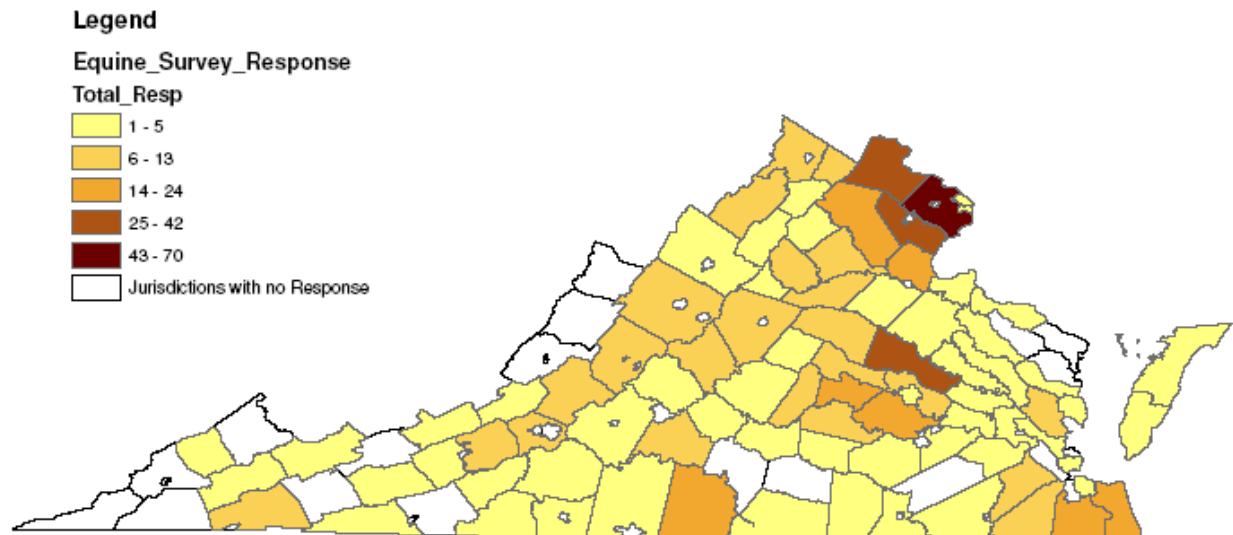


Highlights of the 2008 Virginia Equestrian Tourism Survey Results

Conducted by Carol Kline, Ph.D., Assistant Professor, Hospitality and Tourism Administration,
North Carolina Central University
Sally Aungier, Virginia Horse Council Board of Directors

This survey was designed to obtain the opinion of horse-back trail riders in Virginia. The questions were compiled by tourism specialists, trail riders, and park staff. The survey was available for a period of three weeks in September of 2008 and was made available to the public through an online survey provider, SurveyMonkey.com. This fifty-question survey was designed to assess equestrian trail-riding in Virginia. The questions targeted rider preferences and travel patterns, desired trail/camping amenities, expenditures while traveling, trail development potential and issues. At the close of the survey, 822 individual had recorded responses to the questions. Respondents represented a cross section of the state with nearly every county represented as shown below. Questions were a variety of multiple choice, matrix choice, rating scale, and open ended text format.

2008 Equine Survey
Response by Jurisdiction



Rider Profile Based on Survey Participants

Typical trail rider:

- Gender: 88 % Female, 12 % male
- Age: 18-30: 6.4% 31-40: 9% 41-50: 33.4%
51-60: 38.8% 61-70: 11.1% Over 70: 1.2%
- Employment Status: 79.4 % Employed 15.1% Retired
1.6% Students 3% Unemployed
- Average Income: 61.1% have incomes between \$50,000 and \$150,000. 14 % were under \$50,000; and 24% were above \$150,000.
- Most of the respondents (88.80%) typically ride with friends, while over half (53.3%) ride by themselves and another forty percent ride with a club. Riding with one's family (26.9%) and one's spouse (25.7%) are also popular. The "other" organized group category included Scouts, Church, YMCA, etc.
- Trail riders are involved in many disciplines: 97.3% trail ride for recreation. 24.4% indicated that they participate in trail-related competitive events. Others are engaged in disciplines including - 20.7% hunter/jumper; 20.3 % dressage; 16% foxhunting; 16.2% western pleasure among others.
- 26.5% of the responders indicated that they participate in trail/construction and maintenance efforts.
- 24.4% of the respondents revealed that they ride more than 500 miles each year. 39.3% indicated that they ride 200-500 miles annually. 36.3% rode less than 200 miles annually.

Travel Patterns

Of the 691 respondents, 697 (or 99.6%) identified that they took trips within the State of Virginia. However, 555 (or 79.6%) respondents identified they also took out of state riding trips.

- Responders identified their typical trail riding trips as
65.1% - day trips 17.8% - 1-2 day trips
14.6% - 3-4 day trips 2.5 % - 5 or more days.
- During overnight trips riders use the following types of lodging:
48.2% - Camping with trailer 6.1 % - B&B
9.7% - Hotel/motel 12.5% - Camping (no trailer)
22.3% - Stay with friends or family

Trail Preferences

- Trail types in order of preference: Forested, Loops, historic, public, high country/mountain, open land, private, and linear.
- Trail markings: 82.6% felt that trail markings were important. Riders indicated a preference for trails marked with estimated distances or ride times.
- Ideal length of trails: Two categories were presented: 1) Day Trip; and 2) Multiday Trip. Out of approximately 695 respondents a majority (35.8%) indicated that 10-15 miles would be ideal for day trips. A nearly equal number (35.7%) indicated that 5-10 miles would be ideal.

For multi-day trips a majority of 26.4% agreed on the ideal trail length of 20-30 miles. Trails of 15-20 miles were a close runner up (22.8%).

- Minimal length of trail: The majority (50.7%) of respondents from the day trip category identified their desired minimal length trail is 5-10 miles. Another 30% thought 5 miles or less was acceptable for day trips.

Results for minimal multi-day trail length were less than what would have been expected. A majority (24.9%) of those who replied to multiday category identified their preference for minimal length of a trail to be approximately 15-20 miles. The following chart further breaks down respondent's responses for both categories:

Type	<5 miles	5-10 miles	10-15 miles	15-20 miles	20-30 miles	30-50 miles	>50 miles
Day	30.3%	50.7%	15.5%	3.3%	0.1%	0.0%	0.0%
Multiday	3.7%	20.4%	22.1%	24.9%	18.2%	7.8%	2.8%

- Respondents were asked to identify the most important features or amenities that a TRAIL can provide. At least 660 people answered this question, offering 2351 responses that fell into 66 distinct categories. Thirty of these categories had five or less "votes." Below are the top 15 responses to the question in order of the rated importance.

- | | |
|-----------------------------------|------------------------------------|
| Water | Loop options |
| Bathroom | Adequate markings |
| Diverse/Various Trails | Available maps |
| Overall safety (horses, trailers) | Adequate footing for people/horses |
| Ample parking | Cleared trails |
| Attractive scenery | Long trails |
| Adequate parking for trailers | Limited vehicular/bike traffic |
| Shade | |

- Respondents were asked to list the top three places they most frequently ride. The top 10 responses were

National Battlefield Park –Manassas	Home/farm/private property
James River State Park	National Battlefield Park - Petersburg
Lake Anna State Park	Graves Mountain area Trails, Syria, VA
Beaver Dam Park – Gloucester	Bull Run Regional Park
National Forest - George Washington National Forest	
Powhatan Wildlife Management Area	

Multi-day Trips

- Horse containment typically used when traveling overnight: The majority (45%) of respondents identified indoor stalls as the typical containment system used when traveling overnight with their horse. 72.9% indicated that they use electric fence pens and portable corrals. Another 32.5% use high lines or tie their horses to the trailer overnight. Other responses included using the trailer as a stall, permanent paddocks, hobbles, and field trial stake systems.
- Amenities typically used when traveling overnight: Respondents indicated that they most frequently took advantage of restrooms if provided. They also used showers, picnic tables, fire rings, electric hookups, water hookups. Only a small percentage (9.5%) took advantage of septic hookups. Write in responses included water faucet for horses, grills, camp store, restaurant, permanent paddocks, and shade. A number of respondents indicated a preference for having cabins or rooms near the horse facility because they do not camp.
- A majority (44%) of the respondents indicated that they use both group and individual camping grounds.
- The majority of 57.2% indicated that their trailer does not have formal living quarters. Many commented that they rough camped out of their trailers by utilizing the dressing room or horse compartment.

Tourism Related

- Interest in packaged equestrian vacations: A 67% majority revealed that they would “definitely” book a package trip if the package would include more than the mere necessities.
- Riders were asked if they had participated in progressive or point to point trail rides on linear versus looped trails. Majority (66.3%) of the respondents answered “no.”
- Progressive trail ride opportunities: If provisions could be forwarded to the next stop, an overwhelming majority (81.9%) replied that they would be interested in progressive/point to point rides.
- Non-trail riding activities that riders like to do during trips include wildlife watching, learning about local history, local crafts, local music, farm visits, vineyards/wineries, other horse related events, water sports, going to church, and antiquing.

- Riders expressed they often have concerns about water access for the horses on the trail (77.4%); length of trail (78.1%); quality of riding facility (70.4%); lack of effective signage (65.6%); lack of maps (63.4%); and vehicle safety (60.4%). Riders also indicated that they are more concerned about finding a safe place to stay for their horse than for themselves. Other concerns included the following:

Difficult trail topography	Distance between trailheads
Unexpected trail closures	Availability of restrooms
Personal safety in the community	Ability to call for assistance
Access to vets & farriers	Getting lost
Weather	Trip expenses
Ease of trailer access	Inconsiderate users of other types
Cell phone service	Access to diesel fuel
Road safety (truck/trailer performance)	
- Most riders relied on word of mouth and club newsletters for trip planning. Additionally, a number of respondents indicated that they rely on organized trail rider flyers and announcements, and maps for planning.
- Riders also are active in many other outdoor recreation activities either at home or when they are traveling. The majority (64.6%) of people indicated that they participate in walking/running in addition to riding horses. The other top activities were hiking, swimming, gardening, and camping, followed by birding/wildlife watching, fishing, kayaking or canoeing among others. Some riders indicated that they would like to participate in other activities while traveling but do not like to leave their horses unattended.
- Respondents were asked to identify where they went on their last trail riding trip outside their local area (50 mile radius). The most frequent responses were:

Graves Mountain	James River State Park
Mount Rogers National Scenic Area	Gettysburg, PA
Petersburg Battlefield National Park	Fair Hill, MD
Fort Valley, VA	Lexington, VA
Lake Anna State Park	Pleasant Grove, Fluvanna
- Location choice: 49.4% choose a specific place based on their prior experience at the location, personal recommendations, and closeness to home. Additionally, sites were chosen because individuals were attending organized trail rides. Very few respondents (8.6%) indicated that they chose locations based on marketing or advertizing.
- Riders identified gas, food, overnight fees, and event registration fees as their primary expenses on longer trips. The majority spent \$51-100 on gas and less than \$50 on food during their trips.
- Respondents were asked to identify the nature of their last trail-riding trip. Most identified it was a typical weekend trip. Many others indicated that it was day trip with friends, or locally organized rides.
- Respondents were asked how much gas prices affected their decision to travel less often or stay closer to home to ride. The majority (50.6%) identified that inflation in gas prices affected their travel arrangements quite a bit while another 37.9% indicated that it affected their choices somewhat. Riders pointed that more local trails would minimize the expense of gas.

- Respondents were asked what they thought would improve their overall trail riding experience in Virginia. The majority indicated more trails and places to camp with horses. Also identified were more local trails, better maps, better trails that are maintained and marked trails, better parking facilities, and a publication/website listing of trails among others.

Local Equestrian Tourism

- The majority of respondents (63.3%) indicated that equestrian tourists do visit their county.
- More than a quarter of respondents indicated that equestrian tourism can be a viable industry in their county.
- Most indicated that there were equine events, facilities, organized events and equestrian groups in their county.
- The majority (32.2%) of people indicated that less than 30 miles of riding trails existed in their county. 17.3% have 30-50 miles; 18% have 50-100 miles; 12.1% have 100-150 miles; 4.9% have 150-200 miles, and 15.5 % indicated they had more than 200 miles of trails. A review of the responses shows that counties were ranked significantly different by individual respondents. This aberration may be due to individual access to private trails.
- Participants were asked to rank the top three barriers to developing equestrian trail tourism in their county. The majority responded lack of funding, lack of support from officials, lack of organization, and lack of undeveloped land as the main barriers.
- Participants were asked what kinds of training or technical assistance is needed to further equestrian tourism in their counties. The primary response was education of public officials on the benefits of equestrian tourism. Other responses included the following: Advertisement/Marketing; Economic importance of Equestrian Tourism; Equestrian tourism director; Trail development; Political organization assistance; and assistance from local county officials among others.
- Participants were asked what they saw as the “next steps” in developing equestrian tourism in their county. The majority listed Advertisement/Marketing/promoting and raising awareness, along with Assistance from local county officials; Political organization assistance; Educating public officials on the benefits of equestrian tourism. Many others listed trail and facility development and maintenance, stopping urban sprawl, preserving land, and opening more parks.
- Participants were asked what can be done to improve a visitor’s equestrian experience in Virginia. They identified Advertisement/Marketing/Promoting as a top recommendation. Responses also included the following:

More available parks and trails	Horse rentals
Centralized equestrian information source/trail guide	Overnight lodging
Detailed maps	Horse-friendly camping grounds
Creating public riding facility	Better trail markings
Better facilities	
More parking at trailheads/camps	