

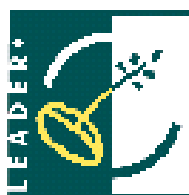
Trends in New Forest Pony Sales 2002 - 2006

Research Commissioned by the
New Forest Pony Publicity Group

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Steve Kitcher	New Forest Equine Directory
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1. Research Requirement

1.1 Research Aims

Evaluate current Pony Publicity Group marketing activities (2002-2006) to identify their impact on the price of New Forest ponies sold locally. This should include:

- Equine & agricultural shows attended by the group (where possible this should be broken down into individual events)
- Beaulieu Road pony sale yard
- Foal and young stock shows held by the New Forest Pony Publicity Group at Beaulieu Road Pony Sales Yard
- Website sales from the New Forest Equine Directory site (www.nfed.co.uk)
- Special promotional events e.g. New Forest Weekend 2005

This impact should be measured in terms of:

- Increase in prices paid for New Forest ponies
- Types of New Forest businesses benefiting from this activity e.g. private sales, studs, dealers and individual commoners
- Type of ponies sold in the New Forest i.e. young-stock, broken/unbroken, ponies reared on or off the Open Forest or stud bred

Based on the above:

Identify a cost effective marketing strategy for New Forest ponies which can be self-funded by the beneficiaries or through other sources.

Wider impacts such as expanding businesses and increasing confidence in New Forest ponies were also examined in the course of the research.

1.2 Outputs

A short report and presentation to the New Forest Pony Publicity Group and the LEADER+ Local Action Group

1.3 Timescale

A draft report should be produced by 30 September and a final report should be agreed by 16 October 2006

2. Methodology

2.1 Selling price research.

Sales price trends of New Forest ponies and the number of people selling ponies was examined to identify any increases in the prices being paid.

The sale reports produced by Southern Counties Auctioneers (SCA) for the Beaulieu Road pony sales were identified as the prime source of data. The following data sets were used:

- Aug-Dec sales for 1999, 2002 and 2005.
- Section A/1 foal prices (these foals are already registered or eligible for registration) at the largest sale of each year (either September or October) 1999 to 2006
- Number of people selling ponies at September sales 2002 & 2006

Notes: Years were chosen to give a representative spread - 2001 was untypical due to foot and mouth, the New Forest Pony Publicity Group started in 2002. April/May sale is often the smallest (10-15% of the year total) and its exclusion did not materially affect the results.

In addition qualitative opinion about selling prices and volumes was sought from three New Forest pony studs, commoners met at Beaulieu Road Pony Sale and at a drift as well as Southern Counties Auctioneers and The New Forest Pony Breeding and Cattle Society.

2.2 Buyers

Buyer trends were examined to determine where buyers originated.

The following data sets were examined:

- Postcodes and number of animals bought at 2002 and 2005 Beaulieu Road Pony Sales

The New Forest Pony Breeders & Cattle Society produces an annual Stud Book recording new registrations and transfers of New Forest ponies. This was examined to identify where New Forest ponies were registered. The following data was used:

- The location of all registrations and transfers outside Hampshire, Wiltshire, Dorset and the Isle of Wight, of ponies born in 2005.

2.3 New Forest Pony Publicity Group activities and their impact

The marketing, promotion and educational activities of the New Forest Pony Publicity Group were reviewed to determine any links with increased pony sales (both volume and price).

The New Forest Pony Publicity Group visitor's book records comments and origin of visitors to their events. This provides a useful source of information but should be treated as indicative as should the stand be congested, numbers signing the book may decline.

An e-mail survey was undertaken on 21st September of people registered with a local equine website (The New Forest Equine Directory). A copy of the questionnaire and responses received up to 27th September can be found in Appendix 2 and it should be noted that;

- a) people on the NFED contact list have an inherent New Forest pony bias – over 50% of respondents own a New Forest Pony; and
- b) those with positive (and negative) views are more likely to respond to such a survey.

The views of seven other organisations with whom the New Forest Pony Publicity Group interacts were sought, plus the opportunity to speak to a selection of approximately 25 buyers/ sellers/commoners was taken at the Beaulieu sales and at a pony drift.

A meeting of the New Forest Pony Publicity Group was also attended

3. Trends

3.1 Price trends at Beaulieu Road Pony Sales Yard

3.1.1. Price trends all ages/classes of pony

Table 1 below shows a comparison between the selling price of all categories (different registration types including crosses) of New Forest ponies and all other breeds for August to December sales. 1 guinea is £1.05pence.

Table 1

Year	Average Price of New Forest ponies (in guineas)	Average Price of all other breeds (in guineas)
1999	22	106
2002	45	179
2005	122	233

This table shows that between 1999 and 2005 the average price of New Forest ponies increased by 455% in comparison to the price of all other breeds which increased by 120%. This represents a four fold increase.

For the period since the commencement of the New Forest Pony Publicity Group i.e. from 2002; the average price of New Forest ponies increased by 270% in comparison to the price of all other breeds which increased by 30%.

The extent to which average selling prices of New Forest Ponies have increased faster than other breeds since 2002 is demonstrated in the graph below.

Graph 1: Relative % increase in average prices 1999-2005

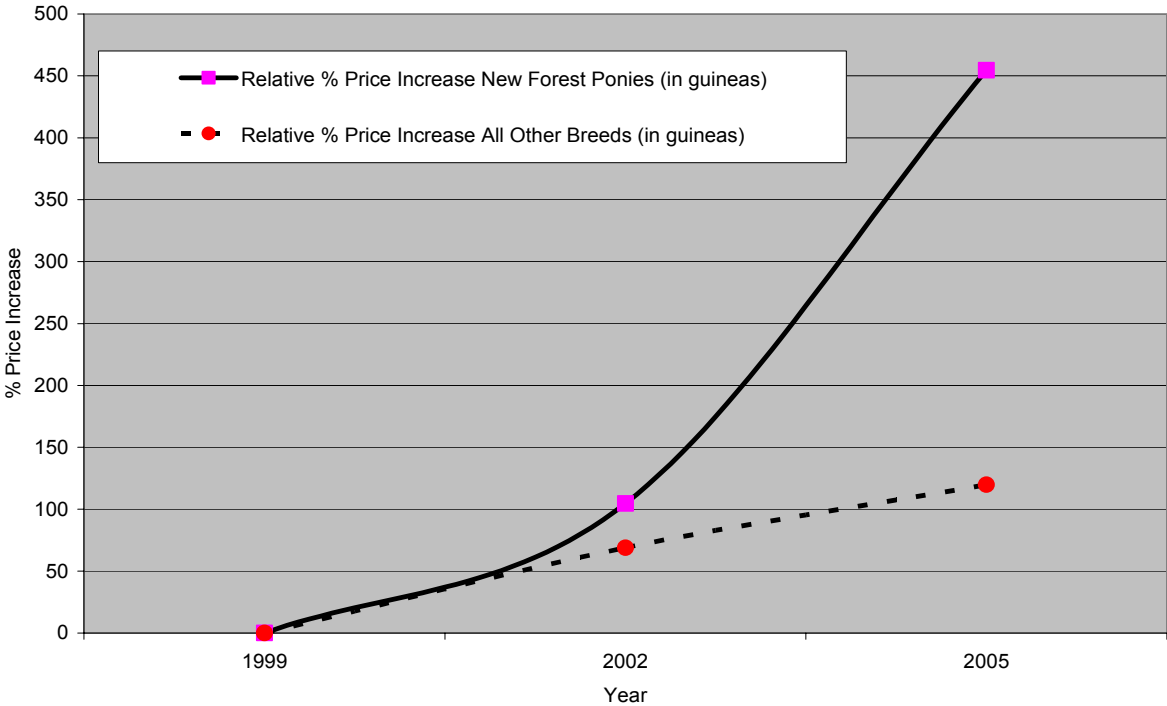


Table 2 below shows the total value and volume of all sales from the Beaulieu Road pony sales for all August to December sales.

Table 2

Year	Number of New Forest ponies sold	Number of other breeds sold	Total Number Sold	Total Value
1999	938	84	1022	£31.2k
2002	895	107	1002	£62.5k
2005	729	125	854	£124.1k

Including the April Beaulieu Road Pony Sales, the total value of 2005 sales was £145k.

The decline in the number of ponies sold through Beaulieu Road Pony Sales up to 2005 has been reversed in 2006 – 498 were sold in first three sales in 2006 compared to 343 in 2005, with prices of foals continuing to increase as can be seen in 3.1.2. Had numbers continued to fall, this could have contributed to the increase in prices.

3.1.2 Price trends - section 1/A New Forest foals

The increase in prices has been even more marked for Section 1/A foals. Table 3 shows a comparison between the average selling price of Section 1/A foals and the numbers at the largest sale of each year (September or October).

Table 3

Year	Number	Average Price in guineas
1999	188	13
2001	53	13
2002	110	29
2003	120	63
2004	165	53
2005	149	78
2006	203	100

This table shows that between 1999 and 2005 the average price of Section 1/A foals increased by approximately 650%

Looking in detail at the period 2002-2005 (i.e. since the commencement of the New Forest Pony Publicity Group), the rate of increase in average prices has been higher than the period 1999 - 2002.

Graph 2: below shows the increase in the prices (in guineas) of Section 1/A Foals



Note: The prices for 2000 were not available so they have been averaged

The total value of sales of Section 1/A foals at the largest sale each year at the Beaulieu Road Pony Sales Yard rose from £2.7k in 1999 to £21.4k in 2006. As there has been no decline in the number of Section 1/A foals sold, it can be assumed that the increase in average price is not due to reduced availability.

Anecdotal evidence from commoners suggests that in 2005/6 foals were selling for 3-5 times the price of similar foals from early 2000's.

In addition, the prices of New Forest ponies in Horse & Hound magazine were also observed to have increased.

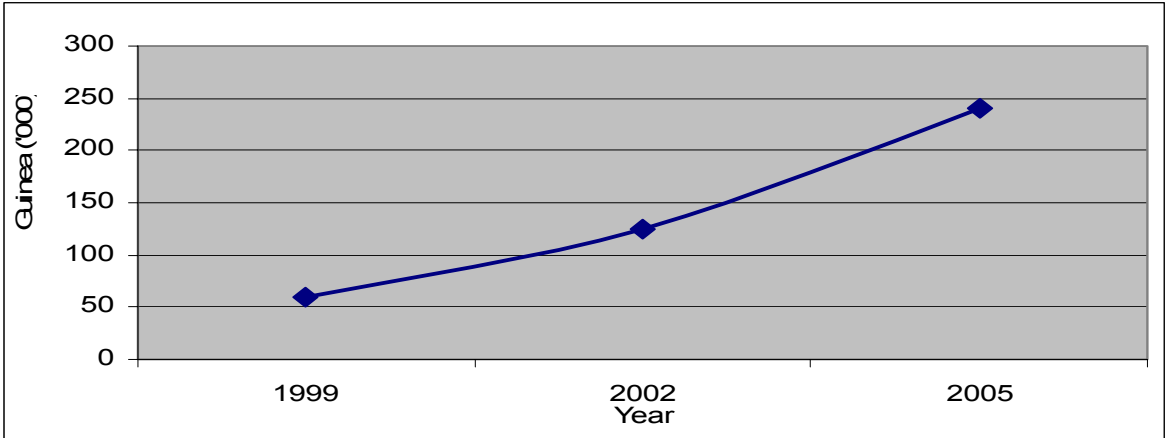
3.2 Price trends of sales not made through Beaulieu Road Sales Yard

It is difficult to examine the trends in non-auction sales due to a lack of available data. Therefore it is only possible to estimate the number and value of sales made outside the Beaulieu Road pony sales.

Conversations with approximately ten sellers of New Forest ponies indicate that at least a third of sales from the New Forest are made outside the auction. Using the 2005 figures from table 2, this represents approximately 400-500 sales per year at prices typically 50% higher than those made at the Beaulieu Road Pony Sales Yard. Sales of ponies outside of the sale yard would appear to have increased in recent years due to the higher prices achieved through private sales including those through the internet. The internet has also attracted buyers from further away.

Assuming 500 sales are made privately each year at an average price of 183 guineas, (2005 average of 121g+50%), the estimated total value for in 2005 of all New Forest Pony sales from both Beaulieu Road Pony Sales and private sales is approximately £241k (£145k + £96k) compared to approximately £60k in 1999 and £125k in 2002. This can be seen in the graph below.

Graph 3: The estimated total value of sales from both Beaulieu Road Pony Sales and private sales



3.3 Trends in numbers of sellers

Limited available data has made it difficult to examine trends in the number of sellers. In addition, it was necessary to estimate the total number of sellers over the whole of 2006 (including the October & November sales held after the completion of this report).

However, using data from one sale for each of the years 2002, 2005 and 2006 it is possible to estimate, using the Pareto 80/20 Principle, the total number of sellers for each of the years.

This assumes:

- an ‘average’ sale is 80% of the largest sale of the year
- 80% of sellers at each sale are regular sellers, whilst 20% sell at only one auction per year.
- there are 5 Beaulieu Road pony sales per year

Thus for 2002, the largest sale had 76 successful sellers. If one assumes an average sale for 2002 has 61 sellers (80% of 76) and that 80% of these are regular sellers (49) (and so should only be considered once) and 20% (12) are different sellers at each sale, the total number of sellers for the year is therefore = (5 x 12) + 49 = 109. Similarly for 2005, 80% of average sale is 44, + 5 x 11 = 99 and 2006, 80% of 96 is 77, + 5 x 19.2 = 173

Table 4 below shows the numbers of successful sellers at the largest autumn Beaulieu Road pony sales for 2002, 2005 & 2006.

Table 4

Year	No. of successful sellers at the largest Beaulieu Road pony sales (Sep or Oct)	Estimate of number of successful sellers at an ‘average’ Beaulieu Road pony sale (80% of largest sale)	Therefore: total number of sellers per year (using Pareto Principle)
2002	76	61	109
2005	69	55	99
2006	120	96	173

Of these sales, one can assume the vast majority of sellers are commoners, some of whom also run studs. Although the larger commoning families still account for significant volumes of ponies

sold, on the basis of the recent sale, more commoners are using the sale. However as this increase seems to a very recent trend, it would be unwise to draw firm conclusions.

3.4 Where do buyers come from?

Between 2002 and 2005, the number of postcode areas where buyers came from increased from 44 to 56; an increase of 27%. New postcodes included Cardiff, Derby, Durham, Dudley, Dumfries & Galloway, Sheffield, Shrewsbury, Lancaster, Manchester and with noticeably more activity from Doncaster, Leicester and York.

Map 1 shows the location of registrations of transfers of ownership of New Forest ponies born in 2005 to owners outside the local area. This shows that there are significant numbers of transfers to buyers in Yorkshire, Midlands and East Anglia.



The introduction of the national pony passport scheme in 2004 has vastly increased registration activity as all ponies must now be registered. This has made comparison with earlier years irrelevant.

4. Review of New Forest Pony Publicity Group activities

4.1 Attendance at shows/activities

The New Forest Pony Publicity Group's primary aim is to promote New Forest ponies through attendance at equine shows and events, both locally and around the country. This is achieved through a considerable amount of volunteer time and effort; this is especially the case for non- local shows.

Table 5 below shows the total numbers of entries in the New Forest Pony Publicity Group visitor book.

Show	2006	2005	2004	2003	2002
New Forest Show	161	251	205	149	101
From Hants/Dorset/IOW/Wiltshire	135	220			
Not Local	23	29			
Overseas	3	2			
Great Yorkshire Show	162	205	147		
Not Local	159	203			
From Hants/Dorset/IOW/Wiltshire	2	2			
Overseas	1				
Horse of the year Show		242	67	153	319
From Hants/Dorset/IOW/Wiltshire		31			
Not local		209			
Overseas		2			
Royal Show	65	93	78	74	
From Hants/Dorset/IOW/Wiltshire	14	3			
Not Local	50	90			
Overseas	1				
Your Horse Live		88	97		
From Hants/Dorset/IOW/Wiltshire		3			
Not Local		85			
Museum Exhibition	122				
New Forest Week End		25			
British Equine Event	.			115	137
Sparsholt College Openday	.	80			
Brockenhurst Horse trials	.	71	39	75	
Youngstock Show	9				
Total All Shows & Events	519	1055	633	566	557
Total Across Same Shows 2005 & 2006	388	549			

The comments in the book were overwhelmingly favourable, with visitors to the stand particularly commenting on the photographs and the helpfulness of the New Forest Pony Publicity Group members.

Whilst it is difficult to draw meaningful conclusions from this information, one can assume that approximately 1 in 3 visitors to the stand write in the visitor's book. This means that potentially over 3000 people visited New Forest Pony Publicity Group stands in 2005.

As would be expected the New Forest Show is particularly good at reaching local people, though some of the addresses given may be second homes or temporary stay.

The activity weekend was considered a success by the New Forest Pony Publicity Group with an estimated half dozen ponies sold as direct result, and with some useful judging education undertaken.

Other activities which the group have undertaken include leaflet production, advertising and enquiry support for pre-sale foal show and the New Forest Pony Publicity Group Website. The website was revamped in May and contains the Forest Bred Ponies for Sale adverts, Beaulieu Road Pony Sale dates, events diary, photograph gallery and contact details.

4.2 Pre-sale Foal Show

The pre-sale foal show is organised by the New Forest Pony Publicity Group with the aim of encouraging commoners to add value to their ponies by, for example, halter breaking. The show is held in the autumn generally before the largest sale of the year and attracts approximately 30 entrants. It is popular both with sellers and with people attending the show; over 100 watched it in 2006.

In 2006, the top sale price for a colt was 475 guineas and for a filly was 305 guineas. These were both foal show class winners. In 2004 the top price at the sale (360 guineas) also went to the filly class winner.

A small survey of approximately 20 buyers and sellers conducted at the recent sale indicated that that sellers would prefer the sale not to be held in early September.

4.3 Survey of Registered Users of the New Forest Equine Directory

Approximately 10% of recipients of the questionnaire responded with a total of over 130 responses. A copy of the questionnaire and responses received up to 27th September can be found in Appendix 2.

Of the 69% of respondents who advised that their opinion of New Forest Ponies had changed in the last 5 years, 94% now viewed them more positively. Although 29% of respondents advised that they had no change in attitude to New Forest ponies in the last 5 years, over half of these were already owners 5 years ago and presumably already had a high regard for New Forest Ponies.

47% of respondents stated that they had contact with the Pony Publicity Group through attending a show and of these 65% had made contact at New Forest Show which almost certainly reflects the large local content in the database, rather than the relative merits of the various shows. 19% had made contact through the use of the internet or email and a further 16% said contact was through Beaulieu Road Pony Sale Yard.

86% of respondents (approx 111 people) own a New Forest pony, of these 5 people responded that contact with the New Forest Pony Publicity Group had influenced their decision.

A wide range of comments were made, over 95% of them positive.

4.4 Feedback from other organisations

The Verderers of the New Forest stated that the quality of animals on the forest had improved significantly in recent years. This is indicated by the 75% reduction in removals of ill animals, or those in poor condition, from the Open Forest.

The New Forest Agricultural Show Society commented that the quality of New Forest Ponies had improved and that they are more than holding their own against other breeds.

The New Forest Livestock Society has reported greater interest in the Beaulieu Road pony sales due to promotional work undertaken by the New Forest Pony Publicity Group. They identified the pre-sale foal show as particularly popular and the advertising for it had generated interest from as far away as France and Scotland.

The New Forest Pony Breeding and Cattle Society commented that New Forest ponies were a success story to which the New Forest Pony Publicity Group had contributed. Other factors mentioned included the improvement in stock and introduction of the passport registration scheme in 2004.

5. Summary/Conclusions

5.1 Prices

Prices of New Forest ponies sold at the Beaulieu Road Pony Sales have risen significantly both in real terms and relative to other breeds. However as so many factors may have affected the increase it is difficult to quantify the impact of the New Forest Pony Publicity Group. These factors are considered to be:

- a) The rebuild of Beaulieu Road Pony Sales yard in 2002 (managed by New Forest Livestock Society)
- b) General market growth for ponies – influenced by increasing public affluence & lifestyle trends
- c) The development of internet sales, for example the New Forest Equine Directory website and the site run by the New Forest Pony Breeding and Cattle Society.
- d) Improvement in the quality of New Forest Ponies (influenced by the grading and registration schemes)
- e) High profile show success of individual New Forest Ponies
- f) Increased proportion of ponies being halter broken before sale at Beaulieu Road Pony Sales Yard, thus 'adding value' to the pony
- g) The New Forest Pony Publicity Group's pre-sale foal show at Beaulieu Road Pony Sales Yard
- h) The New Forest Pony Publicity Group's Forest Bred Ponies for Sale pages on the New Forest Equine Directory website
- i) Other promotional activity undertaken by the New Forest Pony Publicity Group, including attendance at equine shows, advertising, publicity materials etc.
- j) The activities of other groups promoting New Forest ponies, for example the New Forest Pony Breeding and Cattle Society, the New Forest Pony Enthusiasts Riding Club, The New Forest Commoners Defence Association and the New Forest Equestrian Association etc

However concentrating on the period that the New Forest Pony Publicity Group have been active (2002-2005), and if one assumes that other breeds sold at Beaulieu Road Pony Sales have been equally affected by points (a.) and (b.) above, it can be concluded that:

- The prices achieved by 'other' breeds (i.e. non-New Forest) at the Beaulieu Road sales increased by 30% in the period, whilst the prices achieved by New Forest Ponies (all categories) increased by 270%:

- It can then be assumed that 240% of the 270% increase in New Forest Pony prices was due to the remaining factors identified in points (c.) to (j.) above:
- Of the remaining 8 factors, half relate to the activities of the New Forest Pony Publicity Group (including the percentage of New Forest ponies halter broken before being sold at Beaulieu Road sales, as the pre-sale foal show has influenced this).

It is therefore very likely that the New Forest Pony Publicity Group has had a significant impact on the prices of ponies.

The anecdotal comments that more commoners are now using the Beaulieu Road Pony Sales and that there are more non-local buyers have been confirmed by the review of the Auctioneers sales records.

Conversations with commoners, including those running studs, revealed that more ponies were being sold privately, primarily due to the internet. This was confirmed by large increases in activity of both the New Forest Equine Directory website and the accompanying Forest Bred Ponies for sale pages run by the New Forest Pony Publicity Group. They also commented on 'how much better things were' than in the late 1990s/early 2000s. Not just in terms of prices, but because of the success of New Forest ponies at shows and that more buyers are coming from further away.

Several commoners commented that more foals were being halter broken prior to sale at Beaulieu Road Pony Sales since the pre-sale foal show was introduced by the New Forest Pony Publicity Group in 2003, though they are still in the minority at auction. Halter breaking a pony makes it easier to sell at a higher price.

5.2 New Forest Pony Publicity Group Activities

It should be noted that even large commercial organisations find it extremely difficult to measure the true merits of marketing activities by tracking activities through to sales. As the New Forest Pony Publicity Group is not directly involved in the sales process this makes it even more difficult to make the connection.

With the caveat that there is an inherent bias in the survey sample (registered users of the New Forest Equine Directory), New Forest Pony Publicity Group activities which appear to have the greatest total impact are:

- The stand and attendance at the New Forest Show
- The stand and attendance at the Brockenhurst Horse Trials
- Information provided on the New Forest Pony Publicity Group website (including the 'Forest Bred Ponies for Sale' pages)
- Email interaction with New Forest Pony Publicity Group
- The Beaulieu Road pre-sale foal show

However the number of non-local contacts made at shows outside the New Forest demonstrates that there is potential to foster and develop interest around the country. In addition there appears to have been an increase in sales to the North of England since the New Forest Pony Publicity Group started attending the Great Yorkshire Show.

Although the New Forest Pony Publicity Group was very positive about the benefits of the New Forest weekend, the numbers reached are relatively low. However the weekend has the potential to become at least partially self-funding, (see below).

If future funding is limited then the activities listed above should probably be prioritised, with shows outside the area attended on a rotating basis. At recent meeting of the New Forest Pony Publicity Group it was clear that members recognised the need to spread the word by varying the location of shows. However the shows attended may be influenced by the availability of group members own transport to carry equipment to shows and in some cases horseboxes etc provides accommodation for those staffing the stand.

In addition, the provision of information (and opportunities for sales) via the internet should be developed and increased.

5.3 Future Funding Options

There appear to be two potential sources of funding to support the activities of the NFPPG, these are considered to be:

- a) Organisations/sectors that benefit from the maintenance of a healthy, self sustaining population of New Forest ponies
- b) Individuals directly connected with New Forest Ponies

5.3.1 Organisations/sectors that benefit from New Forest ponies

That New Forest ponies play an integral role in the New Forest – in particular maintaining the landscape and attracting large numbers of visitors – is not in question. Indeed, they have been referred to as the architects of the New Forest.

It is also clear that the activities of the New Forest Pony Publicity Group:

- are increasing appreciation of New Forest ponies and understanding of their role by both local people and visitors
- contribute to the viability of owning and running New Forest ponies on the Forest and therefore have a positive impact on the income from tourism and tourist related businesses in the New Forest.

Therefore potential funders with an interest in the visitor appeal and sustainability of the New Forest, and animal welfare should be approached. These include:

- Environmental support organisations e.g. National Park Authority
- The Forestry Commission
- New Forest District Council
- The New Forest Trust
- Tourism related businesses.

5.3.2 Individuals directly connected with New Forest Ponies

These are considered to be:

- Breeders (including commoners and stud owners) who sell ponies
- Buyers of New Forest ponies

It should be noted

- that many of the stud owners are also commoners
- the amount of time that members of the New Forest Pony Publicity Group (most of whom are also commoners), give voluntarily to the project is significant. When a value is put to this time it can equate to over £24k per annum.

It is generally expensive and potentially uneconomic to collect small (less than £5-10) discrete amounts of money from a wide range of people. As the collection method has to be efficient and easy to operate, small amounts should be collected via existing collection methods such as auction fees and registrations/transfers.

Option 1: Levy on sellers at Beaulieu Road Pony sale

Currently sellers are charged 5% of the sales price of a pony by the auctioneers and a further 2% by the New Forest Livestock Society who operate Beaulieu Road Pony Sales. This is deducted by the auctioneers from the payment made to the seller. An additional 1% levy on New Forest Ponies to pay for their promotion would raise, based on 2005 sales, approximately £1000 annually.

For example: someone selling a foal at the Beaulieu Road pony sales for £70 would pay £3.50p (i.e. 5% of sale price) to the auctioneers and a further £1.40 (2%) to the New Forest Livestock Society. If the levy was introduced the seller would contribute a further 70p of the total sale price for marketing activities.

Advantages of scheme: easy to collect levy through the auctioneers, owners of ponies only pay when selling stock

Disadvantages of scheme: sales other than those through Beaulieu Road Pony Sales Yard (including sales through the internet) would be outside the scope of the levy. In addition the levy could be seen by sellers as an additional expense/tax.

Option 2: Levy on Buyers at Beaulieu Road Pony Sale

A similar levy on buyers of New Forest ponies would also raise approximately £1000 annually

Advantages of scheme: easy to collect and as the levy is added on to the price of the pony it is less obvious to the buyer

Disadvantages of scheme:– purchases other than those made through Beaulieu Road Pony Sales Yard (including purchases through the internet) would be outside the scope of the levy. In addition there may be a negative reaction from large trade buyers

Option 3: Levy on stud book transfers of New Forest Ponies by non-members

New Forest Pony and Cattle Society currently charges £7 for transfers by non-members. Based on a review of the 2005 New Forest pony stud book, there were approximately 1300 transfers of ponies in 2005. If it is assumed 1000 transfers were paid for by non-member buyers, if the charge for registration transfer was increased by £3 per transfer, an additional £3000 per annum would be raised.

Advantages of scheme: easy to collect with transfer fee; not directly linked to cost of purchase; relatively small cost relative to cost of purchase and ownership; sales of New Forest ponies from all sources included.

Disadvantages of scheme: May result in a fewer registration transfers of low value ponies (but is this necessarily a bad thing?)

Note: As with all the other options, considerations such as co-operation, resources and constitution of collecting organisation need also to be considered.

Other options considered included a levy on stud book registrations of foals. There were a similar number of registrations as transfers in 2005 and if £3 were added to the cost of registration a similar sum would be raised. However this would impact directly on breeders rather than buyers, and could result in a loss of ponies from the breed (although if a pony is not registered with the Stud book this would be expected to reduce its value).

New Forest Pony Publicity Group Research Brief

1. Introduction

We wish to gauge the impact of the activities of a community group, the New Forest Pony Publicity Group (New Forest Pony Publicity Group), which was specifically set up to promote New Forest ponies. The group has been running for 4 years and anecdotal evidence suggests that it has been contributory in the rise in prices for New Forest ponies sold locally. Please see attached example of an annual report.

The group is currently financed using EU funding which is due to come to an end in 2007. The aim of this research is to identify the cost effectiveness of various marketing activities undertaken by the group and to recommend ways in which the group might self fund itself post 2007.

2. Research Aims

1. Evaluate current Pony Publicity Group marketing activities (2002-2006) to identify their impact on the price of New Forest ponies sold locally. This should include:

- Equine & agricultural shows attended by the group (where possible this should be broken down into individual events)
- Beaulieu Road pony sale yard
- Foal and young stock shows held by the PPG at Beaulieu Road
- Website sales from the New Forest Equine Directory site (www.newforestpony.com)
- Special promotional events e.g. New Forest Weekend 2005

This impact should be measured in terms of:

- Increase in prices paid for New Forest ponies

- Types of New Forest businesses benefiting from this activity e.g. private sales, studs, dealers, individual commoners
- Type of ponies sold in the New Forest i.e. young-stock, broken/unbroken, ponies reared on or off the Open Forest, or stud bred

2. Based on the above identify a cost effective marketing strategy for New Forest ponies which can be self-funded by the beneficiaries or through other sources.

3. Outputs

A short report and presentation to the PPG and the LEADER+ Local Action Group

4. Budget

A budget of £1,500 is available for this work.

5. Timescale

A draft report should be produced by 30 September and a final report should be agreed by 16 October 2006

6. Steering and reporting arrangements

Day to day management of the consultant's contract will be through Emma Rigglesworth, Head of Sustainable Development at the New Forest National Park Authority

The final report should be presented to the PPG and the LEADER+ Local Action Group at its meeting in November (date to be confirmed).

Appendix 2: Survey Questionnaire

Total Responses to questionnaire = 135

	Number of respondents	% of total respondents
<u>Question 1</u>		
Has your opinion of New Forest Ponies changed in the last 5 years		
Yes	93	69%
No	39	29%
NA	3	2%
If Yes do you now view them more positively than you did		
Yes	87	94%
No	6	6%
If Yes, do you know why (please tick all that apply)		
I (or my family) have bought one	59	68%
I have seen them winning at shows	34	39%
I have talked to the New Forest Pony Publicity Group	14	16%
Friends have one	36	41%
Other reasons/Comments	30	34%
<i>A large range of comments were made, the vast majority of them positive. The majority of these (I have omitted some repetitions) are shown in Appendix 3. Although 29% advised no change over half of these were already owners 5 years ago and presumably already had a high regard for New Forest Ponies.</i>		
<u>Question 2</u>		
If you have had contact with the New Forest Pony Publicity Group, was it: (Please tick more than one if appropriate)		
At a show	64	47%
Beaulieu Sales/Foal Show	16	12%
In response to an advert	5	4%
New Forest Weekend	4	3%
Telephone	4	3%
Through the Internet/Email	25	19%
Other	8	6%
<u>Question 3</u>		
If at a show, which one(ones)		
Brockenhurst Horse Trials	12	
Great Yorkshire Show	1	
Horse of the Year Show	3	
New Forest Show	55	
Royal Show Stoneleigh	5	
Youngstock Show	4	
Your Horse Live	1	
Other shows, events etc	3	
<i>The high % for the New Forest Show almost certainly reflects the large local content in the database, rather than the relative merits of the various shows.</i>		

<u>Question 4</u>		
Do you (or your family) currently own a pony/horse?		
Pony	92	68%
Total Number	449	
Horse	67	50%
Total Number	98	
If you run a stud or riding establishment, please tick here		
	8	6%
If you ticked Pony, what breeds of Pony(ies) do you have		
Connemara	10	11%
Dales	2	2%
Dartmoor	1	1%
Exmoor	3	3%
Highland	1	1%
New Forest	79	86%
Shetland	29	32%
Welsh	10	11%
Part-Bred	34	37%
Other	18	20%
<i>The survey sample clearly shows a high % of Pony ownership with most of these owning a New Forest Pony</i>		
<u>Question 5</u>		
5 people responded that contact with the NFPPG influenced their decision. However several commented very positively to previous questions without saying yes to this question.		
<u>Question 6</u>		
A large range of general comments were received. The majority of comments were positive and are shown in the Appendix 3 - Where a comment was repeated e.g. re the versatility of New Forest Ponies, repetitions have been omitted.		

Appendix 3: Comments from survey respondents

Please note that these have been copied directly from questionnaire responses in the order in which they received.

Question 1 Comments

Reason: they are good all-round performance ponies and have the most amazing and loveable temperament.

We have 3 and think they are wonderful!!

Having have both full and part bred new forest ponies, all being born and bred on the forest i find them to have the temperment i want along with the quality and confirmation needed to do well in the ring.

Reason: my pony is a new forest and everyday i spend with him is so valuable - he has taught me so much and given me so much love in the 13 years i have had him

Now know more about them.

They are going back to how they used to look when i enjoyed owning one. At one time they seem to be loosing the individual breed look which was very disappointing.

hear say that they are usually sturdy type

became a member of the NFED!

i am alot more aware of the ponies that have come out doing amazing things eg. beautiful dressage eventing

I did a project on the amangement of the new forest pony and leanred what a tenacious, versatile pony they are.

Have always had a high opinion of them - and always will!

They are good to handle and have a great but cheeky attitude

Have ridden all sorts over nearly 30 years & bought a Forester 5 years ago. Now wouldn't have any other breed. Didn't know much aboutthem prior to owning my own.

As far as the forest bred ones goes I think the quality and condition of stock has improved vastly.

Living in the Forest seen first hand their experiences of life.

Reason: have owned one in past, brought for £80.00, best pony i ever owned, still going strong with present owner at 20yrs old!! fantastic ponies.

Reason: i produce childrens ponies, and have found them to be the easiest to train and about the only breed that i can call 100% safe.

i deal almost exclusively with foresters now, as even the "wild" ones are so willing to please. I am a show secretary and New Forest Pony Publicity Group send us rosettes each year

They are looking better on the Forest and are fetching higher prices. From my experience as a groom and ride escort at a local riding school, more people, from afar, are aware that they can be used as successful performance ponies.

They are looking better on the forest. They also gain a lot of publicity due to the number of road deaths

I recently tried to get my mare into foal with a NF stallion and was very impressed with the breed

Question 6 Comments

Nf ponies are probably the most suitable of the native breeds for children and adults alike due to their temperament, weight carrying abilities, performance prospects and variety in size.

Who are the "New Forest Pony Publicity Group"

New Forest Ponies are fun to own, and quick to learn, not always to the owners advantage!

PPG_Influenced_How: Saw her advertised on the NF website

Any_Comments: I love the temperament and versatility of NF ponies

think there is still a lot that could be done to market Forest ponies more widely but I appreciate advertising costs money. Also I fully appreciate the enormity of the task but perhaps more could be done to encourage the commoners to put greater effort into preparing their animals for sale - i.e. proper weaning, halter breaking etc., in order to get better prices.

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PPG_Influenced_How: By making me realise that the youngstock was very reasonably priced for a native pony.

Any_Comments: As a child my friend had a NF pony who was an absolute star.

30yrs later the all NF ponies I had come into contact with had both soundness and personality issues. After following the nfed site for a while I decided to take a chance and buy one, mainly because the equivalent 'hairy' would have been at least double the price. I am chuffed to bits, she has been such a sweetie so far (touchwood)

PS I do regret the current increase in popularity of the 'hairies' in the showing as I believe 'showring' animals, (in any breed,) are not the true type and any breed that breeds for type for the showing are not doing themselves a favour. Look at the manic neurotic welsh cob, it certainly ain't the steady sensible chap it used to be.

I think the NF pony should be marketed as an allrounder - but I think you have that sorted. LOL

i think the NF ponies are great!!! the nfed is also very helpful you can contact a lot of people through that site..

new forest ponies are brilliant in every way good temperament, quick to learn and very easy going

Brilliant ponies do anything can be ridden by children and adults. I have owned mine for 16 years.

Like a lot of people, I am concerned about the amount of ponies killed on the roads. I think the speed limit in the new forest and hinter land should be 30mph, except on fenced roads. I also think you should run a TV advert campaign with graphic images of run over ponies to show drivers what they are doing. Similar to the new adverts about children being run over.

I enjoy going to the New Forest Beulieu sales and trying to keep track of current trends with regards to price is hard, perhaps you could post a postsale catalogue with all sales prices noted next to the ponies that were going through the ring on that particular sale. Just an idea I have spoken to others and they agree this would be a fantastic idea..

Versatile and good with children. Used to own a super N F Pony - Now in Sweden.

great allround pony - ours does ODE, Dressage, Jumping and is a great best friend to my 9yr old daughter

Keep using NFED as it is very popular - use that site to post news and the like

Contact or encouragement of use of NF ponies within the pony club possibly by offering rosettes to best new forest pony in competitions?

New Forest ponies are absolutely superb. They are extremely versatile and willing to please. They can turn their hoof to anything and are ideal for learners right through to experienced riders.

Any_Comments: Things we like about New Forest Ponies: hardiness, longevity, versatility, temperament, looks, movement. Don't currently own a pony, but intend to breed New Forest Ponies as soon as we have a place with land (and ideally common rights!)

My pony is exceptional fun and I enjoy spending time with her and she is a great allrounder with a superb temperament!
I love the versatility of them, they're just so great at every thing and even though I'm quite tall and I can still ride a 13.2hh NF pony with her having no trouble! I love them

I think the publicity has really helped selling reg new forest ponies for better money

I've been riding and grooming for a NF stud for 15 years now, which is why my opinion of NFs hasn't changed in the last 5 years! I think the publicity group is doing great work and would be happy to help in any capacity.

New Forest Pony Society and NFED Websites very good especially for looking at ponies to buy and at Stallions. We like the wonderful temperaments and have a go at anything attitudes of our Foresters.

Reason: My first pony was a NF and although that was many years ago I can't think of a better pony for me on Bodmin Moor!

Any_Comments: I don't think I knew of the existence of the New Forest Pony Publicity Group until this survey!

they learn new things quite fast and most are very kind with children

PPG_Influenced: Yes

PPG_Influenced_How: General Advice mainly

The quality of the ponies has improved in my opinion.

Any_Comments: The members of the publicity group have a great knowledge of the breed & their enthusiasm shines through. Having seen them in action 3 years running with their stand at the Great Yorkshire show I can say that they have done much to raise the profile of the breed up here in the North. I believe that there is a market that could be exploited up here now - people are starting to want Foresters now that they are seeing how versatile they are.

Might be useful to attend NPS, BPS & PUK championships to let potential/existing native owners know just how versatile the NF is.

My daughter had a New Forest Pony when she was 11, (now 28) Best pony we could have chosen.

I brought my pony from she was very helpful after we brought the pony as we had a couple of problems and she was always at the other end of the phone or email we could not thank her enough and now we have a wonderful pony and a joy to own. It would be nice to have a group/talk/meeting for all new NFP owners to get together either at a show/sales/meeting to have a chat, I am a mature lady(over 40!!) who has come back into ponies after a break.

Generally they are great all rounders and hardy which makes them easier with regard to living out during winter

PPG_Influenced_How: they proved to me what an excellent up and coming breed they are

Any_Comments: the publicity group have been doing an excellent job at all the shows and are a credit to the breed

Any publicity to preserve the New Forest breed is most valuable

I think the New Forest Pony Publicity Group do a fantastic job promoting an amazing breed and sincerely hope they can continue to do so.

I have had other kinds of horses/ponies and have had a lot of experience with top class eventers, dressage and race horses, but over them all I would choose a Forest pony every time. They are versatile, hard working, love to please, intelligent, cheeky and sane! I am the proud owner of 3 and wouldn't swap them for any other breed. I'm not biased... honestly!

All organisations should band together to demand for some form of traffic speed on the forest like road sensors and stop lights when cars are speeding. Also to get breeders with ponies on the forest to patrol the roads a visible presence would slow traffic

I feel that throughout all the pony clubs across the country are a lot of new forest ponies competing at very high levels and people do not say they are new forest ponies they are just a pony and the breeding does not matter to them- so if you were to do something to get the New Forest ponies more recognised through The Pony Club for example Giving the pony clubs special Prizes for the registered new forest ponies.

The New Forest Pony Publicity Group has had a huge impact on the public perception of the New Forest Pony and played a major role in the improved prices.

Any_Comments: I think it is a terrible shame that the stud bred ponies are so different from the 'real' ones found on the forest. Some of the ones that have qualified for prestigious shows are no more than mini warmbloods that are over size with poor bone. The traditional pony has lots of bone and are not nearly 15hh.

The group need to support ALL studs and owners when displaying achievements not just their favourite ones. All I ever see at the stand is.....

The new forest pony is very versatile and are the best of the native breeds

The New Forest Pony Publicity Group were very helpful when I was trying to find information about my pony. sent me photographs and names of his extended pedigree and I am very grateful for her help.

I live in Crawley W. Sussex and just wish there were shows closer

anything would be good north dorset we now live near dorchester very little offered this way for foresters except dorchester show/ Moreton has excellent facilities