digestibility is the ease with which hay can be digested by a horse. Hay that is soft, leafy, and pliable is more easily digested by horses, while hay that is dry or filled with stems will probably be avoided by both horses and their owners.

**Location**

Location refers to the physical location of the hay supplier. Forty-nine percent of the respondents to this survey said they live in northern Nevada (37% northwest, 12% northeast). In addition to convenience, horse owners may be interested in finding a hay supplier who operates nearby due to recent increases in fuel costs.

**Nutrition**

Nutritional value refers to the nutritional aspect of the hay, including such aspects as forage type, and the relative content of energy, protein, carbohydrates, sugars, fiber, and vitamins and minerals. The nutritional balance of a horse's diet is quite precise, and can be even more critical to owners of expensive racehorses.

**Perceived Age**

Perceived age refers to how fresh the hay appears to be at the time of purchase. Weathering, processing and curing methods, as well as storage facilities, can affect the hay's apparent freshness. The presence of dust on hay can also affect the customer's perceived age of the hay.

**Relationship**

Relationship refers to the importance to horse owners of having a relationship with their hay supplier. As with consistent service, having a relationship with the hay supplier may not be as important to horse owners, who might be more influenced by the quality characteristics of the product and/or cost. However, providing consistently high-quality hay and excellent service is one way to encourage repeat customers.

**Visual Appearance**

Visual appearance refers to the quality aspects of hay that can be determined through visual inspection. In Nevada, cool season hay quality is mainly determined through the process of visual inspection; while in other states, chemical and infrared analyses are gaining popularity. In the absence of the tools necessary to conduct such analyses, it may be a good idea to advise potential customers of the visual inspection that has been done. Producers can assure customers that the hay is free of weeds, foreign matter, insects, dust, mold, etc. If the hay was inspected by a third party, customers may also be interested to know that the inspection was performed impartially.

**Rating by Horse Owner Type**

The following sections describe the five hay attributes that were rated highest by all horse owners, and by the individual owner types.

**All Horse Owner Types**

Over all of the horse owners who responded to the survey, the hay characteristics found to be most important were nutrition, digestibility, cost, visual appearance, and the location of the supplier. It is important to note that although cost made the top five, it was not found to be the most important hay attribute over all horse owner types. This indicates that horse owners may be willing to pay a premium for hay that they consider to be of high nutritional value and highly digestible.
Boarders/Trainers
Twenty-five respondents (8% overall) to this survey identified themselves as being horse boarders and/or trainers. Horse boarders and trainers rated the location of the hay supplier as the most important hay attribute. This may be due to the nature of their business, as boarding and training horses requires a lot of hands-on involvement. The cost of hay was rated second most important. Visual appearance, nutritional value, and digestibility rounded out the top five. This indicates that boarders and trainers largely base their preferences on factors that can be determined through visual inspection, as chemical and infrared analyses are not widely used in Nevada. Boarders and trainers may be using the visual appearance of the hay to infer the nutritional value and digestibility of the hay.

Breeders
Forty-two horse owners (13% overall) responding to this survey identified themselves as being horse breeders. Breeders rated nutritional value as the most important hay attribute, with location of the supplier second, and digestibility third. It makes sense that breeders would be most concerned with the nutritional value of the hay, as breeders are trying to raise healthy, strong animals. The emphasis on the location of the supplier also makes sense as breeders, like boarders and trainers, probably do not have a lot of flexibility for travel due to their business. The cost of hay was rated fourth, and visual appearance of hay was rated fifth.

Companion
Two hundred and twenty-two respondents (67% overall) identified themselves as being companion horse owners. Companion horse owners rated digestibility and nutritional value as the most important hay attributes, with visual inspection given the third rank. Location and cost were also considered to be very important to companion horse owners. These rankings indicate that companion horse owners are most concerned with the chemical composition of the hay, since digestibility and nutritional value cannot be accurately determined through visual inspection alone. However, the ranking of visual appearance over cost indicates that these horse owners do place value on the visual quality of the hay.

Racehorse
Five respondents (2% overall) to this survey identified themselves as being racehorse owners. Racehorse owners gave very different ratings than the other horse owner groups. Cost was rated as most important, while the relationship with the supplier was second in importance. Perceived age and visual appearance were third and fourth in importance, while consistent service was fifth. These results indicate that racehorse owners may be more concerned with who is providing

Horse Breeders
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Companion Horse Owners
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Boarders/Trainers
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All Horse Owners
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their hay than the other owner types. Hay producers looking to supply hay to racehorse owners should be aware that this group of owners might respond well to personal attention. Although cost was given the highest ranking by racehorse owners, the other rankings indicate that racehorse owners may be willing to pay more for hay from a supplier with whom they are familiar.

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<td>Consistent Service</td>
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**Racehorse Owners**

Cost was given the highest ranking by racehorse owners, indicating that this group of owners might respond well to personal attention. Although cost was given the highest ranking by racehorse owners, the other rankings indicate that racehorse owners may be willing to pay more for hay from a supplier with whom they are familiar.

**Ranchers**

Thirty-two respondents (10% overall) to this survey identified themselves as being ranchers. Ranchers were most concerned with the nutritional value and digestibility of hay, though perceived age and visual appearance were also rated very highly. This may be an indication of ranchers' emphasis on visual qualities. Having a relationship with the supplier was also in the top five for ranchers.

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**Conclusions**

Recognizing the hay attributes regarded as most important by horse owners may help producers ensure repeat customers or potentially increase their market share. The results of this study indicate that the value of hay attributes differ across horse owner types, which in turn indicates that the market for cool season hays is ideal for niche marketing. Niche marketing is the process of marketing a product directly to the consumer without going through a middleman. This allows the supplier to remain in direct contact with the customer, providing the supplier the opportunity to design his/her product according to the customer's specific needs.

The information presented here can be used as a tool for cool season hay producers to identify the characteristics of greatest importance to their customers. The results of this study can also serve as evidence that hay attribute preferences vary among horse owner types as well as between individual horse owners. The more information a supplier has about the preferences of his/her potential customers, the better the chances of maintaining a long-term relationship with that customer.

**More Information**

University of Nevada Cooperative Extension has additional publications relating to hay quality, equine nutrition, niche marketing, and more. These publications can be found online at [http://www.unce.unr.edu/pubs.html](http://www.unce.unr.edu/pubs.html).

**References**