



International Lama Registry

Membership Survey
January 2007



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Objectives

- Identify what has attracted ILR members into the Llama business
- Prioritize some of the key issues facing the ILR
- Identify and prioritize growth opportunities for the ILR
- Gain reaction to potential activities that could be implemented by the ILR
- Measure members' satisfaction with current ILR programs and activities

Methodology

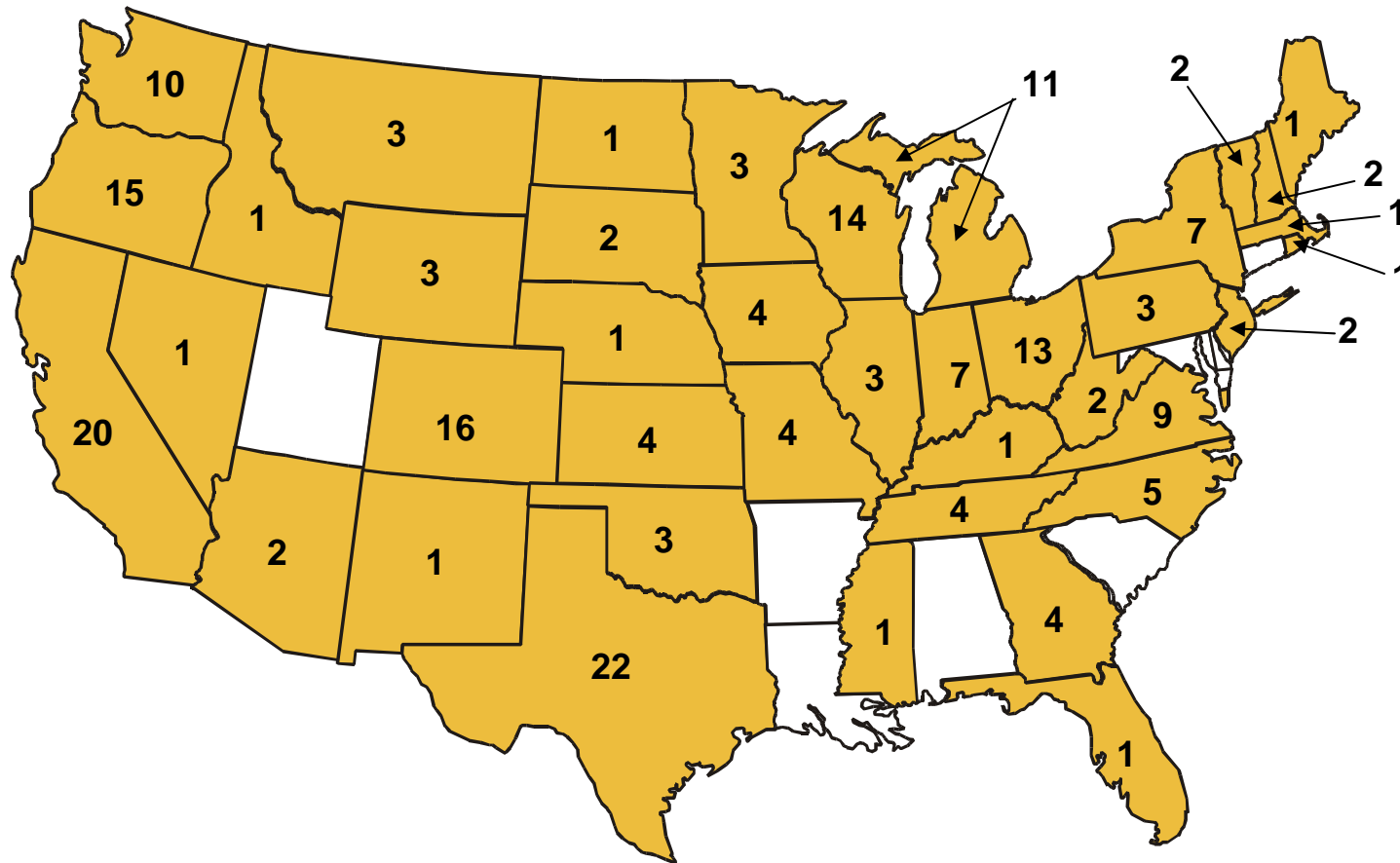
- ABG and ILR participated in a kick-off meeting to discuss and review objectives
- ABG drafted a questionnaire
- ILR reviewed and approved questionnaire
- ILR disseminated the questionnaires to members via internet and mail
- ILR collected and aggregated the data
- ABG analyzed the data and reported findings based on data received



Member Demographics

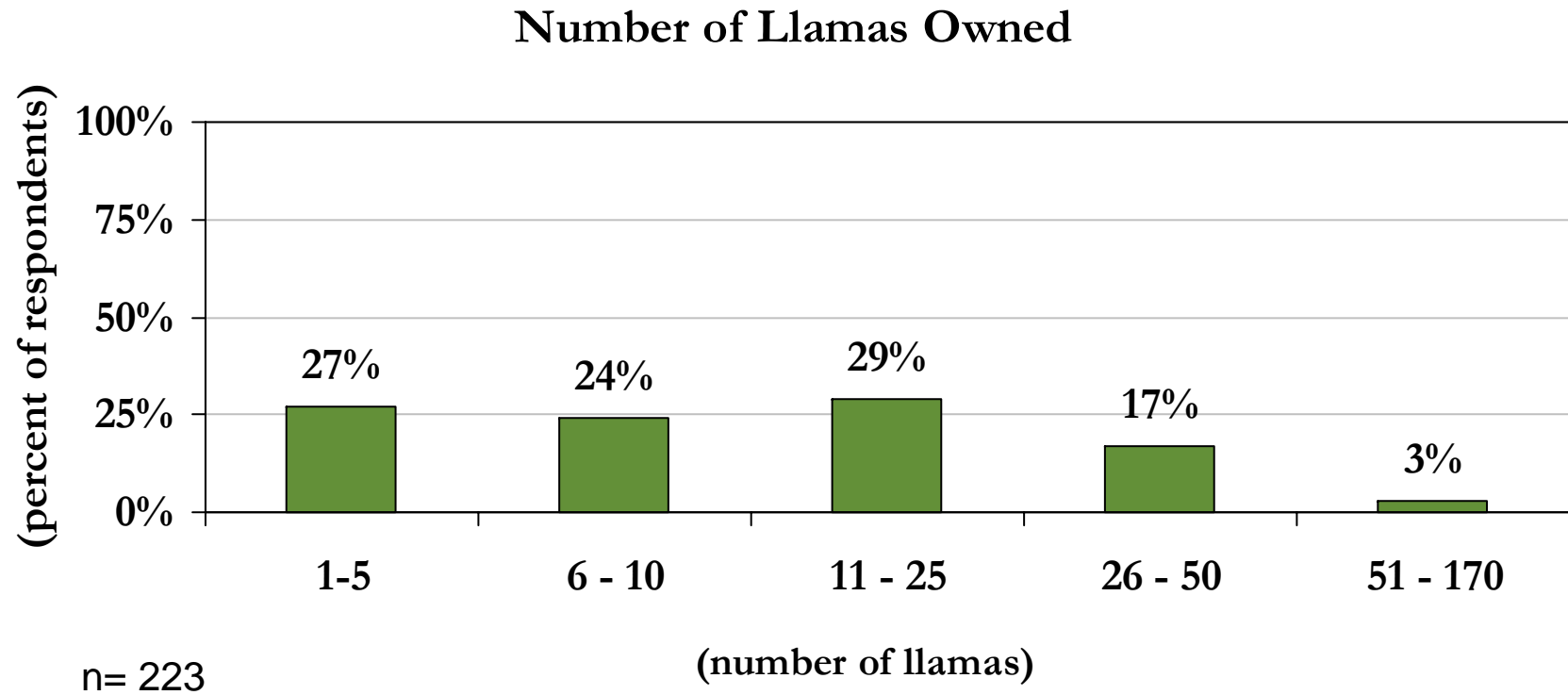
226 survey responses from throughout the country were received

The map below indicates the number of responses received from each state



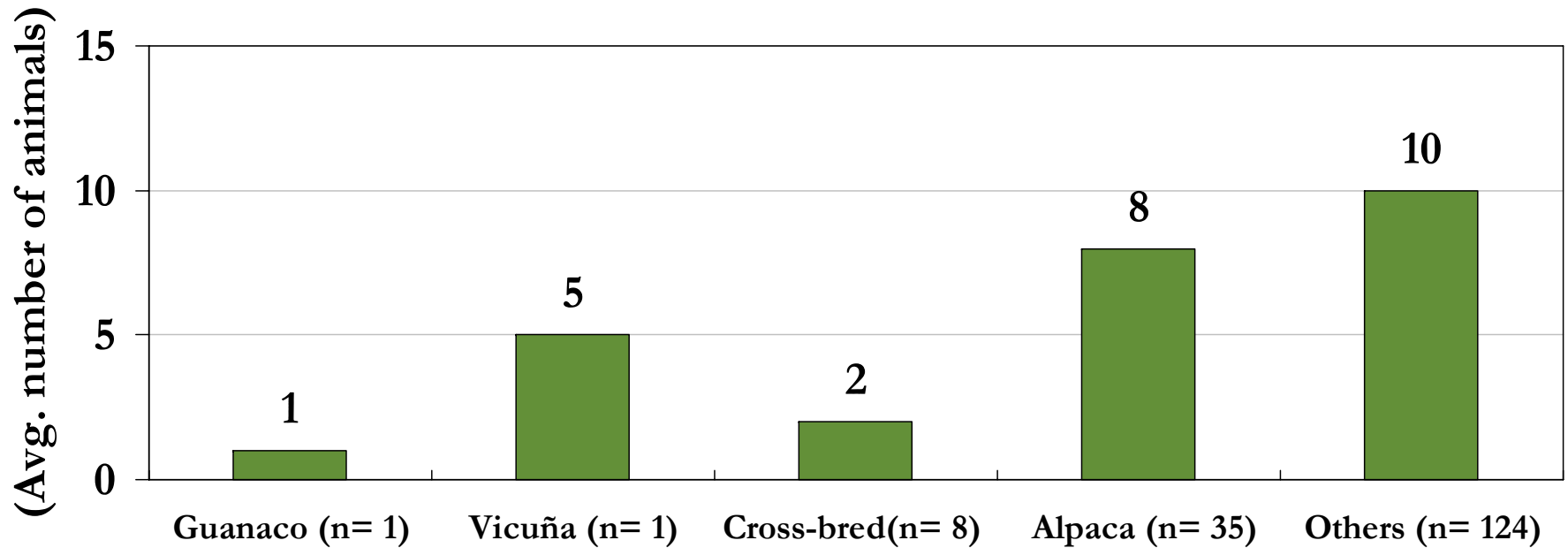
Almost all respondents owned llamas, with an average of 16 llamas per herd

- Respondents have owned their llamas for approximately 11 years



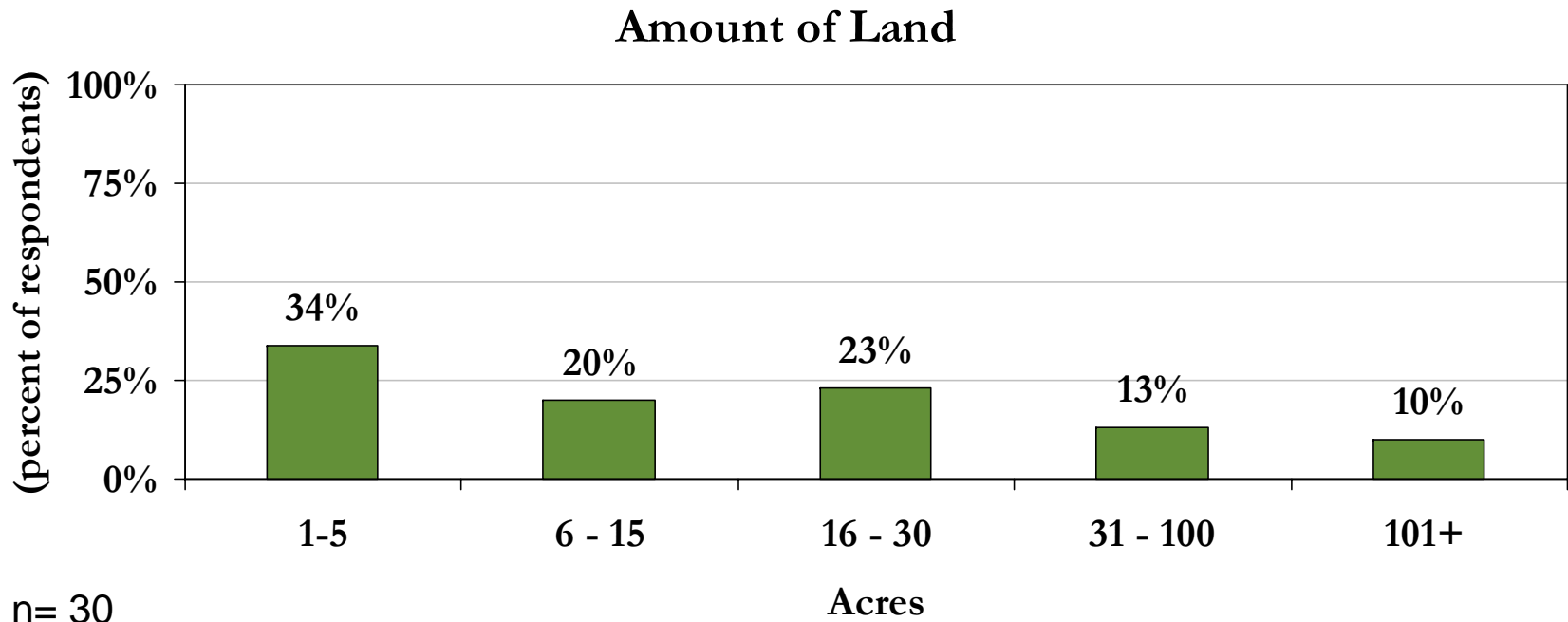
15 percent of respondents also owned alpacas

Other types of lamas owned



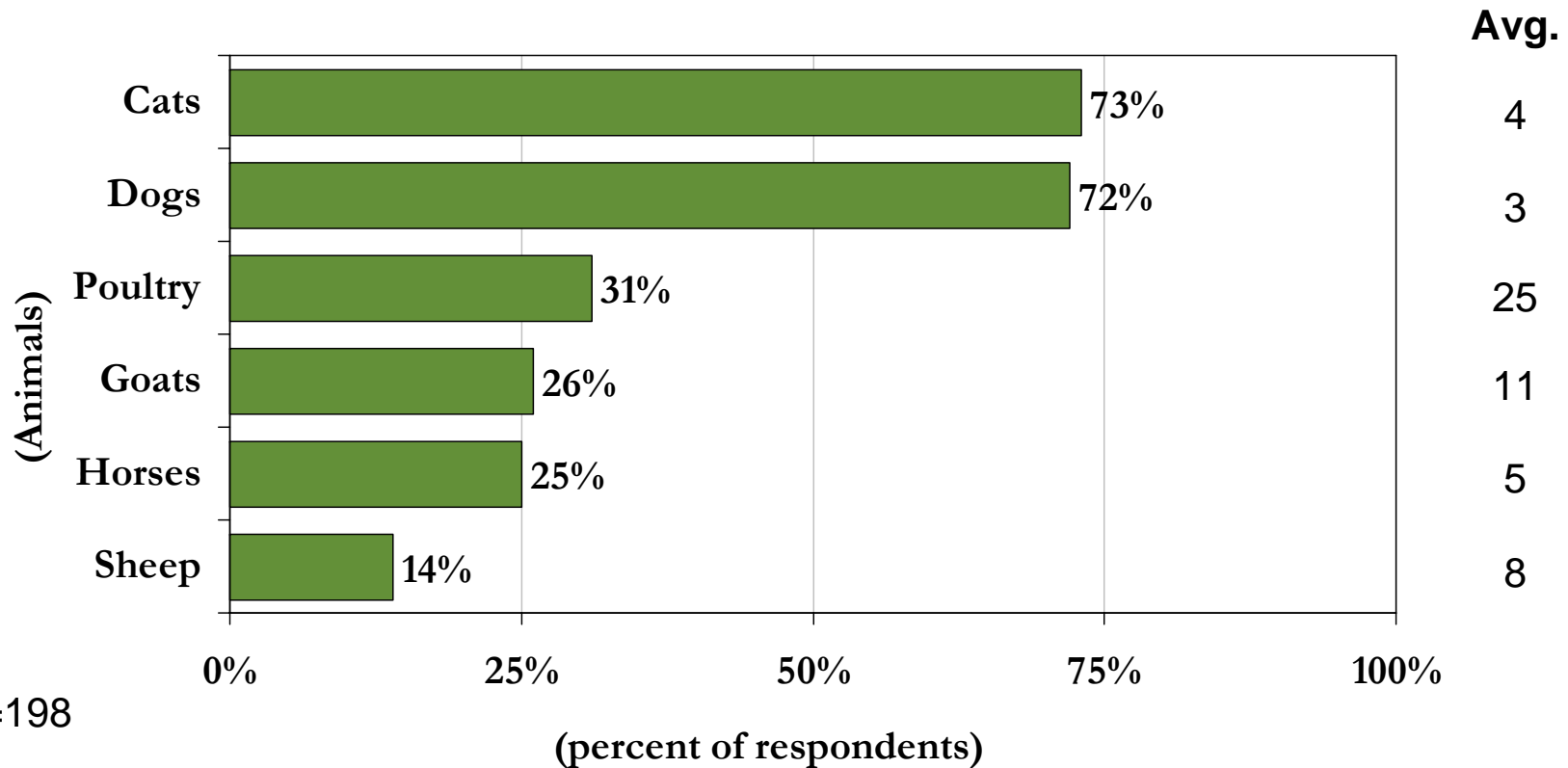
Respondents kept their llamas on a relatively small parcel of land*

- The median response was 14 acres; however, due to a few large respondents the average acreage was 61 acres



*Special note: Only 13% of survey respondents answered this question

Respondents owned a variety of other animals, with cats and dogs being most popular



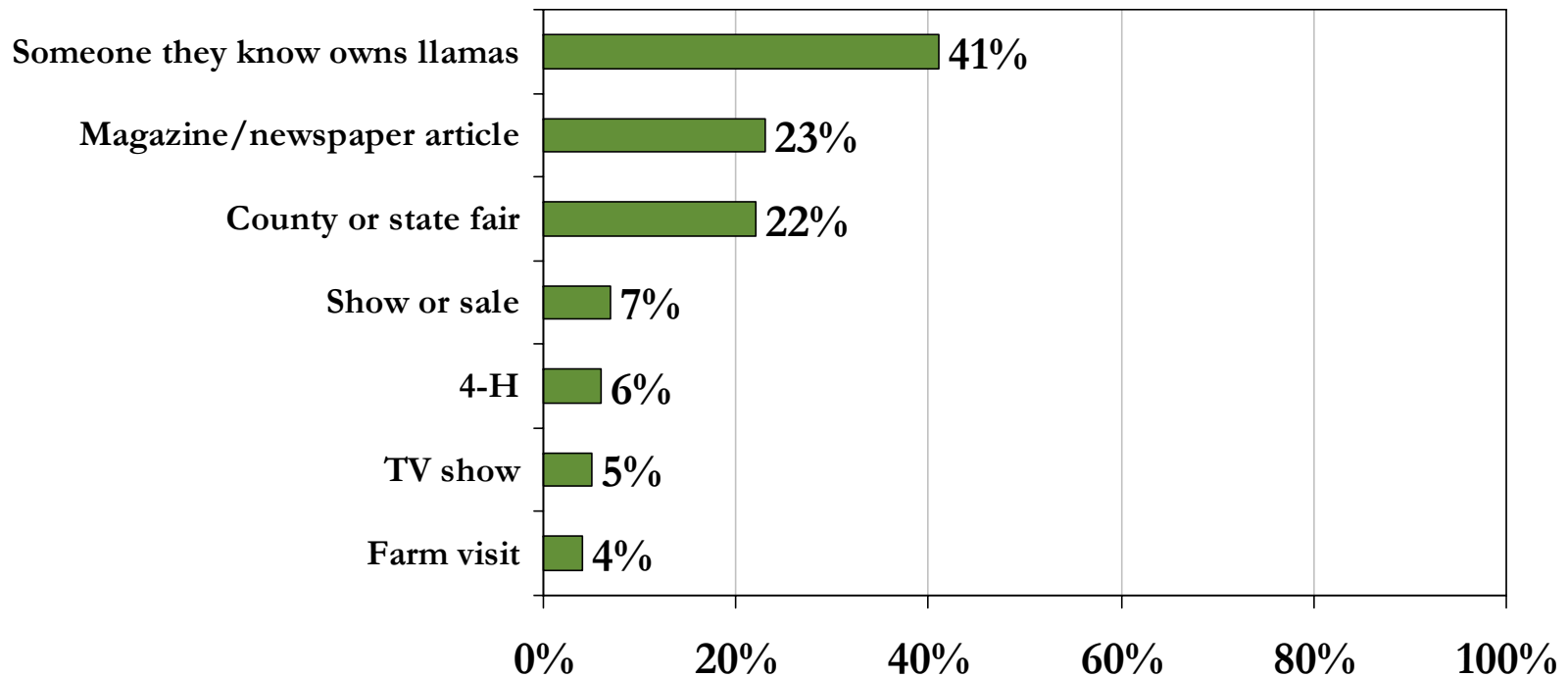
- Other multiple mentions included:
 - *Birds, rabbits, beef cattle, donkeys, dairy cattle, chinchillas, deer, emus, snakes, mules*



Llama ownership

Most respondents learned about llamas from friends, relatives, and neighbors

Learned about llamas (top mentions)

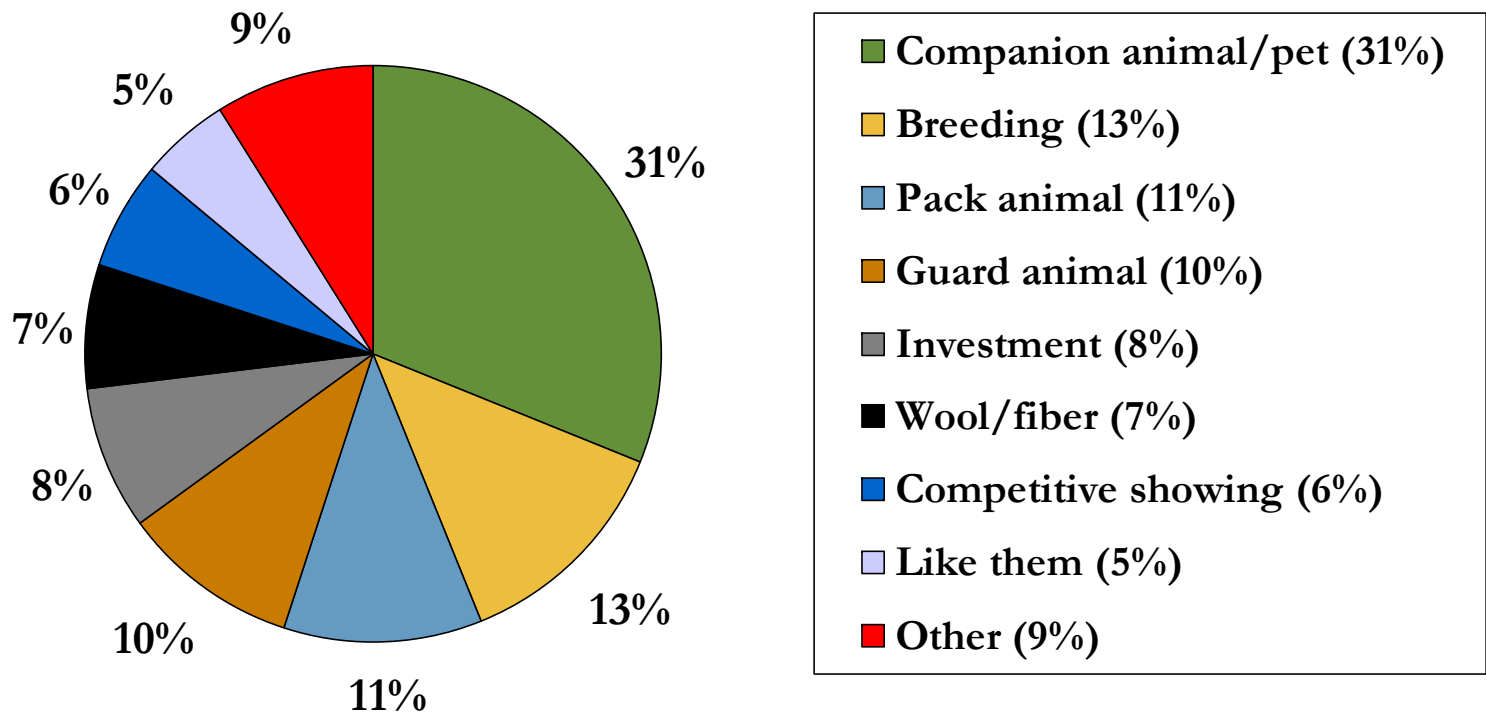


n= 217

(percent of respondents)

Almost one-third of respondents purchased their llamas as a companion animal or pet

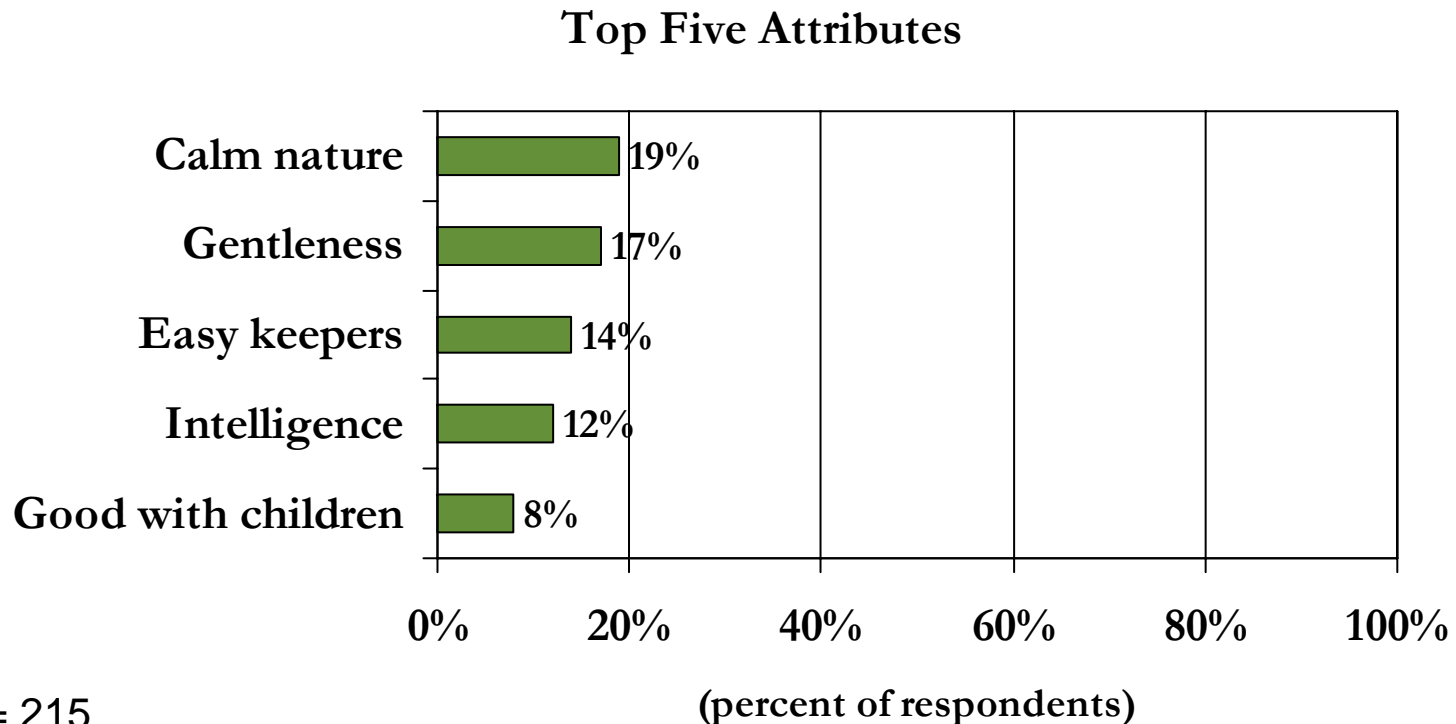
Reasons for purchasing a llama



n= 220

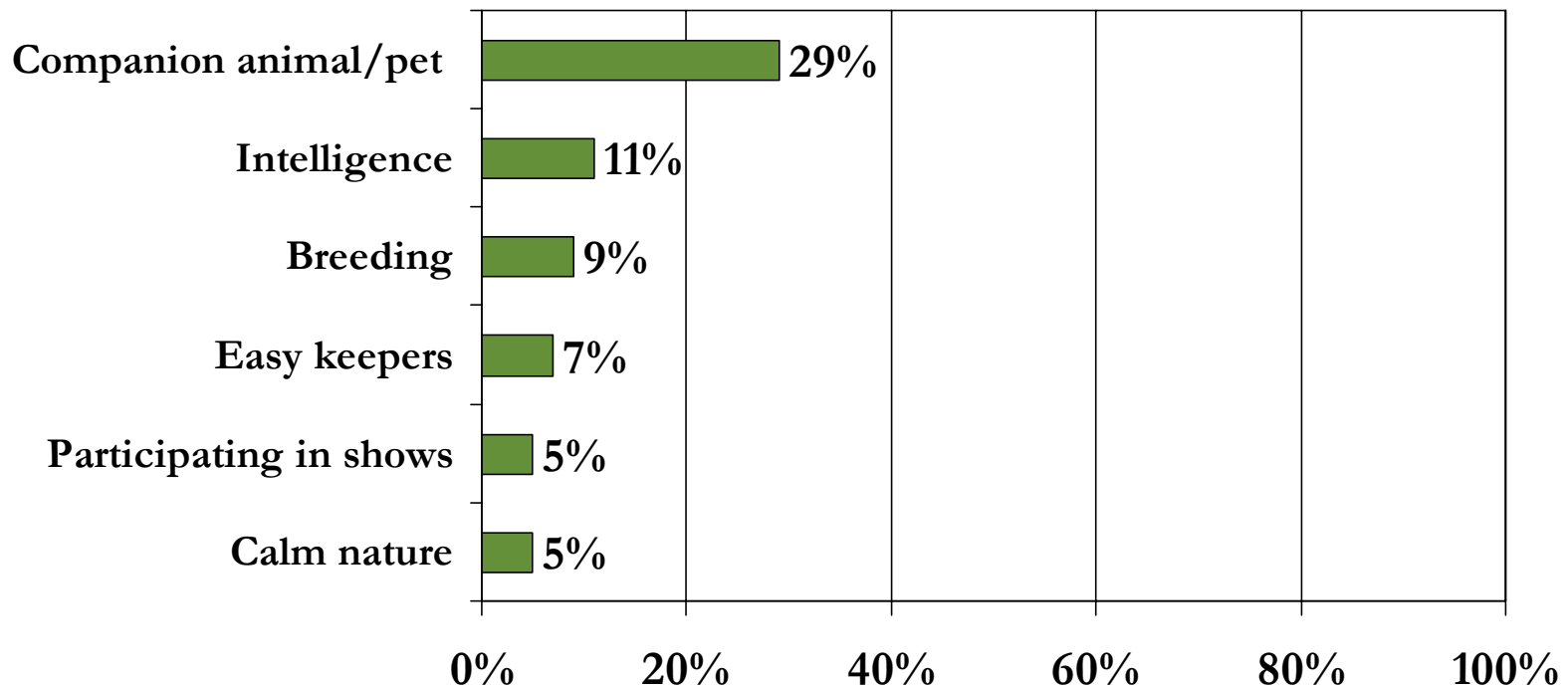
One-fifth of respondents cited a llama's calm nature as the primary reason they bought a llama over another animal

- Gentleness, ease of keeping, and their intelligence were also important attributes participants considered



Companionship was what participants liked best about owning a llama

Top Five Reasons



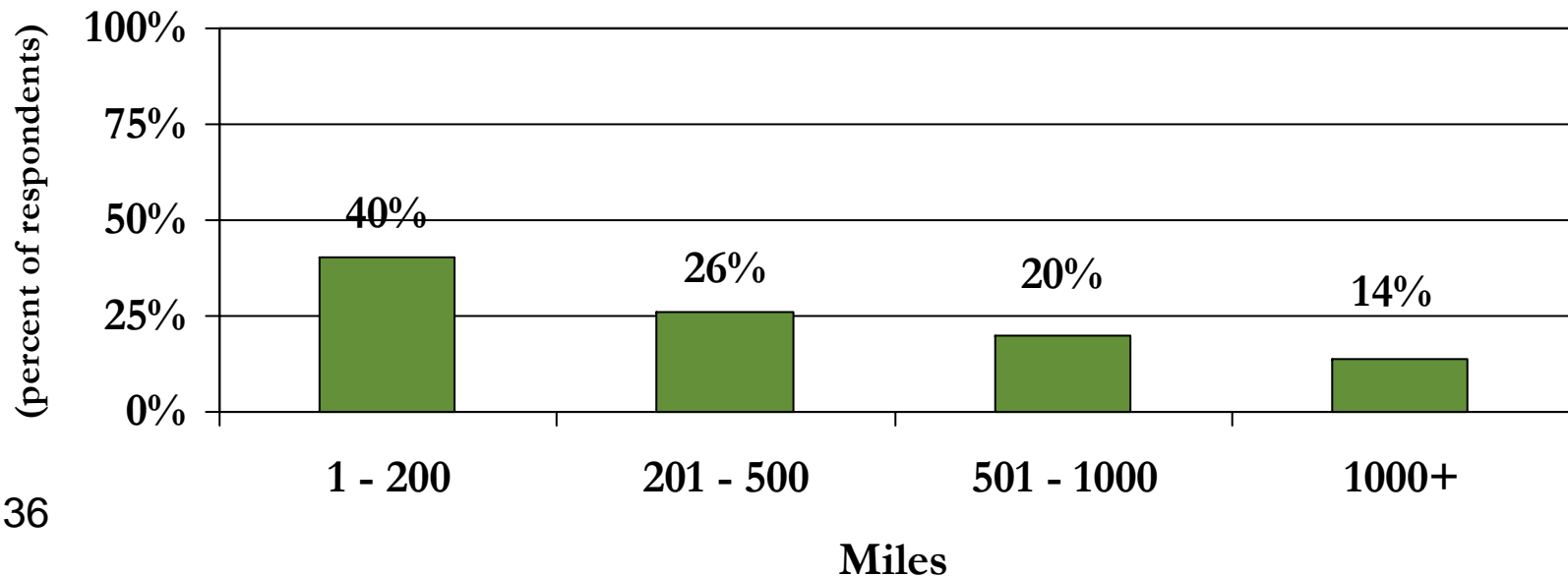
n= 170

(percent of respondents)

Participants frequently showed their llamas and were willing to travel to do so

- 60 percent of respondents showed llamas, attending an average of 5 shows per year
- On average, respondents were likely to travel as far as 520 miles to a show within the last year

Furthest distance traveled to show



n= 136



Llama Industry - General

A low demand coupled with an oversupply of llamas concerned respondents

Concerns	% of respondents
Low demand	21%
Oversupply	16%
Lack of profitability/costs	15%
Division into types/fragmenting the industry	13%
Lack of education	11%
Need for rescue	8%
ALSA	7%
Cross breeding with alpacas/other types	7%
Competing registries	2%
None	2%
Misc.	15%

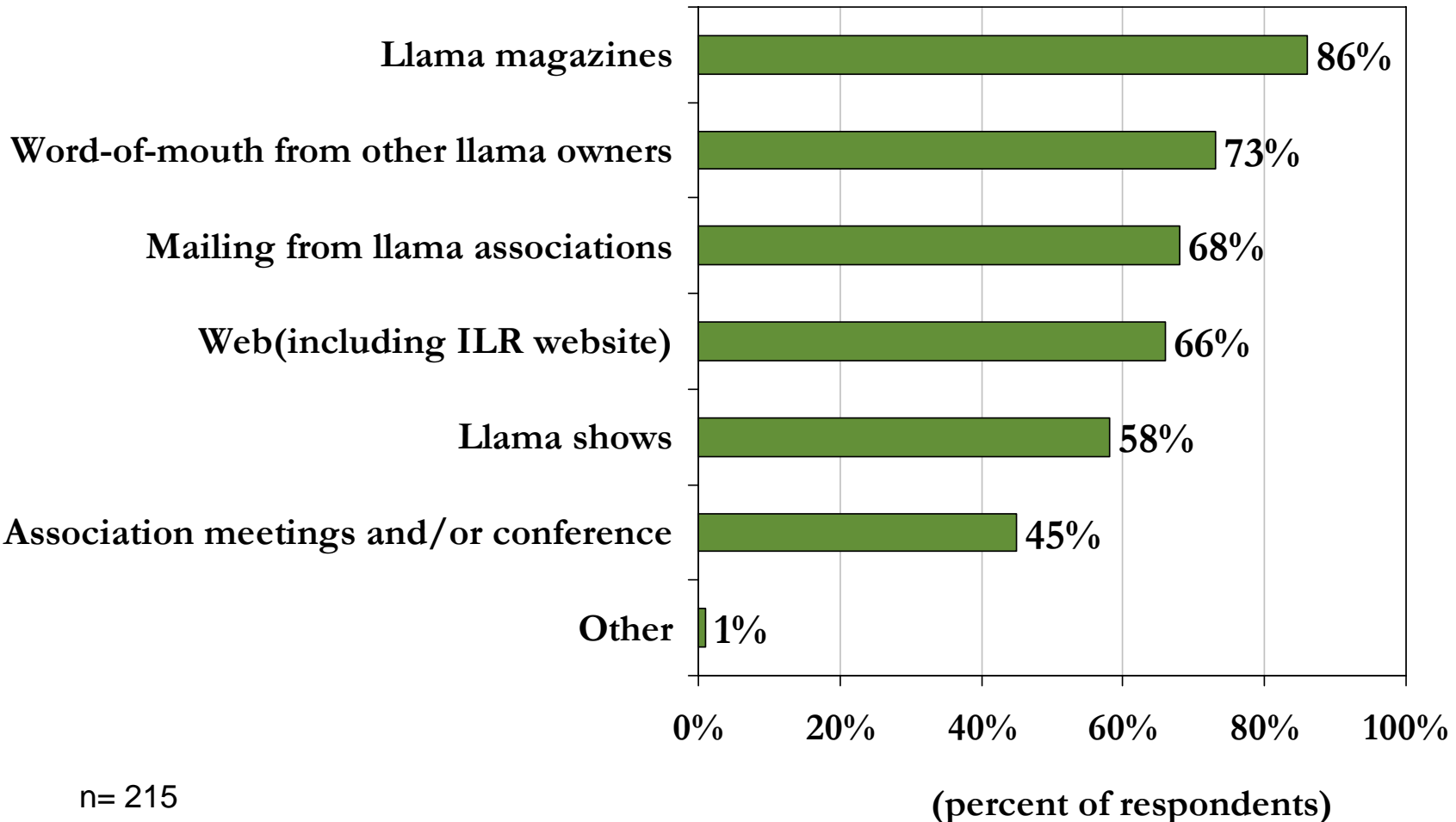
n=127

Most respondents were active in their local or regional llama organization and ALSA

Organization	% of respondents
Local or regional llama organization	70%
Alpaca and Llama Show Association	53%
None	17%
Alpaca Owners and Breeders Association	7%
Other	6%
Local or regional alpaca organization	4%
Foreign (not U.S.-based) llama or alpaca organization	2%
AMLA	2%
GALA, LANA, LFA, SLA	1% each

n=207

Besides print information, networking is very important to help keep llama owners up-to-date



Respondents most often read LamaLink.com and Llama Banner to gain information about llamas



Periodical	% of respondents
LamaLink.com	67%
Llama Banner	63%
Camelid Quarterly	52%
Llama Life II	50%
The International Camelid Journal	36%
American Livestock Magazine	27%
Alpacas	7%
Misc.	10%
Humming Herald, Back Country Lama, Cool Camelid, ALSA Showring	<2% each

n= 197

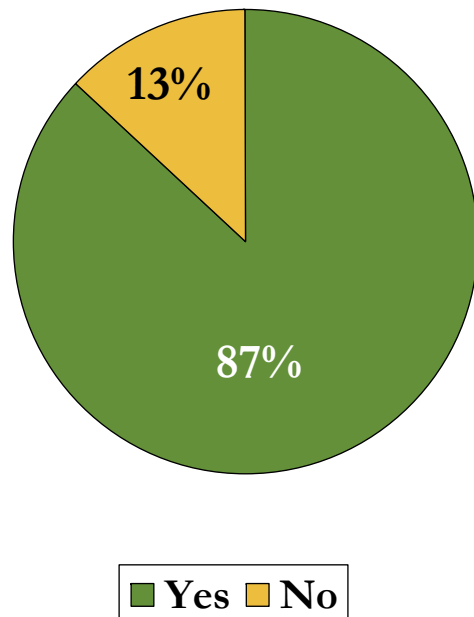


ILR Membership

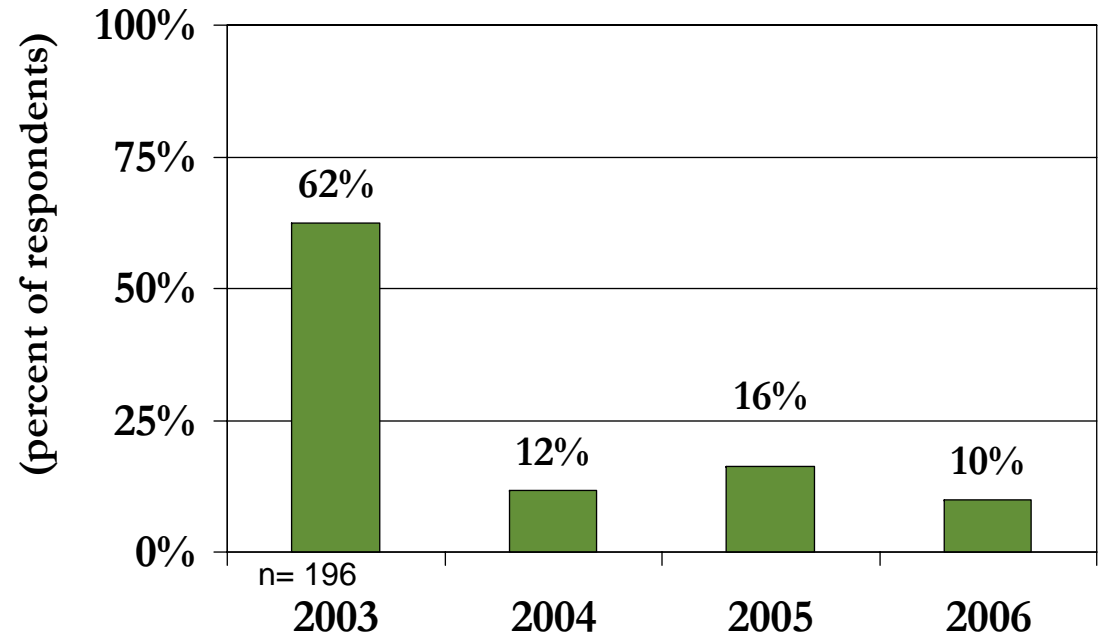
Almost all respondents were ILR members

- The average length of ILR membership was approximately 3 years

Current Membership



When you joined the ILR



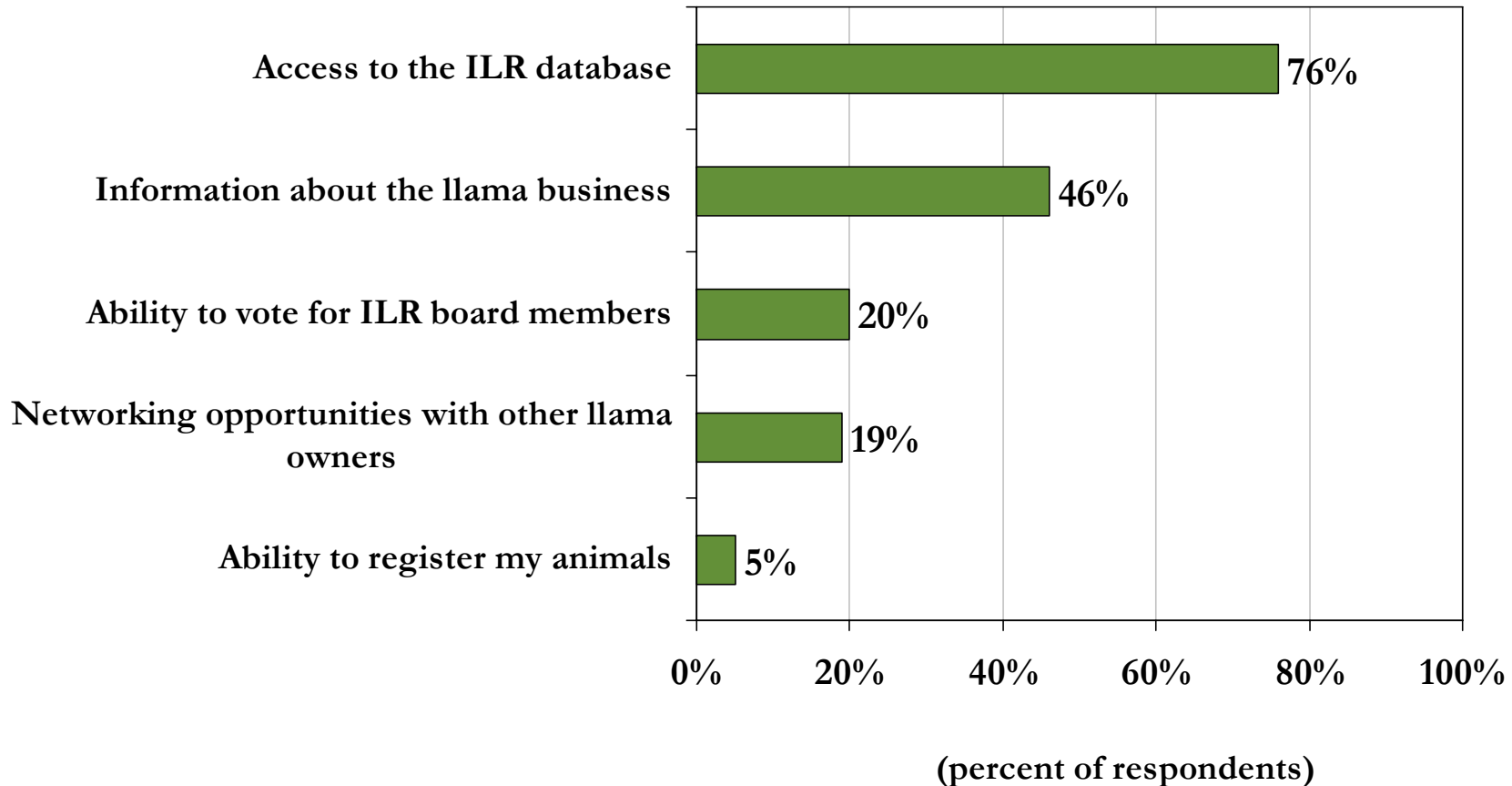
n=226

Access to information from the ILR were driving reasons why respondents became members

Reasons to become a member	% of respondents
Access to the animal/owner info database	58%
I value the info I receive from being a member of ILR	50%
I received membership info from ILR after the transfer of ownership to me of my first llama	48%
To support an organization that is critical to the success of our industry	40%
Another llama owner invited me to join	17%
Cost reductions on registrations and advertising	15%
The opportunity to influence the direction of the llama industry thru voting for directors & financial support	5%
Required to show	1%
To provide registry with financial support to deal with U.S. Animal Health Assoc.	<1%

Owners view access to ILR's database as the greatest benefit they receive from membership

Top Five Benefits

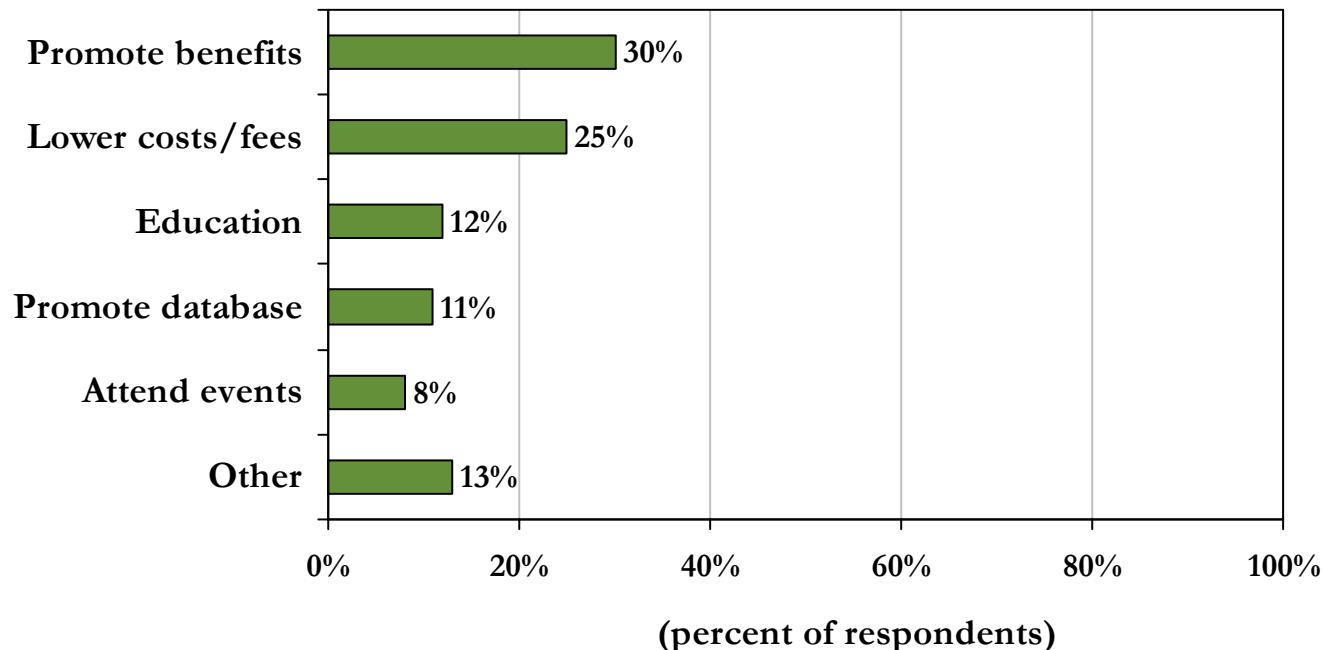


n= 190

Increased promotion of ILR's benefits are seen as the best way to encourage membership

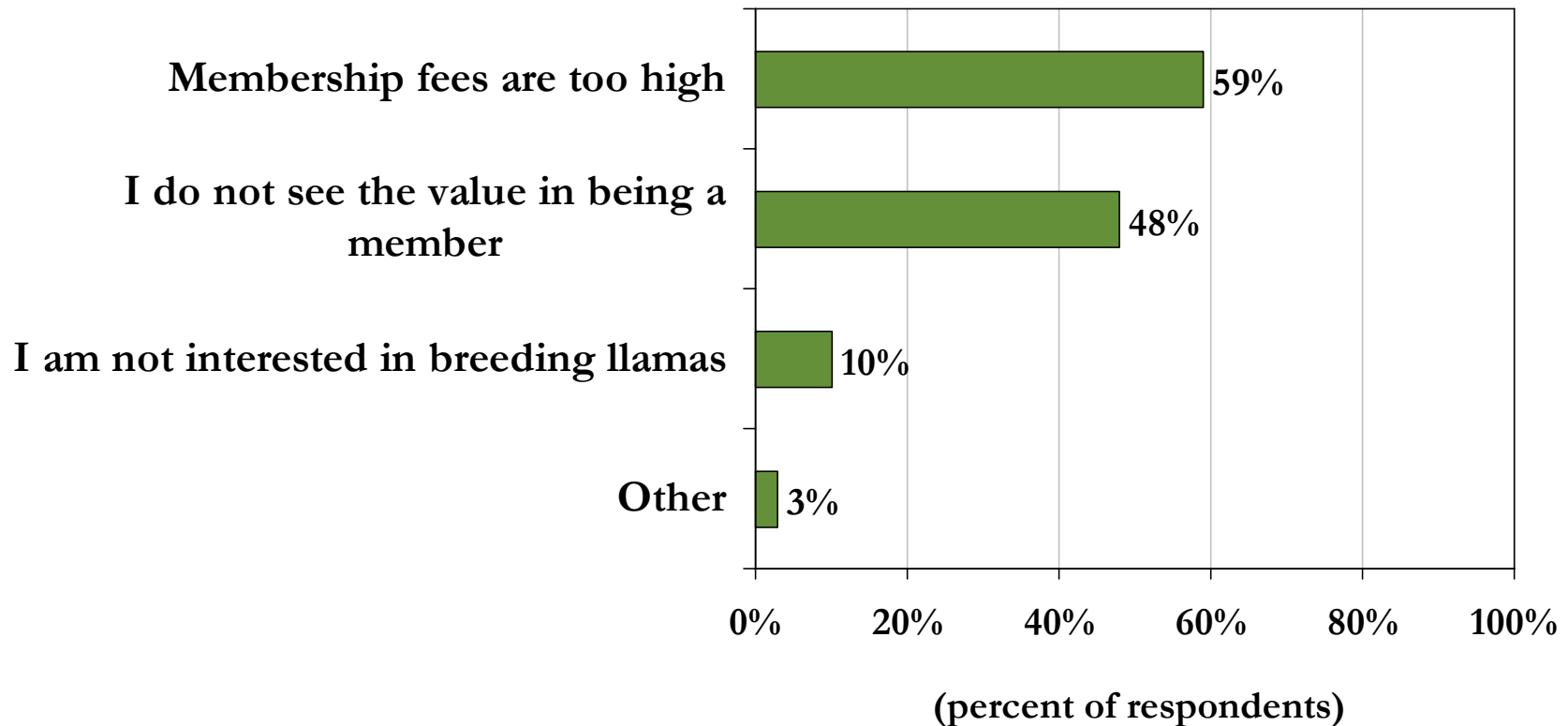
- Respondents also believed lower costs/fees would assist in increasing membership

Opportunities to encourage membership (top mentions)



n=137

Individuals who are not members don't view the benefits of membership outweighing the costs



n= 30

Participants rated the value of the services ILR provides on a 1 to 7 scale (7 = high)

Services	Average	Services	Average
Registration capabilities	6.1	Online credit card payment option	4.7
Web access to animal information database	6.0	Representation at USAHA	4.4
Animal information	6.0	Lobbying and advocacy	4.4
Online llama photos	5.6	Endowment & working funds for government relations	4.1
Owner information	5.6	IWAL (I Want A Llama) website	4.1
Office staff to deal with problems & questions directly	5.6	Classic llama pages on IWAL website	4.1
Web access to owner information database	5.5	Advertising opportunities on IWAL (I Want A Llama)	3.8
Parent verification – DNA	5.4	Donations tax deductible	3.7
Online registration	5.3	Mailing lists for purchase	3.7
Education	5.3	Advertising opportunities on ILRe-port	3.5
Government relation and llama promotion	4.9	Advertising opportunities on website	3.5
Office assistance for database research	4.8		

n= approx. 190



How valuable are the following services to you? (On a 1-7 scale where one means “not at all valuable” and 7 means “very valuable”)

Respondents valued registration papers because they provide pedigree information

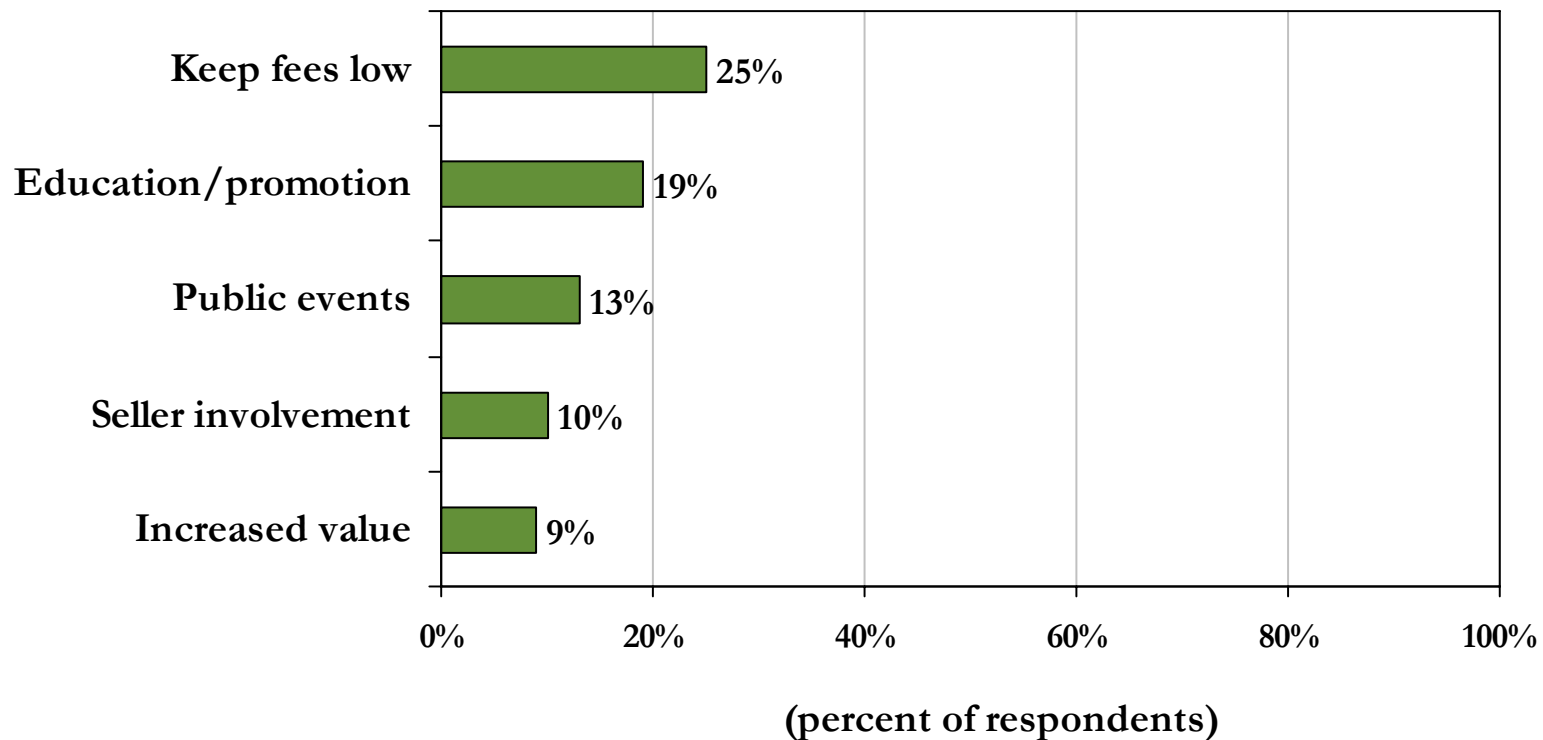
- 89% of respondents believe registration papers make their llamas more valuable

Why (top mentions)	% of respondents
Provides pedigree information	62%
Provides added value	20%
Increases credibility of the breeder	10%
Must be registered to show	5%
Brings legitimacy to the industry	4%

n=206

Keeping costs low and continued education are the best ways to promote llama registration

Opportunities to encourage registration (top mentions)



n=129

Participants would like to see the ILR provide more access to information

- Increased marketing and affordable fees were also mentioned as additional services
- 25 percent of respondents didn't have any suggestions

Additional Services	% of respondents
Additional access to information	19%
Marketing/advertising	9%
Affordable fees for rescue registrations	3%
Publicize heritable problems	2%
Education	1%
Can't think of any	25%
Misc.	40%

n=88

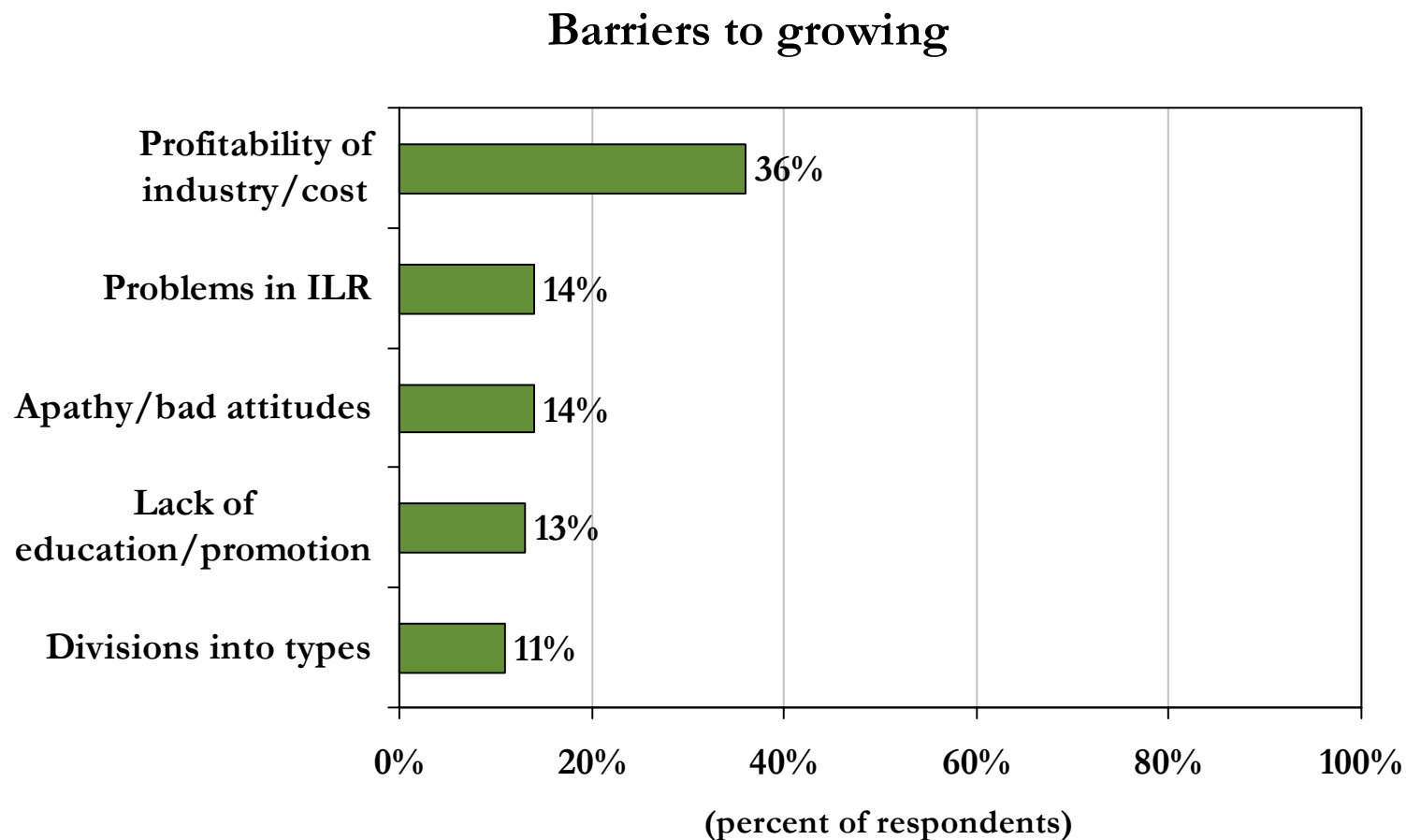
Respondents believed that the ILR should focus on education and promotion over the next 3-5 years

Top mentions	% of respondents
Education/promotion	36%
DNA/ID	11%
Continue as is	9%
No importation	7%
Marketing	7%
Record keeping only	6%

- Other mentions included:
 - *ALSA, fiber, keeping fees low, rescues, presence at events, misc.*

n=122

Producer profitability is the largest barrier to growing the ILR



n=122

Respondents again cited increased marketing as a path to help grow the ILR

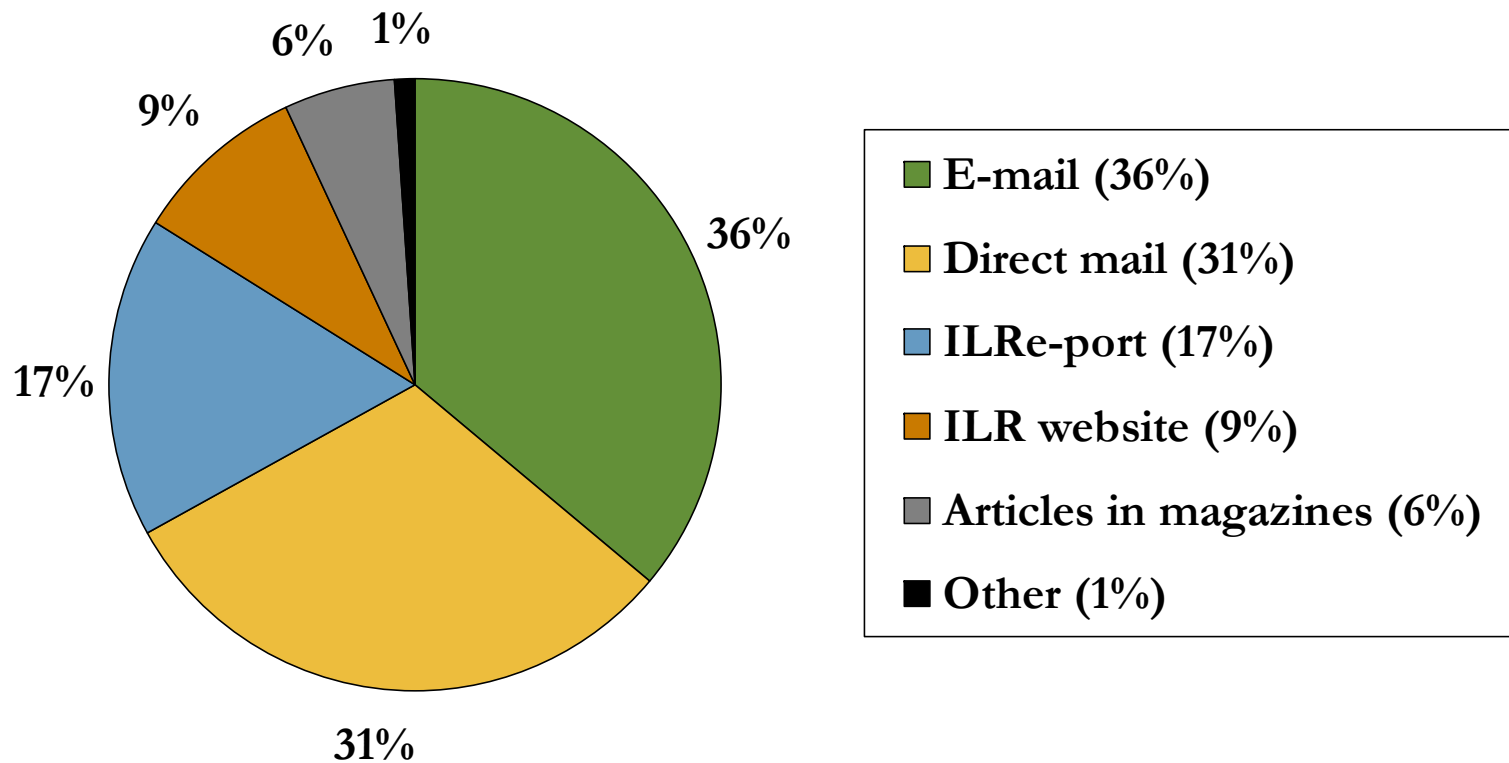
- Encouraging rural landowners and livestock owners to become involved with llamas also received a lot of attention

Ideas	% of respondents who ranked 1 or 2
Make available marketing materials for current members to use in attracting new people to become involved with llamas	46%
Convince current llama owners to register their currently non-registered llamas	42%
Encourage rural landowners who don't currently own livestock to become involved with llamas	41%
Recruit other livestock/animal owners to become involved with llamas	40%
Create more opportunities for current members to network with each other	23%
Target current alpaca owners to become involved with llamas	15%

n=158

Respondents prefer email and direct mail communication from the ILR

Communication preferences



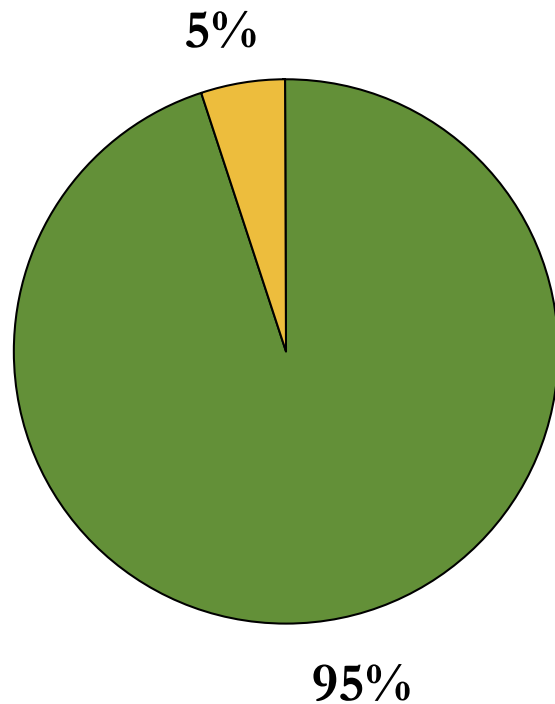
n= 226



Website/Internet

Respondents overwhelmingly had internet access and had visited the ILR website

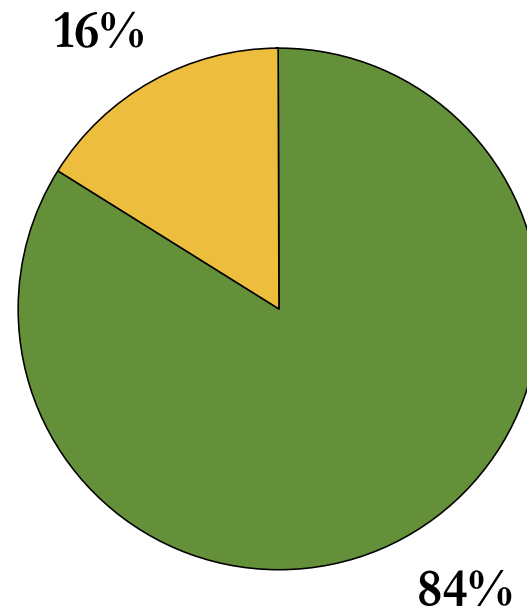
Internet Access



n= 226



Visited ILR Website



n= 216

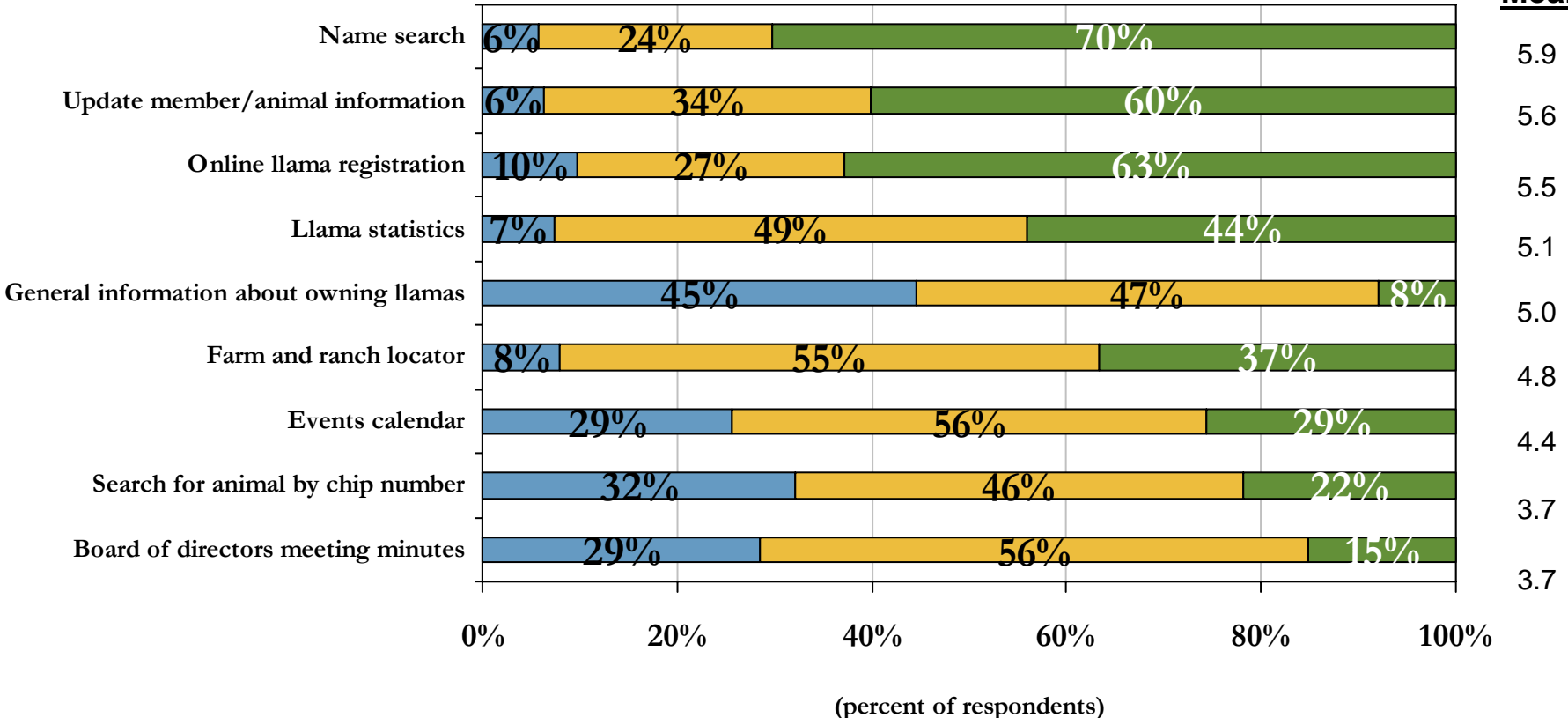


Respondents found the name search most valuable and the meeting minutes least valuable



Website services

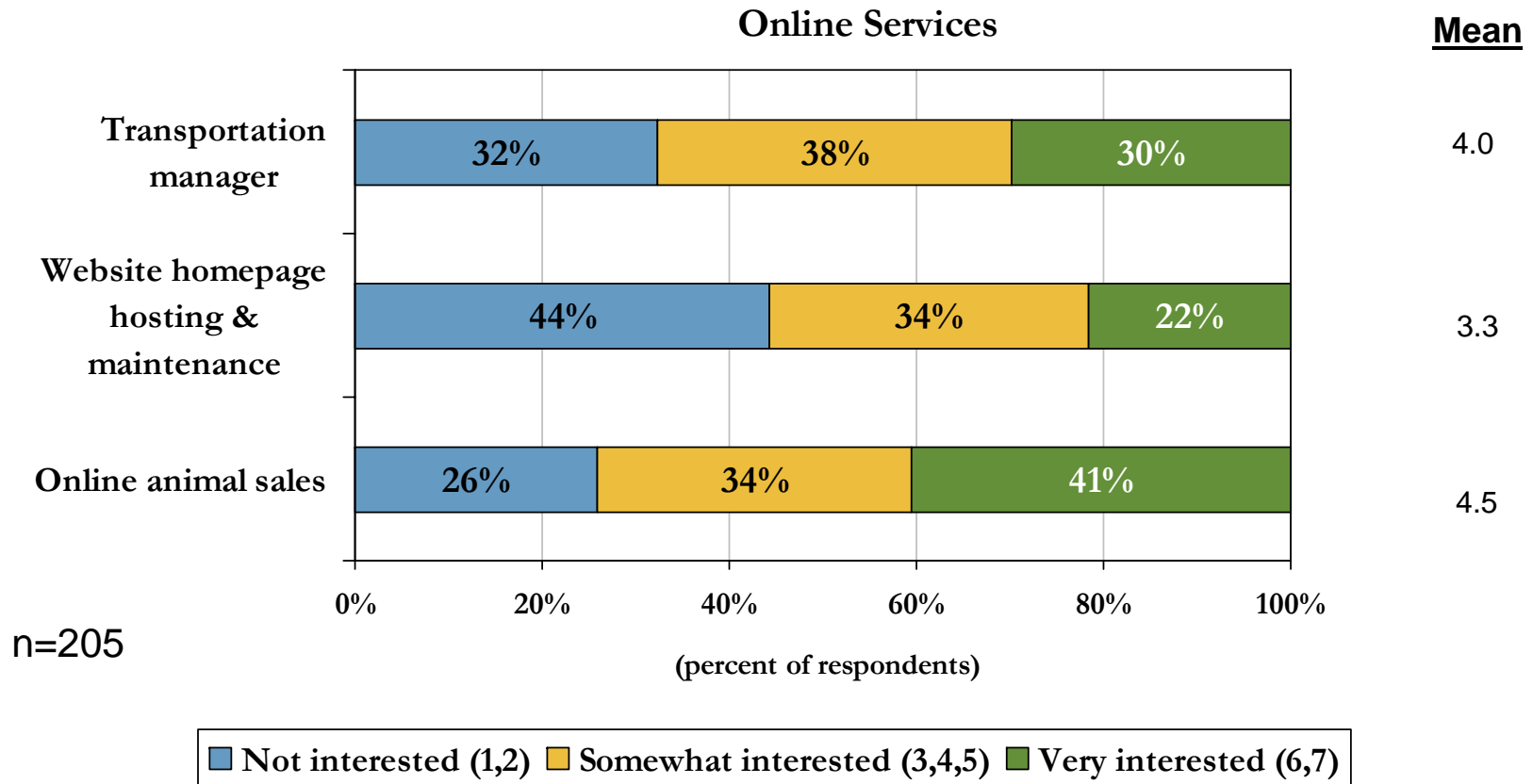
Mean



n=175



Online animal sales was most appealing option as a new service ILR could offer



- Respondents were willing to pay \$16 a month on average for a photo ad of a llama (n=70)



Key Conclusions

Key Conclusions

- Demographics
 - *Llama owners tend to own smaller acreages and have been involved in the llama business for over ten years*
- Llama Ownership
 - *Most participants learned about llamas through someone they knew; however, some also mentioned magazines and shows as the way they were introduced to llamas*
 - *Individuals purchased llamas for many different reasons, but the dominant reason mentioned was to use them as a companion animal/pet*
 - *Key attributes of llamas that resonated with respondents tended to be their calm nature, gentleness, and ease of keeping*
 - *A majority of survey respondents (60%) showed llamas at an average of five shows over the past year and traveled up to 500 miles to exhibit their llamas*

Key Conclusions (continued)

- Llama Industry/Key Issues
 - *Key industry issues identified by respondents are the imbalance of supply and demand and the profitability of the industry*
 - *A majority of respondents were involved in local and regional llama organizations and subscribed to several industry publications to stay updated on the industry*
 - *Networking with other llama owners was also identified as an important way to gather information*
- Membership
 - *A vast majority of survey respondents were members and they perceived significant value in the information they have access to through the ILR*
 - *Most respondents (95%) have access to the internet and 84% have utilized ILR's website*
 - *Participants preferred ILR to communicate with them via e-mail and direct mail*
 - *Participants also challenged the ILR to constantly seek ways to lower the costs of membership and registration fees*

Key Conclusions (continued)

- Value of Services Provided
 - *Registration capabilities and web access to animal information ranked as highly valued services with advertising opportunities being less valuable*
 - *Nearly all respondents perceived that registration papers made their llamas more valuable*
- ILR Growth
 - *Respondents repeatedly cited increased education and marketing as ways to grow the llama industry and the ILR*
 - *Participants found online animal sales to be the most appealing new service for ILR to consider*
 - *Respondents recommended that something should be done to encourage people who own non-registered llamas to register them*
 - *Respondents also identified rural landowners who don't already own livestock as a prime target market for the llama industry*



Appendix

Intelligence, calm nature, and gentleness were attributes respondents liked best about llamas

Attribute	% of respondents	Attribute	% of respondents
Intelligence	80%	Participating in shows	47%
Calm nature	80%	Good with children	46%
Gentleness	78%	Socializing with other llama owners	46%
Companion animal/pet	68%	Disease resistance	30%
Easy keepers	63%	Use as a guard animal	30%
Curiousness	54%	Affordability	30%
Easy to train	53%	Use as a pack animal	25%
Environmentally friendly	53%	Animal-assisted therapy	13%
Breeding	53%	Beauty, personality, uniqueness, misc.	Each less than 2%

n= 175

Again, a llama's calm nature, gentleness, and intelligence caused owners to choose them over other animals

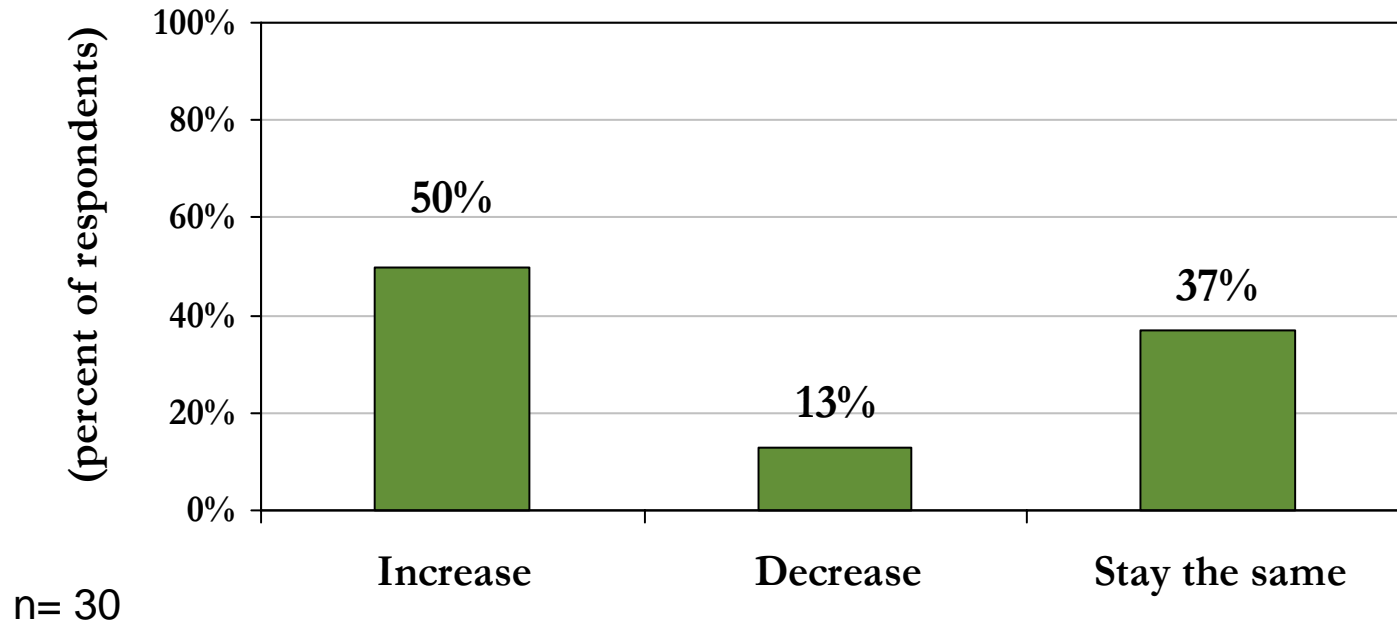
Attributes	% of respondents	Attributes	% of respondents
Calm nature	79%	Fiber	30%
Gentleness	74%	Type of people involved in the llama industry	29%
Intelligence	73%	Disease resistance	27%
Easy keepers	62%	Cost to purchase	18%
Environmentally friendly	52%	Unique	7%
Easy to train	48%	Beauty	5%
Curiousness	48%	Size	3%
Good with children	38%	Non-food animal	2%
Cost to feed	33%	Others	7%

n= 225

One-half of respondents plan to increase their herd*

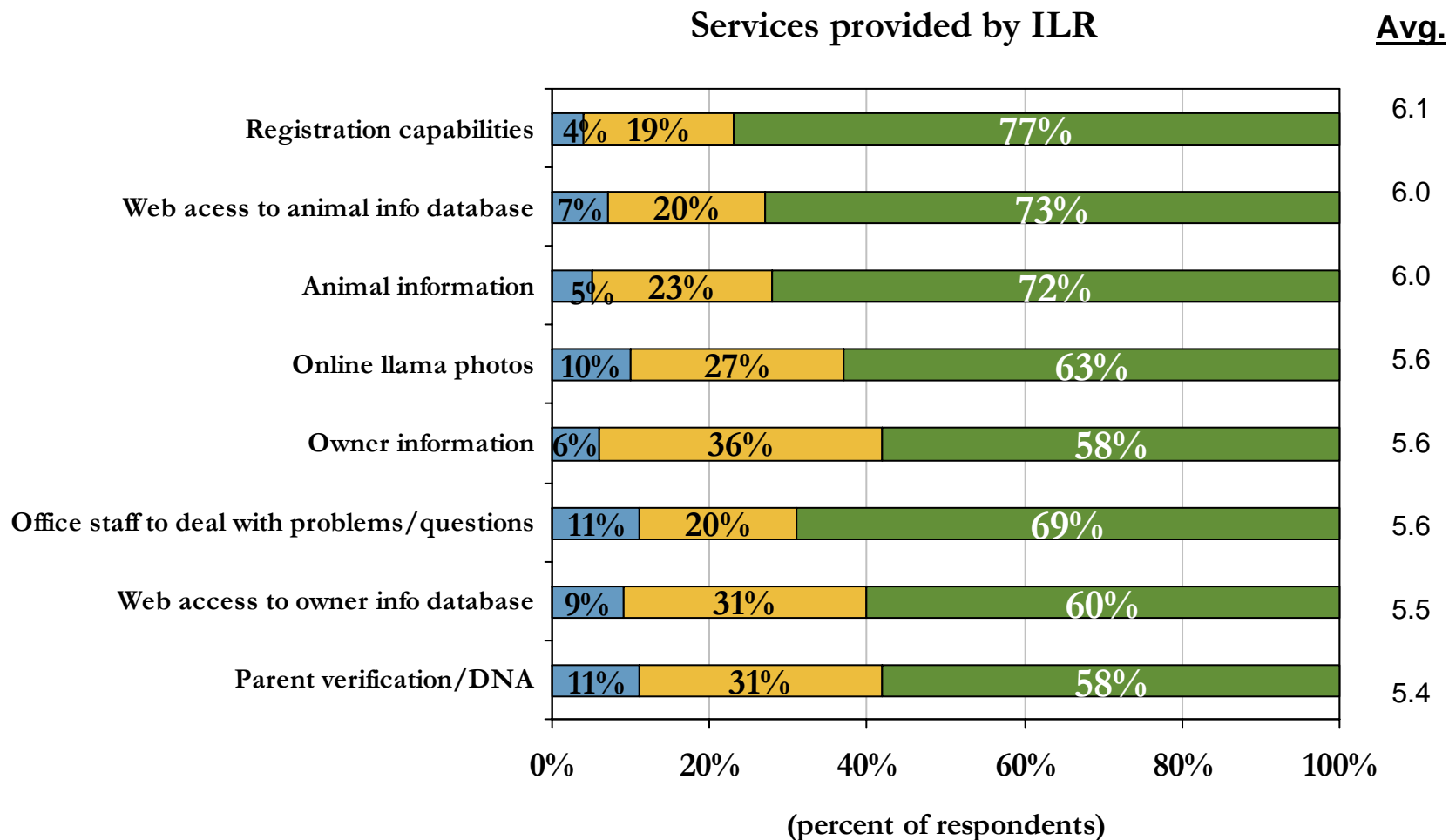
- Respondents most often cited profitability as the main reason for expanding their herd
- Getting older/space limitations was most often cited as the reason for decreasing a herd

Intentions for Growth



***Special note: Only 13% of survey respondents answered this question**

Participants rated the value of the services ILR provides on a 1 to 7 scale (7 = high)



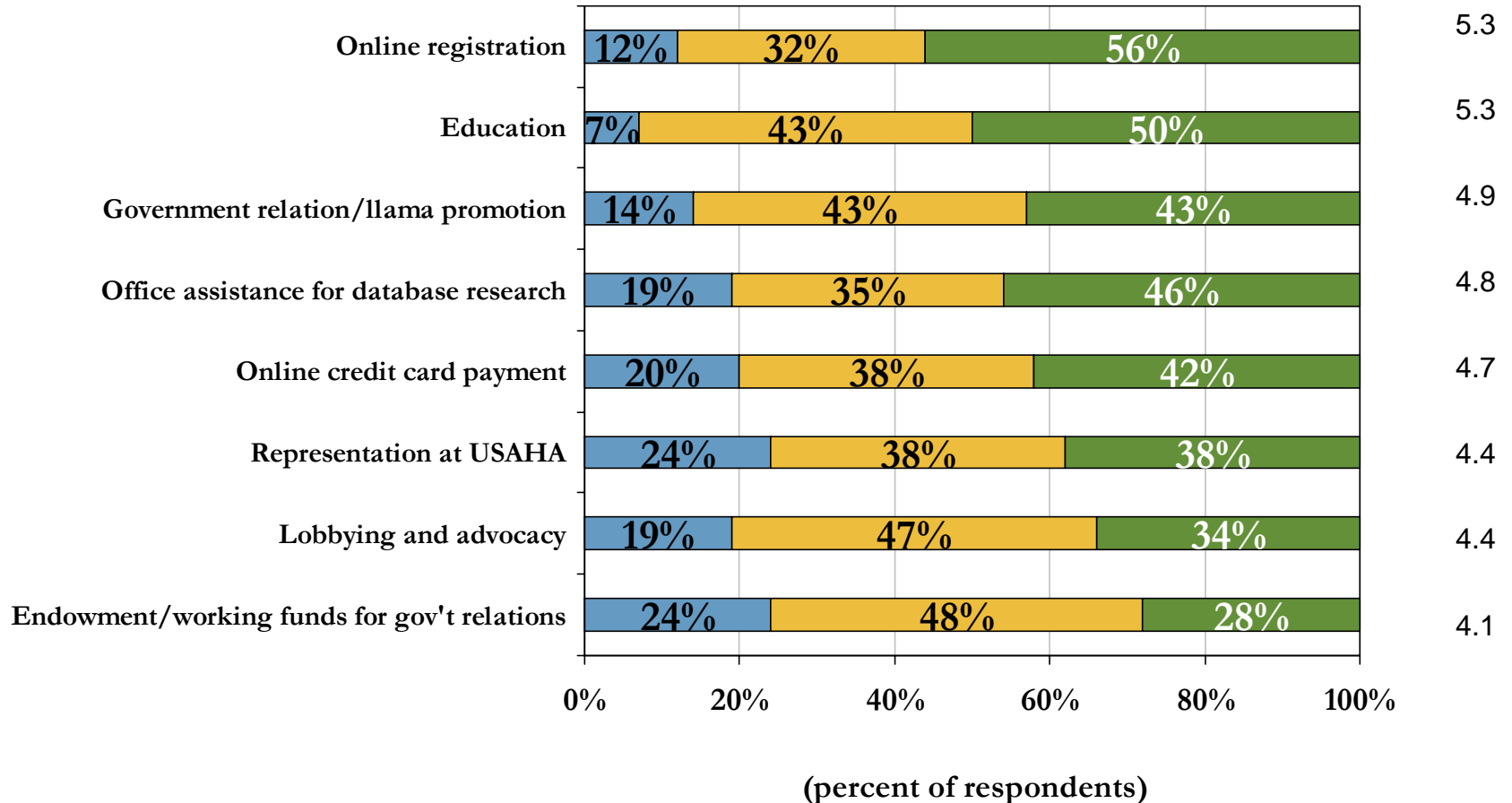
n= approx. 190

■ Not valuable (1,2) ■ Somewhat valuable (3,4,5) ■ Very valuable (6,7)

Participants rated the value of the services ILR provides on a 1 to 7 scale (continued)

Services provided by ILR

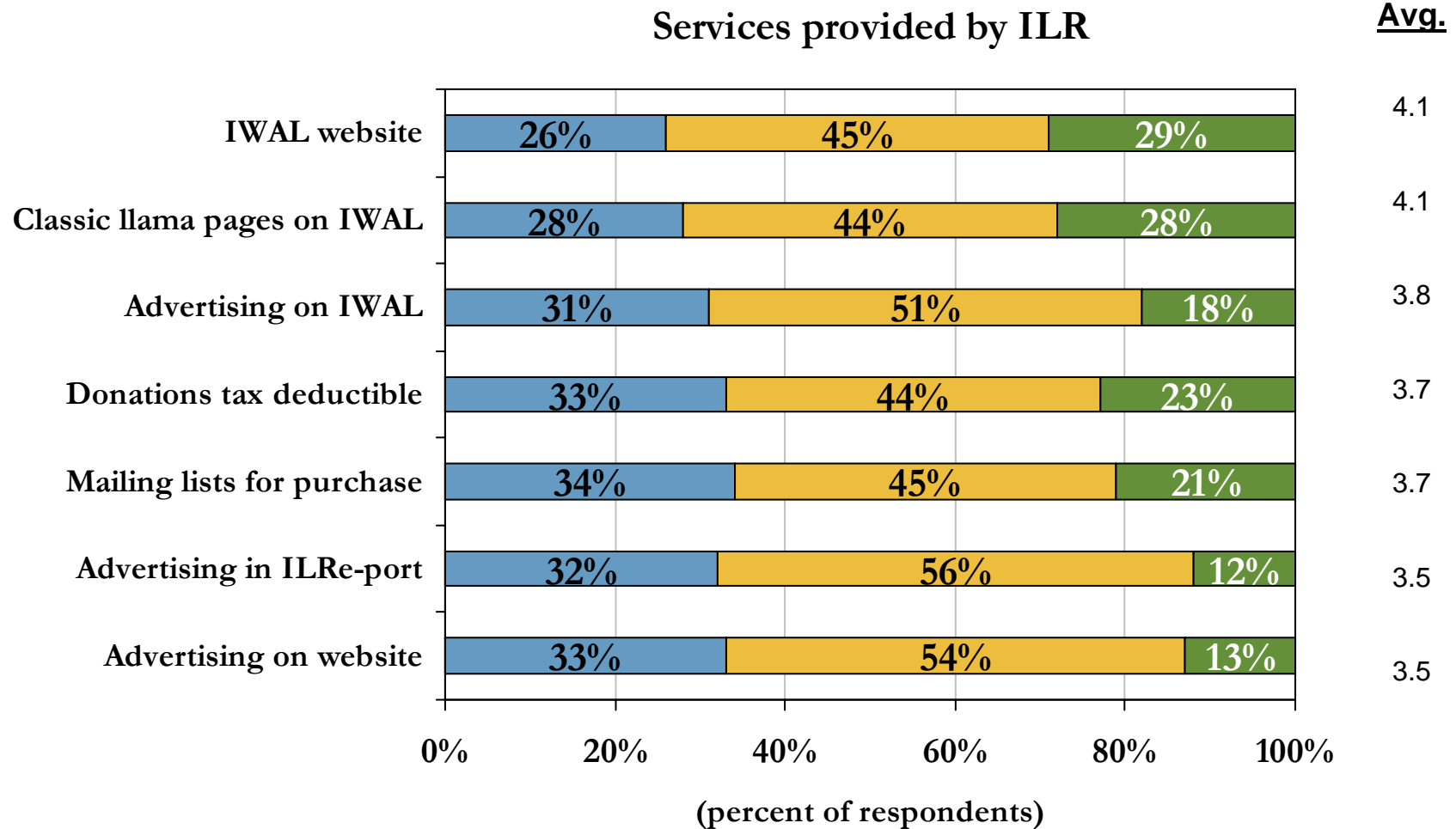
Avg.



n= approx. 190

■ Not valuable (1,2) ■ Somewhat valuable (3,4,5) ■ Very valuable (6,7)

Participants rated the value of the services ILR provides on a 1 to 7 scale (continued)



n= approx. 190

■ Not valuable (1,2)
 ■ Somewhat valuable (3,4,5)
 ■ Very valuable (6,7)