



The University of Georgia

Center for Agribusiness and Economic Development

College of Agricultural and Environmental Sciences

Jasper County Horse Trail Interest Study

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Considerations for Getting Started in the Horse Trails Business

Introduction

The Center for Agribusiness and Economic Development (CAED) and the Jasper County an County Extension Service worked with a the Jasper County Agricultural Development Committee to investigate the potential horse trail riders and their interest in traveling to Jasper County to ride. After lengthy discussions with the Georgia Horse Council and other professions working in Georgia's horse industry, it was determined there was a lack of reliable data pertaining to the trail riding industry. To gather data and learn about the growing industry, the CAED implemented a combination of a mail and email survey to horse club members across the State. The survey was administered during the Fall of 2005. A total of 55 responses were gathered and the data is used in the following report.

There are a number of significant factors that need to be considered before a horse riding trail facility is constructed. Are people willing to travel outside of their immediate area (self defined) to ride horse trails? This question is critical in estimating the market potential for a trail riding facility. If trail riders typically stay within their immediate area, the market potential is limited to a very specific geographic area but if riders are willing to travel outside their immediate area the market potential is greatly increased. According to the survey results, 51 out of the 55 respondents indicated that they trailer their horses and travel outside their immediate area to ride trails. The majority of the respondents reside in rural areas which is encouraging for and his proposed operation. There was initial concern that riders living in small town and rural areas would have ample access to trail systems in their immediate area, i.e. local farm land, logging trails or Park lands.

To obtain a better estimate of trail riding market potential, it is important to determine how far riders are willing to travel one way to ride trails. The distance data reflects only riders who travel outside of their immediate area to ride trails. The riders indicated that they are willing to travel as little as 30 miles and as much as 600 miles to ride trails. The average distances riders are willing to travel one way are calculated to provide insight into the distance the typical rider may be willing to travel, table 1.

Table 1. Distance Riders are Willing to Travel to Ride Trails	
Miles	Percent
Less than 50	8%
50-100	35%
101-150	2%
151-200	0%
201-250	25%
251-300	4%
300+	25%
Mean	199
Median	225

Trips

It is also important to determine how many trips riders make outside their immediate area annually to more accurately determine the market potential. The riders take anywhere from one (1) to 60 riding trips per year. On average, riders take fourteen (14) trips annually. This is encouraging as riders are more likely to visit different parts of the state to enjoy different trails, scenery and wildlife. There does appear to be a very dedicated group of riders that take more than 10 trips annually to different horse trails. Attracting these riders and presenting them with a satisfactory experience will likely be critical to establishing a successful trail riding operation. Riders rely on word of mouth from others to collect information on trails. The frequent riders are more likely to communicate with potential riders given their involvement in the sport and their approval and/or recommendations will most likely define quality of the facility and determine its reputation in the industry.

Table 2. Number of Trips Taken per Year	
Trips	Percent
Less than 5	53%
5 to 10	22%
11 to 15	12%
16 or more	12%
Mean	14
Median	5

Party Size

Riders appear to travel in groups and not alone when they ride trails. The survey results indicated that riders travel in groups of three to five people. This information is important when planning, developing and laying out the facility. Riders travel in groups and would most likely prefer to trailer their horses and camp in near each other. Party sizes range from individuals, to groups of 40 or more riders. These results are encouraging because if the riding facility can be brought to the attention of one rider and convince them to patron the facility, chances are they will bring other riders. This reiterates the importance of generating positive word of mouth advertising.

Days Away

The data indicates that riders spend an average of three days away from their home when they embark on a trail riding trip outside their immediate area. The riders typically spend three days and two nights at the trail riding facility. This provides additional opportunities for the trail riding operator. Trail riders will need to feed themselves and their horses. They may need to purchase grocery items, clothing items and horse stock. The trail riding operation may want to consider opening a general store on the premises to provide visitors easy access to supplies. Souvenirs, crafts and general merchandise could provide an additional revenue generating activity with high profit potential. General merchandise, horse stock products and souvenirs available onsite are able to command a slightly higher price than found elsewhere due to convenience. For example, if a halter breaks, the rider could purchase one at the general store or if the rider does not want to transport food products, they can purchase them at the general store. Given riders propensity to take over night trips, they need to be informed of a general merchandise and horse stock store.

Days	Days Away from Home Percent	Days at Facility Percent	Nights at Facility Percent
0	2%	0%	2%
1	10%	12%	8%
2	15%	16%	27%
3	23%	27%	31%
4	21%	22%	15%
5	13%	16%	10%
6 or more	17%	8%	6%
Mean	3.5 days	3 days	3 nights
Median	3.75 days	3 days	3 nights

Expenditures

On average, it costs riders about \$14.00 per night to camp with their trailers at trail riding facilities. The cost per night ranges from a low of nothing to a high of \$40 per night. To be competitive, the camping facility should charge between \$10 and \$20 per night, depending on the amenities offered at the facility. The more amenities, the more the riders would expect to pay. However, the price should not deviate greatly from what the riders are currently paying or they might decide to ride elsewhere.

Table 4. Cost per Night to Camp with Trailer	
Dollars	Percent
< \$10	13%
\$10- \$15	33%
\$16-\$20	38%
\$21-\$25	10%
\$26 or more	8%
Mean	\$18.50
Median	\$17.50

Amenities

The riders were provided a list of amenities that might be available to at a riding facility, table 5. This list of amenities is very important. Riders have a choice of where they ride, and if a facility is not rider- friendly, i.e., offer the amenities they demand, they will choose to ride elsewhere. Therefore, before any trail riding facility is constructed, it is important to consider what the riders expect to find at the riding facility.

Based on riders responses, the inclusion of various amenities can be broken down into four levels of importance. The first level includes access to water and camp grounds. Specifically, the most important amenity appears to be access to water near the parking facility, seventy-one (71%) percent of the riders indicated the want water faucets located near the parking area. Toilet facilities were also deemed important Having an on-site campground is important as well. Again, the majority of the riders indicated that they camp with their horses when they travel to trail riding destinations. These three amenities were mentioned more often than other amenities and should be provided by a trail riding facility.

The second tier amenities, toilet facilities, shower facilities, and barns and stalls, are less important than the aforementioned amenities, but they are still very important to the riders and should be included in the operation. The third tier amenities include pasture for horses, picnic areas, trailer pads, changing facilities and convenience stores. The picnic area and pads for trailers. These can be incorporated into previously mentioned amenities at a minimal cost. For example, when the toilet areas are constructed, build a space to allow riders to change clothing. The picnic areas can consist of picnic tables and grills as part of the camp sites. A pasture area could be incorporated into the barn/stall structures.

The availability of a grooming facilities, cool down and walking ring, tack shop, feed products, a store, pastures and guided tours do not appear to be very important to riders. However, the inclusion of the store, tack shop and animal feed products provides additional profit centers. Having access to food and supplies may not be important to the riders until they forget to pack the appropriate supplies or experience equipment failure, broken halter. A simple retail establishment offering refreshments, basic tack and hay could be incorporated into the operation easily and provide tremendous profit potential.

Table 5. Desired Riding Facility Amenities	
Amenities	Percent
Water Faucets located close to parking	71%
Camping area	67%
Toilet facilities	53%
Shower facilities	40%
Barns/stalls	40%
Picnic area/grills	22%
Pads for trailers	18%
Changing facilities	11%
Grocery/convenience store	11%
Pasture space for your animal	9%
Guided tours	4%
Availability of feed and hay	2%
Cool down/walking ring	2%
On-site tack shop	2%
Horse grooming facilities	0%
— values above dashed lines are were mentioned significantly more often than those below the dashed lines.	

The riders were asked if the following factors came into lay when they choose a facility. The most important of these seven factors appears to be the availability of trails with varying levels of difficulty. Of the seven factors explored, this one was rated the most important. The appearance of the facilities was deemed important as it may provide insight into the quality of the ride and corresponding safety. It is important to have friendly folks working at the facility as well as wild life.

Proximity to tourist attractions, hotels and restaurants as well as historical attractions and other activities do not appear to be as important.

Table 6. Importance of Factors when Choosing a Facility to visit	
Factor	Percent
Offers trails of varying difficulty	87%
Appearance of attractions	76%
Friendliness of people that work there	49%
Presence of wildlife	38%
Historical attractions	22%
Proximity to other tourist attractions, hotels, and restaurants	11%
Availability of associated activities	11%

The riders were asked if they participated in a number of specific activities while visiting a trail riding facility. Hiking and photography appear to be the most frequently participated activities. There does not appear to be a significant number of riders participating in fishing activities.

Table 7. Activities Participated in During Your Trial Ride Trips	
Activity	Percent
Hiking	31%
Photography	31%
Antiques	16%
Museums	16%
Parks	15%
Wineries	11%
Swimming	11%
Fishing	7%
Biking	7%
Restaurant	2%
Boating	2%
Bird Watching	2%
Hunting	0%
Other	7%

Likelihood to Visit Facility in Jasper County

The riders were asked how likely they would be to visit a trail riding facility in Jasper County Georgia. To ensure clarity, the questioned included a description of Jasper Counties location in Georgia and the fact that the area had over 25 miles of wilderness trails and offers pasture boarding, stables, camper pads with full hook-ups.

Nearly nine in ten of the respondents indicated they would be likely to use the facility. Even more positive is the fact that 58% of the respondents indicated they would be very likely to use the facility.

Table 8. Likelihood to use a horse riding trail operation in Jasper County	
Likelihood	Percent
Very likely (4)	58%
Somewhat likely (3)	31%
Somewhat unlikely (2)	6%
Very unlikely (1)	8%
Mean	3.02

The Center for Agribusiness & Economic Development



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To provide feasibility and other short term studies for current or potential Georgia agribusiness firms and/or emerging food and fiber industries.

To provide agricultural, natural resource, and demographic data for private and public decision makers.

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