

Survey Objectives (1)

- Determine which trails and parts of the state were attracting the highest number of riders.
- Determine what riders expectations were of those trails so that resources can be focused on meeting those needs.
- Determine if trails were primarily used for day trips or overnights.
- Determine if riders were looking for more places to camp or if they preferred lodging when traveling overnight with their horses.

Survey Objectives (2)

- Determine the types of information riders take into consideration when planning trips.
- Examine trail riders interests beyond riding to characterize their broader potential impact on tourism when on riding trips.
- Use the results to help focus facility assessment and improvements (e.g. should there be a focus on developing new facilities or on upgrading existing?).
- Determine minimal trail mileage preferred.

Survey Objectives (3)

- Examine the economic impact of trail riding trips
- Examine local opportunities for trail riding and other equestrian tourism.
- Identify the barriers to and types of assistance that might be needed to develop local public trails.

Using the Results

Data obtained in the survey can be used to

- Influence decisions regarding Legislation and policy
- Facilitate Trail and camp development
- Prioritize improvements at existing facilities
- Assist private enterprise development
- Encourage local tourism

Virginia Trail Riding Survey

2008 Equestrian Tourism - Assessing the Landscape

1. 2008 Virginia Trail Riding Survey

Welcome to the Virginia Trail Riding Survey!

Thank you for your willingness to participate in this study - it is being conducted by the Virginia Horse Council to gain information on the state of trail rides within the state of Virginia. We all know that the equine industry is a large economic for Trail riding and the travel associated with it is one facet of that industry.

Please help us understand the current state of trails in Virginia by telling us what is available in your home county assist us in growing equestrian tourism in an economically, socially and environmentally lasting way. We are asking this study being as honest as possible. Your responses will be kept completely confidential and reported in aggregate.

The information obtained from these questions will be used to gain a local and statewide understanding of the expansion of this exciting industry niche. Additionally, the information gathered in for the development of supporting programs.

AS A THANK YOU FOR PARTICIPATING IN THIS SURVEY, YOU WILL BE ENTERED INTO A DRAWING FOR A VIRGINIA TRAIL RIDING PASS. At the end of the survey, we ask for your contact information so that we can enter you into the drawing. Your contact information will be kept separate from your survey responses so that they remain anonymous.

At the conclusion of this study, the results will be displayed on the Virginia Horse Council's website. A summary of results will be shared at the Virginia Governor's Conference on Trails and Greenways in November.

In order to obtain the most accurate information possible, you will be able to fill out the survey as often as you like. This will demonstrate strong support for equestrian tourism and provide possible information on facilities and needs. The survey ends on Monday, September 22, 2008.

Thank you for your continued efforts in making Virginia a healthy place for horses and hounds.

Sally Aungler, Chair, Trails Committee
Virginia Horse Council

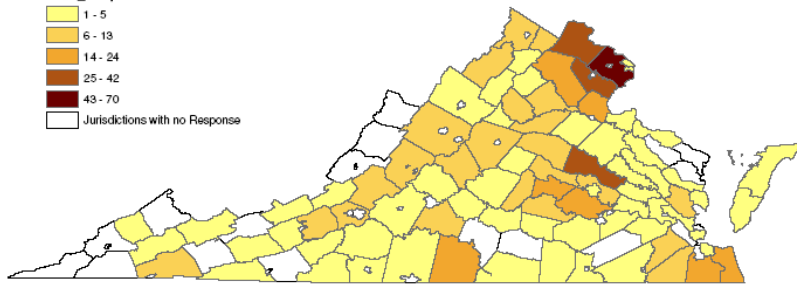
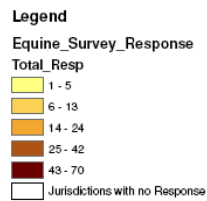
Carol Kline, Assistant Professor
Hospitality and Tourism Administration
North Carolina Central University

| | |
|--|-------------------------------------|
| Like being away from the city | Often |
| Want to see wildlife/nature | <input checked="" type="checkbox"/> |
| Enjoy learning about native flora | <input checked="" type="checkbox"/> |
| Go often | |
| Enjoy it | |
| Typical | |
| Been there before/good experience | |
| Recommended by someone | |
| Marketing/advertising that I saw | |
| Close to home | |
| Near a city/ city amenities | |
| Not near a city/ rural ambience | |
| Good value/ price | |
| Other | |
| If you checked other, please elaborate | |
| Visit via | |

Survey Responses by County

822 Received

2008 Equine Survey
Response by Jurisdiction

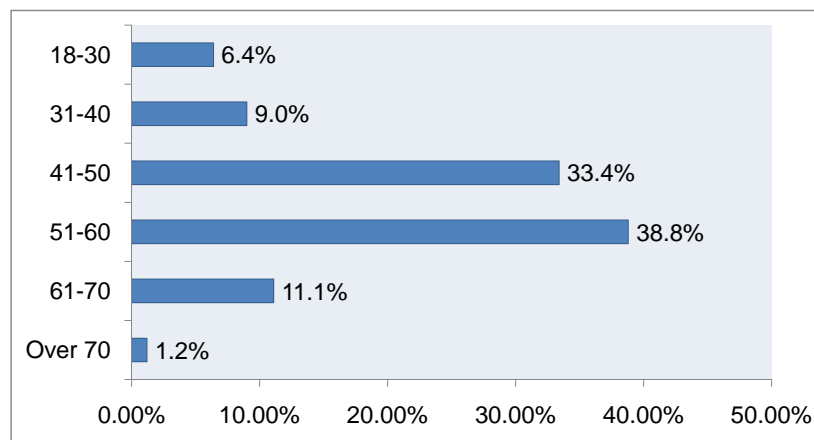


Virginia Trail Riding Survey

- 49 questions
- August 27 – Sept 22, 2008
- Distributed through list serves
- “Snowball effect”
- 822 responses

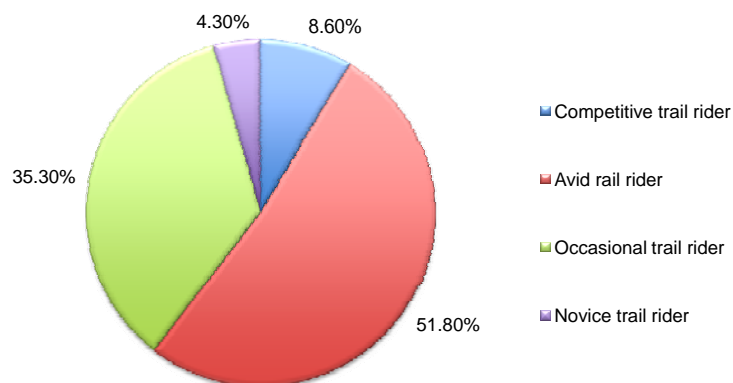


Age of Respondents



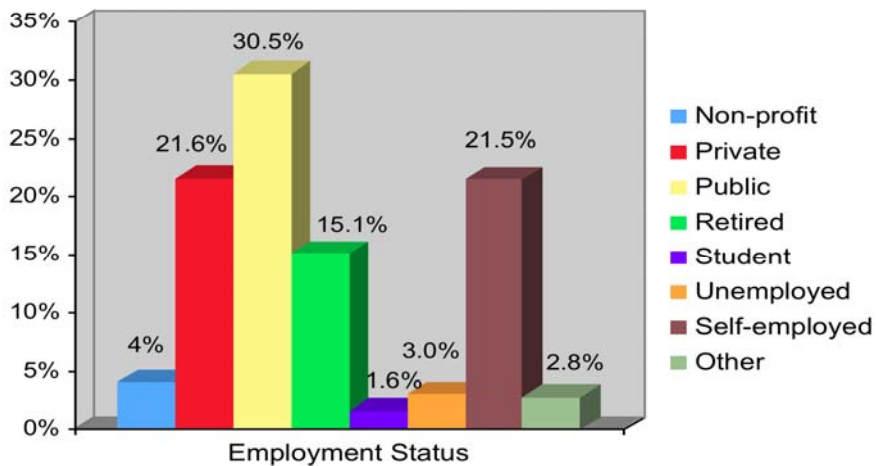
N=641

Trail Riding Frequency/Type

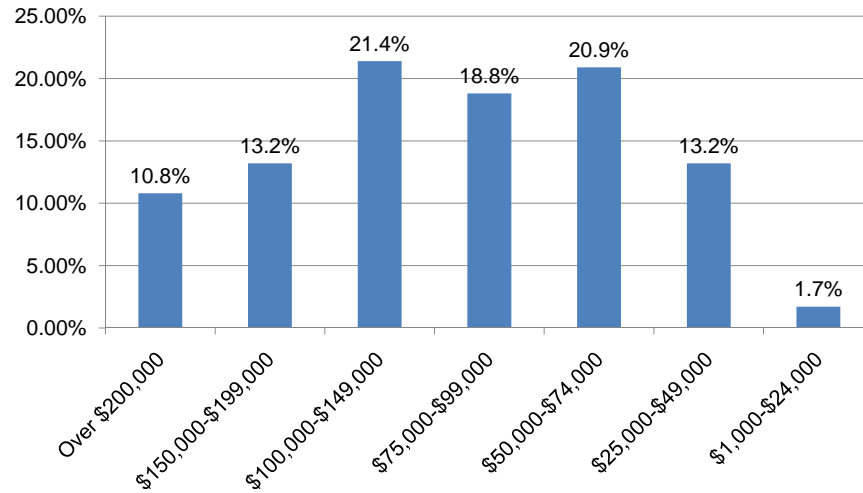


Employment Status

Employment Description (N=643)



Profile: Income



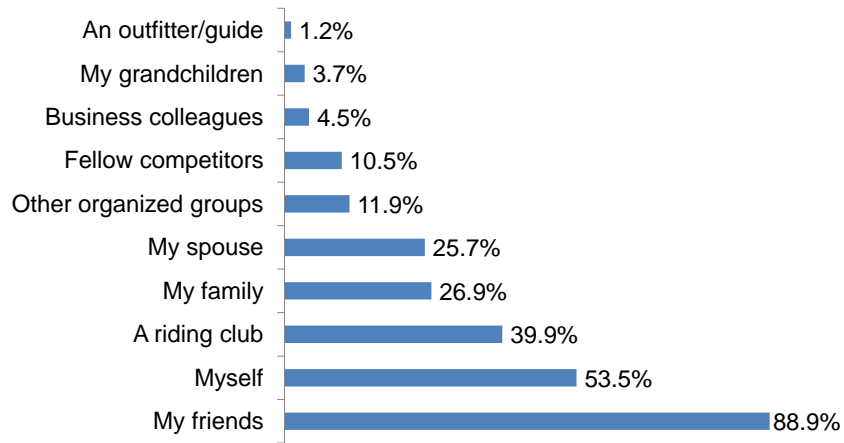
N=584

Participation in Horse-related Activities

| Category | Percentage |
|-----------------------------|------------|
| Trail riding (recreational) | 97.3% |
| Construction/maintenance | 26.5% |
| Trail riding competitions | 24.4% |
| Hunter/jumper | 20.7% |
| Dressage | 20.3% |
| Board horses | 18.7% |
| Western pleasure/events | 16.2% |
| Foxhunting | 16.0% |
| Three-day eventing | 9.9% |
| Own riding school | 4.6% |
| Rent hack horses | 1.0% |
| Cowboy-mounted shooting | 0.7% |
| Other * | 25.1% |

*Other included:
 4-H & Pony club
 Teaching
 Driving
 Breed shows
 Endurance riding
 Reining

Riding Companions



N=811

Approximately, # of miles ridden monthly and annually

| | <10 miles | 10-20 miles | 20-30 miles | 30-50 miles | >50 miles |
|----------------|-----------|-------------|-------------|-------------|-----------|
| Monthly | 9.6% | 18.1% | 24.3 | 21.9 | 26.0% |

| | <50 miles | 50-100 miles | 100-150 miles | 150-200 miles | 200-300 miles | 300-500 miles | >500 miles |
|-----------------|-----------|--------------|---------------|---------------|---------------|---------------|------------|
| Annually | 4.4% | 10.0% | 9.4% | 12.5% | 18.4% | 20.9% | 24.4% |

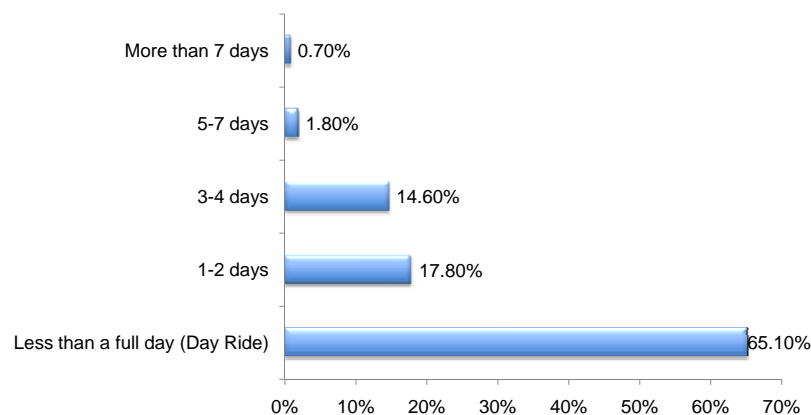
N=673

Primary Sources for Trip Planning Information (1= most frequently used)

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | Never | Count |
|------------------------|-------|-------|-------|-------|-------|------|------|------|--------|-------|
| Internet | 33.8% | 27.6% | 17.9% | 6.4% | 5.7% | 1.8% | 1.2% | 2.3% | 3.4% | 565 |
| Word of mouth | 70.2% | 20.6% | 5.9% | 0.9% | 0.8% | 0.6% | 0.0% | 0.6% | 0.3% | 646 |
| Magazines | 3.9% | 9.8% | 23.8% | 17.2% | 11.3% | 6.4% | 4.4% | 4.4% | 18.9% | 408 |
| Television | 0.9% | 1.7% | 4.6% | 7.4% | 7.2% | 6.9% | 7.4% | 8.6% | 55.3% | 349 |
| Travel books | 2.8% | 6.1% | 14.2% | 15.2% | 17.2% | 9.1% | 8.9% | 4.8% | 21.8% | 395 |
| Maps/atlas | 6.1% | 9.3% | 11.7% | 13.3% | 9.3% | 9.6% | 8.3% | 8.3% | 24.0% | 375 |
| Newsletters | 5.2% | 6.5% | 9.0% | 10.6% | 8.7% | 7.1% | 7.4% | 6.8% | 38.7% | 367 |
| Equestrian newsletters | 24.2% | 30.4% | 22.2% | 8.3% | 4.1% | 3.4% | 1.4% | 2.1% | 3.9% | 563 |
| Other | 32.7% | 7.3% | 1.8% | 5.5% | 3.6% | 0.0% | 1.8% | 1.8% | 45.50% | 55 |

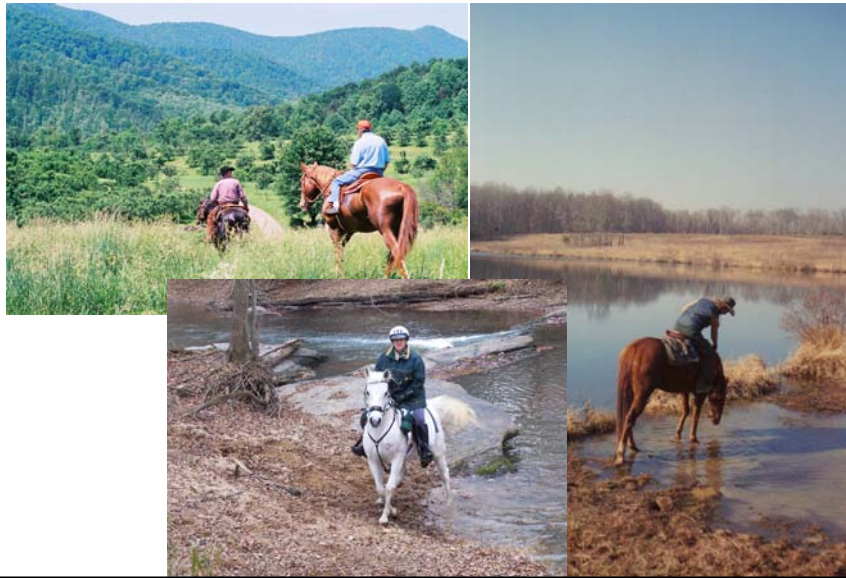
Other sources – primarily ride flyers

Duration of Typical Trip

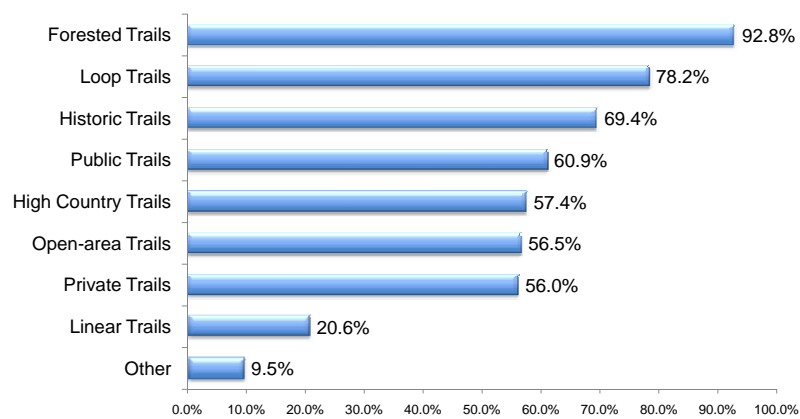


N=703

Trail Preferences



Trail Type Preferences



* Other: Beach trails, single use trails, carriage accessible

N=705

Trail Marking

Importance of having Trails Marked According to Difficulty Level

| | |
|--------------------|-------|
| Very Important | 32.7% |
| Somewhat Important | 49.9% |
| Not Important | 17.4% |

Importance of Marking Trails with Estimated Time to Ride

| | |
|--------------------|-------|
| Very Important | 49.8% |
| Somewhat Important | 38.7% |
| Not Important | 11.6% |

N=701

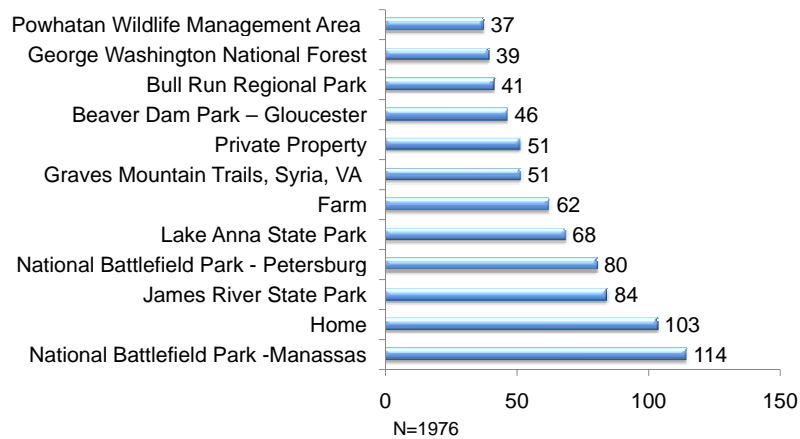
What is the MINIMAL length of trail that you desire?

| | <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% |

Ideal Length of Trails

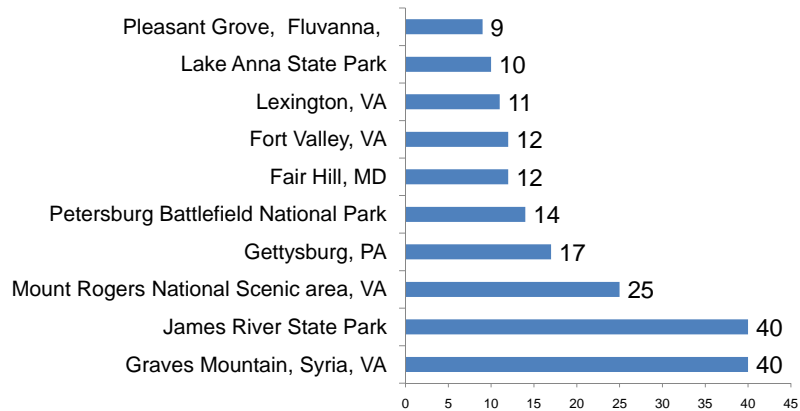
| | <5 miles | 5-10 miles | 10-15 miles | 15-20 miles | 20-30 miles | 30-50 miles | >50 miles |
|----------|-------------|---------------|----------------|----------------|----------------|----------------|--------------|
| Day | 5.3% | 35.7% | 35.8% | 18.3% | 4.6% | 0.4% | 0.0% |
| Multiday | 0.2% | 6.1% | 10.0% | 22.8% | 26.4% | 19.1% | 15.4% |

Most Frequent Riding Places Private and Public



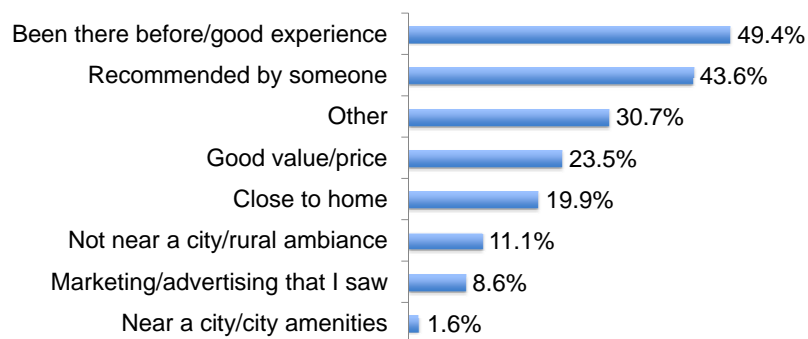
295 different places identified in responses

Last trail riding trip OUTSIDE your local area (50 mile radius)? Most frequent responses



178 different places identified

Last Trip - Reason for Choice



*Other – Organized ride or other horse event, access to beach

Important Trail Features

| Feature | Ranking |
|------------------------------------|---------|
| Water | 471 |
| Loop options | 314 |
| Bathroom | 305 |
| Adequate markings | 190 |
| Diverse/Various Trails | 146 |
| Available maps | 100 |
| Overall safety (horses, trailers) | 81 |
| Adequate footing for people/horses | 76 |
| Ample parking | 63 |
| Cleared trails | 56 |
| Attractive scenery | 55 |
| Long trails | 49 |
| Adequate parking for trailers | 39 |
| Limited vehicular/bike traffic | 30 |
| Shade | 30 |

660 people answered this question, offering 2351 responses that fell into 57 distinct categories. 27 of these categories had five or less "votes." Top responses are listed here.

Trail Concerns when Planning Trips

| | | | | |
|-----------|--------------------------------------|----------------------------|-----------------|----------------------------|
| N = 680 | Water access for horses on the trail | Quality of riding facility | Length of trail | Difficult trail topography |
| Often | 77.4% | 70.4% | 78.1% | 54.4% |
| Sometimes | 20.5% | 25.3% | 20.1% | 38.5% |
| Never | 2.1% | 4.2% | 1.8% | 7.1% |

| | | | | |
|-----------|-----------------------------|---------------------------|---------------------------|--------------|
| N = 680 | Distance between trailheads | Unexpected trail closures | Lack of effective signage | Lack of maps |
| Often | 45.4% | 53.0% | 65.6% | 63.4% |
| Sometimes | 46.5% | 38.0% | 32.1% | 32.5% |
| Never | 8.1% | 9.1% | 2.3% | 4.1% |

| | | | | |
|-----------|---------------------------|----------------------------------|--------------------------------|------------------------|
| N = 680 | Availability of restrooms | Personal safety in the community | Ability to call for assistance | Access to medical care |
| Often | 35.4% | 45.2% | 42.9% | 35.0% |
| Sometimes | 48.0% | 36.0% | 44.0% | 48.8% |
| Never | 16.6% | 18.8% | 13.2% | 16.2% |

Other concerns included

- Weather
- Trip expenses
- Ease of trailer access
- Inconsiderate users of other types
- Cell phone service
- Access to diesel fuel
- Road safety (truck/trailer performance)

Trail Concerns when Planning Trips (2)

| N = 680 | Quality of rental horses/equipment | Access to knowledgeable instructors/guides | Access to vets | Access to farrier |
|-----------|------------------------------------|--|----------------|-------------------|
| Often | 15.2% | 14.5% | 31.9% | 24.0% |
| Sometimes | 16.9% | 37.9% | 50.6% | 50.2% |
| Never | 67.9% | 47.6% | 17.5% | 25.8% |

| N = 680 | Finding a safe, clean, and comfortable place to stay | Finding a safe, clean, & comfortable place to board my horse | Safety of my personal vehicle/trailer | Being recognized as an outsider |
|-----------|--|--|---------------------------------------|---------------------------------|
| Often | 48.0% | 56.4% | 60.4% | 7.4% |
| Sometimes | 32.0% | 25.0% | 31.6% | 36.2% |
| Never | 20.0% | 18.6% | 8.0% | 56.4% |

| N = 680 | Getting lost | Other |
|-----------|--------------|-------|
| Often | 30.0% | 37.5% |
| Sometimes | 51.2% | 7.5% |
| Never | 18.8% | 55.0% |



Lodging Typically used on a Riding Trip

| Lodging | Ranking |
|-------------------------------------|----------------|
| At a Bed and Breakfast/Bed and Barn | 6.1% |
| At a hotel/motel | 9.7% |
| Camping without a trailer | 12.5% |
| Other | 19.7% |
| With friends/family | 22.3% |
| Camping with a trailer | 48.2% |
| I typically take day trips only | 74.0% |

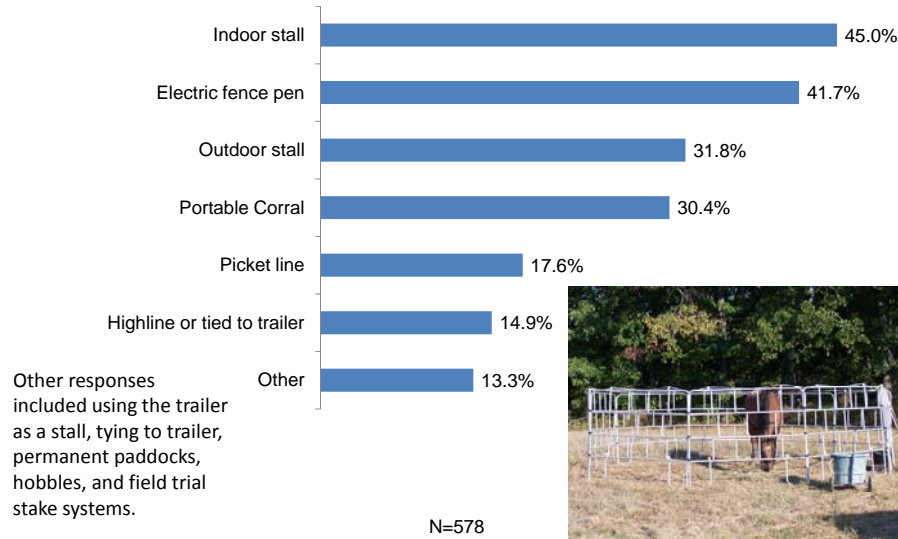
57.1% indicated in another question that their trailer does not have LQ. 26.8 % do have LQ.
Other – included RVs, Cabins, back of Pickup

Important Lodging/Camping Features

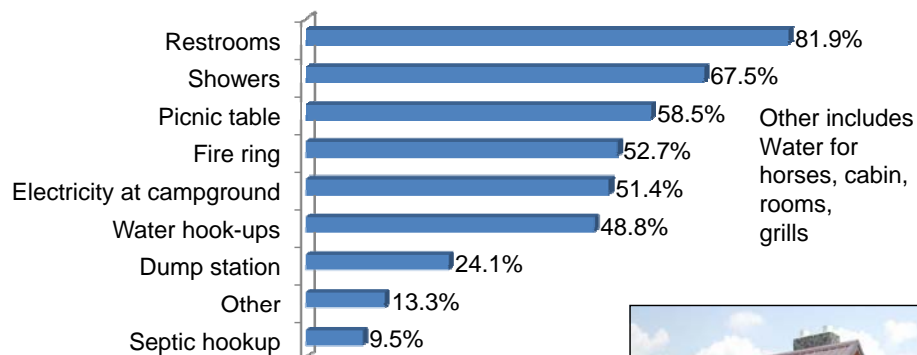
| Amenity | Rank |
|---|-------------|
| Water access | 261 |
| Stalls/paddocks/corrals for horses | 226 |
| Restrooms | 183 |
| Showers with hot water | 118 |
| Amenities Hook-ups | 98 |
| Safe lodging | 78 |
| Power/Electricity | 76 |
| Sanitary campsite/ lodgings/trails/stalls | 64 |
| Easy access to trails | 47 |
| Trees/Shade | 46 |
| Ample Parking | 44 |
| Dinning Hall/Restaurants/Food | 39 |
| Stables and Barns | 38 |
| Well-maintained trails | 38 |
| Campground | 36 |

585 people answered this question, offering 1951 responses that fell into 71 categories. 27 of these categories had 5 or less "votes." The top 15 responses to the question are listed.

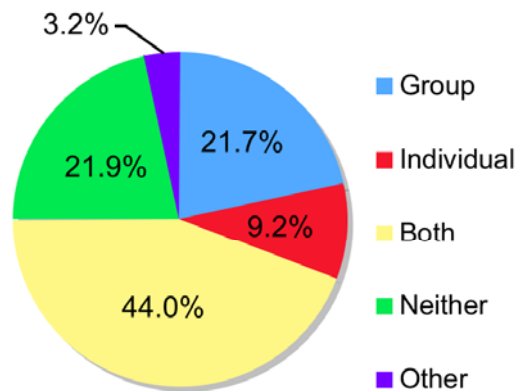
Horse Containment Methods



Facility: Amenities Utilized

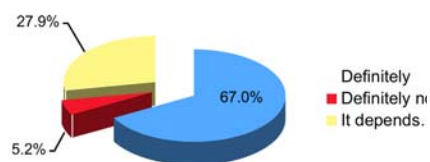


Do you typically use group or individual camping areas?

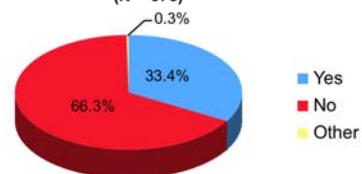


Potential Travel Habits

Package Consideration (N = 675)

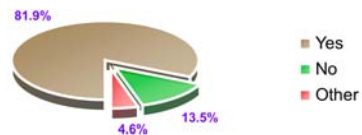


Progressive Trail Ride Participation (N = 675)



Potential for Progressive Trail Ride →

Many responded that it depended on costs, trail quality, use of own horses, and access to family friendly activities.

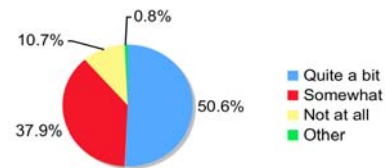


Last Non-local Trip Expenses (>50 miles)

| | < \$100 | N/A |
|-------------------|---------|-----|
| Lodging | 24% | 43% |
| Gas | 32% | 7% |
| Food | 50% | 10% |
| Registration Fees | 38% | 54% |

Gas Price Influence (N=652)

Has the price of gas
influenced decisions about
where to ride? →



Participants were asked what can be done to improve a visitor's equestrian experience

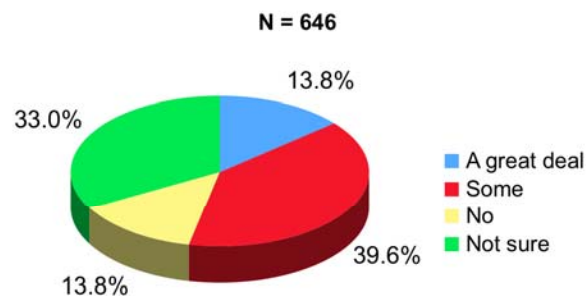
Advertisement/
Marketing/Promoting
was the #1
response)

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



***Do you currently have
equestrian tourists coming
to your county?***



Can tourism/ trail riding tourism can be a viable industry for your county?

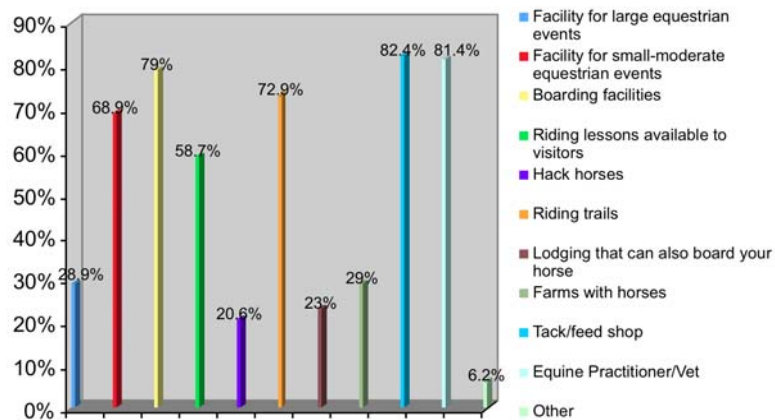
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|----------------|------|------|----|------|-------|------|------|-------|------|-------|
| Percent | 5.3% | 4.4% | 6% | 5.5% | 12.7% | 6.1% | 9.3% | 17.1% | 8.3% | 25.4% |
| Count | 34 | 28 | 38 | 35 | 81 | 39 | 59 | 109 | 53 | 162 |



(10 = extremely viable)

Equestrian Tourism Assets Found in the Counties

N= 630



Top 3 Perceived Barriers to Developing Tourism at the County Level

| | 1 st | 2 nd | 3 rd | Rating Avg. | Count |
|---------------------------------|-----------------|-----------------|-----------------|-------------|-------|
| Lack of funding for development | 44.5% | 31% | 24.5% | 1.80 | 355 |
| Lack of funding for marketing | 7.6% | 45.7% | 46.7% | 2.39 | 105 |
| Lack of support from officials | 35.3% | 38.7% | 26.1% | 1.91 | 357 |
| Lack of education | 20.3% | 37.3% | 42.4% | 2.22 | 59 |
| Lack of undeveloped land | 52.5% | 22.3% | 25.2% | 1.73 | 238 |
| Low quality trails | 27.7% | 41% | 31.4% | 2.04 | 188 |
| Lack of organization | 33.3% | 31.2% | 35.5% | 2.02 | 282 |
| Liability issues | 23% | 27.9% | 49.1% | 2.26 | 165 |
| Other | 43.8% | 18.8% | 37.5% | 1.94 | 16 |

Training or Technical Assistance Needed

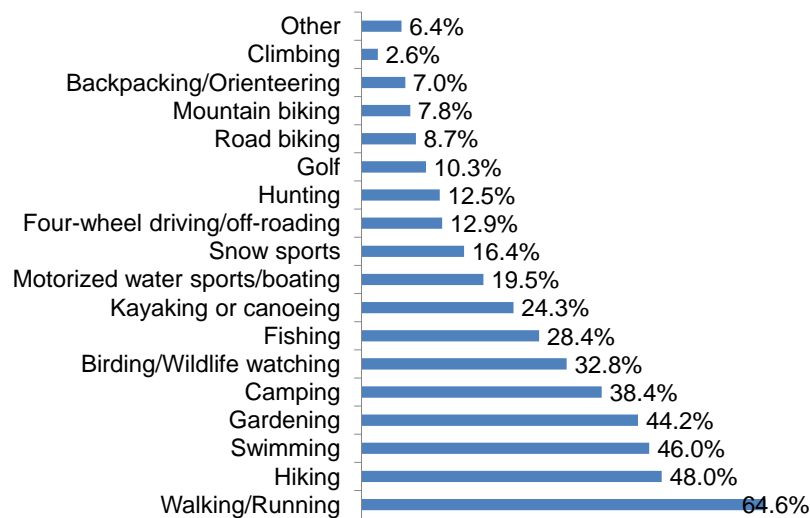
Participants were asked what kinds of training or technical assistance is needed to further equestrian tourism in their counties.

- The primary response was education of public officials on the benefits of equestrian tourism.
- Other responses included
 - Advertisement/ Marketing;
 - Economic importance of Equestrian Tourism;
 - Equestrian tourism director;
 - Trail development;
 - Political organization assistance;
 - and assistance from local county officials among others.

What does the Equine Tourist want?

- Access to horse activities
- Areas of natural beauty
- Accommodations near trails/ horse activities
- Variety of Amenities – Primitive camping to Luxury
- Complimentary activities (outdoor, culinary, educational)

Riders Indicate they Participate in other Recreational Activities



Get Involved!

Volunteer to help with Trail Development and Maintenance Projects



Questions?