

ECONOMIC IMPACT OF THE HORSE INDUSTRY

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Back Country Horsemen of America published results of a study of recreational horse trails in rural America. Here are some interesting statistics from the report ¹:

- There are 123,799 miles of trail for recreational and pack horse use available on federal and state land in the lower 48 states.
- 85% of the trail mileage is on federal land and 69% of that is managed by the USDA Forest Service.
- Most of the nation's trail mileage is in the West, with 67% located in eight western states.
- The eastern United States has just 22% of the trail mileage, but 56% of the nation's more than 9 million horses. (American Horse Council, 2005).
- AHC estimated that 3.9 million of the 9.2 million horses in the U.S. are used exclusively or primarily for recreation.

The American Recovery & Reinvestment Act of 2009 signed into law on February 17th appropriated over \$1.7 billion for NPS, USFS and BLM that can be used for the maintenance and construction of trails and other infrastructure improvements on public land. The American Horse Council (AHC) is encouraging land managers to use a portion of those funds for equestrian trails. ²

“The recreational horse industry contributes \$11.8 billion a year directly to the economy and directly employs nearly 130,000 people nationwide. Indirectly the industry contributes an additional \$20.1 billion and generates another 307,000 jobs. That is extremely significant and important in these economic times”.

AHC President Jay Hickey, 2009

As reported by the American Horse Council, 42% of the approximate 9.2 million horses in the United States are owned and used for recreational trail riding purposes. Over 2 million people are horse owners contributing to nearly 4.6 million people who are involved in the industry either as owners, breeders, trainers, service providers, or otherwise. ³

Virginia itself is home to over 170,000 horses. The average Virginia horse owner spends \$2,969 per horse yearly. Horse owners spend \$505 million in annual expenses and support approximately 20,000 jobs statewide. Nearly 700 equine events are held in Virginia each year, attracting over 800,000 participants and spectators who spend more than \$167 million at these events. In total, Virginia's horse industry has a \$1 billion impact on the state's economy according to the 2001 Equine Survey conducted by the Virginia Agricultural Statistics Service. ⁴



According to the Virginia Horse Council, Virginia offers over 285 public access horse riding trails across the state so “it is not surprising to find that recreation and trail riding is the number one use for Virginia horses.



Trails are located throughout the state at a multitude of public locations including state parks, national park, historic battlefields, and city parks and cover a variety of terrain from sandy and hilly, to mountainous, flat and rough”. In an EnviroHorse Public Issues paper making a case for saving trails from budget cuts, the following points were made pertaining to equestrian trails ⁵:

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1. Many people are disabled, and only have access to parks through their use of livestock. If equestrian trails are closed, they could be impacted.
2. According to recently completed studies, it is estimated that the ANNUAL economic and social contribution of equestrian activities in a county comparable in size and composition to San Mateo County is ~\$300 million per year.
3. Investment in horse trails is returned by a multiplier of 4 to the economy of the surrounding area according to data from the American Horse Council.
4. Equestrians make extensive use of and serve as guardians and advocates for public parks and open spaces in San Mateo County. For 2001, San Mateo County has calculated the value of equestrian volunteer service at its equestrian parks based on 3843 hours at \$76,858.00. For 2002, 3900 hours were logged by
5. Volunteer Trail Patrol in MROSD properties.
6. If equestrians do not have horse trails, we cannot provide the County with this volunteerism. With reduced park staff, the need for volunteers will increase, not decrease.
A horse can easily cover 15-30 miles a day, providing eyes and ears to report on what is happening in remote areas.

RIDER PREFERENCE: 2008 VIRGINIA EQUESTRIAN STUDY ⁶

In 2008, a study was conducted by the Virginia Horse Council in which 822 Virginians completed a survey. A few of the findings from the study are provided below:

- 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.
- Of the 697 respondents, 691 (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.
- Over 60% of the overnight trips riders camped. Breakdown is provided below:
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 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. Day Trips: 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 5-10 miles would be ideal.
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.
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%).



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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. Their preferences are listed below in order of importance.

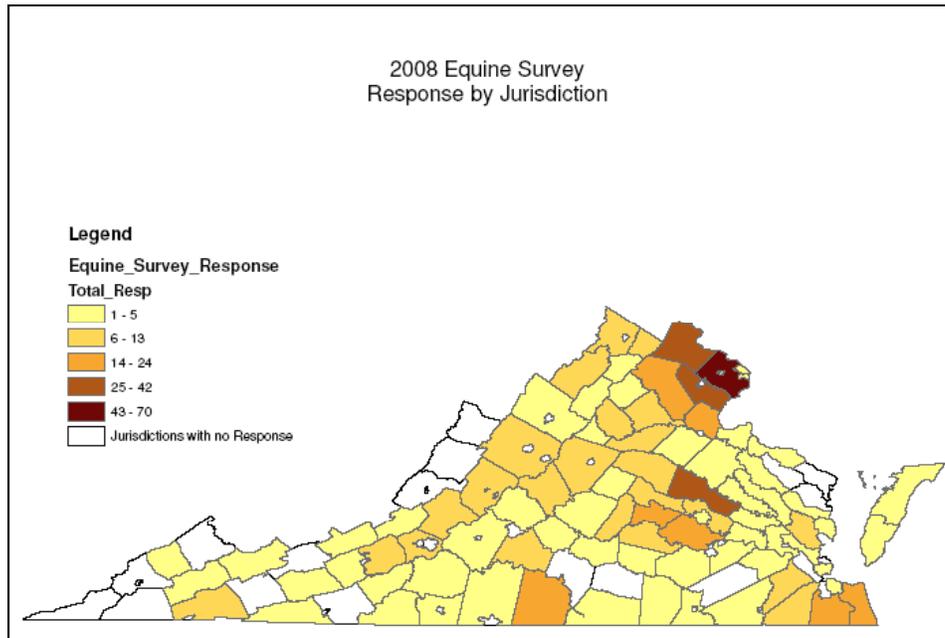
Water, Bathroom, Diverse/Variou Trails , Overall safety (horses, trailers), Ample Parking, Adequate parking for trailers, Attractive scenery, Shade, Loop options, Adequate markings, Available Maps, Adequate footing for people/horses, Cleared trails, Long trails, Limited vehicular/bike traffic.

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.



Economic Impact Potential:

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 a little less than \$50 on food during their trips.



Please Note:

Of the 822 respondents to the survey, less than fifteen people responded from the Spearhead Trails area and even then only from Dickenson, Russell and Tazewell counties.

The region needs to be more proactive and responsive to insure inclusion in any and all state initiatives.

The report in its entirety can be found at www.virginiahorsecouncil.org

It would be strongly recommended that the entire study be reviewed as there is some excellent information contained in the report that may be useful as more equestrian trails are developed in the Spearhead Trails project area which is highly recommended.

TRAIL RIDING ORGANIZATIONS IDENTIFIED IN THE SPEARHEAD TRAILS STUDY AREA

Researchers identified three horse organizations in the Spearhead Trails study area:

- **Scott County Horse Association:** They are a 501c3 organization whose mission is “To promote and provide equine activities in Scott County and the surrounding region for our youth and fellow horsemen, while encouraging sportsmanship, family values and lasting friendships with our community and members through dedication and public involvement. We promote all breeds and activities pertaining to each breed”. They are home to the Scott County Horse Park and have numerous trails “in the works”. See *POTENTIAL FOR HORSE TRAILS* for more information or visit their website at <http://schorse.org/>
- **Cumberland – Pine Mountain Trail Riders:** This club has been in existence since the first trail ride was organized and left from the Twin Branch area in 1979. They hold events at the Pound River Show Grounds and have rides throughout the year. Visit their website at <http://www.cpmtrailriders.com/> for more on this club.
- **The Dickenson 4-H Saddle Club:** Contact Dickenson County Virginia Cooperative Extension or visit their website at <http://offices.ext.vt.edu/dickenson/index.html> for contact information.
- There is also a wonderful riding ring and facilities at Poplar Gap Park in Buchanan County.

Please Note: There may be other clubs, organizations and groups but these were the only ones found in our research.

RECOMMENDATION: The SRRA should work with the Virginia Horse Council, Cumberland-Pine Mountain Trail Riders, Scott County Horse Association, Dickenson 4-H Saddle Club and other interested organizations, groups and individuals to:

- Develop and maintain public horseback riding trails within the Spearhead Trails Study area,
- Increase the total number of trails,
- Encourage looped trails,
- Develop trails that are 5 to 15 miles long for day use and 15 to 30 miles long for multi-day use,
- Provide detailed information and maps of the trails that are printable from a website,
- Provide the above information to the Virginia Horse Council for inclusion in their inventory of trails,
- Properly mark both the trailheads and trails,
- And encourage good stewardship while on the trails.

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¹ Back Country Horsemen of America, Vol. 17, Fall 2006

² February 2, 2009 press release, AHC Urges Land Managers to use Stimulus Funding for Equestrian Trails. Website: <http://www.azasha.com/Media/EDocs/americanhorsecouncil/02feb09.pdf>
For more information contact Bridget Harrison (202) 296-4031, bharrison@horsecouncil.org

³ Information from the Virginia Horse Industry Board website <http://www.vhib.org>, Virginia Department of Agriculture & Consumer Services, 102 Governor Street, Room 318, Richmond, VA 23219, (804) 786-5842. <http://www.vhib.org/virginia-horse-country.html>

⁴ For more information about trail riding in Virginia, visit the Virginia Horse Council. Website: www.virginiahorsecouncil.org

⁵ Quinn, A., EnviroHorse Public Issues paper making a case for saving trails from budget cuts, San Matio County California, May 6 2003. <http://www.californiastatehorsemen.com/enviro/ENVIRO-PSI.htm>

⁶ Kline, C., Virginia Equestrian Trails Tourism Survey, Hospitality and Tourism Administration, North Carolina Central University for the Virginia Horse Council, 2008.

CASE STUDY: TRAIL RIDE MAKES ECONOMIC IMPACT

CASE STUDY: KNOTT COUNTY BI-ANNUAL TRAIL RIDE IN EASTERN KENTUCKY¹

In 2006, through a partnership with the Knott County Fiscal Court and Western Pocahontas Land Company, a major portion of 43,000 acres of reclaimed coal land was opened up for horseback riding. Already over 100 miles of trails in the heart of Elk Country have been developed and are now marked and ready to ride. The trails are open year-round with trailhead parking near Sutton Memorial Park.



Since the Fall of 2006, an annual Fall ride has been held the first weekend in October and a Spring ride the first weekend in May. The first ride attracted over 500 riders and 250 horses. By the following year, the number of riders had grown to over 3000 people attend coming from as far away as Utah, Florida and Texas. And this year, that number grew to over 5,000 riders attending the Spring event bringing in nearly 2,500 horses. Riders and horses came from Ohio, West Virginia, Indiana, Florida, Tennessee, Texas, Utah, Illinois, Michigan, and Georgia with the most out-of-staters coming out of Virginia.

In a 2007 survey², visitors spent on average \$130.80 on gas, food, ice, t-shirts, tack, etc. The amounts ranged from some spending just \$10.00 to others spending as much as \$300 while in the area. The highest amount spent was just over \$1000 which included the purchase of a saddle and other items from one of the four tack vendors at the event.

Economic Impact of the 2007 Trail Ride:

\$130.80 per person per event x 3000 attendees resulted in an economic impact of \$400,000 for the area.

Did the event impact the local economy? *Anyone trying to find dinner rolls or bags of ice anywhere in town on Sunday following the event was a good indicator that the event did indeed impact the local economy. Nearly every store within a 20 mile radius of the event were sold out of both items. The gas stations also experienced a significant increase in business especially those along Hwy 80.*

Economic Impact Study of the 2008 Trail Ride was conducted through intercept surveys by Berea College.³

“The average per person expenditure was \$92.82 per day with an estimated average stay of 3.5 days. Food and beverage for the trail event is estimated at 25 percent of the total spending; entrance fee was calculated at 3%; retail sales 32% and private auto expenses and others are estimated at 40% of the total direct effect of the \$324.91 expenditure per person for the event. For each item, food and beverage, entrance fee, retail shopping and private auto expenses and others results show total direct expenditures were approximately \$649,740.00”.



Please note: All vendors except a few of the tack stores were local organizations using this event as a primary fundraising opportunity. In fact, a local community center and the fire department each raised over \$3000 for their organizations which in turn goes right back into the community to help others.

RECOMMENDATION: SRRA should encourage more organized trail rides in their area and suggest local event planners use local vendors for greatest economic impact for the region.

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