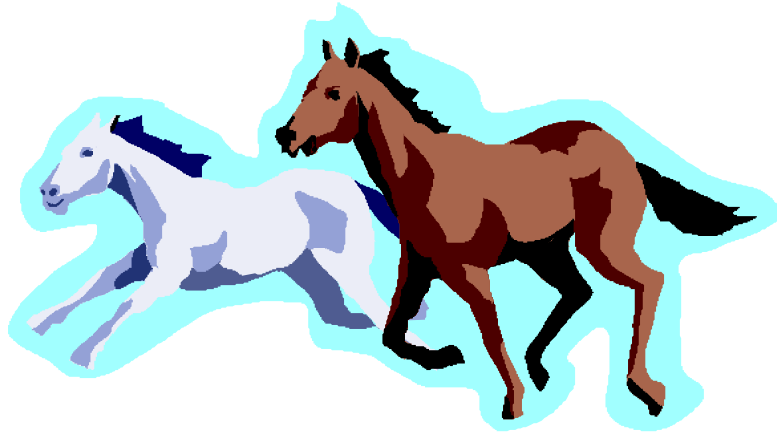


AAEP Senior Horse Feed Survey



Conducted by:

Dr. Michael Stachiw, Ph.D.

Strategic Mapping & Data Services LLC
10715 Kahlmeyer Dr.
St. Louis, MO 63132

In conjunction with



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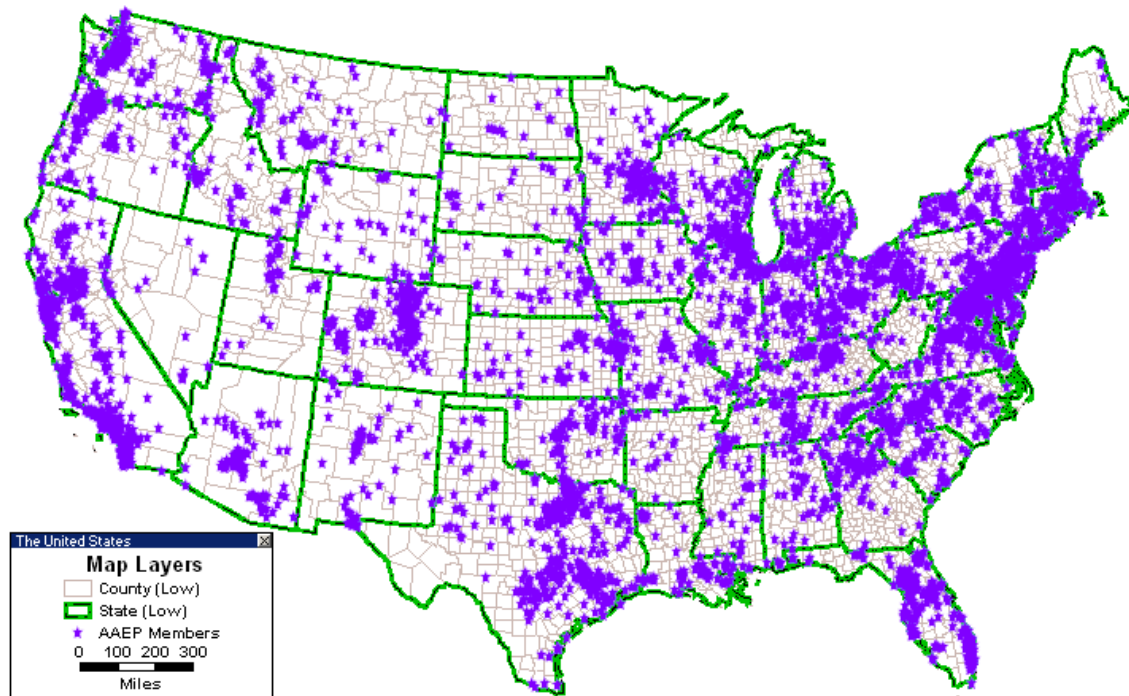
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Introduction:

Everyday we see in advertisements the statement “recommended by xx more than any other product” and all too often we never think of how these claims are formulated nor any idea of the data backing up these claims. We at Strategic Mapping & Data Services LLC (SM&DS) were recently charged with the task of finding out if veterinarians do actually recommend horse feeds to their clients, and for their senior horses what products do they recommend. Using the AAEP database over 6,400 surveys were mailed out, and by the cut off date for this study, 2157 surveys were returned which represents a 33.7% return rate. The geographical coverage of the AAEP database is shown in Figure 1.

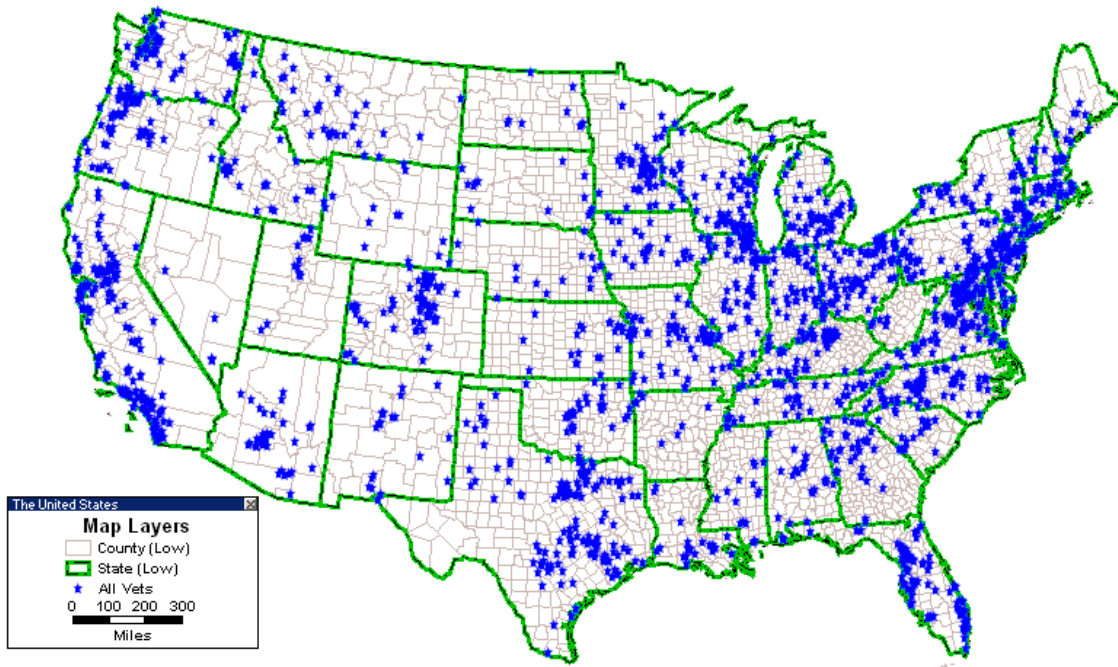
Figure 1 – AAEP Members



Results:

As indicated, 2157 veterinarians returned the postage prepaid postcard with their answers. This represents a 33.7% return rate which makes the findings of this study statistically significant.. To see if there existed in the data any regional bias, the address of the returned surveys was plotted, as shown in Figure 2, and as can be seen the sample data is geographically evenly distributed by itself. When the AAEP membership as shown in Figure 1 is compared to the returned surveys shown in Figure 2, a regionally equal sampling is seen without bias to local/regional horse feed brands.

Figure 2 - AAEP Veterinarians Who Responded to the Survey



The first question asked of the veterinarians was if they are often asked to recommend horse feeds by their clients. The results of this question are shown in Table 1.

Table 1 – I am often asked to recommend horse feeds to my clients?

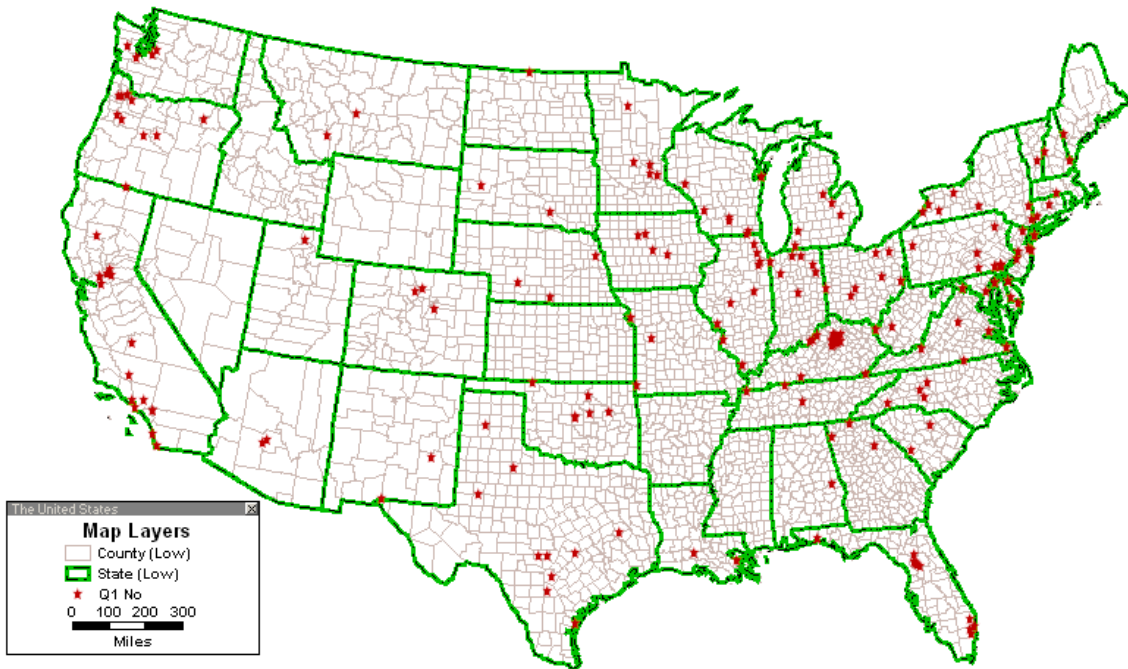
# of Respondents	% of Responses	Answer
1868	89.1%	Yes
229	10.9%	No

Again to see if any region geographical bias existed, the respondents who answered “yes” where plotted out in Figure 3, and the respondents who answered “no; where plotted out in Figure 4.

Figure 3 - I am often asked to recommend horse feed to my clients: Yes



Figure 4 - I am often asked to recommend horse feed to my clients: No



Out of the 2157 respondents, 2109 indicated the senior horse feed they would recommend to their clients. The results are presented in Table 2.

Table 2 – If you were recommending a Senior Horse feed product to your clients which of the following products would you recommend.

Percents add to more than 100 because of multiple responses

# Responses	%	Senior Horse Feed
99	4.7%	Progressive Senior Formula
409	19.4%	Triple Crown Senior
138	6.5%	LMF Senior Feed
1811	85.9%	Purina Mills Equine Senior
232	11.0%	Buckeye Senior feed
475	22.5%	Nutrena Life Design Senior
41	1.9%	Manna Pro
13	0.6%	Dumor Senior
227	10.8%	Other

The number one recommended senior horse feed is Purina Mill's Equine Senior at 85.9% followed by a distant second Nutrena's Life Design Senior at 22.5%. When asked if the veterinarian had any senior horses at home or in their clinic and which brand of senior horse feed they use, 1,672 responded with the results shown in Table 3.

Table 3 – Do you have any senior horses at home or in your clinic? If so, what senior horse feed do you feed at home or in your clinic?

Percents add to more than 100 because of multiple responses

# Responses	%	Senior Horse Feed
37	2.2%	Progressive Senior Formula
132	7.9%	Triple Crown Senior
49	2.9%	LMF Senior Feed
1216	72.7%	Purina Mills Equine Senior
41	2.5%	Buckeye Senior feed
159	9.5%	Nutrena Life Design Senior
15	0.9%	Manna Pro
8	0.5%	Dumor Senior
216	12.9%	Other

Again the number one senior horse feed is Purina Mill's Equine Senior at 72.7% followed again by a distant second of Nutrena's Life Design Senior at 9.5%. In actuality, second place is occupied by a collection of other brands not directly surveyed coming in at 12.9% (The details of other brands specified are shown in Appendix 2).

Appendices

Appendix 1 – OTHER - If you were recommending a Senior Horse feed product to your clients, which of the following products would you recommend

Q2	Frequency	Percent	Cumul ati ve Frequency	Cumul ati ve Percent
ADE	1	0.45	1	0.45
ADM ALLI ANCE	2	0.90	3	1.35
ADM PATRI OT	2	0.90	5	2.24
ADM PATRI OT SENI OR	1	0.45	6	2.69
ADM SENI OR GLO	2	0.90	8	3.59
ADM SR	1	0.45	9	4.04
AGWAY SUPERI OR SR	1	0.45	10	4.48
ALL AMERI CAN SENI OR	1	0.45	11	4.93
ALL I N ONE	1	0.45	12	5.38
ALLEGRA SR.	2	0.90	14	6.28
APM SR GLO	1	0.45	15	6.73
ASSURANCE SR	1	0.45	16	7.17
AVOID SENI OR FEEDS	1	0.45	17	7.62
BANKS MILL SR	1	0.45	18	8.07
BEETPULP	1	0.45	19	8.52
BERRETI NI SR	1	0.45	20	8.97
BLUE SEAL	20	8.97	40	17.94
BLUE SEAL EQUI NE	1	0.45	41	18.39
BLUE SEAL SR	3	1.35	44	19.73
BLUE SEAL SR.	6	2.69	50	22.42
BLUE SEAL VINTAG	1	0.45	51	22.87
BLUE SEAL VINTAGE	3	1.35	54	24.22
BLUE SEAL VINTAGE SENI OR	1	0.45	55	24.66
BLUE SEAL VINTAGE SR	8	3.59	63	28.25
BLUESEAL SENI OR	1	0.45	64	28.70
COMPLETE SR	1	0.45	65	29.15
COOP YEARS	1	0.45	66	29.60
COSTCO SR	1	0.45	67	30.04
CUSTOM MIX	2	0.90	69	30.94
DYNASTY SENI OR	2	0.90	71	31.84
DYNASTY SR	1	0.45	72	32.29
EQUINE SUPPLY ANI	1	0.45	73	32.74
EQUIS FOR THE CHALLENGED	1	0.45	74	33.18
FRM SR	1	0.45	75	33.63
FRONTRUNNER	1	0.45	76	34.08
GOLDEN YEARS	1	0.45	77	34.53
HALLWAY	1	0.45	78	34.98
HERI TAGE	1	0.45	79	35.43
HIGHEST FAV AVAI LABLE	1	0.45	80	35.87
HUBBARD FRONT RUNNER	1	0.45	81	36.32
I NTEGRITY	2	0.90	83	37.22
JOHN LYON SR	1	0.45	84	37.67
JOHN LYONS	1	0.45	85	38.12
KENT DYNASTY SENI OR	3	1.35	88	39.46
KING FEEDS SR	2	0.90	90	40.36
KRUSE OLT	1	0.45	91	40.81
LANDMARK SR	1	0.45	92	41.26
LEGENDS MATURI TY	1	0.45	93	41.70
LOCAL BRAND KRN	1	0.45	94	42.15
LOCAL FEED SUPPLI ER	2	0.90	96	43.05
MCCAULEY BROS	1	0.45	97	43.50
MCCAULEY BROTHERS SR.	4	1.79	101	45.29
MCCAULEYS SENI OR	1	0.45	102	45.74
MERI L SENI OR	1	0.45	103	46.19
MFA GOLDEN YRS	2	0.90	105	47.09
MOORMANS NATURAL	1	0.45	106	47.53

Appendix 1 (Cont) – OTHER - If you were recommending a Senior Horse feed product to your clients, which of the following products would you recommend

Q2	Frequency	Percent	Cumul ati ve Frequency	Cumul ati ve Percent
MORMANS SR GLO	1	0.45	107	47.98
NATIONAL BRAND	1	0.45	108	48.43
NEW PURINA SR	1	0.45	109	48.88
NORTHWEST	1	0.45	110	49.33
NUTRENA	2	0.90	112	50.22
NUTRENA PRIME	1	0.45	113	50.67
NUTRENA SAFE CHOICE	2	0.90	115	51.57
NUTRENA SR	1	0.45	116	52.02
NUTRENE EQUINE ONE	1	0.45	117	52.47
NUTRINA	1	0.45	118	52.91
OATS & ALFALFA	1	0.45	119	53.36
OMALENE/OATS	1	0.45	120	53.81
ONE 'N ONLY	2	0.90	122	54.71
ONE AND ONLY	2	0.90	124	55.61
ONE N ONLY	2	0.90	126	56.50
ORGANIC GRAINS	1	0.45	127	56.95
PATRIOT SENIOR	3	1.35	130	58.30
PEMFIELD	2	0.90	132	59.19
PENNFELD	5	2.24	137	61.43
PENNFELD SR	1	0.45	138	61.88
PENNFELDS SR	2	0.90	140	62.78
PLAIN GRAIN	1	0.45	141	63.23
PLATINUM PERFORM.	2	0.90	143	64.13
POULIN	3	1.35	146	65.47
POULIN SR	1	0.45	147	65.92
PREFERENCE	1	0.45	148	66.37
PREFERRED SR	1	0.45	149	66.82
PRODUCERS COOP	1	0.45	150	67.26
PROFILE SR	1	0.45	151	67.71
PURINA ALTIUM	1	0.45	152	68.16
PURINA L/S	1	0.45	153	68.61
PURINA WELLSOLVE	3	1.35	156	69.96
RAMAEKERS	1	0.45	157	70.40
RANCHWAY	1	0.45	158	70.85
REVOLUTION	2	0.90	160	71.75
RICE BRAN	1	0.45	161	72.20
SAFE CHOICE	3	1.35	164	73.54
SEMI NOLE	3	1.35	167	74.89
SEMI NOLE SENIOR	1	0.45	168	75.34
SEMI NOLE SENIOR FORMULA	1	0.45	169	75.78
SEMI NOLE SR	10	4.48	179	80.27
SENIOR ADVANT	1	0.45	180	80.72
SENIOR GLO	2	0.90	182	81.61
SO STATES	1	0.45	183	82.06
SO STATES SR	1	0.45	184	82.51
SOUTHERN STATE	1	0.45	185	82.96
SOUTHERN STATE SR	2	0.90	187	83.86
SOUTHERN STATES	1	0.45	188	84.30
SOUTHERN STATES SR	1	0.45	189	84.75
SR GLO	6	2.69	195	87.44
SR STABLE	1	0.45	196	87.89
STEAM ROLLED OAT GROATS	1	0.45	197	88.34
STRATEGY	2	0.90	199	89.24
SWEET FEED	1	0.45	200	89.69
TDI SR	2	0.90	202	90.58
TDT SR	1	0.45	203	91.03

Appendix 1 (Cont) – OTHER - If you were recommending a Senior Horse feed product to your clients, which of the following products would you recommend

Q2	Frequency	Percent	Cumul ative Frequency	Cumul ative Percent
TEMPLETON FEED	1	0.45	204	91.48
TIZ WHIZ	1	0.45	205	91.93
TRIPLE CROWN COMPLETE	1	0.45	206	92.38
ULTIUM	1	0.45	207	92.83
VINTAGE SR.	4	1.79	211	94.62
VITIUM	1	0.45	212	95.07
VITO ROYAL HI PRO PLUS	1	0.45	213	95.52
WELLSOLVE L/S	4	1.79	217	97.31
WENDLANDS	1	0.45	218	97.76
WOODFORD FEED SENIOR	1	0.45	219	98.21
WOODRUFF HOUSE FEED	1	0.45	220	98.65
WOODY'S FEED	2	0.90	222	99.55
WOODYS SR	1	0.45	223	100.00

Appendix 2 – OTHER - Do you have any senior horses at home or in your clinic? If so, what senior horse feed do you feed?

Q3	Frequency	Percent	Cumul ati ve Frequency	Cumul ati ve Percent
12% SWEET FEED	1	0.49	1	0.49
ADM PATRIOT	1	0.49	2	0.99
ADM PATRIOT SENIOR	1	0.49	3	1.48
ADM SENIOR GLO	1	0.49	4	1.97
AGWAY SUPREME SR	3	1.48	7	3.45
ALL AMERICAN SENIOR	1	0.49	8	3.94
ALLEGRA SR.	2	0.99	10	4.93
ASSURANCE FEEDS	1	0.49	11	5.42
BANKS MILL SR	2	0.99	13	6.40
BARLEY & OATS	1	0.49	14	6.90
BARTLET SR. FEED	1	0.49	15	7.39
BEETPULP	1	0.49	16	7.88
BERRETINI SR.	1	0.49	17	8.37
BLUE RIBBON	1	0.49	18	8.87
BLUE SEAL	10	4.93	28	13.79
BLUE SEAL EQUINE	1	0.49	29	14.29
BLUE SEAL SENIOR	10	4.93	39	19.21
BLUE SEAL SR	1	0.49	40	19.70
BLUE SEAL VINTAGE	1	0.49	41	20.20
BLUE SEAL VINTAGE SR	6	2.96	47	23.15
BUCKEYE SAFE & EASY	1	0.49	48	23.65
COOP SUPREME	1	0.49	49	24.14
CRIMPED OATS	1	0.49	50	24.63
CULPEPER FARMERS COOP	1	0.49	51	25.12
CUSTOM MIX	2	0.99	53	26.11
DYNASTY SENIOR	3	1.48	56	27.59
ELK GROVE SR	2	0.99	58	28.57
EQUINE SUPPLY ANI	1	0.49	59	29.06
FRONTRUNNER	1	0.49	60	29.56
GOLDEN YEARS	1	0.49	61	30.05
HALLWAY	1	0.49	62	30.54
HAY PELLETS/VI TAMI NS	1	0.49	63	31.03
HERI TAGE	1	0.49	64	31.53
HUBBARD FRONT RUNNER	1	0.49	65	32.02
I MUMYONGRAIN	1	0.49	66	32.51
I NTEGRITY	1	0.49	67	33.00
KELLIP SR	1	0.49	68	33.50
KENT DYNASTY SENIOR	3	1.48	71	34.98
KENT DYNASTY SR	1	0.49	72	35.47
KENT SR	1	0.49	73	35.96
KING FEEDS SR	2	0.99	75	36.95
KRUSE OLT	1	0.49	76	37.44
LANDMARK SR	1	0.49	77	37.93
LEGENDS MATERIAL	1	0.49	78	38.42
LEGENDS PERFORMANCE	1	0.49	79	38.92
LIVENGOOD	1	0.49	80	39.41
LOCAL BRAND KRN	1	0.49	81	39.90
LOCAL COOP	1	0.49	82	40.39
LOCAL FEED CO.	1	0.49	83	40.89
LOCAL MIX	1	0.49	84	41.38
LONE STAR TRAK STAR	1	0.49	85	41.87
LOW STARCH	1	0.49	86	42.36
MATURE HORSE	1	0.49	87	42.86
MCCAULEY BROS	1	0.49	88	43.35
MCCAULEY BROTHERS	3	1.48	91	44.83
MCCAULEY SENIOR	1	0.49	92	45.32

Appendix 2 (Cont) – OTHER - Do you have any senior horses at home or in your clinic? If so, what senior horse feed do you feed?

Q3	Frequency	Percent	Cumul ati ve Frequency	Cumul ati ve Percent
MCCAULY BROTHERS	1	0.49	93	45.81
MERIL SENIOR	1	0.49	94	46.31
MFA GOLDEN YRS	1	0.49	95	46.80
MIX MY OWN	1	0.49	96	47.29
MY OWN MIX	1	0.49	97	47.78
N/A	1	0.49	98	48.28
NUTRENA	1	0.49	99	48.77
NUTRENA COMPLETE	2	0.99	101	49.75
NUTRENA EQUINE ONE	1	0.49	102	50.25
NUTRENA PRIME	1	0.49	103	50.74
NUTRENA SAFE	1	0.49	104	51.23
NUTRENA SAFE CHOICE	4	1.97	108	53.20
OBS	1	0.49	109	53.69
OMALENE/OATS	1	0.49	110	54.19
ONE 'N ONLY	1	0.49	111	54.68
ONE AND ONLY	1	0.49	112	55.17
ONE N ONLY	1	0.49	113	55.67
PATRIOT SENIOR	3	1.48	116	57.14
PEMFIELD	3	1.48	119	58.62
PENNFELD	1	0.49	120	59.11
PENNFIELDS SR	2	0.99	122	60.10
PILGRIMS SR	1	0.49	123	60.59
PLATINUM PERF.	2	0.99	125	61.58
POULIN	2	0.99	127	62.56
PREFERENCE	1	0.49	128	63.05
PREFERRED SR	1	0.49	129	63.55
PRINCE	1	0.49	130	64.04
PRODUCERS COOP	1	0.49	131	64.53
PROGRESSIVE PRO	1	0.49	132	65.02
PRURINA 10/10	1	0.49	133	65.52
PURINA CROSSROADS	1	0.49	134	66.01
PURINA HORSE CHARGE	1	0.49	135	66.50
PURINA L/S	1	0.49	136	67.00
PURINA STRATEGY	2	0.99	138	67.98
PURINA ULTIM	1	0.49	139	68.47
PURINA W/C SR.	1	0.49	140	68.97
PURINA WELLSOLVE	2	0.99	142	69.95
RAMAERS	1	0.49	143	70.44
RANCHWAY	1	0.49	144	70.94
RE-LEVE	1	0.49	145	71.43
RED MILLS	1	0.49	146	71.92
RELIANCE	1	0.49	147	72.41
REVOLUTION	2	0.99	149	73.40
ROLLED OATS	1	0.49	150	73.89
SAFE CHOICE	2	0.99	152	74.88
SAFE-CHOICE	2	0.99	154	75.86
SAFECHOICE BY NUTRENA	1	0.49	155	76.35
SEMINOLE BRAND	3	1.48	158	77.83
SEMINOLE SR	5	2.46	163	80.30
SENIOR ADVANT	1	0.49	164	80.79
SENIOR GLO ADM	1	0.49	165	81.28
SOUTHERN STATES	3	1.48	168	82.76
SOUTHERN STATES SR	1	0.49	169	83.25
SR GLO	4	1.97	173	85.22
SR STABLE	1	0.49	174	85.71
STEAM ROLLED OAT GROATS	1	0.49	175	86.21

Appendix 2 (Cont) – OTHER - Do you have any senior horses at home or in your clinic? If so, what senior horse feed do you feed?

Q3	Frequency	Percent	Cumul ati ve Frequency	Cumul ati ve Percent
STRATEGY	4	1.97	179	88.18
SWEET FEED	1	0.49	180	88.67
TDI SR	1	0.49	181	89.16
TIZ WHIZ	1	0.49	182	89.66
TOTAL EQUINE	1	0.49	183	90.15
TRIPLE CROWN COMPLETE	4	1.97	187	92.12
TRIPLE CROWN LITE	1	0.49	188	92.61
ULTIUM	5	2.46	193	95.07
VINTAGE SR	1	0.49	194	95.57
VITALITY 12%	1	0.49	195	96.06
VITIUM	1	0.49	196	96.55
VITO ROYAL HI PRO PLUS	1	0.49	197	97.04
WELLSOVE L/S	1	0.49	198	97.54
WENDLANDS	1	0.49	199	98.03
WOODFOR FEED SENIOR	1	0.49	200	98.52
WOODRUFF HOUSE FEED	1	0.49	201	99.01
WOODYS SR	2	0.99	203	100.00