



Horses and Dollars

Carol Kline

NC Central University

Trails, commerce, and horses are all tied together.

- American Trails

-
-
-
-
- An introduction to equine tourism
 - An estimate of its economic impact
 - A note on positive spin-off effects
 - Some ideas on how businesses and communities can get started

.....Baseline stats on Virginia trail riding and trail riding tourism

Horses are Big Business

- \$102 B industry (\$39 B direct)
- Involvement by 4.6 M people (1 of 63 Americans)
- Does not count spectators
- Middle-class activity
- 70% horse owners live in small communities

– The Economic Impact of the US Horse Industry,
American Horse Council, 2005



Horses are Big Business

	No. Horses	GDP Contribute	Direct Employment
Racing	844,000+	\$10.6 B	146,625
Showing	2.7 M+	\$10.8 B	99,051
Recreation	3.9 M	\$11.8 B	128,324
Other	1.7 M	\$5.5 B	79,612
Total	9.2 M	\$38.8 B	435,612

Tourism is Big Business

\$740 billion national revenues

\$16.4 billion to Virginia

Ranked 10th in nation

- Travel and Tourism Works for America,
Travel Industry Association, 2007



Tourism Impacts Communities

↑ Positive Impacts of Tourism

↓ Negative Impacts of Tourism

The Power of Travel

How Travel Dollars Support America



Tourism Niches and Spin-offs

- Not your 1970's family beach vacation
- Ecotourism, Cultural and Heritage Tourism, Agritourism, Adventure Tourism
- Paddling, Wildlife, Birding, Culinary, Theater, Spiritual, Wellness, Fly-Fishing, Marathons, Family Reunions, Homecomings, Ethnic, Horticulture, Historic re-enactments, Sailing, Diving, Sports, Music, Architecture, Volunteer ...



Development Strategy

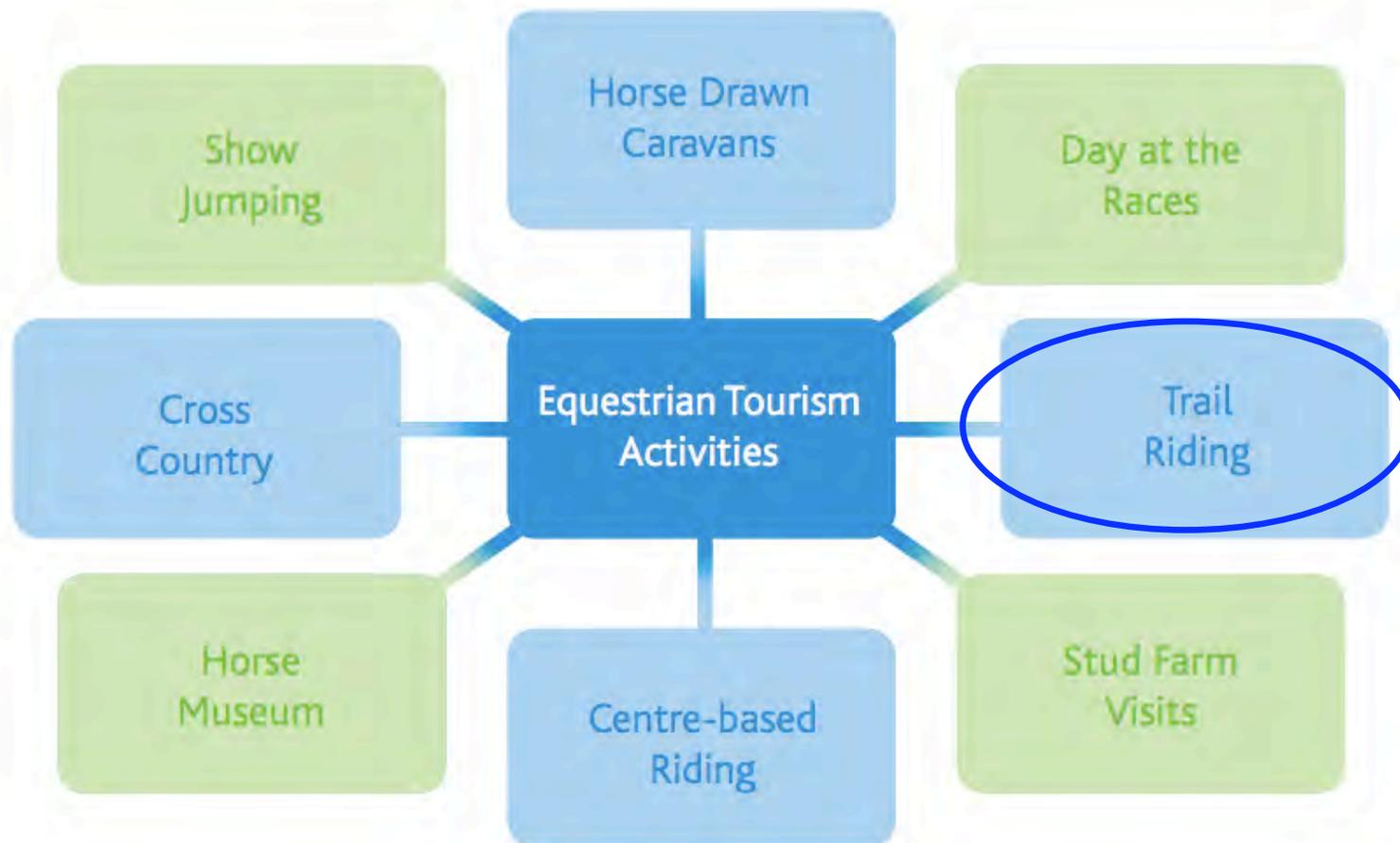
Niche + Niche + Niche

Equine Tourism

- Guided horse treks, tours and trail rides
- Fixed-site farmstays, guest and working ranches
- Riding clinics and camps
- Competitions
- Horse-related conferences & meetings
- Horse-drawn carriages
- Others?

Equine “Products”

- Contact with horses
- Scenery/ place
- Exercise
- Learning/ education
- Sharpening skills
- Competition
- Bonding with family/ friends
- Nostalgia
- Entertainment/ Fun
- Self-esteem/ confidence
- Spiritual connection
- Escape/ rejuvenation
- Novelty

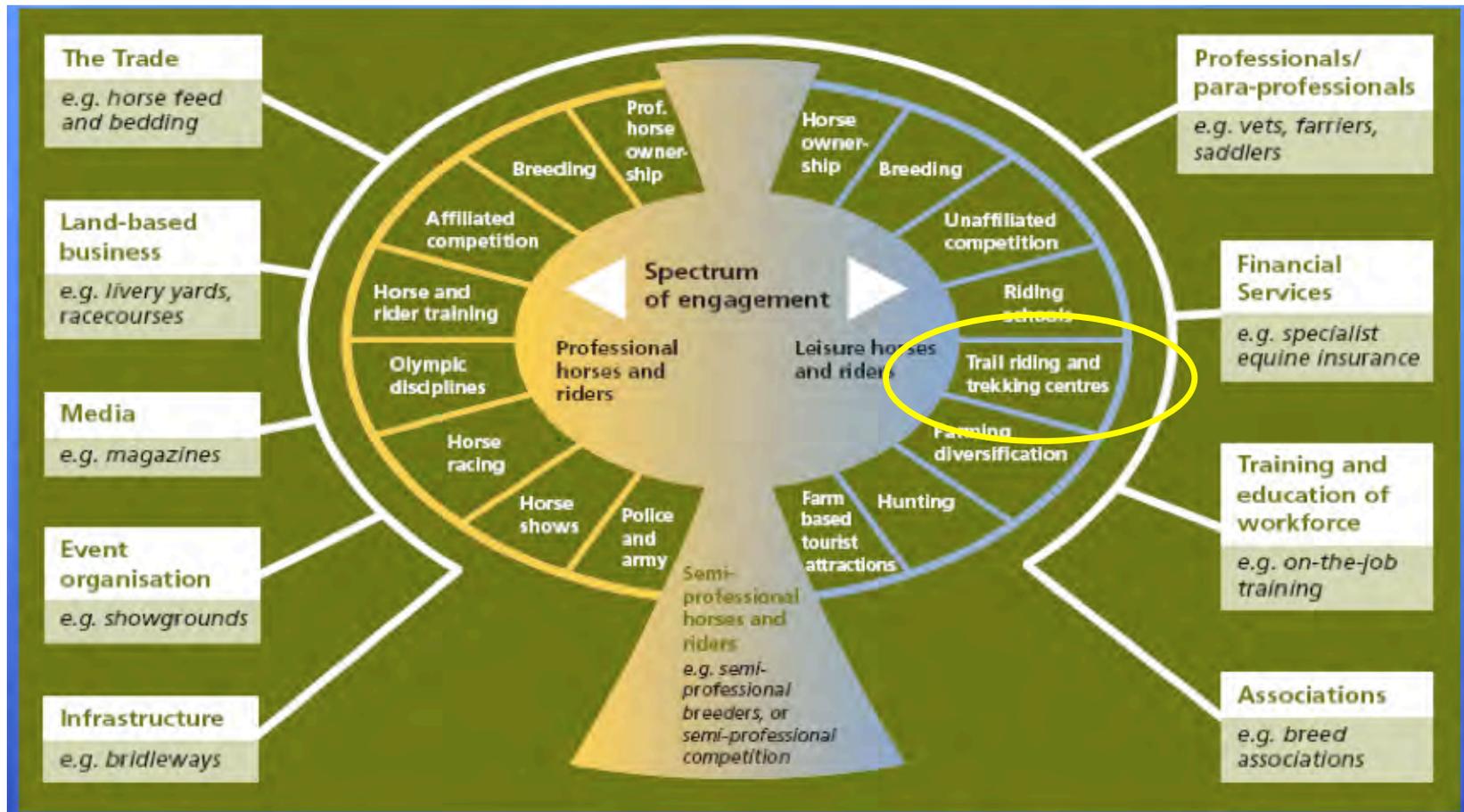


Equine Tourism

- Tied strongly to culture
- Tied strongly to land
- Experiential
- Relationship between horse and person in the context of land and culture



Equine Tourism system



-Claire Williams, ED, BETA

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 insight 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 and assist us in growing equestrian tourism in an economically, socially and environmentally lasting way. We are asking you to assist 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 activity and the issues surrounding the expansion of this activity for the development of supporting programs. **21. We'd like to know about activities you like to do on your trips apart from riding. Please check the most appropriate sentence. "When I take an riding trip I..."**

AS A THANK YOU FOR PARTICIPATING IN THIS SURVEY, we will contact you separately from your survey responses so that they can be used for future research.

At the conclusion of this study, the results will be displayed and the results will be shared at the Virginia Governor's Conference.

In order to obtain the most accurate information possible to fill out the survey. This will demonstrate the most possible information on facilities and needs. The survey is confidential.

Thank you for your continued efforts in making Virginia a better place to visit.

Sally Aungier, Chair, Trails Committee
Virginia Horse Council

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

	Often
Like being away from the city	<input type="radio"/>
Want to see wildlife/birds	<input type="radio"/>
Enjoy learning about native flora	<input type="radio"/>
Go fishing	<input type="radio"/>
Enjoy meeting and talking to the locals	<input type="radio"/>
Typically pack my own food	<input type="radio"/>
Typically bring all of my camping supplies, fuel, etc.	<input type="radio"/>
Seek out well-known chain restaurants	<input type="radio"/>
Experience local cafes and restaurants	<input type="radio"/>
Try regional foods	<input type="radio"/>
Learn about local history	<input type="radio"/>
Get the feel of local culture	<input type="radio"/>
Look for handmade arts and crafts to buy	<input type="radio"/>
Attend community events	<input type="radio"/>
Enjoy hearing local music	<input type="radio"/>
Visit farms	<input type="radio"/>
Visit farmer's markets	<input type="radio"/>
Visit vineyards/wineries	<input type="radio"/>

29. Why did you choose this location? Please check all that apply.

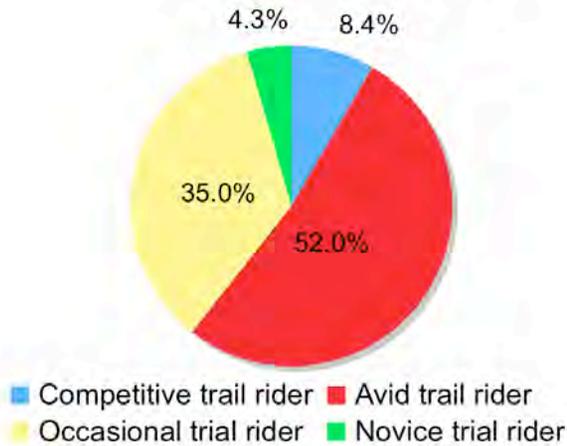
- Been there before/good experience
- Recommended by someone
- Marketing/advertising that I saw
- Close to home
- Near a city/ city amenities
- Not near a city/ rural ambiance
- Good value/ price
- Other

If you checked other, please elaborate

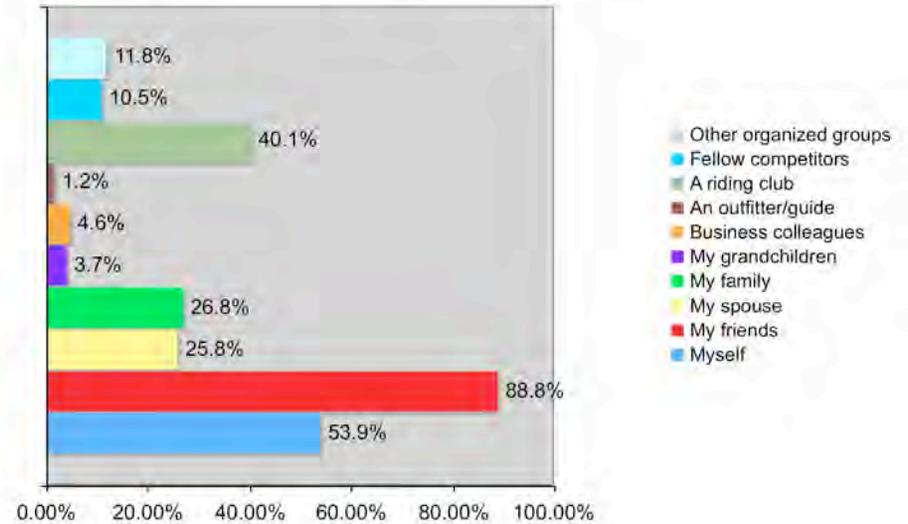
Virginia Trail Riding Survey

- 49 questions
- August 27 – Sept 22, 2008
- Distributed through listservs
- “Snowball effect”
- 820+ responses
- 88% female

Self Description (N = 806)

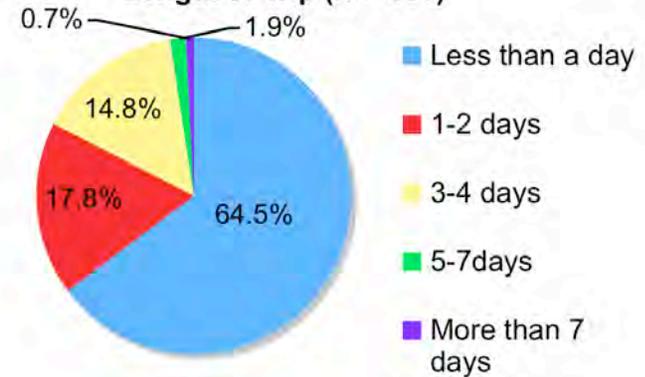


Company Riders (N = 811)

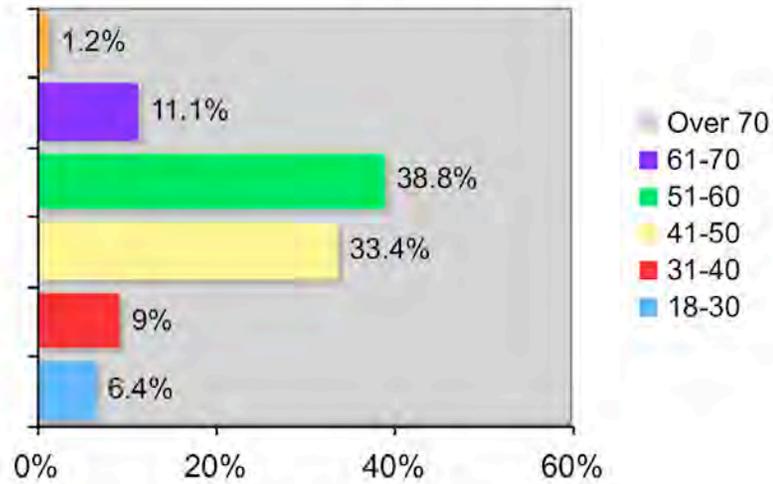


Category	Percentage
Trail riding (recreational)	97.3%
Trail riding competitions	24.4%
Hunter/jumper	20.7%
Western pleasure/events	16.2%
Dressage	20.3%
Three-day eventing	9.9%
Foxhunting	16%
Cowboy-mounted shooting	0.7%
Own riding school	4.6%
Rent hack horses	1.0%
Board horses	18.7%
Construction/maintenance	26.5%
Other*	25.1%

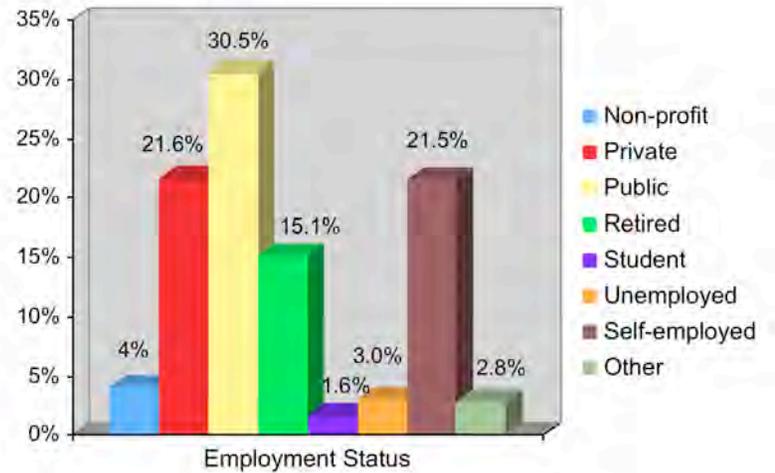
Length of Trip (N = 698)



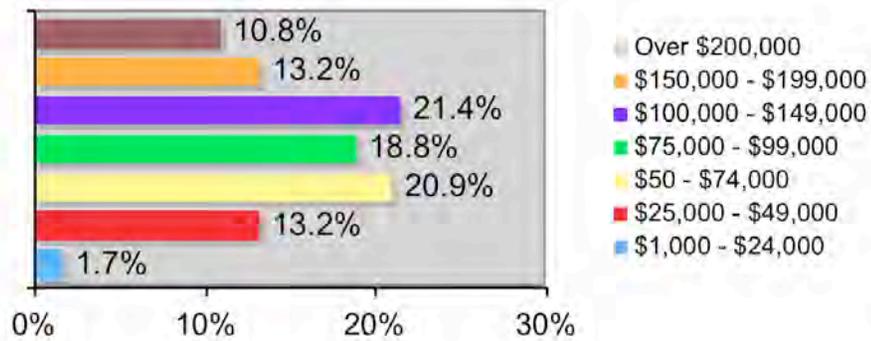
Age (N=641)



Employment Description (N=643)



Income Information (N=584)



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%

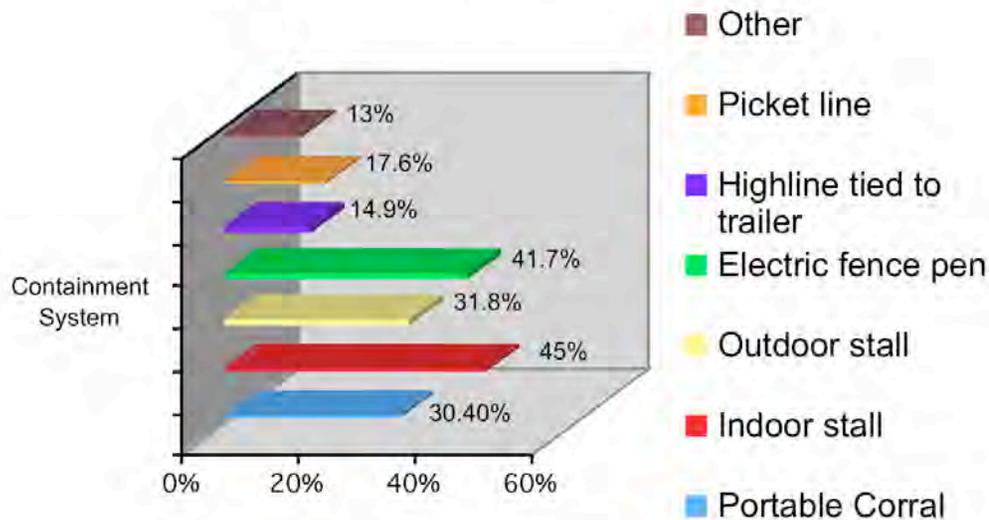
Approximately, how many miles do you ride monthly and/or annually?

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

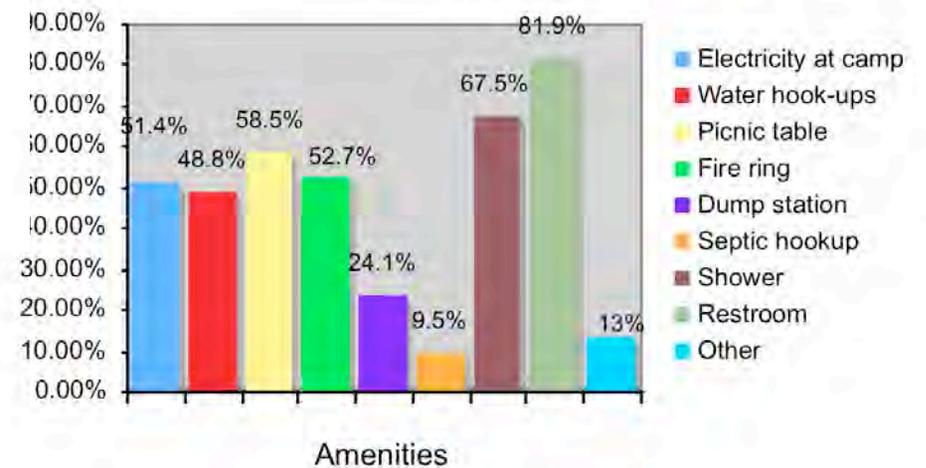
	<50 miles	50-100 miles	100-150 miles	150-200 miles	200-300 miles	300-500 miles	>500 miles
Annually	4.4%	10.0%	9.4%	12.5%	18.4%	20.9%	24.4%

Travel Habits

Containment System Use (N = 578)

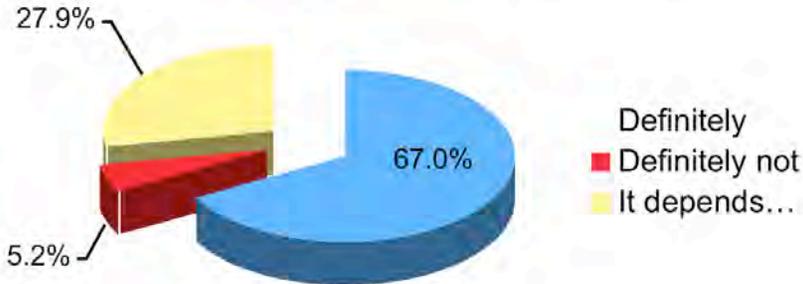


Amenities Use (N = 547)

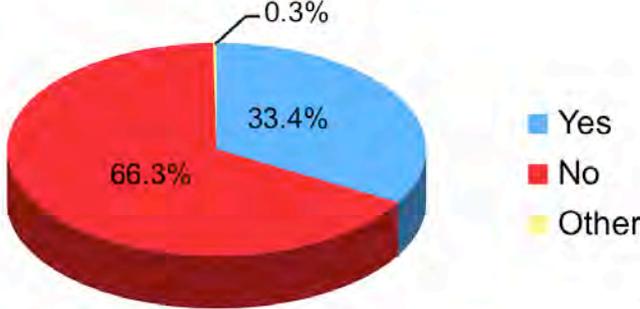


Potential Travel Habits

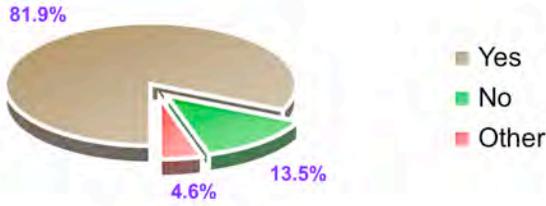
Package Consideration (N = 675)



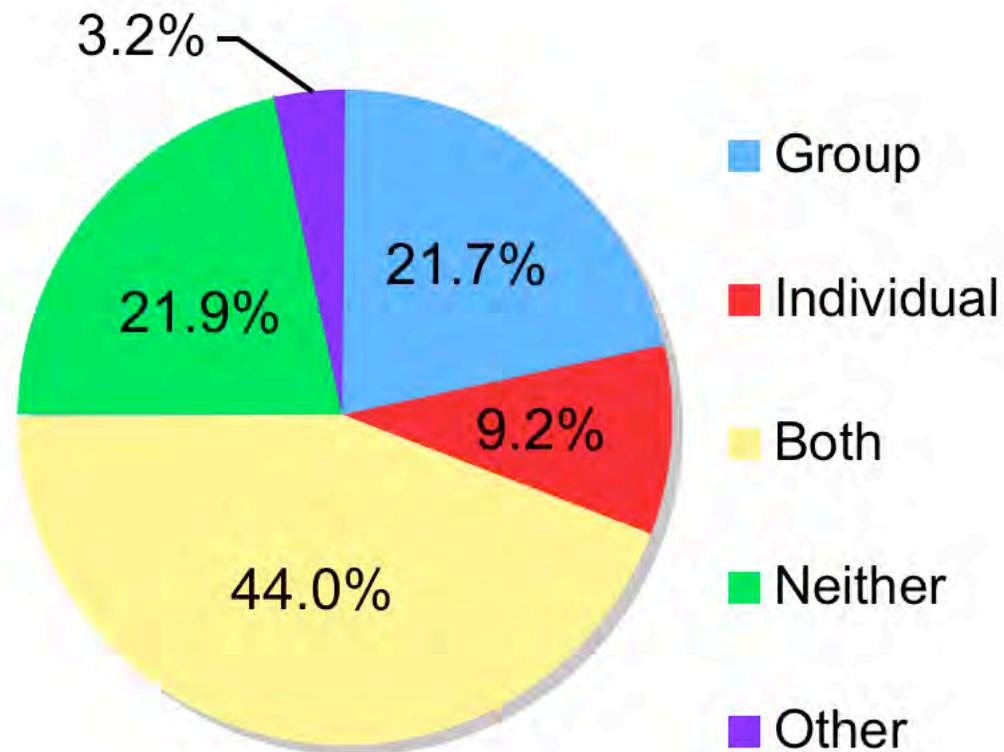
Progressive Trail Ride Participation (N = 675)



Potential for PTR →



Do you typically use group or individual camping areas?



Last Trip >50 miles

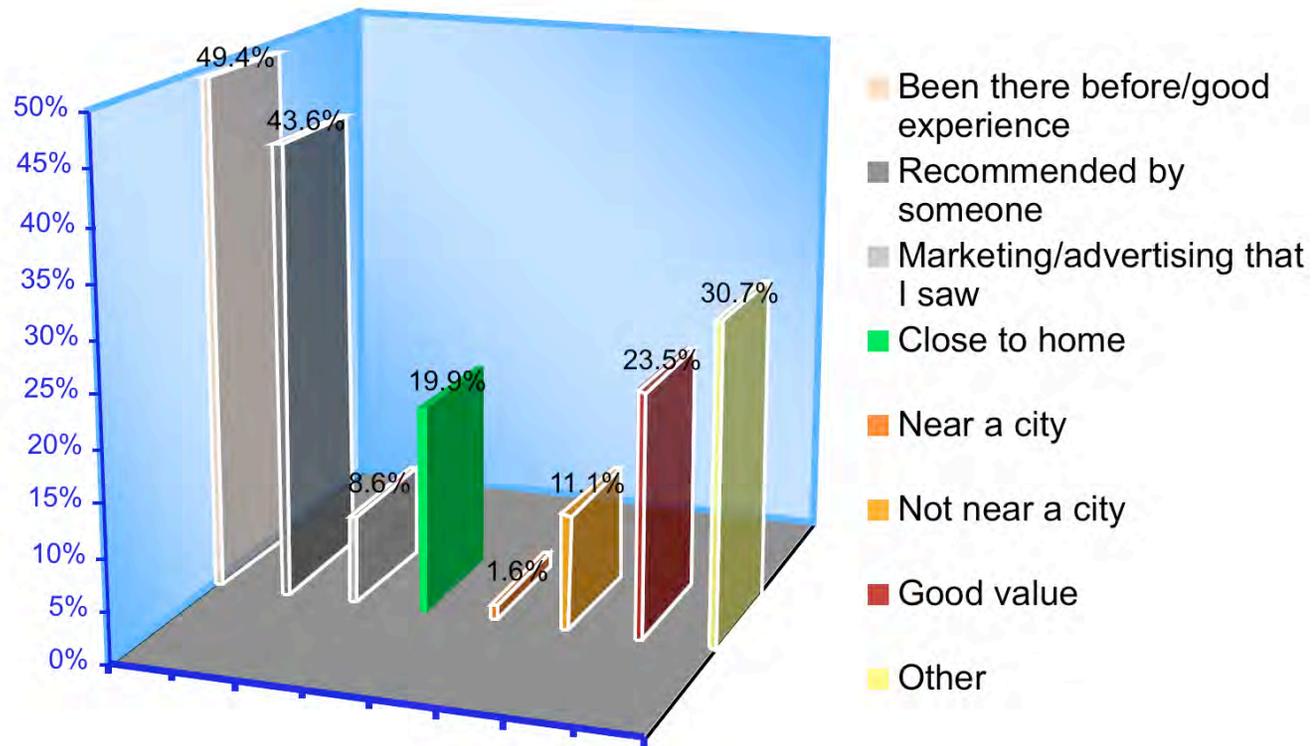
- Eastern Shore of Virginia
- Fair Hill, Maryland
- Fort Valley, Virginia
- Gettysburg, Pennsylvania
- Graves Mountain, Virginia
- Iron Mountain, Virginia

Last Trip >50 miles, con't

- James River State Park, Virginia
- Lake Anna State Park, Virginia
- Mount Rogers
- Petersburg, Pennsylvania

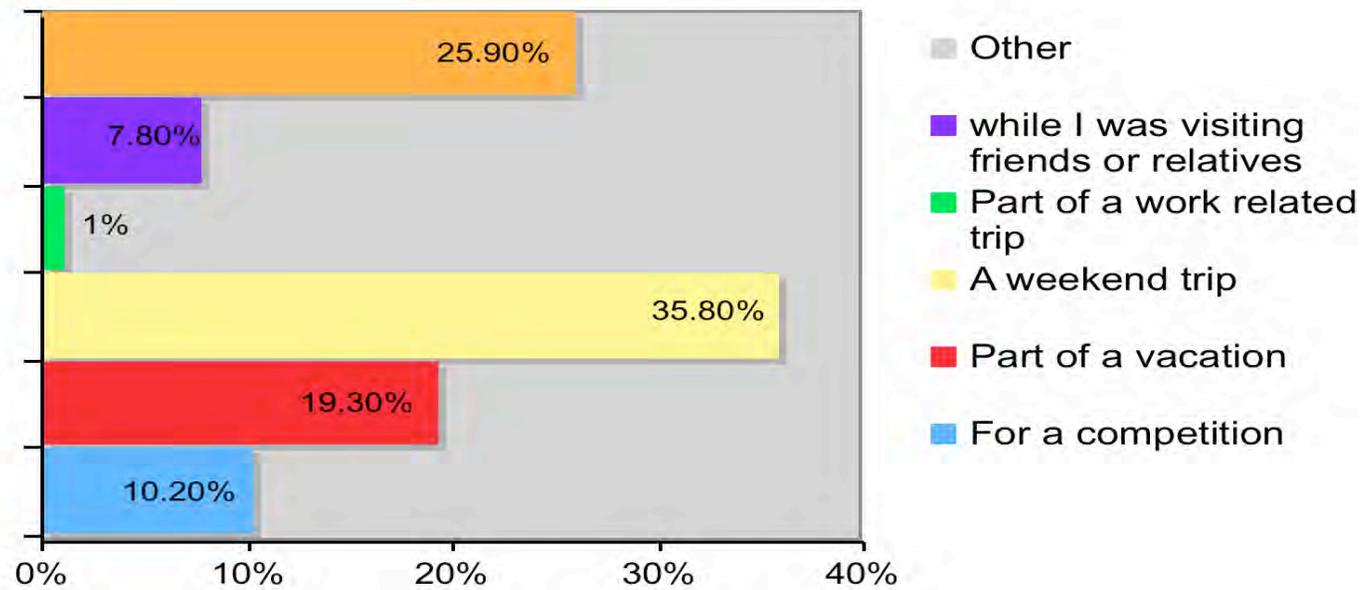
Last Trip

Choice of Location (N = 557)



Last Trip

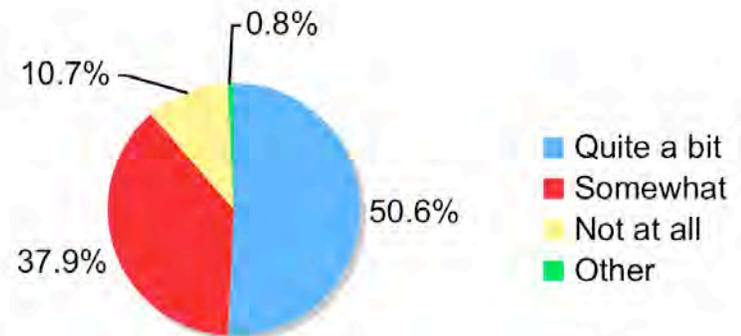
Last Trip (N = 606)



Non-local Trip Costs

	< \$100	N/A
Lodging	24%	43%
Gas	32%	7%
Food	50%	10%

Gas Price Influence (N=652)



Trail Concerns

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%

Trail Concerns, con't

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%

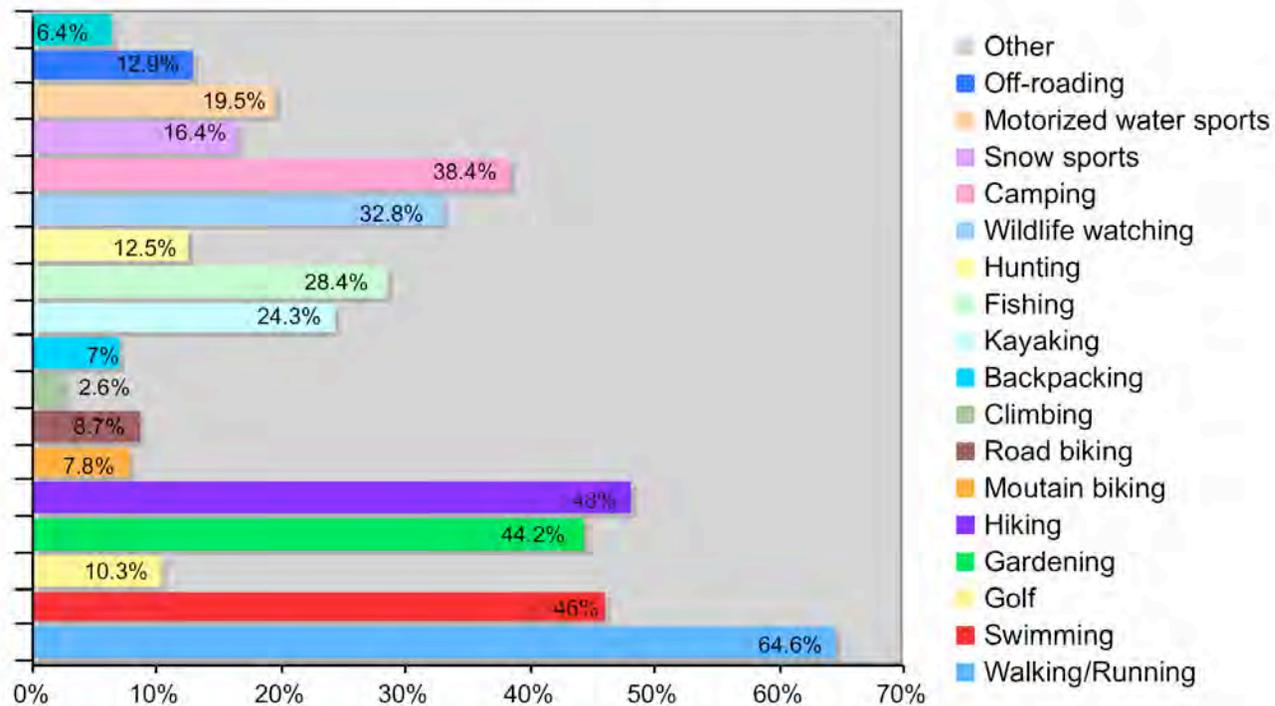
Sources for Planning - ranking

- Word of Mouth - 60% listed as top source
- Internet – 21% listed as top source
- Equestrian Newsletters – 16% listed as top source
- Same three for second source
- Magazines were introduced in third most often used source

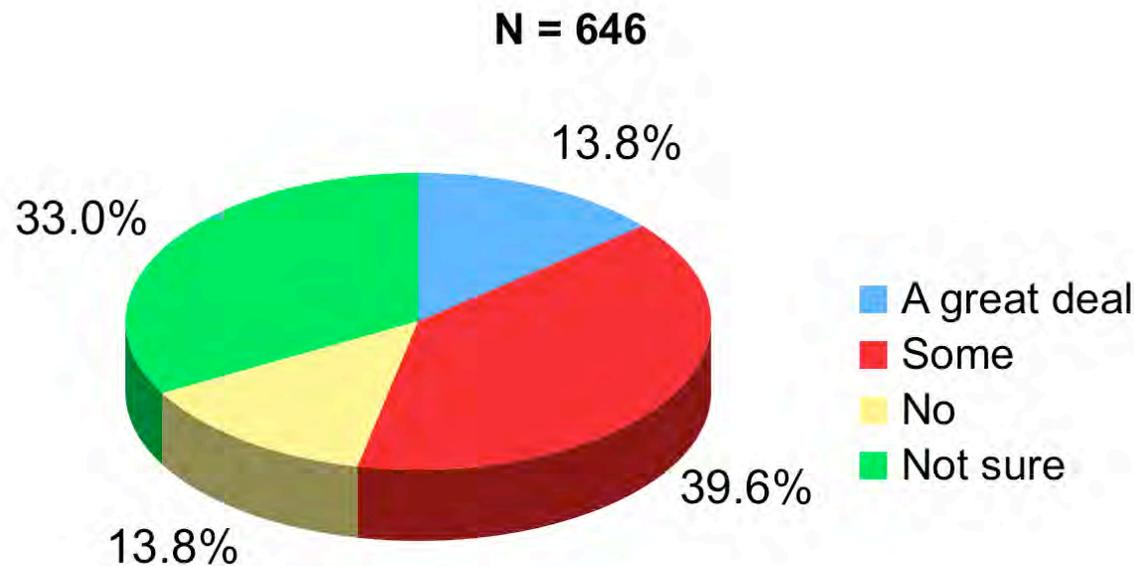
Like being away from the city	90%
Want to see wildlife/birds	85%
Typically pack my own	60%
Typically bring all of my camping supplies, fuel, etc.	57%
Enjoy learning about native flora	52%
Enjoy meeting and talking to the locals	50%
Learn about local history	48%
Get the feel of local culture	41%
Experience local cafes and restaurants	40%
Try regional foods	37%
Look for handmade arts and crafts to buy	34%
Enjoy hearing local music	33%
Visit farmer's markets	32%
Visit vineyards/wineries	24%
Visit farms	22%

Other Activities in General

Participation in Outdoor Activities (N = 658)



Do you currently have equestrian tourists coming to your county?

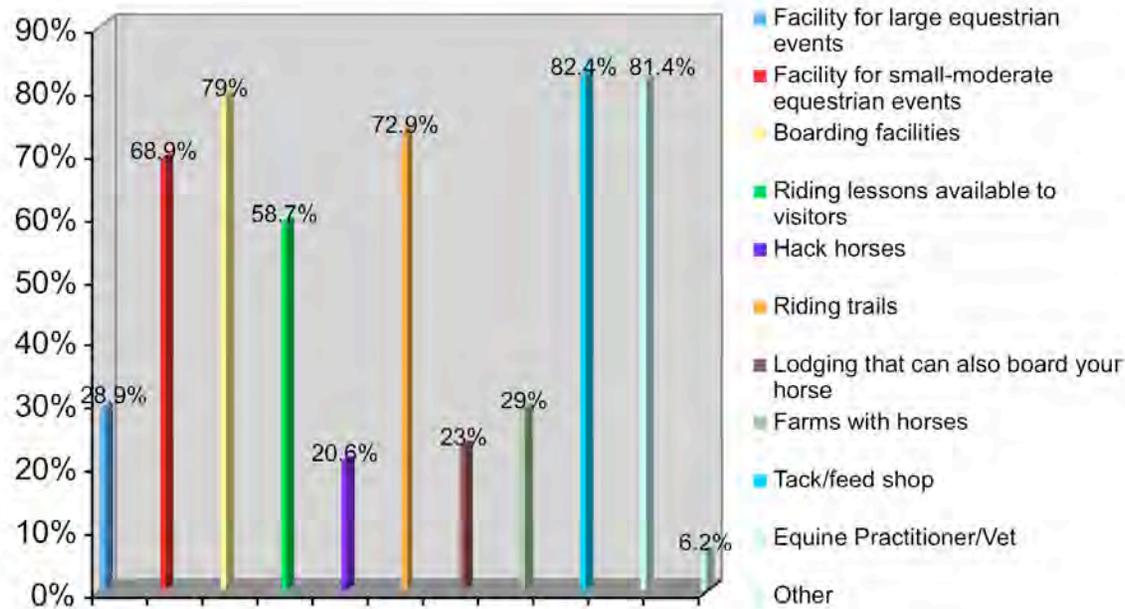


Is it viable for your county?

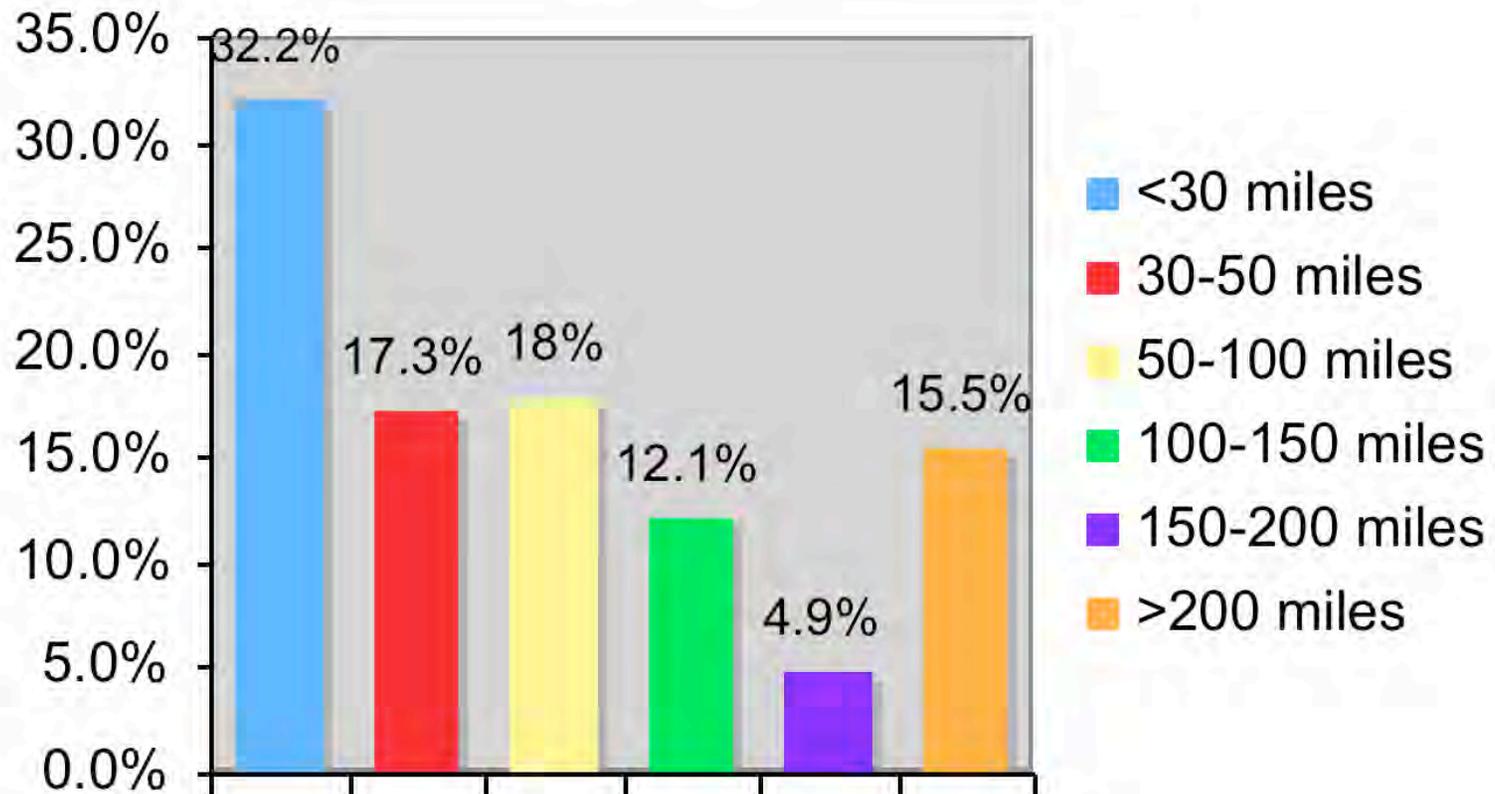
	1 - 4	5	6	7	8	9	10
Percent	12%	12.7%	6.1%	9.3%	17.1%	8.3%	25.4%
Count		81	39	59	109	53	162

Equestrian Tourism Assets

N= 630



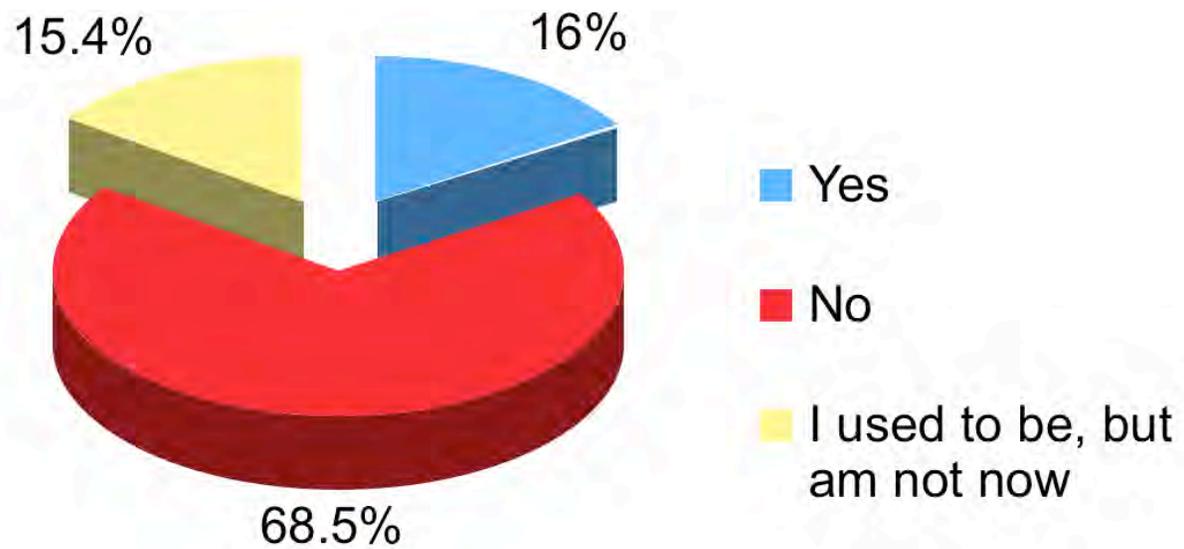
Estimated length of riding trails (N=588)



Perceived Barriers

	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

Member of Virginia Horse Council (N=642)



...equestrian tourism...



Carol Kline

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Horses and Dollars, Part Two

Carol Kline

NC Central University

Equine Tourism is Cutting Edge

*(Even though it has been around
since beginning of time)*

Analyze General Societal Trends



Analyze General Tourism Trends



Estimate Potential Equine Tourism Trends



Gather Virginia Market Data



Get Started/ Plug Into Tourism System

General Societal Trends

- Fuel prices
- Demographic shifts/ Population/ Sprawl
- Technology ever increasing
- Globalization - world is smaller and accessible
- Greening of businesses and homes
- Telecommuting/flexible work options
- Entrepreneurship

General Societal Trends

- Focus on local activism
- Healthy communities
- Natural and organic foods
- Focus on *Lifestyles*

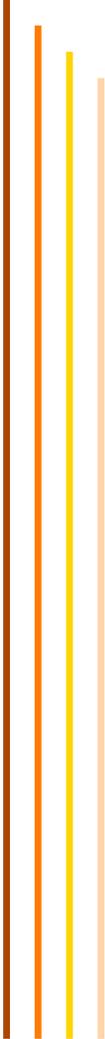
General Tourism Trends

- International Visitors
- Security when traveling
- Use of Internet for looking and booking
- Business + Family travel
- Group Travel is becoming hipper
- Tailored experiences
- Rural Tourism Trails
- Niche/ Themed packages

General Tourism Trends

- Connecting with people & lifestyles
- Demanding quality active and interactive experiences
- Expansion of niches
 - Voluntourism
 - Wellness/ retreat tourism
 - Spiritual tourism

What do we want to know?

- 
- Visitor Profile
 - Trip Characteristics
 - Decision-making behavior
 - Sources of Information
 - Expenditures
 - Desired Product* Qualities

Academic Literature

Claudia Ollenburg, *Worldwide Structure of the Equestrian Tourism Sector*, Journal of Ecotourism, Vol 4, No 1, 2005

- Core, peripheral, minor
- *“Horse treks and trail rides are the archetypal form of horse tourism”*
- Accommodate range of skill levels
- Creativity/ variety in combining with the other tourism components



Associations, NGOs, Gov't

- American Horse Council
- Backcountry Horsemen of America
- National Survey on Recreation and the Environment
- Canadian Tourism Commission



U. S. Forest Service, Region 8

Percent (%) and number (#) of people age 16 and older participating in outdoor recreation by age group

Recreation & Tourism Statistics Update
 April, 2006

Participation in Outdoor Recreation Activities by People Living in Region 8¹

(Includes Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, & Virginia)

Nature-Based Land Activities: TOTAL POPULATION

	Age 16-34 %	Age 16-34 #	Age 35-54 %	Age 35-54 #	Age 55+ %	Age 55+ #	All Ages %	All Ages #
Visit a wilderness or primitive area	36.5	9,389,008	33.8	9,340,614	22.8	4,892,285	31.6	23,621,907
Day hiking	31.3	8,061,671	32.3	8,928,726	21.3	4,579,242	28.8	21,569,639
Visit a farm or agricultural setting	26.7	6,858,240	30.2	8,341,357	22.9	4,916,217	26.9	20,115,814
Developed camping	26.5	6,809,425	26.1	7,211,731	15.1	3,240,304	23.1	17,261,460
Drive off-road	27.3	7,026,055	18.0	4,981,211	10.3	2,208,111	19.0	14,215,377
Mountain biking	24.1	6,192,625	18.2	5,030,332	7.1	1,521,701	17.0	12,744,658
Primitive camping	19.5	5,011,264	14.3	3,962,491	6.8	1,466,454	14.0	10,440,209
Hunting (any type)	16.7	4,303,538	12.8	3,547,513	8.7	1,870,730	13.0	9,720,342
Big game hunting	12.5	3,224,591	9.2	2,539,488	6.9	1,482,763	9.7	7,246,079
Small game hunting	11.7	2,999,852	8.7	2,415,741	5.7	1,217,239	8.9	6,632,009
Horseback riding on trails	12.0	3,084,606	9.1	2,526,323	3.9	830,050	8.6	6,440,979
Backpacking	11.7	3,013,376	8.5	2,359,028	3.5	756,068	8.2	6,128,472
Mountain climbing	6.9	1,769,731	5.1	1,395,811	3.0	640,780	5.0	3,744,162
Rock climbing	6.0	1,543,969	4.5	1,242,601	1.6	341,635	4.1	3,069,574
Migratory bird hunting	4.3	1,111,119	3.0	822,463	1.9	406,433	3.1	2,329,202
Orienteering	2.8	727,347	1.6	430,147	1.0	223,113	1.7	1,260,927

- 2000-2004 National Survey on Recreation and the Environment. USDA Forest Service. Southern Research Station. Athens, Georgia

Canadian Tourism Commission

- US Activity Profile: Horseback Riding while on Trips

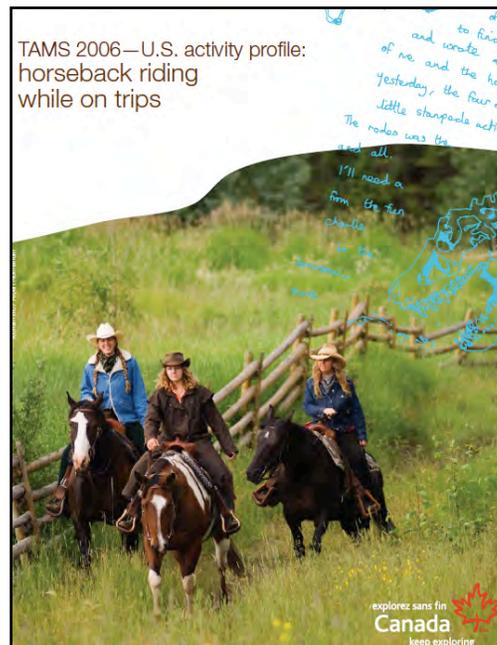


Fig. 1 Incidence of Horseback Riding While on Trips¹

	Number of Horseback Riders ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	10,606,278	2,690,739	170,610,241	222,846,268
Horseback Riding (All Activities)	10,606,278	24.7%	6.2%	4.7%
Horseback riding same-day excursion	10,166,431	22.5%	6.0%	4.6%
Horseback riding with an overnight stop	945,969	63.4%	0.6%	0.4%
Participated in both activities	606,112	48.3%	0.4%	0.3%

1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.

Horseback Riding on Trips

- Estimated 275,000 riders in Virginia (6%)
- Average age 40 yrs
- Most married (72%) w/o children in HH (60%)
- College educated (66%)
- Financially solvent (ave. HH income \$90,000)
- Planning with Internet (87%), previous experience (60%), word of mouth (55%)

- *Canadian Tourism Commission*

Fig.13 Benefits Sought While on Vacation (Percent Rating Each Benefit as "Highly Important")



Fig. 14 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")

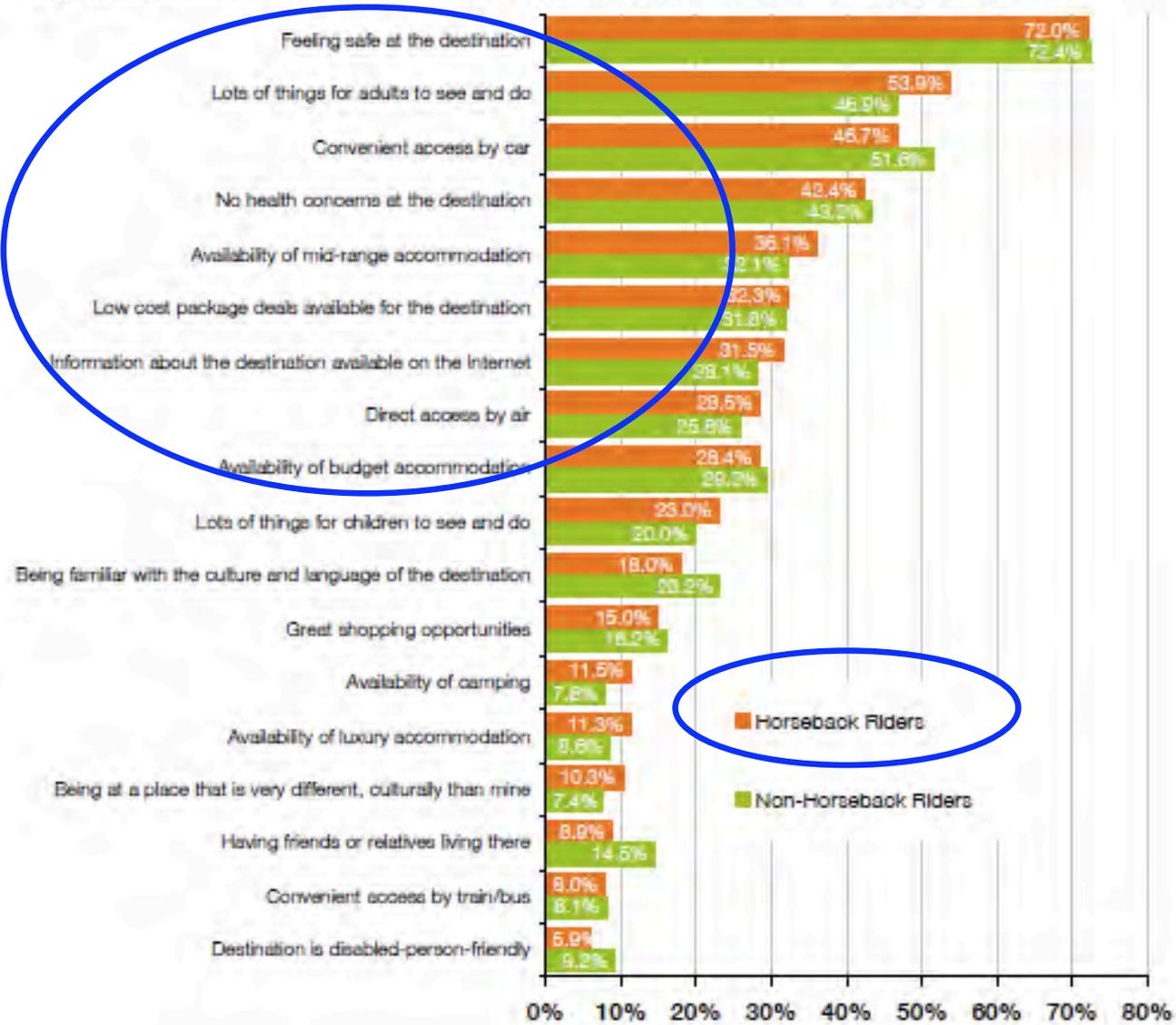


Fig. 7 Other Outdoor Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Outdoor Activity)

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,606,278	160,003,963	170,610,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	66.7%	37.8%	39.6%	169
Wildlife Viewing	61.8%	33.1%	34.9%	177
Hiking, Climbing & Paddling	66.3%	21.4%	23.6%	236
Games & Individual Sports (e.g., tennis, board games)	47.3%	20.6%	22.2%	213
Boating & Swimming (e.g., motorboating, swimming in lakes)	46.1%	19.6%	21.0%	216
Fishing	33.7%	17.4%	18.4%	183
Exercising and Jogging	30.9%	13.0%	14.1%	220
Downhill Skiing and Snowboarding	21.2%	7.2%	8.0%	264
Snowmobiling & ATVing	20.6%	6.2%	7.1%	289
Golfing	20.1%	10.0%	10.7%	188
Team Sports (e.g., football, baseball, basketball)	18.6%	7.2%	7.9%	236
Cycling	17.4%	6.6%	6.3%	276
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	16.0%	4.0%	4.8%	336
Board and Blade (e.g., skateboarding, ice-skating)	14.9%	3.3%	4.0%	370
Scuba & Snorkelling	12.8%	3.6%	4.1%	316
Hunting	12.1%	6.0%	6.4%	224
Motorcycling	8.1%	2.7%	3.1%	266
Extreme Air Sports (e.g., parachuting, bungee jumping)	7.0%	1.4%	1.7%	408
Cross-country Skiing & Snowshoeing	6.3%	1.6%	1.9%	334
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.4%	0.3%	0.3%	416

Fig. 9 Cultural and Entertainment Activities Pursued While on Trips
 (See Appendix Two for a Definition of Each Type of Culture & Entertainment Activity)

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,606,278	160,003,963	222,846,268	100
Shopping and Dining	90.6%	76.9%	60.4%	160
Historical Sites, Museums & Art Galleries	73.3%	62.2%	40.9%	179
Theme Parks & Exhibits	70.9%	47.6%	37.8%	188
Fairs and Festivals	63.7%	39.5%	31.7%	201
Casino, Theatre and Comedy Clubs	62.6%	44.3%	36.1%	178
Fine Dining and Spas	61.7%	31.7%	26.6%	203
Science and Technology Exhibits	42.0%	23.7%	19.1%	220
Wine, Beer and Food Tastings	41.4%	21.7%	17.7%	234
Equestrian & Western Events	36.9%	14.1%	12.0%	300
Rock Concerts and Recreational Dancing	31.6%	14.2%	11.8%	269
Agro-Tourism	29.3%	12.6%	10.4%	281
Garden Theme Attractions	27.9%	12.7%	10.6%	266
Professional Sporting Events	26.6%	16.4%	12.6%	214
High Art Performances	24.8%	10.0%	8.6%	293
Aboriginal Cultural Experiences	19.3%	7.9%	6.6%	292
Theatre, Film & Musical Festivals	18.0%	7.7%	6.6%	279
Amateur Tournaments	16.8%	7.1%	6.9%	284
Archaeological Digs & Sites	12.6%	6.1%	4.2%	296
Participatory Historical Activities	9.3%	3.6%	3.0%	308
National & International Sporting Events	6.2%	1.6%	1.4%	430

Fig. 11 Accommodations Stayed In While on Trips

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,610,241	100
Seaside Resort	33.6%	17.3%	18.3%	183
A Public Campground In a National, State, Provincial or Municipal Park	31.7%	16.0%	16.9%	187
Lakeside/Riverside Resort	27.0%	11.6%	12.4%	217
Ski Resort or Mountain Resort	22.7%	8.1%	9.0%	263
A Private Campground	18.2%	9.7%	10.2%	178
A Camp Site in a Wilderness Setting (Not a Campground)	11.9%	4.2%	4.7%	263
Wilderness Lodge You Can Drive to by Car	10.8%	3.0%	3.6%	309
Health Spa	9.0%	2.8%	3.1%	287
Farm or Guest Ranch	8.6%	1.6%	2.0%	426
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	8.1%	4.0%	4.2%	190
Country Inn or Resort with Gourmet Restaurant	6.3%	1.8%	2.0%	264
On a Houseboat	4.4%	1.2%	1.4%	308
Remote or Fly-In Wilderness Lodge	2.9%	0.7%	0.8%	368
Cooking School	2.1%	0.6%	0.6%	372
Remote or Fly-In Wilderness Outpost	1.9%	0.3%	0.4%	426
Wine Tasting School	1.4%	0.4%	0.4%	323

Potential ET Trends/ Opps

- Horses = Farms = Food
- Package with complimentary activities
- Local breed/ local experience
- Connection with local people
- Quality interpretation
- Hands-on and/or contributory
- Thinking in terms of your markets

Potential ET Trends/ Opps

- International
- Non-equestrian market
- Energy issues
- Incorporate technology in marketing
- Emphasize the “Local”
- Educate your community - you have something the tourism industry wants!

What does the Equine Tourist want?

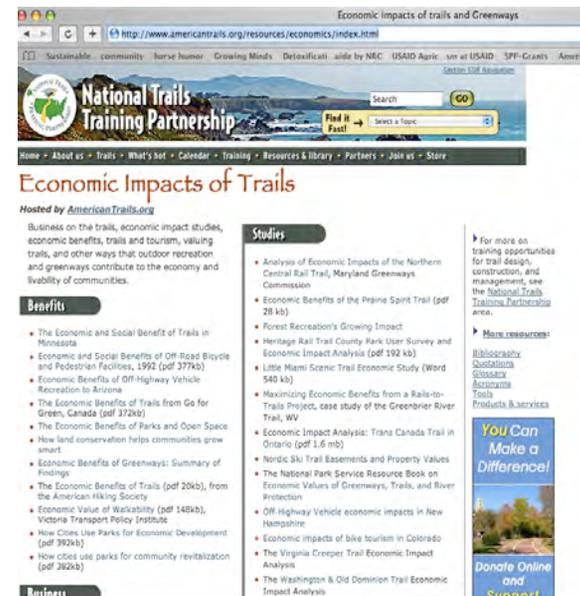
- Access to horse activities
- Areas of natural beauty
- Accommodations near trails/ horse activities
- Variety of Amenities/ Luxury
- Eco-ethic
- Complimentary activities (outdoor, culinary, educational)

Getting Started

- Evaluate your product
- ID relevant all of your markets
- Link all trail/tourism assets for the sake of unity in effort and image
- Consider brand for your community/ region
- Consider standards for various components

Getting Started

- Teach yourself about tourism niches as economic development
- Launch education & awareness programs - elected officials/ community but also equine community on how to begin
- Resources on developing trails/trail tourism/trail-based ed programs



Getting Started

- Continue watch the trends
- Research existing markets and products
- Create development strategies appropriate for your area

Irish Equestrian Tourism Development Strategy: Making it work for you

- Lobby for marketing funds
- Join the Virginia Horse Council

Plugging into the Tourism Industry

- Learn the system
- Learn the lingo
- Know your local/ regional Visitor Bureau
- Know your local Extension faculty
- Survey the landscape for partners
- Check your product *for visitors* and if necessary, refine

Plugging into the Tourism Industry

- Invite your local visitor bureau out to your facility/ trail
- Feed them press releases/ PSAs
- Attend tourism-related meetings
- Join local/ regional tourism efforts
- Educate tourism folks about business/ industry - **YOU HAVE SOMETHING THEY WANT!**