



MOVING FORWARD: BC EQUESTRIAN TRAIL USER STUDY

REPORT JANUARY 2013

Conducted by the Joint Trails & Access Committee for Horse Council BC with support from Vancouver Island University.

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A collaborative initiative by:



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MOVING FORWARD: BC EQUESTRIAN TRAIL USER STUDY - EXECUTIVE SUMMARY

This study was a collaborative initiative of the Joint Trails & Access Committee conducted in the summer of 2012. The purpose of this study was to gain an understanding of the trail usage patterns, user satisfaction and potential enhancements to BC Equestrian Trail Systems.

The objectives of the study were:

- To describe the BC Equestrian Trail User;
- To learn how BC Equestrians use existing trail systems;
- To measure the level of satisfaction of BC Equestrians with components of the Trail System; and
- To determine preferred enhancements to the existing trail system.

The Committee developed core questions centered around a) understanding the equestrian trail user (demographics, horse ownership, disciplines and participation); b) understanding trail usage patterns (location, frequency of use, types of trails ridden, accessibility) c) learning d) level of satisfaction with existing trail systems; and e) what enhancements and improvements they recommend.

A total of 725 responded to the survey owning an aggregate number of 2,056 horses and 31 mules. The majority of respondents are aged 45 years and older, 89.2% are female, and have been involved an average of 22 years in equestrian trail activity. Approximately 62% of respondents are between 45 and 64 years. The results suggest that trail riding is an activity that one can enjoy for many years and can continue into later adulthood.

Approximately 94% of respondents own their own horse or mule whereas the remaining 6% lease or ride another person's horse. Sixty seven percent of respondents keep their animals at their own location with the remainder boarding them elsewhere. The majority of riders are able to access trails from the location where their animals were kept (78.5%) with the remainder must trailer to gain access to trails. Fifteen percent indicated that trails were the exclusive venue for their equestrian activity, however, a further 42% use trails 80-99% of the time and another 11% use trails between 60-79% of the time. Equestrian trail users are most likely to ride alone or with one other person with 82% of their time on trails spent as a solitary or partnered activity.

The types of trails reported as used are varied. Many riders have to use the sides of roadways to access trails or as an alternative to other trail systems. The ability to access Crown, Park or other public land is highly desirable in the equestrian community. Equestrians also ride on private lands including those held by timber companies, ranchers, and other land managers. The amount of daylight, temperatures and availability of vacation days are contributing factors to the level of use of all types of trails. With more time in summer, better temperatures and more daylight, equestrians are able to get out on more trails and travel longer distances. For example, 45.1% of users ride less than 5 km in the spring season, but with the coming of summer, distances increase dramatically and roadside riding decreases as trail users access longer trails. The most significant increases are for those riding 13-19 km, indicating the length of trail systems required to accommodate the demand in the equestrian trail riding market. Trail riding is also often combined with overnight stays. In total, 45.9% of respondents indicated they combine trail activity with overnights stays, staying on average 12 nights away each year. This data highlights the need for greater access to trails and horse camping facilities and the opportunities for growth in equestrian tourism activities.

When asked about other equestrian activities they engage in beyond trail riding, respondents identified natural horsemanship and groundwork (54.1%), ringwork (48.3%), dressage (33.8%), jumping (25.2%) and competitive long distance sports (21%). The variety of activity and level of participation confirms that riders use trail riding as a cross-training activity for other disciplines and as a competition activity in itself, as well as for recreational riding.

Sixty three percent of respondents indicated that they were somewhat (51%) or very (11.7%) involved in advocating for trail access or trail building work. This data indicates that equestrian trail users are also trail advocates and trail builders or maintainers.

So what is driving the equestrian's demand for trail use? The top three motivations given were to gain relaxation and stress release benefits (85%), to socialize with like-minded horse people (85%), and to improve their horse's fitness and conditioning (85%). Seventy seven percent indicated they also used trails to improve their horse's mental state and 61% for their own physical fitness. Clearly, trail riding is viewed by riders as being highly beneficial for both the horse and rider. Perhaps summing it up best, respondents stated "trail riding is FUN"!

Equestrian trail users generate significant spending in the provincial economy. The average annual spending on equestrian items per household is \$8,404.82 per year. Total annual spending on equestrian related expenses by all households in the study was \$6,076,693 of which equestrian trail use generated \$4,253,685.10 in direct spending to the provincial economy. This spending is estimated to contribute \$5,529,790.63 in direct and indirect economic impacts to BC. These figures, of course, do not account for all trail users in the province, only those responding in this study, but are clearly an indication of a significant economic impact by equestrian trail users across BC.

The study looked at the level of user satisfaction with the components of existing trail systems and found that where equestrians are most satisfied are: the etiquette of other equestrians (63.4%), the safety of trails (51%), the congestion of other equestrians on the trail (51%), and the types of trails that they have access to (43%). However, respondents indicated they experience dissatisfaction in several areas: with the lack of infrastructure and services, such as highway pull outs, rest stops and accommodations, available when traveling to trail systems (50%); with the lack of infrastructure, such as turnarounds, parking, manure pits, and corrals, at trailheads (49%); with the availability of information on trails in their area (45%); and the lack of education opportunities (43%). A number of comments also centered on the loss of trails through restrictions by timber companies and through changes in use by Parks and Protected Areas.

Respondents provided some very clear direction for priorities to enhance equestrian trails in BC. The most important priority noted was the need to have equestrian use as a designated activity on existing trail systems (82%). The second priority identified was to provide more information on where existing trails are located and how to access them (71%), with the third priority being to enhance access to private land holdings (69%). Education on etiquette around horses for other trail users was a priority for 68%, as is those who want to see new trail systems developed in rural and remote areas of the province (68%). Two other priorities were noted by over 60% of respondents with 65% wanted to see improved footing, bridges, and safety on existing trail systems and another 63% wanted to see maps, particularly GPS maps, developed and made available.

The BC Equestrian Trail Users Study has gathered important information to help us better understand equestrian trail users and their needs. The respondents have identified a number of key areas and priorities. The Joint Trail Access Committee, Horse Council BC, other equestrian groups, various levels of government and stakeholders involved in trail development can use this study and the information gathered to review existing programs, and as an aid to develop future projects and actions required.

“The Road to Success is Not a Path you Find, but a Trail you Blaze”



Over the past decade there has been an increasing need to provide equal opportunity for recreational equine use on public lands and trails. To address issues, many equine groups had approached both the Back Country Horsemen of BC¹ and Horse Council BC² (HCBC) to help find solutions. From this a committee called the Joint Trails and Access Committee (JTAC)³ was formed in 2006 to collectively “blaze the trail” to actions!

People still value horses and partner with them for a wide variety of purposes including: Competitive sports, Work, Therapy, Recreation, Tourism and Entertainment.

In 2012, HCBC had 22,400 members. Of those, approximately 17,000 were recreational riders that use trails (defined as any route that joins two places; so it could be the shoulder of a road or a back country single track trail). In order to characterize the trail rider and their needs, JTAC needed accurate details. So in the spring of 2012, they designed this survey specific to the wants and desires of the equine trail rider. It is information that can be used to develop action plans as it identifies the priorities of the trail riding horse community. Because the horse is used for such a diverse number of activities it is a challenge to measure and quantify. This survey will also give us a starting point to measure and benchmark progress.

Here are some facts from the 2009 Equine Industry Study done by Horse Council BC (*complete study available at www.hcbc.ca/study*):

- 13,659 properties in BC have approximately 95,000 horses
- they live on 145,000 acres of farmland
- supported by 7,200 full time jobs
- with \$31.2 million employment income
- and generate \$740 million in economic activity
- 90% of the industry intends to maintain/increase involvement in

the next 5 years

¹ Through collaboration with countless individuals, government, business and other recreational users of public land, BCHBC strives to preserve and enhance the use of public lands for all equestrians (BCHBC Website)

² Horse Council BC is a member service organization committed to working together on behalf of the equine interests of our members. Representing horse enthusiasts in BC, we collaborate with individuals, businesses, industry professionals, and government to strengthen communication, education, and safety. We strive to preserve and enhance equestrian use of public lands and promote and foster participation in all varieties of equine activity (HCBC information brochure).

³ The Joint Trails & Access Committee incorporated membership from other provincial riding groups including the BC Competitive Trail Riders' Association and Endurance Riders Association of BC. The purpose of JTAC is to: To advocate for, and preserve equine access on public land; To gather, record, and distribute information about new and existing trails; To cooperate with the affiliates and clubs as well as other stakeholders; and To coordinate representation to all government bodies (HCBC website).

According to the same study 2009 Equine Industry Study by HCBC, there are shifts occurring in the types of activities that equestrians are engaged in within the province. As shown in figure 1, in the last two decades, there has been an increase in what has been defined as recreational use within BC, where racing and sport (which excludes trail related equine sports) have been declining. Work and guide activity has remained constant. This shift raises obvious questions about what recreational activity has been increasing, why, and what is enabling or constraining its growth. As trail use is often regarded as a recreational use of horses, the opportunity to explore these questions with trail users was regarded as a valuable step in understanding both trail users as one type of recreational user group.

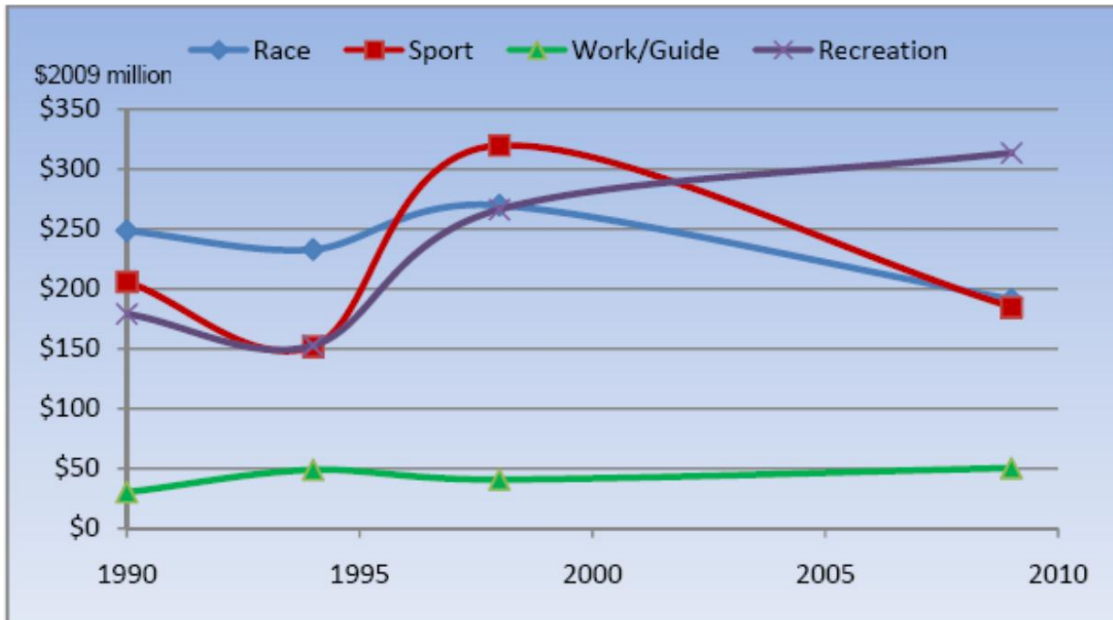


Figure 1: Trends in Economic Significance of Equestrian Industry. *Source: HCBC 2009 Equine Industry Study*

As the Equine industry moves forward and continues to blaze a trail while building partnerships with other user groups and land managers in order to find solutions to the challenges, the information gathered in this study should prove invaluable.



METHODOLOGY

The purpose of this study was to gain an understanding of the trail usage patterns, level of satisfaction and preferred enhancements to the BC Equestrian Trail System.

The objectives of the study were:

1. To describe the BC Equestrian Trail User;
2. To learn about how BC Equestrians use the existing trail system;
3. To measure the level of satisfaction of BC Equestrians with components of the Trail System; and
4. To determine the preferred enhancements to the existing trail system.

This study was conducted as a collaborative initiative of the Joint Trails & Access Committee in the summer of 2012. The questions were developed after polling the members of the committee about what information would be helpful for the committee to develop strategies for Equestrian Trails in BC. The committee determined that the information required centered around understanding the current equestrian trail user therefore questions on demographics, location, horse ownership and participation in other activities were deemed important. The core questions of the study were aimed to understand the usage patterns of the trail user therefore questions on the location, frequency of use, types of trails ridden and accessibility were incorporated into the study. In order to define the work ahead, the survey also asked a series of questions to understand how satisfied equestrian trail users are with their existing trail systems and what enhancements they would like to see.

The survey questions were imported onto Survey Monkey and pilot tested with 10 different equestrian users to fine tune the format and language before sending it out to a broader audience. When complete, the survey was launched in May 2012 and data collection remained open until the end of July 2012. Responses were generated by promoting the study online via the websites of Horse Council BC, The Back Country Horsemen of BC, the BC Competitive Trail Riders and other local clubs. An e-blast was sent out to HCBC members to encourage participation as well as through BCHBC and BCCTRA. An ad was also included in the June issue of Saddle Up Magazine.

An incentive was used to generate responses. Members of JTAC contributed a range of prizes including a getaway at Twincreeks (Duncan), an Equine First Aid Kit, and Logo wear from BCHBC.

When the study was complete, data was analyzed at Vancouver Island University in the Recreation and Tourism Department by Dr. Nicole L. Vaugeois. Data was analyzed using Statistical Package for the Social Sciences. Basic descriptive data was used to generate tables in Excel, which are incorporated into this report. Cross-tabulations were done to get a better understanding of differences between users in different zones and long and short term users.

When data was analysed, the report was developed in a working meeting with a sub-committee of members from the JTAC at Vancouver Island University. The results will be shared within the full report which will be made available on the HCBC site and through the BCHBC and BCCTRA sites. A write up on the results will be shared via provincial horse magazines and presentations to audiences deemed important by JTAC will be scheduled in 2013.

LIMITATIONS:

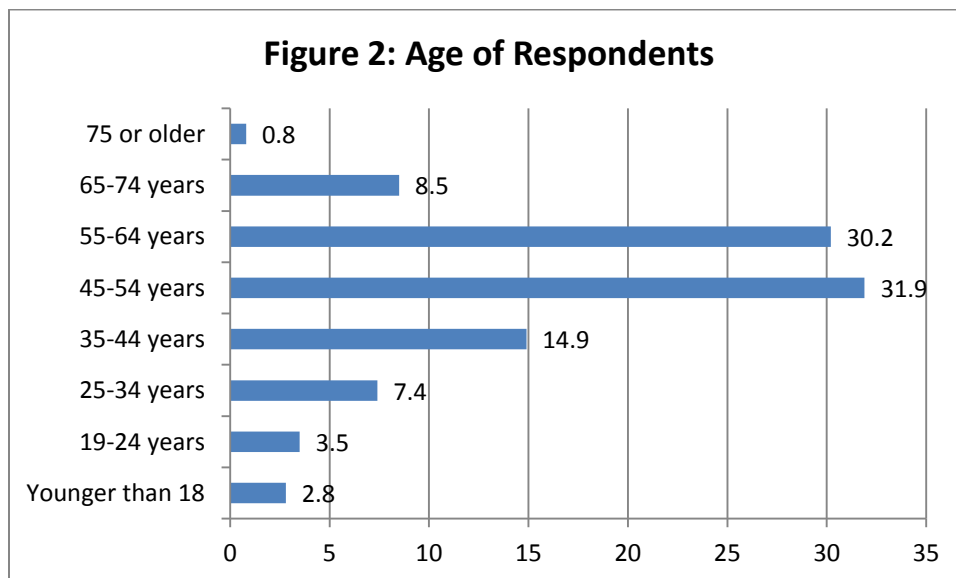
There is not a full listing of all Equestrian Trail Riders in BC therefore a random sample of users could not be generated. The data in this study were generated by a purposive sampling method, so the conclusions drawn should not be interpreted as a generalization of all trail riders in the province. While the response was very positive resulting in a large sample (n-752), the sample likely underestimates some types of equestrian users or regions of the province. Recognizing this limitation, tests done between regions and user groups produced little significant differences in most questions. Where results showed significant differences, notes are provided in the findings section of this report.

FINDINGS

The survey was completed by 725 respondents during the data collection period. This section will provide answers to the questions asked in the study.

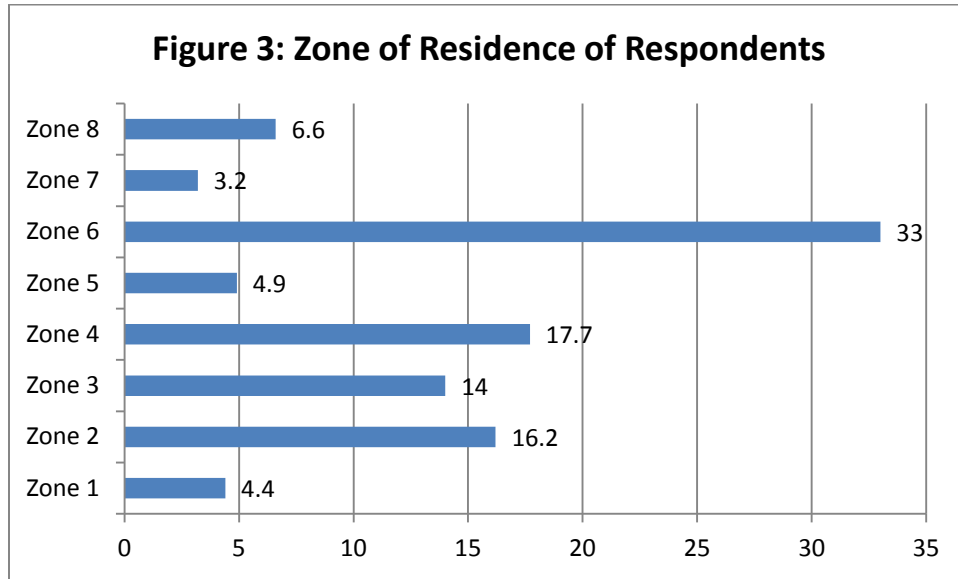
A BIT ABOUT THE RESPONDENTS

The survey respondents can be described as a mid to late equestrian who were more often female (89.2%) and who had engaged in trail related activity with horses for an average of 22 years. As shown in Figure 2, the majority of respondents were 45 years and older. Approximately 62% of respondents were between 45 and 64 years. The results suggest that trail riding is an activity that can be continued into later adulthood with 9.3% of the respondents belonging to the age categories 65 and older (.8% 75 and older). The data also suggest that new trail riders are emerging in younger age categories (14.9% 35-44, 7.4% 25 to 34 years and 3.5% 19-24 years). While only 2.8% of the respondents were younger than 19, this age group may not have accessed the survey due to the sampling strategy.



Approximately 94% of respondents own their own horse or mule whereas the remaining 6% lease or ride another person’s horse. The aggregate number of horses owned by respondents was 2056 and 31 mules. On average, each respondent owned 3.28 horses or mules. They were most likely to keep their animals at their own location (67.3%) or to a less extent, by boarding them out (32.7%).

The respondents were from all of the Horse Council BC Zones (see figure 3).



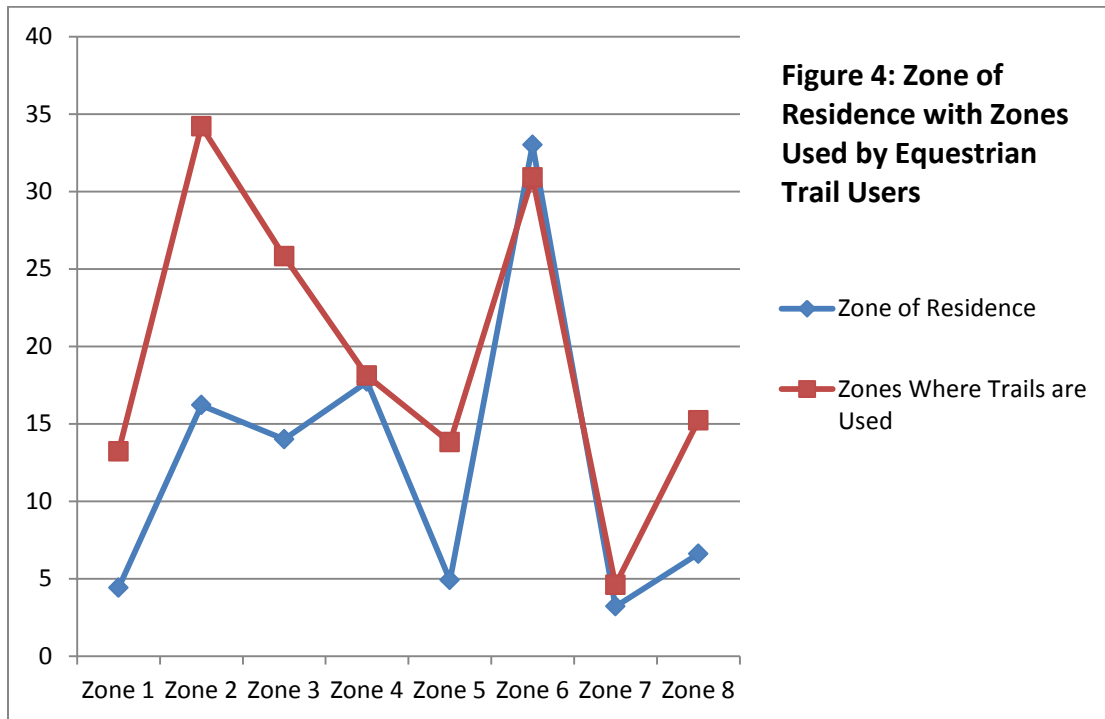
The sample that participated in the study was compared to the Horse Council BC membership data to get a sense of how representative it was of trail users in the province. Overall, the sample reflects the diversity of riders in the province quite well, particularly in the Kootenay, Thompson Okanagan, Vancouver and Squamish, Vancouver Island and Northwest regions. The sample is slightly under representing the Fraser Valley and Cariboo North East and it over represents those in the Vancouver – Delta region.



Horse Council BC Zones

- Zone 1 Kootenays (1285 members)*
- Zone 2 Thompson Okanagan (3955 members)*
- Zone 3 Fraser Valley (5428 members)*
- Zone 4 DFraser River – Delta (746 members)*
- Zone 5 Vancouver – Squamish (1759 members)*
- Zone 6 Vancouver Island (5199 members)*
- Zone 7 Northwest (880 members)*
- Zone 8 Cariboo North East (2868 members)*

The respondents were also asked to indicate what zones they use trails in with horses. As shown in Figure 4, there are interesting patterns that emerge when comparing zone of residence with the zones of use by equestrians. There is alignment of the zone of residence and use for Zones 4, 6 and 7, suggesting perhaps that equestrians in these zones have access to trails, prefer to use trails in these zones or perhaps travel barriers (i.e. Vancouver Island) limit use in other regions. In other zones (1,2,3,5 and 8) there is an indication from the data that equestrians from other zones are travelling into these zones to use trail systems resulting in high usage patterns. Overall, Zone 2 is the most popular zone for trail use by equestrians, followed by zone 6, zone 3 and zone 4.

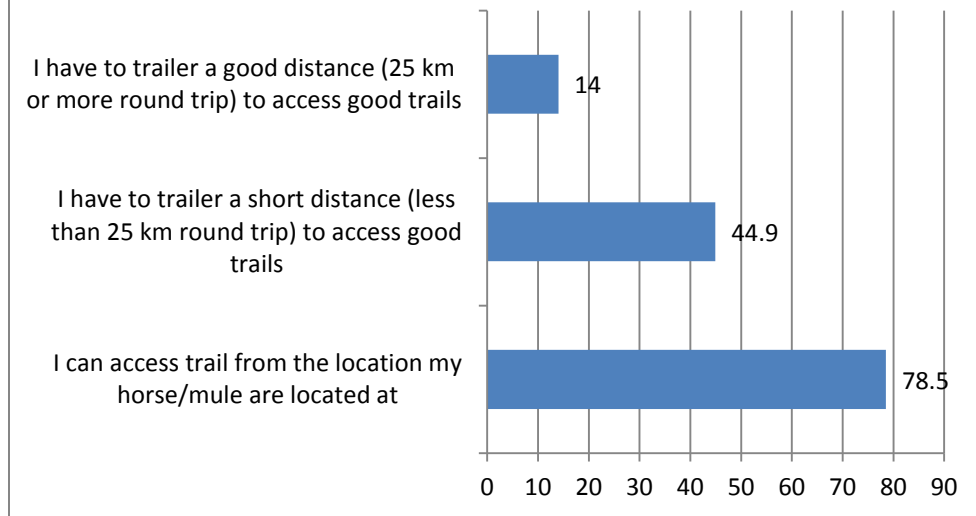


Respondents were asked about how easily they could access good trail systems from their place of residence. As shown in Figure 5, the majority (78.5%) were able to access trails from the location that their horses or mules were kept. The remainder had to trailer to access trails. Approximately 45% had to trailer a short distance (defined as 25 km or less round trip) to access trails, whereas another 14% had to trailer further (over 25 km round trip) to access good trail systems.



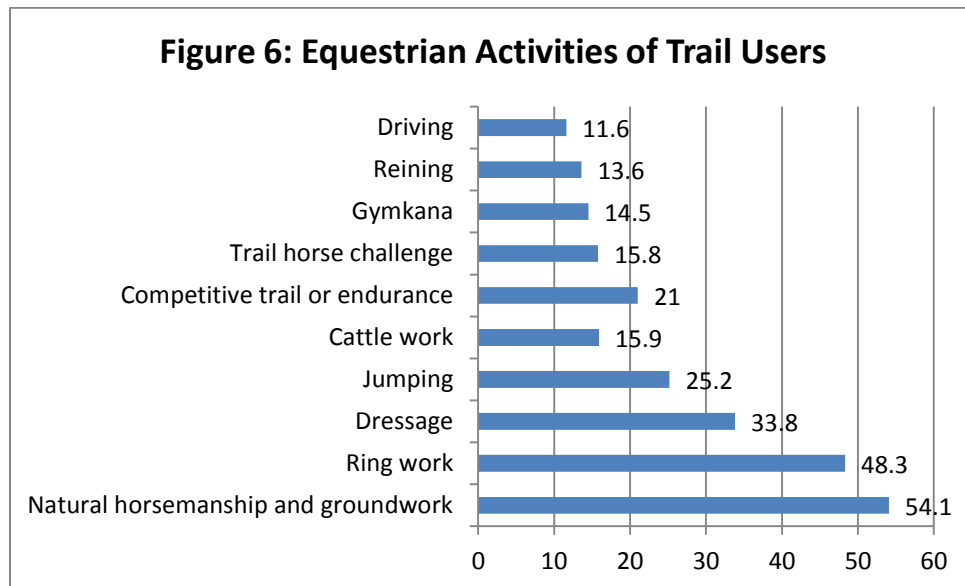
Trails Head Park in Glenora, Duncan showing parking, turnaround, manure pit (photo Nicole Vaugeois)

Figure 5: Access to Good Trails From Place of Residence

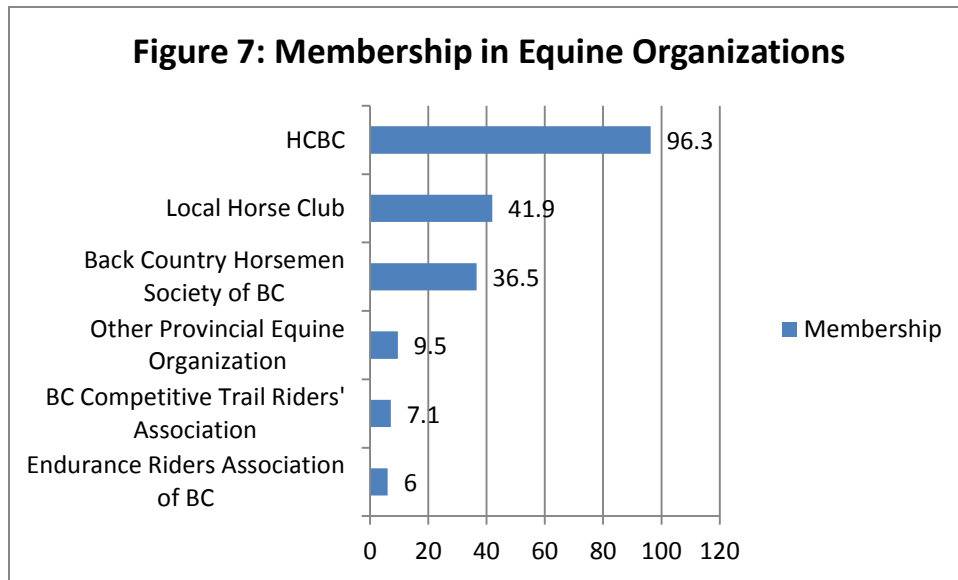


Beyond using trails, respondents were asked what type of activities they participated in with horses. As shown in figure 6, the data suggests that these are “not just trail riders” but they are actively involved in a variety of competitive and recreational activities with horses. The most frequently indicated activities are natural horsemanship and groundwork (54.1%), Ringwork (48.3%), Dressage (33.8%), Jumping (25.2%) and Competitive long distance sports like competitive trail and endurance (21%). This data supports the commonly held assumption that use of trails are used as a cross training activity for ring activity, but it also supports shows evidence of trails for competition activity. Trails should perhaps, be less defined as an activity and reframed as a venue of choice for equestrians.

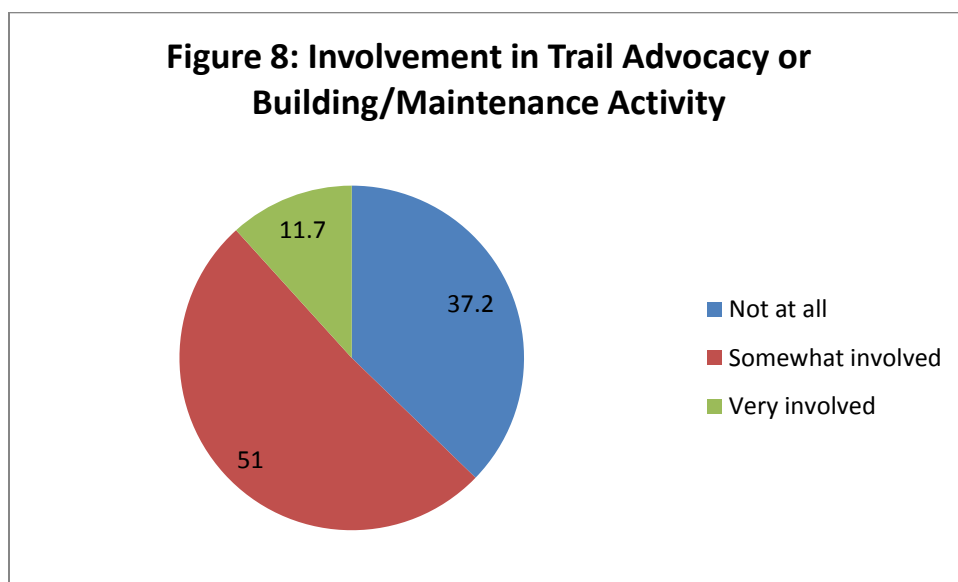
Figure 6: Equestrian Activities of Trail Users



Similarly, respondents were asked to identify which equestrian organizations they were members of. As shown in figure 7, 96.3% were members of Horse Council BC, another 41.9% were members of a local horse club, 36.5% of the Back Country Horsemen Society of BC, and the remainder were members of long distance sports (13.1%).



The data suggest that trail users are also trail advocates and trail builders or maintainers. As shown in figure 8, 63% of respondents indicated that they were somewhat (51%) or very (11.7%) involved in advocating for trail access or trail building work. Supported also by open ended comments, this significant finding is something that could be viewed as a resource for the outcomes of this research. Stated by one respondent, we should *“Encourage all equestrian disciplines to participate in trail maintenance. If they saw what the trails were like while on a work bee then they would more likely come out and use them. There is more focus on cross training now with trail riding being a number one option.”*



ECONOMIC IMPACT OF EQUESTRIAN TRAIL USERS

Trail use by equestrians generates significant spending in the provincial economy. Respondents were asked to provide an indication of their annual spending on equestrian related activity. The average spending on all items per household was \$8404.82 per year. As many households own more than one horse, the average spending per horse was \$3,649.85. Broken down into the categories asked about in the study, Figure 9 shows the breakdown of Average Annual Spending Per Household on Equestrian Care.

Total spending by all households in this sample on equestrian related expenses per year was \$6,076,693. As this number cannot be attributed solely to trail use, the percent of time spent on trails (see figure X) was used to determine a portion of this spending to trail activity. The resulting estimate is that equestrian trail use, by this sample alone, generates \$4,253,685.10 in direct spending to the provincial economy. The circulation of this spending also generates induced economic impacts in the regions of the province. Using a multiplier of 1.4⁴, this spending contributes an estimated \$5,529,790.63 in direct and indirect economic impacts to BC. These figures are of course, do not account for all trail users in the province. If an indication of the number of trail riders can be generated in other studies, the figures generated here could be used to gain a more complete estimate of the economic significance of equestrian trail use in BC.

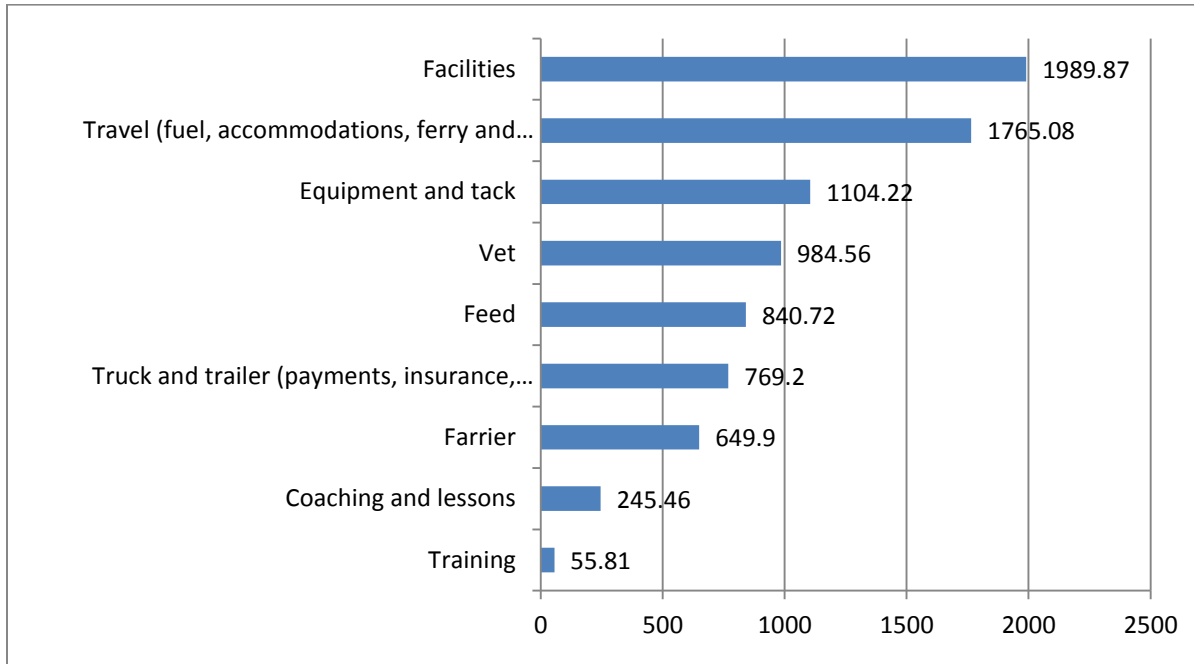
“...Spending by equestrians in this sample alone contributes an estimated \$5,529,790.63 in direct and indirect economic impacts to BC”.

The highest portion of annual household spending on equine care by trail users is for facilities where an estimated \$1,989.87 is spent each year. This is followed by spending on travel including fuel, accommodations, ferry and meals. Travel spending accounts for an average of approximately \$1,765.08 per household each year. Spending on equipment and tack accounts for an estimated \$1,104.22, while vet costs account for \$984.56 per year. Feed expenses amount to approximately \$840.72 per year, while truck and trailer expenses account for \$769.20. Farrier expenses are an estimated \$649.90 per household, although it should be noted that a significant number of responses indicated 0, or comments that shoeing was done by someone in the household. Finally, expenses for training and coaching were minimal with this sample, accounting for \$245.46 and \$55.81 respectively.



⁴ This multiplier was selected to account for differences in economic multipliers in the various regions of the province. It should be considered a conservative multiplier in estimating induced economic impacts from trail related equestrian care spending from this sample alone as it does not include all trail riders in BC (for which the number would increase in significance although to what extent, is unknown until accurate estimates of the number of trail users can be generated).

Figure 9. Average Annual Spending Per Household on Equestrian Care



With an understanding of who the BC Equestrian Trail User is, where they live, what equestrian activity they are involved in and their horse ownership and spending, this report will now turn to the findings on trail use patterns and the satisfaction of the existing trail system.

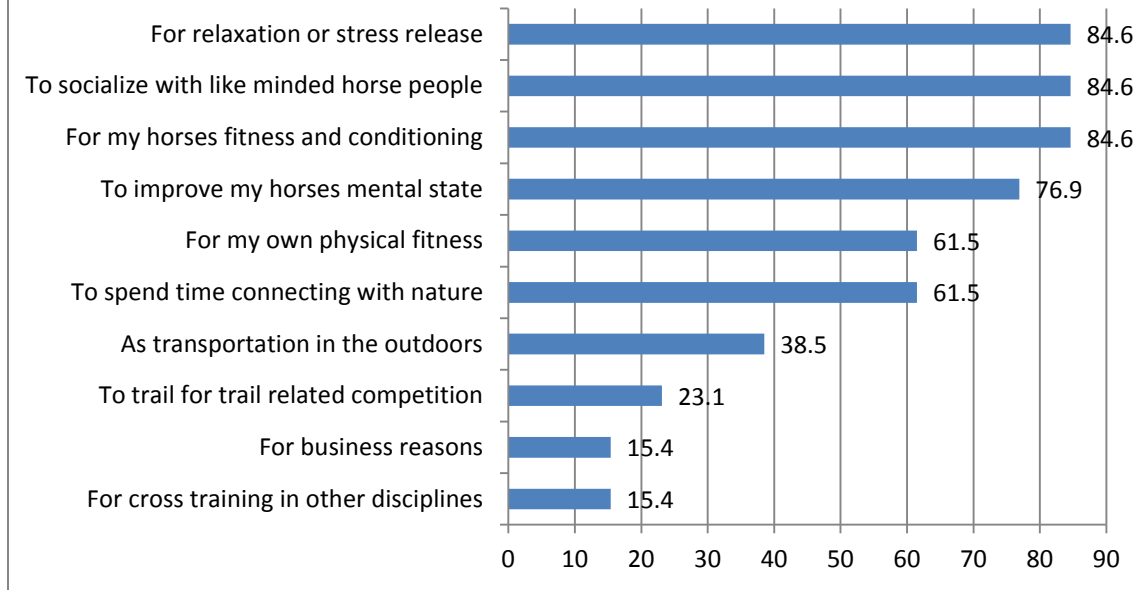
TRAIL USE BY BC EQUESTRIANS

MOTIVATION FOR USING TRAILS

Understanding what is driving demand for trails was deemed important for the study. To this end, respondents were asked to indicate what motivated them to use trails with their horses. As shown in Figure 10, the top three motivations for trail users are gain relaxation and stress release benefits (85%), to socialize with like minded horse people (85%) and to improve their horses fitness and conditioning (85%). The next highest motivators were also around human and horse health. 77% used trails to improve their horses mental state and 61% for their own physical fitness. These results indicate that trail riding is a highly beneficial health and wellness activity for both horse and rider. In the open ended comments, the notion of “fun” and “enjoyment” were expressed frequently.



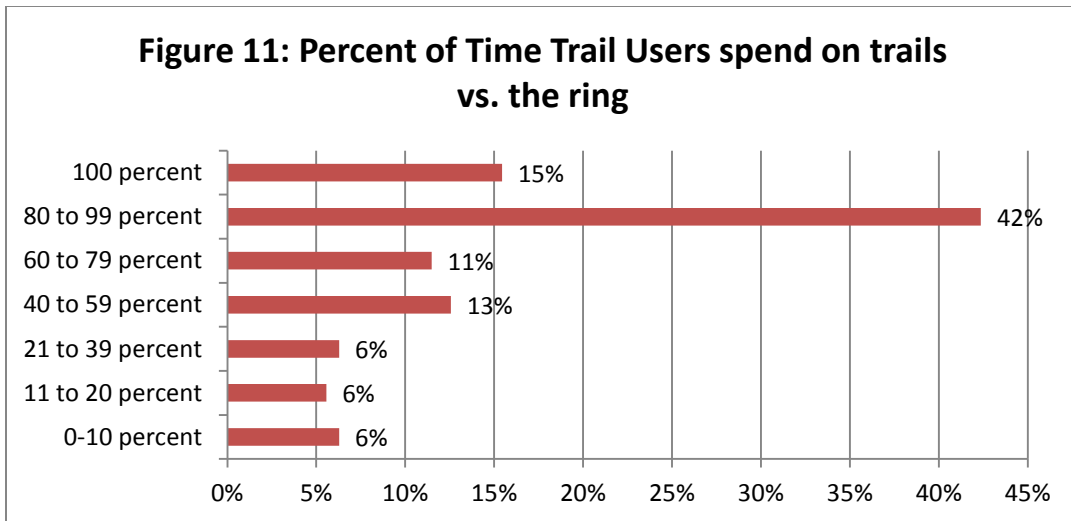
Figure 10: Motivation by Equestrians to Use Trails



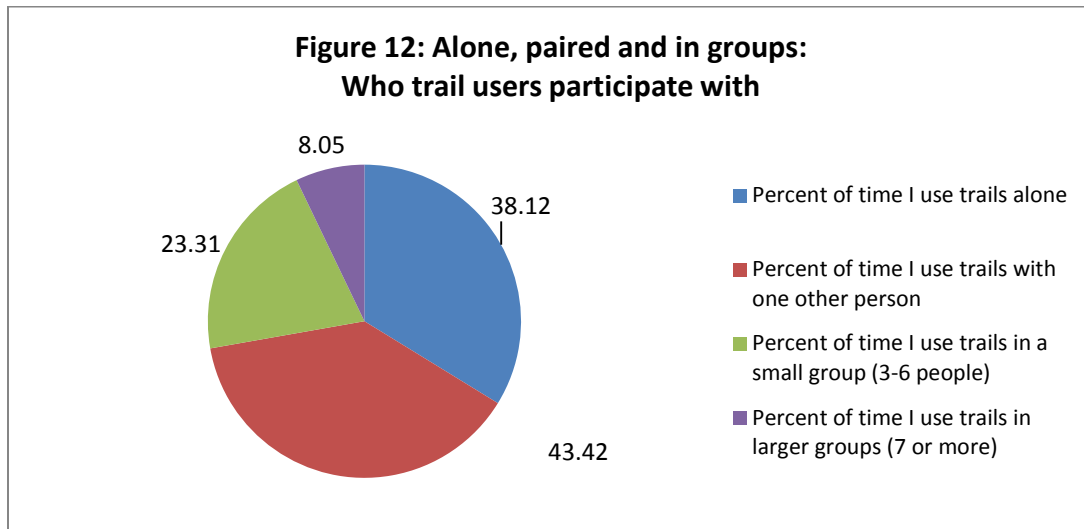
PERCENT OF TIME ON TRAILS

Respondents were asked to indicate what percent of time they spent using trails vs. engaging in other activities in the ring. As shown in Figure 11, trail use is a dominant activity of the respondents where 15% use trails as the exclusive venue for their equestrian activity. A further 42% use trails 80-99% of the time (11% indicated 99% alone), followed by another 11% who use trails between 60-79% of the time. In total, 68% of the sample spends over 60% of their time on trails.

Figure 11: Percent of Time Trail Users spend on trails vs. the ring



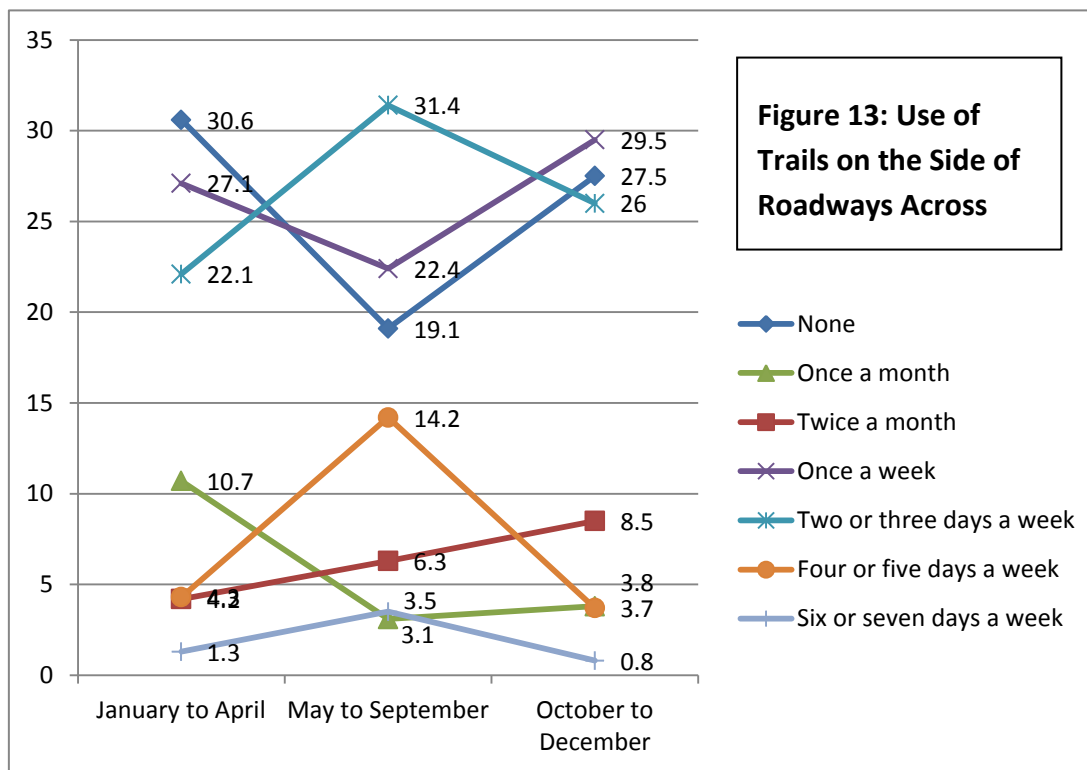
Equestrian trail users are most likely to ride with one other person (43.42%) or alone (38.12%) as shown in Figure 12. For those who ride in groups, 23 % of time is spent riding in small groups of 3 to 6 people, while 8% is spent on with larger groups of 7 or more people. This data suggest that trail use is most often a solitary or partnered activity (82% of time spent using trails this way).



TYPES OF TRAIL USE BY SEASON

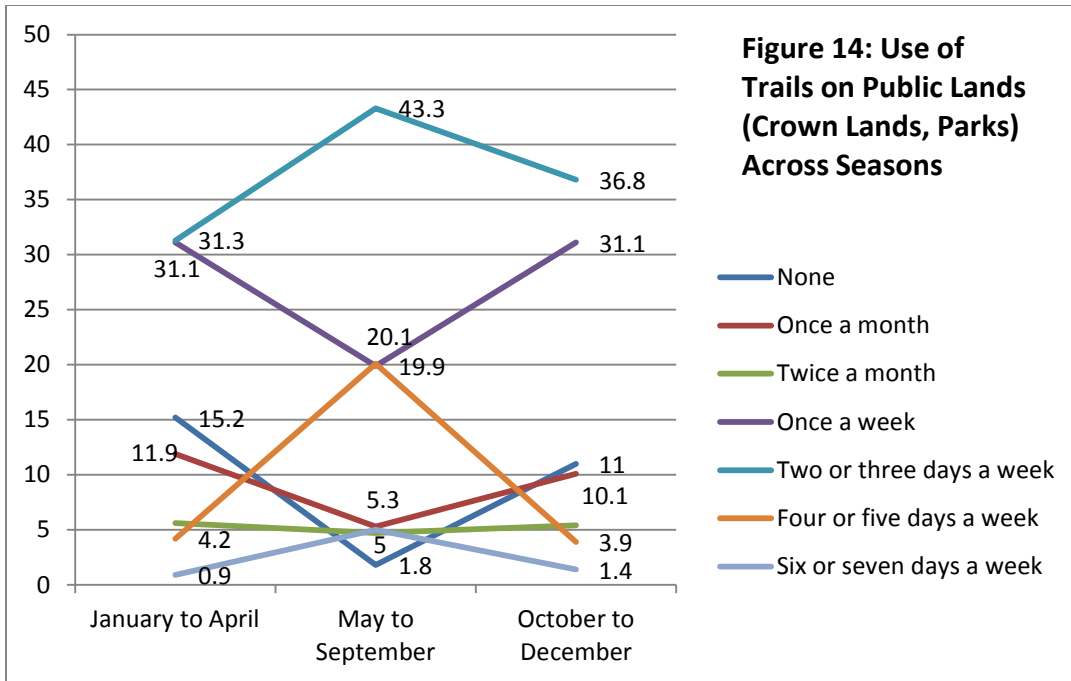
Horses can travel a long distance in a relatively short period of time and as such, equestrian trail users have to figure out paths to access trail systems from the location they keep their animals, or from designated trail heads. This often means their paths cross a variety of types of lands to create a trail of significant distance. The research team wanted to understand what type of trails equestrians were using at different times of the year. As shown in the next three figures, trail use on the side of roadways, on public lands (Crown and Parks) and private lands show usage patterns throughout the year.

Many equestrians have to ride on the side of roadways to either access trails or as an alternative to other trail systems. As shown in figure 13, an interesting pattern emerges when looking at the frequency of use across seasons for road trail users. During the summer season, most riders decrease in the frequency they ride on the road except for those who ride 2-3 days a week or 4-5 days a week. This pattern suggests that equestrians are perhaps riding elsewhere in the summer months as a break from roadway riding where they access trails. It also suggests that for frequent riders, roadway riding increases in the summer. This likely correlates with the increased distance equestrians are riding, which will be discussed in Figure 16.

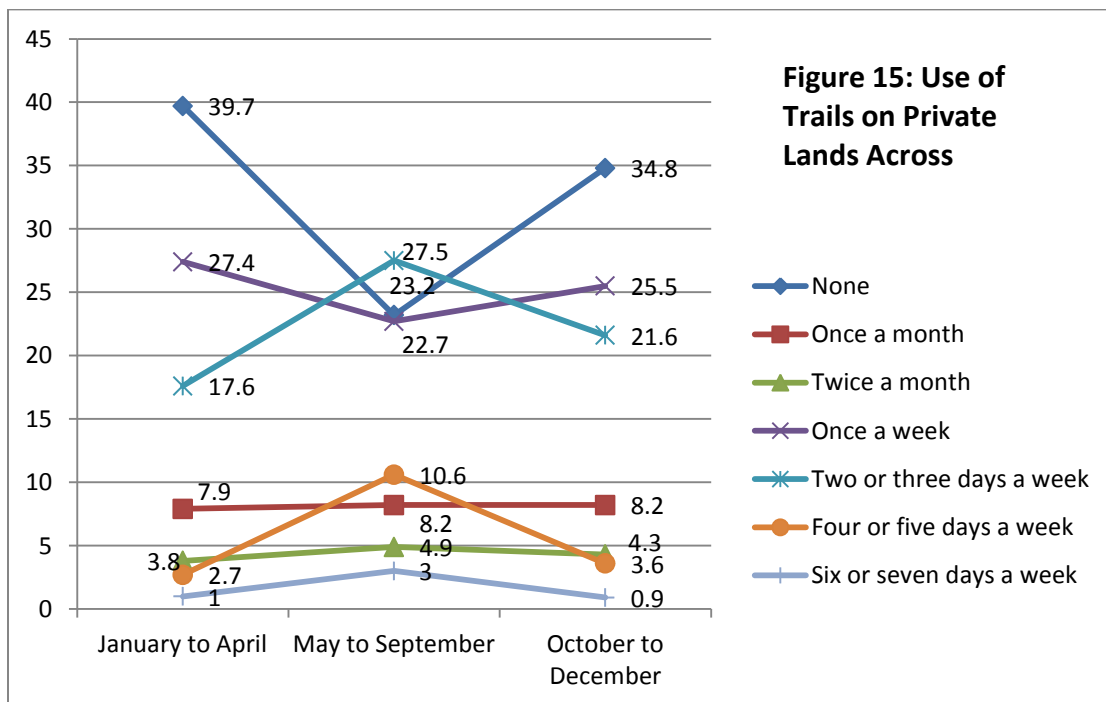


Being able to access trails in the wilderness that are sufficient in length and quality often requires accessing Crown Lands and Parks. The ability to access Crown Land and Parks is highly desirable in the equestrian community. As shown in figure 14, riding on crown lands increases significantly for high frequency riders (two to five days a week). For other riders, use of Crown Lands and Parks remains more constant throughout the year except for decreases among those who are using Crown Lands once a week.



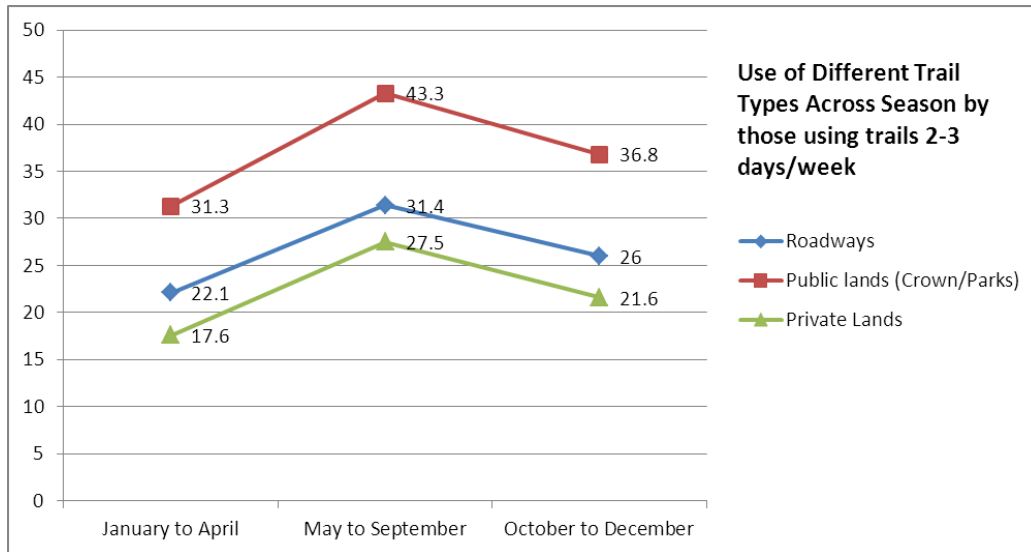


Trail users also ride on private lands. As shown in figure 15, a similar pattern emerges to roadside riding although, more pronounced. For frequent riders (riding two to five days a week), the use of private land for trails in the summer is much higher than the spring and winter seasons. For those riding at other frequencies, the use of private land for trail riding remains more constant during the year except for those riding once a week, whose use drops during the summer.



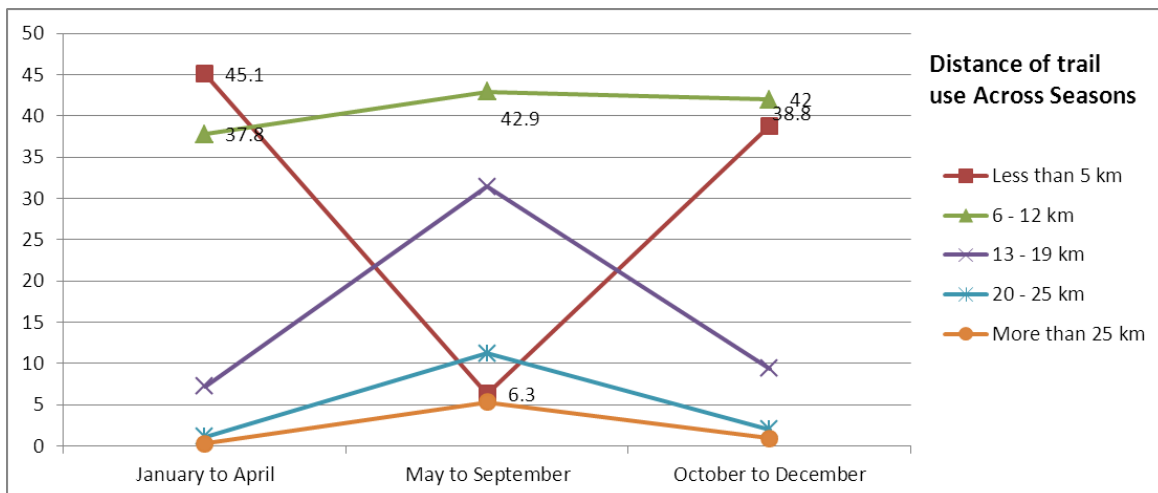
In order to get an indication of how the use of different types of trails differs across the seasons, Figure 16 shows usage across seasons by those using each type of trail 2-3 days/week. Use of trails on Crown Lands are higher throughout the year, followed by use on roadways and then private lands. For all types of trails, the pattern is constant with peak usage occurring in the May to September time period.

Figure 16: Use of Different Trail Types Across Season by those using trails 2-3 days/week



DISTANCE TRAVELED ON TRAILS BY SEASON

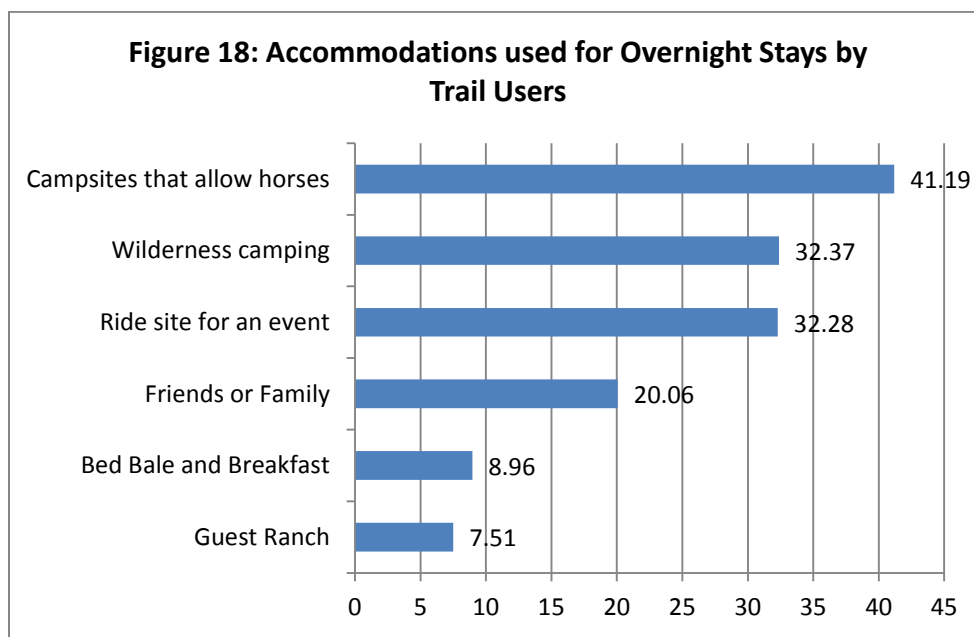
The amount of daylight, temperatures and availability of holidays in the summer months are likely the contributing factors to increases of use of all types of trails previously discussed. With more time, better temperatures and more daylight, equestrians are able to get out on trails and travel longer distances in the summer months. As shown in figure 17, this pattern is shown strongly. For example, while 45.1% of users travel less than 5 km in the spring season, those riding this distance drops dramatically in the summer when individuals likely opt for longer rides. The figure jumps up again in the fall. For other distances however, there is an increase in the summer months with the most significant increases in those riding 13-19 km. These figures provide an indication of the length of trail systems required to accommodate the demand in the equestrian trail riding market.



OVERNIGHT TRAVEL WITH TRAIL USE

As indicated in the zones used by equestrian trail users and the spending on travel, trail use is often combined with overnight stays in other locations. The respondents were asked to indicate to what extent they combined trail use with overnights giving an indication of equestrian tourism related to trails. In total, 45.9% of the sample indicated that they combine trail activity with overnights, staying on average 12 nights away each year.

In terms of accommodation used for overnights, respondents were asked to indicate the percent of time they spent at a variety of alternatives. As shown in Figure 18, 41% of overnights are spent at campsites that allow horses, followed by 32% wilderness camping. Similarly, 32% of nights away are spent at ride sites for events, and 20% are spent at friends and family accommodations. Commercial options account for the remainder of nights away, where Bed, Bale and Breakfasts are the accommodation of choice 9% of the time and Guest Ranches the remaining 7.5% of nights.



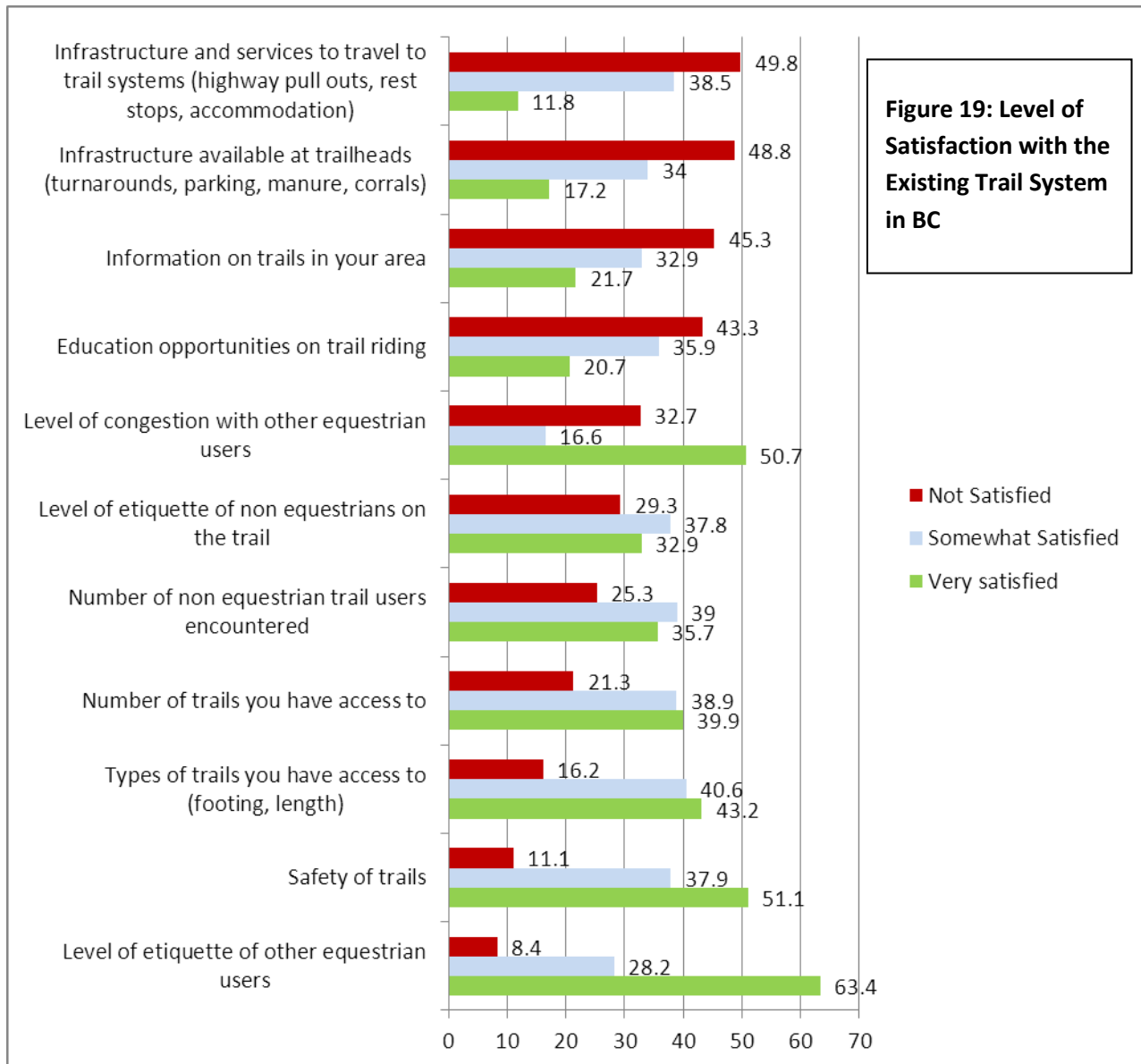
With an understanding of the use patterns of BC Equestrian trail users, the report will now turn to the findings of how satisfied they are with the existing trail system.

SATISFACTION WITH BC EQUESTRIAN TRAILS

In order to move forward, the research team wanted to gain a better understanding of how satisfied equestrian trail users are with their existing trail system. This would give an indication of the strengths and weaknesses that could be addressed through collaborative efforts. As shown in Figure 19, the results of this question generated some good insights for those working on equestrian trails in the province. The areas where equestrians are most satisfied include the level of etiquette of other equestrians (63.4% very satisfied), the safety of trails (51%), the limited congestion of other equestrians on the trail (51%), and the types of trails that they have access to (43%).

“There’s almost no place to trail ride anymore. Places that used to be designated for horses are now closed for horses”

Where equestrians indicate dissatisfaction is with the infrastructure and services to travel to trail systems such as highway pull outs, rest stops and accommodations (50%) and the infrastructure available at trailheads such as turnarounds, parking, manure pits, and corrals (49%). After the dominant dissatisfaction with infrastructure, trail users are then somewhat dissatisfied with information on trails in their area (45%) and on education opportunities on trail riding (43%). Interestingly, while commonly assumed to be large issues for equestrian trail users, the level of etiquette of non equestrians, the number of non equestrians encountered and the number of trails that they have access to ride on were all split between levels of satisfaction.



In a follow up question, the respondents were also asked if their level of satisfaction had changed over the past five years. 26% of respondents indicated that they were less satisfied now than 5 years ago, whereas 53% had no change and 20% are more satisfied now than they were before.

The respondents were also allowed to respond with open ended comments on the question about current level of satisfaction. These open ended responses were analyzed to expand upon the quantitative results above. The only dominant theme out of the satisfaction with existing trail systems centered around the notion of the loss of trails.

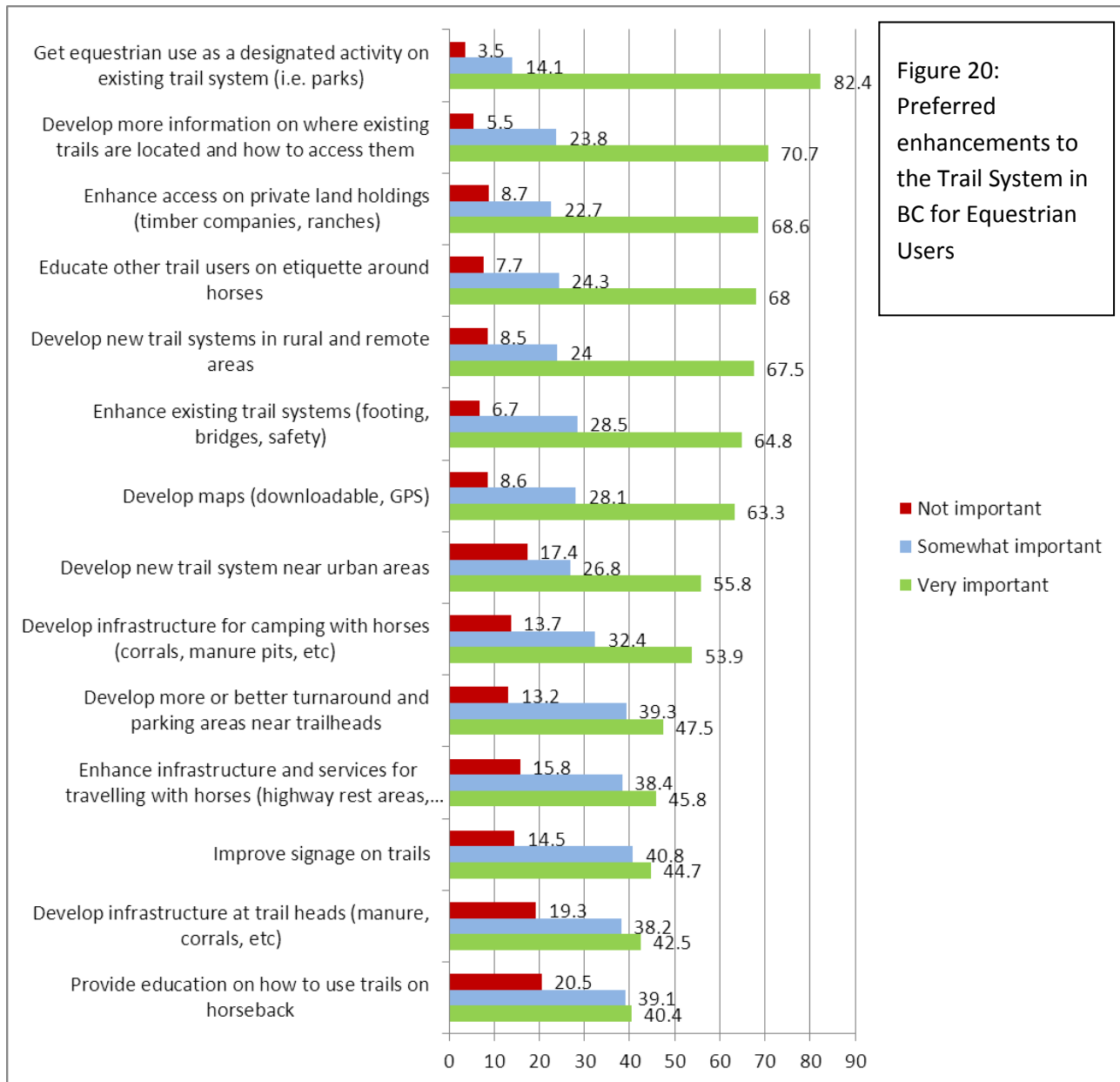
A number of the open ended comments centered on the loss of trail systems that were once available. This general trend appears to be the result of restrictions by timber companies who inhibit access to Crown Land (the most frequently used and desired area for trail use) and to changes in use by Parks and Protected Areas. As indicated by one respondent: *“We are losing access to lands leased by timber company's here they have blocked off most of our trails, and we will have nowhere to ride.”* This was validated by another who wrote: *“Timber companies keep blocking access to crown land- this is extremely frustrating.”* While Timber Companies were most often cited for the loss, private development that blocked access and didn't take into account prior use was also noted as a challenge. For example, one respondent wrote: *“Many of our trails are being destroyed by logging companies and private development companies. More land should be reserved as green pockets, and left standing, with trails through them. Also, we need more trails in the way outback on Vancouver Island. (So much wilderness, but no way to ride through it!)”*. This issue was most frequently cited on Vancouver Island where another respondent indicated: *“On Vancouver Island almost all land is privately held. Timber companies want fees for equestrian events and access is tricky in places. New developments are cutting off access to trails and no allowances are made on roadsides for horses. Provincial parks are no-go for horses! Unused railways could be horse highways.”*. Beyond Crown Land access, some open ended comments indicated challenges for equestrians who need better access to safe roadside riding and urban trail systems. As one respondent indicated: *“And on the loss around Metro or Urban areas, this respondent indicated: “The development in Vancouver, Vancouver Island and Maple Ridge is out of control. I have run out of safe places to ride my horses. I am currently in the process of moving my herd to the Sunshine Coast for these reasons.”*

RECOMMENDED ENHANCEMENTS FOR BC EQUESTRIAN TRAILS

While understanding the level of satisfaction with different aspects of the trail system is important, in order to develop strategy, the research team also needed to understand what the priorities of equestrian trail users were to enhance it. As shown in figure 20, respondents provided some very clear direction to those wanting to enhance the trail system in BC. The most important priority is to get equestrian use as a designated activity on existing trail systems such as in Parks (82%). This is followed by the second priority which is to develop more information on where existing trails are located and how to access them (71%). The third priority is in line with the first, which is to enhance access on private land holdings such as timber companies and ranches (69%). Efforts to educate other trail users on etiquette around horses was a priority for 68% of respondents, the same level of support as those who want to see new trail systems developed in rural and

Many great trails have been made inaccessible by road 'improvements'. Roads that were once safe to ride/lead down to access trailheads are no longer safe to use leaving no access to the trails. Equestrian use should be taken into account for road improvements: wide shoulder, safe places to cross, etc.”

remote areas of the province (68%). Two other priorities were noted by over 60% of respondents. 65% wanted to see enhancements to existing trail systems to improve footing, bridges, safety and another 63% wanted to see maps, particularly downloadable for GPS, developed.



Additional Comments provided by respondents

As in the satisfaction question, respondents were able to provide open ended comments to this question. The comments were grouped and themed. These are shown below with illustrative quotes to help interpret the quantitative results.



ENHANCE ACCESS TO EXISTING TRAILS

“Connecting existing trails to make a loop where possible. What the planners in municipalities and regional districts don't seem to understand is that a 30 km ride is not a long distance on horseback. Most of the existing trails urban areas are designed for walking but if they were connected they could also be used by horses and bicycles.”

“It would be fantastic if organizations stopped putting limits on when horses can use the trails (such as full year use instead of only having access to between June 1 - Sept 30th, and if more rural parks with hiking trails where open to horses).”

“Develop trail systems that connect to other trails and to parks”

“Convince Municipal Governments to buy in to a cross-municipality trail system”

ON THE NEED FOR MORE INFORMATION AND MAPS...

“It is really hard to find good horse trail information on what trails are like and where to go. You always have to find out through other people. Horse trails are always small and are not even worth going to. I am looking for a trails that you can camp on or plan a day trip.”

“There is info and maps but it is too much information....too generic....we need practical user guides...where the horse trails are not every trail in BC...where to turn off, park a trailer, what kind of footing/terrain....how high the trail goes....so we know if we can expect snow in May etc.”

“Providing maps of the area, I've been going up to ride in the Lundbom area for years, best and only map was a photocopy of the mountain biker's map from years ago. I've looked for something better but haven't found anything. Marking trails helps too. The lily lake area is popular mainly because there are some loops marked and a map done by the endurance group. I like to know where I'm going when I'm heading down a trail.”

“I believe a website/link with all the trails located in BC with downloadable maps would highly benefit all trail riders, and the services offered in each map this would also serve a great site for updates and additions, networking on a FB page open to public does seem the fastest, communication, pictures and suggestions would certainly help all those interested in the trails of BC.”

“it would be great to have a website that states horse camping areas with corrals in certain areas”



ON THE NEED FOR ENHANCEMENTS TO EDUCATION

“Definitely need better education for people with loose dogs and drivers! I ride a lot on the road to reach the trails and I've had some really close calls with large trucks ie Ace moving trucks, company transport trucks, etc. Also have had a dog on a leash bite my horse. We need to focus on education!”

“There is a fairly significant lack of awareness in these areas in my experience, resulting in the following conflicts: - trail users unaware that horses may be present in the area or how to behave around them. - loose dogs and/or unprepared dog owners resulting in unsafe encounters - unclear rules pertaining to equestrian trail users (ie manure management), often results in conflicts with other trail users. I and many other equestrians will often avoid certain high traffic areas where horses are permitted but are not well received by many of the users frequenting those areas.”

ON THE NEED FOR LAND DESIGNATED DURING DEVELOPMENT

“with increasing property development on lands where riding used to be common, we must somehow convince developers to allocate some lands to preserve for riding. Otherwise, in time, will be no riding trails”

“work with local government to create trails , when subdivision occurs, connect parks with trails”

ON THE NEED FOR IMPROVED INFRASTRUCTURE

“We need a lot of room for turning around and parking units. Especially if there is to be a group trail ride. We are lucky that we have access to many miles of unregistered trail on grazing lease and private land, but access is parts is lost often due to development”

MOVING FORWARD – NEXT STEPS:

“All in all I am very impressed that our Province is understanding and accommodating of the sport we enjoy. It would be appreciated if even more respect was brought to something that is so natural, and relaxing, and used to be the way of life all over the world.”



The BC Equestrian Trail Users Study has gathered important information on trail riding in the Province of BC. Respondents have identified a number of key areas of concern and named priority areas that support trail use. This report will be made available to equestrian groups, land managers, trail user groups and others interested in these findings. The Joint Trail Access Committee and Horse Council BC will use information provided by the Study to assist in setting priorities and reviewing existing programs, and to develop future projects and action steps. As we take our “next steps” forward, we wish to express appreciation to the equestrians who gave input to this critical snapshot of trail riding in our province.