

The Clark County Equestrian Survey

Sponsored by the Clark County Executive Horse Council

April, 2004

**Survey design and administration by
Market Decisions Corporation, Portland.**

The Clark County Equestrian Survey

Overview

The Clark County Equestrian survey, commissioned by the Clark County Executive Horse Council, is designed to quantify the economic impacts of equine ownership in Clark County and to identify the current issues and concerns of the Clark County equestrian community.

Methodology

The data in the 2000 survey were collected during July, August, and September, 2000 via a self-administered survey distributed to horse clubs and organizations and feed and tack stores throughout Clark County. A total of 365 surveys were returned out of 2,000 surveys originally distributed. In 2004, a total of 204 surveys were collected (out of 1,700) during December, January, February, and March, 2004.

The maximum sampling variability of the survey results is +/- 5.8% with 90% confidence in those results.

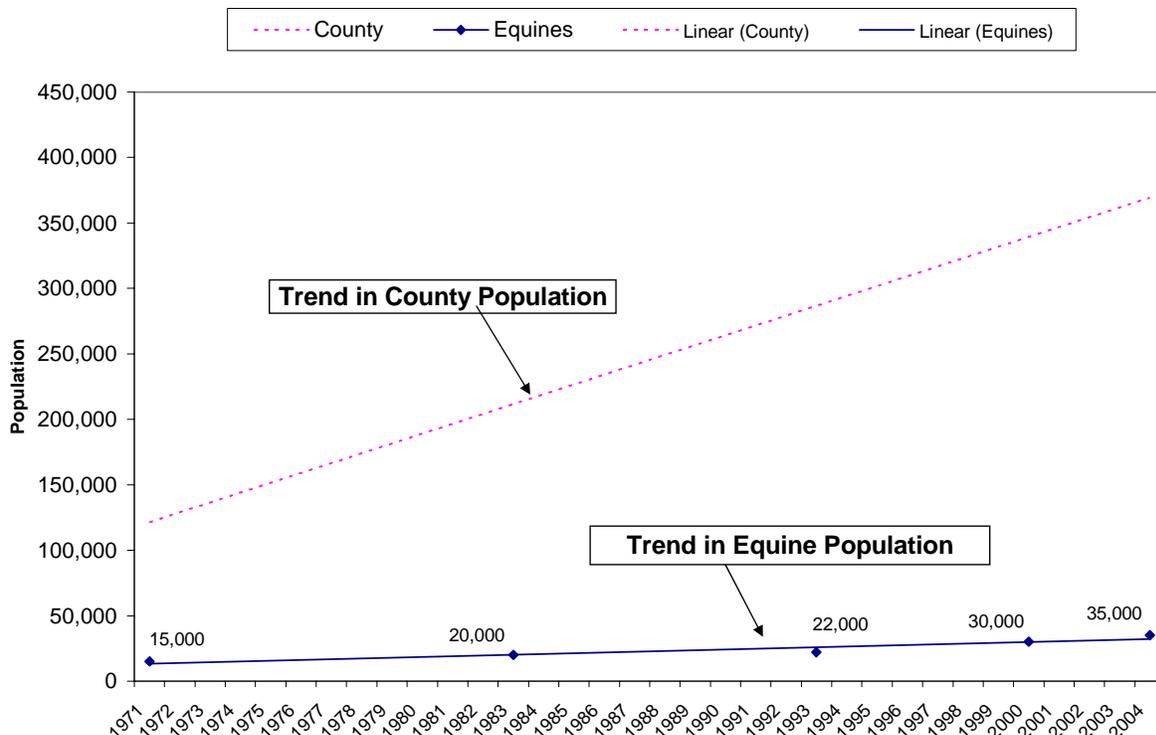
The survey was designed and administered by Market Decisions Corporation, an independent market research organization headquartered in Portland, Oregon.

Survey Findings

Equine Ownership

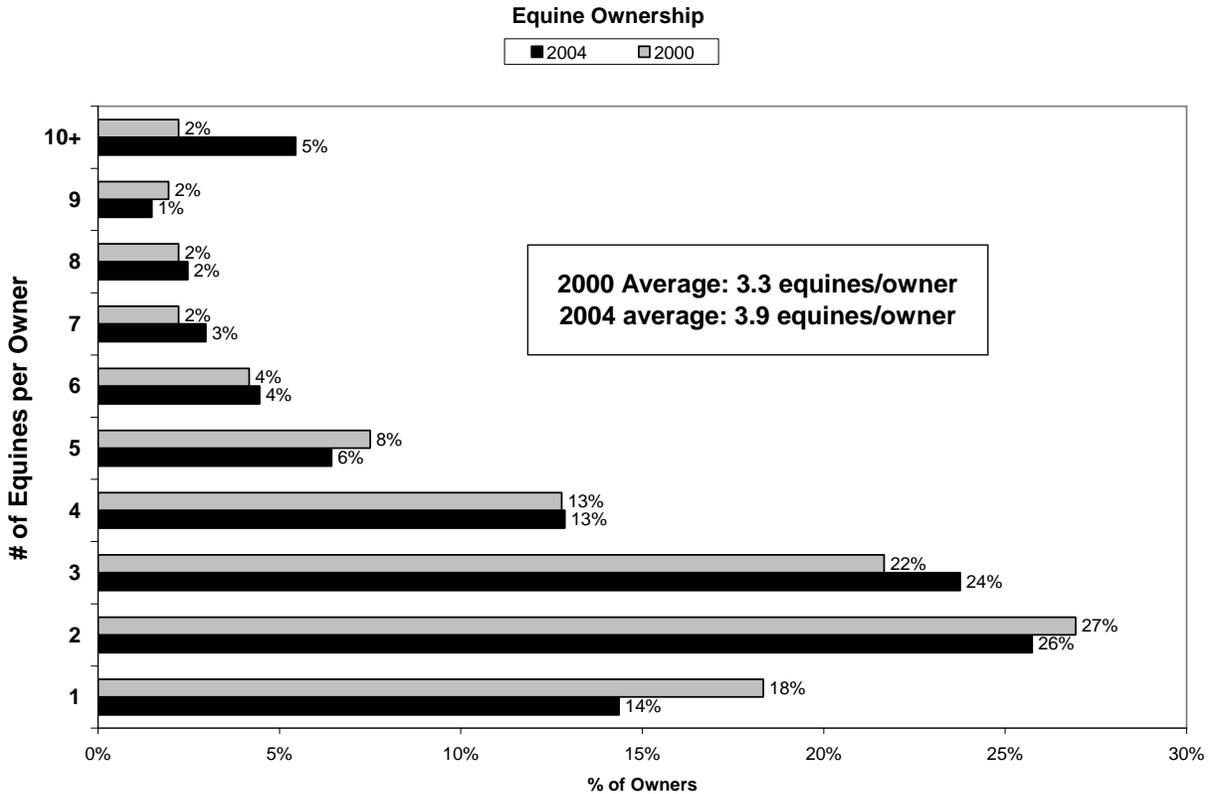
In 1983 it was estimated that there were ~20,000 equines in Clark County, or one for every 9.6 residents. Projecting to today based on the County's population growth and the average number of equines per household, we estimate that there are now approximately 35,000 equines in the County, an average increase of 4.2% per year. Due to the increasing urbanization of the County, the proportion of equines has declined one for every 11.1 residents

Clark County Equine Population 1971 - 2004



Overall, the average Clark County equestrian household has 3.9 equines, an increase of 18% from three years ago. Sixteen percent (16%) of the respondents are new equine owners.

The average number of equines per household increased somewhat between 2000 and 2004, from 3.3 per household to 3.9. However, this is less than the average of 5.6 per household seen in a 1983 survey conducted by the Executive Horse Council.



Spending Related to Equine Ownership

Analyst's Note: In order to present a more balanced view of equine-related spending in the County, the results from last year have been re-stated to moderate the impact upon the averages of a few respondents giving answers that greatly exceed the norm.

In total, equestrian households contribute approximately \$161,459,279 per year to the Clark County economy that is directly related to their equine ownership; an increase of 20.6% (~5% per year):

- **Direct spending: \$75,355,330.**
- **Equine-related spending: \$86,103,949.**

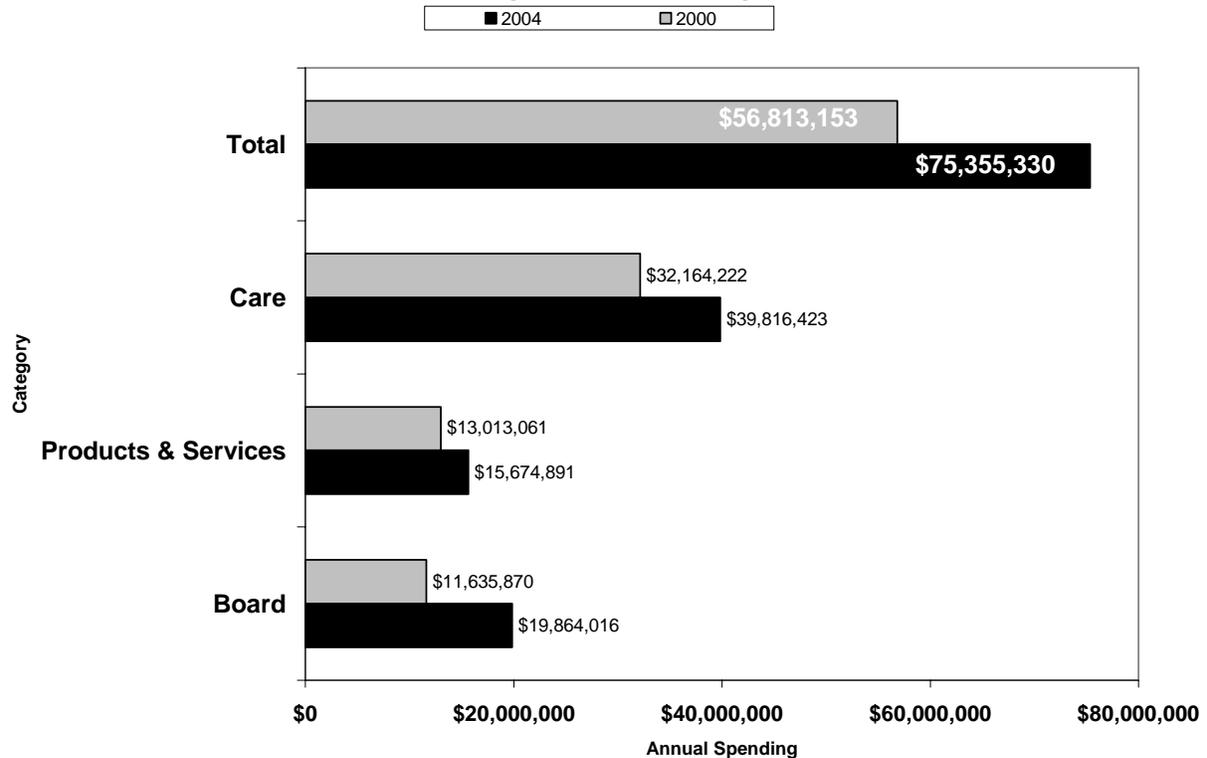
Direct Spending on Equines

The average equestrian household spends \$1,138 per equine per year for the basic care and maintenance of their equines (this would include feed, shoeing, veterinary care, fly spray, feed supplements, etc).

Annual spending equine-related products and services, such as tack, blankets, fly masks, lunge lines, whips, boots and wraps, show clothes, etc. is \$448 per equine per year.

Just over a third (35%) of equine owners, with an average of two equines each, board their equine(s) off of their own property, spending approximately \$1,764 per equine per year.

Direct Expenditures on Equines



Spending Related to Equine Ownership

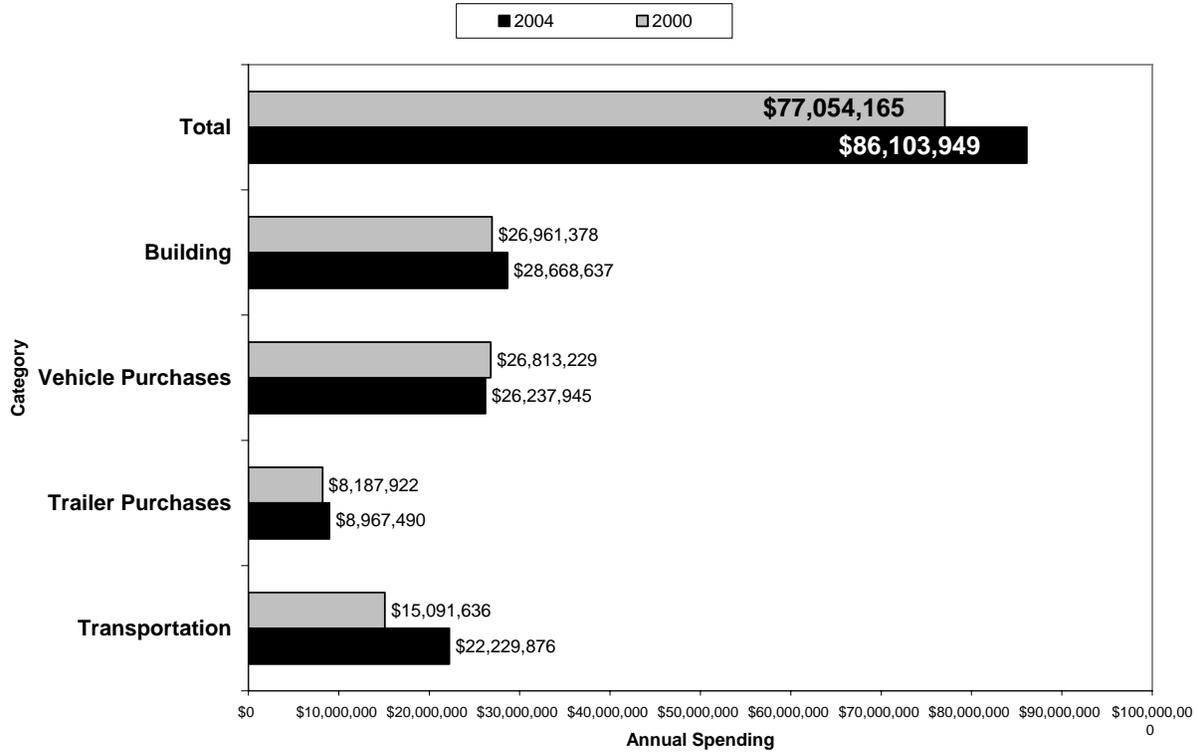
About five out of ten equine owners (49%) report having built, expanded, or improved a barn, stable, or arena on their property in the past 3 years (down from 60% in the 2000 survey), spending an average of \$19,213 (up from \$14,677).

Just over a quarter (26%) own a horse trailer that was purchased from a dealer in Clark County in the last 3 years (compared to 30% in 2000), with an average purchase price of \$11,241. (up from \$8,914 in 2000).

Almost a third (32%) own a vehicle that was purchased from a dealer in Clark County in the last 3 years (vs. 38% in 2000) and is used in connection with their equestrian activities. The average purchase price was \$26,909 (up from \$23,047).

On average, equine owners spend approximately \$53 per equine per month in total for transportation of their equines or any other equine-related use of their vehicle(s), or \$635 per equine per year (up from \$586 per year).

Equine-Related Spending



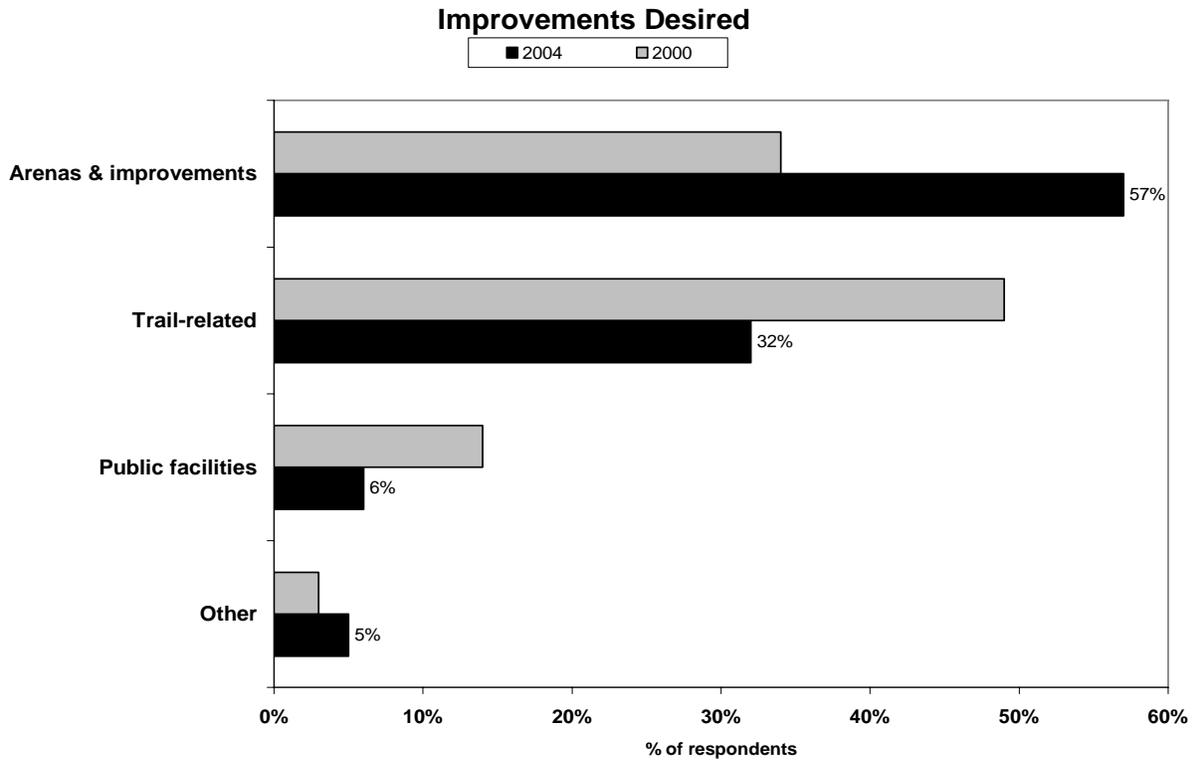
Participation in Equestrian Activities

Respondents were asked to indicate the equine activities they have participated in the past 12 months. More than 8 out of 10 participate in trail riding (82%). Equine owners report participating in an average of 3.3 different activities, the same as in 2000.

<u>2004</u>	<u>2000</u>	<u>Change</u>	<u>Activity</u>
82%	79%	+3%	Trail riding
48%	41%	+7%	County Fair equine exhibiting
40%	39%	+1%	4-H
46%	38%	+8%	Open or breed horse shows within Clark County
23%	33%	(-10%)	Chasing cows (Roping, penning, or cutting)
23%	24%	(-1%)	Gaming
17%	12%	+5%	Dressage
15%	19%	(-4%)	Rodeo
8%	15%	(-7%)	Drill Teams
7%	9%	(-2%)	Endurance riding
8%	9%	(-1%)	Eventing
4%	3%	+1%	Hunter/Jumper
2%	2%	nc	Driving
1%	1%	nc	Pack Trips
8%	6%	(+2%)	Other

Improvements Desired

Nearly 8 of 10 (79%) responded when asked what additional facilities respondents would like to see provided for equestrian activities in Clark County. Most mentioned either improvements to County riding trails (32%) or to County equestrian facilities, especially additional covered riding arenas or improvements to the arena at the Fairgrounds (57%):



The various types of responses making up each of the categories and number of each received are shown in the chart below, followed by the complete listing of the verbatim responses.

Additional Equine Facilities Desired	
	<i>Count</i>
Arena Improvements	115
Additional covered arena(s)	44
More open / public riding	19
New full-use equine center	13
More warm-up / covered warm-up arenas	13
Improvements to CCF show facilities	13
Lower fees	1
More / improved parking at CCF	4
Additional stalls	5
Round pens	2
Footing improvement	1
Better camping and hookups for RV's	1
Trails	65
More trails	44
Better maintenance	6
More / better parking for trailers	5
Connecting trails	4
Driving trails	3
Better access along roads	2
Public Facilities	13
Hunter/Jumper/Eventing Facility	4
Campsites, horse emphasis	3
Outdoor arena	3
Race track	1
Outdoor rodeo grounds	2
Other	10
Educational opportunities re: horses [clinics]	5
More open and/or breed	5

Verbatim Responses to “What additional facilities would you like to see provided for equestrian activities in Clark County?”

Survey

- 0001 More indoor riding areas/more horse trailer dealers.
- 0002 Fee arena or use of the fair grounds arena. Show arena – see Redmond, Oregon. This small county has a beautiful show arena. Upgrade or add on to current fair arena, warm-up is very limited. There are counties all over the USA that have chosen to embrace the equine sport with parks and arenas. I have raised my children with this sport and both are going on to become honor students at high school and the college levels. Horses provide jobs for thousands of people and teach people to become responsible. Last year our combine horse related activities was well over \$10,000 – some of which I had to spend outside of Clark County because we do not offer facilities that support large events, i.e.: Paint Regions, QTR horse Breed Shows, Pinto Breed Shows. Most of these are held in Tacoma or Albany, OR.
- 0003 More trails.
- 0004 Arena and stables.
- 0007 Public riding arena.
- 0009 Show facilities. Clark County fair grounds is declining.
- 0010 Riding trails along 179th so we can get to Whipple Creek Reserve on horseback and also to the fairgrounds. Some new groomed riding trails.
- 0012 Show facility improvements – covered warm-up arena, new barns and stalls, better parking.
- 0014 Improved stalls/arena, showing facilities, more info about trails /maintenance/terrain/difficulty. The fairgrounds seem to be making changes to decrease accessibility and use by equines. I would like this change to NOT happen. Clark County is the largest county in South Washington and there are no other facilities to use.
- 0015 An open to the public indoor, outdoor arena.
- 0016 Improve and expand the trail systems – open fairgrounds to open ride times – during the week and weekends.
- 0017 More trails.
- 0019 Additional access to rideable areas.
- 0020 Finish camp Bonneville.
- 0021 Better parking areas at trail heads.
- 0022 More driving trails without driving on county roads.
- 0025 More trails.
- 0026 Arenas – better trails maintenance – better parking.
- 0028 More trails.
- 0029 More trails.
- 0030 Driving trails.
- 0031 Driving trails.
- 0032 More barns, wash racks, tack rooms. I have watched over the years a steady decline in the focus on horses at the Clark County Fair – especially breeds and open shows. The focus seems to be on how much money can be generated – not on how much the surrounding area can show their accomplishments.
- 0033 Give us more good trails.
- 0035 An arena that breed shows could come to. The equine community in Clark County has a large economic impact on local businesses. People, coming from Portland for a concert once a month at the Amphitheater, don't use local fuel, hotels, restaurants, or other businesses. An equine facility draws people from out of the area. These people, and horses, need to refuel trucks, sleep, and eat somewhere. Most come for 2-3 days. The Amphitheater might benefit the fairgrounds; it doesn't benefit local citizens or businesses. Most of the people with money travel out of the area for breed shows and other activities. These events aren't available here. Clark County's loss. \$\$\$.
- 0036 We need a new facility in North Clark County where my kids can go. I stopped showing at Clark County Fairgrounds.

- 0037 Additional trails, accessible fairgrounds.
- 0039 Better indoor riding area at CC fairgrounds. More trails for riding. What about a “nice” complex for large horseshows and conventions?
- 0040 We need new enclosed areas open to public (i.e. an equestrian center) with at least 300 stalls and at least three areas as other communities have, e.g., Albany, OR, Wenatchee, WA. These need to be dedicated horse facilities.
- 0041 Expansion of the Saddle Club and more open indoor arenas. Expansion or add another indoor arena at the fairgrounds.
- 0042 Improvements at fairgrounds, better outside arena.
- 0043 Outdoor arena. I know space is limited, but a nice out door facility would allow more events to happen in the spring – full time.
- 0044 Covered warm up arena at fairgrounds.
- 0045 Bigger, better horse facility than is at the F.G. Most breed shows go to Albany, Roseburg, and Spanaway instead of here. Lots of \$\$ lost every weekend.
- 0046 Outdoor covered arena.
- 0047 More open ride rights at an inside arena/more clinic’s on how to take care of your animal and ride.
- 0050 More trails, better grounding of halter classes at fair. More local horse shows and competitive trail events.
- 0053 Horse trailer rentals, riding trails, arenas, fix the fair parking mess.
- 0054 Make trails and parks for equine.
- 0055 More public riding areas.
- 0056 Open riding at fairgrounds facility at night during the week. I work you know or weekend availability would like to ride with friends and keep my boys in shape.
- 0057 Preserve trail riding, as Whipple Creek.
- 0058 Indoor arena and stalls.
- 0059 Adequate parking and RV hook-ups at fairgrounds.
- 0060 More trails.
- 0062 Driving trails, a premier show jumping facility.
- 0063 An arena open to the public for riding.
- 0064 Additional large covered arena – Saddle Club.
- 0065 Saddle Club with indoor arena east side C.C. near Camas area.
- 0066 An equestrian sports park on the county property near Daybreak Park. It could tie into the trail system along Lewis River and wild life sanctuary near LeCenter.
- 0068 More trails and horse camps.
- 0069 Arena for public use.
- 0070 Open space open to equestrians/cross-country course.
- 0071 Keep the trails open; continue access to fairgrounds, cross country course?
- 0073 An indoor arena closer or in Battle Ground.
- 0075 Some way for a calendar of events so we can know more about what’s coming up.
- 0076 Eventing – (cross country, dressage and jumping) facility for youth.
- 0079 More breed specific shows.
- 0082 Trails, lots of them.
- 0083 More public riding arenas. Keep horses at Clark County Fair.
- 0084 More horse friendly arena with adequate parking.
- 0085 Something other than the fairgrounds.
- 0086 More parking at Whipple Creek fairgrounds, more, more, more horse facilities.
- 0087 More trails that are maintained like Whipple Creek. Signs for parking areas that help non horse trailer vehicles understand how to park and not block trailers or use up space.
- 0088 Publicly accessible tracks and arenas of high quality.
- 0090 Warm up arena at fairgrounds, public cross country jump facility.
- 0091 Better arena, more trails, better warm up area at fair.
- 0094 Another covered arena.
- 0097 Arena made available for open riding until 5 pm each day.
- 0099 1) Another big arena like the CC Fair horse arena; 2) Motorcycles out of horse barn at CC fairgrounds.

- 0100 Another indoor arena.
- 0101 Arena, equestrian center, only for horses/mules, no motor cars or bikes.
- 0102 An arena besides CCFG.
- 0103 Cheaper supplies, more horse arenas to ride in.
- 0107 Large arena available more hours and days than fairgrounds arena.
- 0108 More horse related arenas to ride in.
- 0109 Public riding arenas.
- 0110 Heated observation room at fairgrounds arena.
- 0111 Better warm up arena at C.C. fair.
- 0112 Better parking and a warm up arena at fairgrounds also more trails to ride on.
- 0113 Larger facilities to barrel race.
- 0115 Rebuild the horse barns at the fairgrounds.
- 0116 More jumping shows.
- 0117 Like to be able to practice at an indoor arena, more trails.
- 0118 I would like to see easy access via riding through private property with permission and possibly gates with a key and membership as they do in Woodside, Calif.
- 0119 More trails in the county for equestrian activities.
- 0120 More places to trail ride, better horse facilities /pkg at CCFG.
- 0121 More trails and more open shows.
- 0122 Additional covered arena for shows.
- 0123 Better parking at fairgrounds, youth gaming facilities.
- 0124 Arena for horse shows, etc., maintained trails.
- 0125 More public trails.
- 0126 Please keep all equine trails/parks. Also – most important to us would be an equine exhibition facility such as the one in Albany, OR, Linn County Exhibition Center.
- 0127 More trails.
- 0128 More trails and parking at existing trailheads.
- 0129 More indoor arenas large enough to barrel.
- 0130 Whipple Creek Trail along 149th Street.
- 0131 Expand facilities at CCFG.
- 0132 Another indoor arena like the one at fair.
- 0133 More riding trails/parks, especially some without motorized vehicles allowed on the trails.
- 0134 I would like to see an equestrian arena (for horses only).
- 0135 Arena for more uses.
- 0136 More public riding without fees.
- 0137 Horse trails are needed throughout the county.
- 0139 A round pen and two warm up arenas.
- 0140 Large arena.
- 0141 Improve the fair – make it more horse-friendly, jointed breed shows, etc.
- 0142 Separate warm up arena, round pens.
- 0144 Ability to ride on easements/private roads (dirt kind).
- 0145 More trails accessible for riding; more public arenas.
- 0146 More places that sell show clothes and tack. Many of them have closed or don't sell very many Western show clothes.
- 0147 We need equestrian trails in parks.
- 0148 More trails for use in winter months.
- 0149 Low elevation trails are needed for trail riding.
- 0150 More all weather trails.
- 0152 More horse trails are needed in the county.
- 0153 More low elevation trails for winter use for horses of course.
- 0154 Trails, camp sites (with corrals with shelter).
- 0155 An attractive show facility, multi use.
- 0156 More equestrian trails and maintenance of current trails.
- 0157 More enclosed arenas to ride in, more parking at trailheads.
- 0158 Full time open arena riding to public.
- 0159 A premium show facility!

- 0160 An "open" riding enclosed arena (other than the fairgrounds) for more availability for riding and showing, an area specifically for equine.
- 0161 An arena accessible for open riding that is maintained.
- 0163 A new arena, larger with more stalls and a decent outdoor and indoor exercise arena.
- 0164 Lunging area separate than the arena.
- 0165 Better maintenance to C.C. fairgrounds arena and barns, better warm-up area.
- 0166 Closed in arenas to ride in year round.
- 0167 Indoor riding arenas.
- 0168 A large public arena for open riding.
- 0170 Covered area open to public.
- 0171 Trails.
- 0172 More ride facilities inside and out.
- 0173 Trails, large indoor arenas with public access.
- 0174 More trails.
- 0175 Lunging area.
- 0176 Keep large horse arena at the fairgrounds.
- 0177 An open arena that is big and you can haul to on holidays and year around.
- 0178 Trail from Whipple Creek Park to fairgrounds.
- 0179 Additional venue for more large horse shows to attract world level shows, plus maintain economy facility for more open and 4-H shows as well as smaller breed shows.
- 0180 More events towards winter, jumper disciplines.
- 0183 Less use of fair facilities by motor cross in winter.
- 0184 Love to enjoy the trails. Please keep them nice and natural.
- 0186 An equestrian/horse park that best serves the growing horse industry and suitable to all disciplines. There is an ideal property recently donated to the county on NE 82nd Ave. by Daybreak Park. It would be a great agricultural use of an open space, be a revenue producer and tie in nicely with long range plans to have a connected equestrian trail along the East Fork of the Lewis River. Our children need to have places preserved to experience rural America. P.S. We have a neighborhood Assn. (Daybreak) and would welcome county representatives to discuss this further. My husband & I are the co-presidents. You may reach us by phone at 66608604 or email: Julliard@earthlink.net.
- 0187 New arena facility built for all horse activities, better barns, etc., bigger warm up arena on Clark County site, more shows available.
- 0188 Clark County fairgrounds area improvement to barns and outdoor arena, snack bar inside arena area.
- 0189 I would like to see Clark County Fair do more for the 4-H and improve the facilities for horses. I would also like to see more vets in the area or 1 or 2 vets on call weekends.
- 0192 Open riding, daily, not on occasion.
- 0193 Arenas we could rent by hour/day (especially during rainy months) for group activities.
- 0194 More for children.
- 0195 More trails, more horse friendly housing.
- 0196 Affordable activities for families.
- 0197 More trails.
- 0198 Public arenas.
- 0199 1) Clark County fairgrounds provide an evening open ride so working parents/kids can practice. 2) An organized ride such as the Capitol Forest trail ride (Olympia) that provides overnight camping/prizes for up to 500 rides.
- 0200 Equestrian camps for children and adults.
- 0201 An arena that is equine only and more available than fairgrounds.
- 0202 Covered warm-up arena, Clark County Fairgrounds.
- 0203 More indoor equestrian arenas for shows and clinics with better acoustics than the fairgrounds.
- 0204 More trails, better warm-up area at fairgrounds.