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PRIVATE OUTDOOR RECREATION BUSINESSES

HORSEBACK RIDING ENTERPRISES

By

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ABSTRACT

Horseback riding is considered a major outdoor recreation activity in Wisconsin. Compared to other activities, like swimming, picnicking or camping, the number of equestrians is small but participants in this activity are enthusiastic and appreciative of quality facilities.

On a usual weekend day in the summer, more than 10,000 people go horseback riding in Wisconsin. Around two-thirds of these people rent horses from private recreation businesses similar to the 21 riding enterprises covered in this study. Such enterprises, numbering 271 throughout the state in 1966, are an important segment of Wisconsin's outdoor recreation industry. In a year, these private enterprises provide horses and facilities for approximately 673,000 participant days of horseback riding. Most enterprises charged fees ranging from \$1.50 to \$2.00 per hour of riding.

Size of the horseback riding enterprises in this study varied. Although one enterprise had only 4 riding horses and one had 34, two-thirds of the enterprises had 11 or more horses and the average number per each enterprise was 15.5 horses. Trail lead horses ridden by enterprise attendants were not rented to customers. About 43 percent of the enterprises had an average of 3.2 ponies each that were ridden only by smaller children in corrals at the enterprise headquarters area.

Wide variations appear to be characteristic of this industry. This is noticeable for the period of days that an enterprise is open for business and for the amounts of trade received. The enterprises studied were about equally divided among three groups that rented horses for 100 or fewer days, 135 to 180 days and 195 to 235 days (including one enterprise open each day) of the year. The average enterprise was open 152 days. The weighted average for horse-availability-days (i.e., the number of horses times the number of days open for business) for all 21 enterprises was 2,642 days, but there was a wide range of days (408 to 7,990 days) for individual enterprises. Likewise, the trade of the individual enterprises varied from 217 participant days to 6,000 participant days with an average of 2,077 days each for all the enterprises studied.

Thirty-eight percent of the enterprise operators had other recreation enterprises on their ownerships and 86 percent of all operators had 1 or more nonrecreational enterprises. Members of the operator's family were the main source of labor in over 85 percent of the riding enterprises; almost all of the operators gave only part of their regular working time to the horseback riding enterprise. Most operators indicated that returns from their riding enterprise were satisfactory. A majority of the enterprises were 5 or more years old; one enterprise had operated for 28 years. Less than one-half of the enterprises boarded horses for other owners.

Separate riding trails used by different enterprises varied from only 1 trail to as many as 7 trails with total miles of trails per enterprise ranging from 2 to 15 miles. The average number of miles of trails per enterprise was 7.1 miles, but 52 percent of the enterprises each had 3 miles but not over 5 miles of trails. Of this average number of miles, 47.3 percent of the trails were on private ownerships having riding enterprises; 23.8 percent were on other private lands; 10.7 percent, on state lands; 8.7 percent, on federal lands and 9.5 percent, on county and township lands. For each mile of trail, there were an average of 7.82 acres of trails and backup lands, with an average of 55.5 acres of trail lands per enterprise. Weighted average width of the horse trails (or paths) was 6.5 feet with 58 feet of immediately adjoining backup lands.

Distributed enterprise brochures were considered by the operators as their most important formalized means of advertisement. However, most operators indicated that personal recommendations by their customers to friends and relatives accounted for 50 percent or more of the new trade. Travel guides and directories, newspapers and roadside signs were also considered to be important advertisement media.

All enterprises studied appeared to be financially sound except for some question about one or two of them. In general, horseback riding is a stable enterprise industry and can be expected to supply the same or increased facilities in future years.

ACKNOWLEDGMENTS

This research report is one of a series of 7 separate reports covering 6 types of recreation enterprises on private lands for commercial use, namely boat rental, camping, horseback riding, picnicking, pond fishing, and swimming, plus 1 covering an analysis of private outdoor recreation businesses -- their composition, operation and stability.

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Edited by Susan Hickey

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INTRODUCTION

Horseback riding is one of many major outdoor recreation activities in Wisconsin.¹ Although its number of participants is small compared to that for all other activities, it is important. On a favorable, summer weekend day more than ten thousand people go horseback riding in the state. Equestrians generally are enthusiastic about this activity whether they own or rent riding animals. An 11-percent increase in equestrian participants in Wisconsin is expected by 1980.

A statewide inventory of Wisconsin's private outdoor recreation facilities shows that in 1966, there were 271 horse-

back riding enterprises with 5,026 horses (Cohée, 1970).² In addition, there were 917 ponies for rent; however, not too many were used for trail riding. If the 5,026 horses were used at the same annual rate as were those horses included in this study, they annually provided over 673,000 participant days riding.³ Demand projections for 1980 indicate that for an average weekend day in Wisconsin, there may be about 11,630 horseback riders (Wisconsin Department of Natural Resources, 1968). Approximately two-thirds of the current needs for horseback riding facilities are supplied by enterprises like those included in this study.

OBJECTIVES

This study of horseback riding enterprises was carried out to evaluate in some depth their physical characteristics, management practices and stability, and the use made of their resources and facilities. As a result of this study, possible expansions of existing recreation areas and/or establishment of new ones can hopefully be better evaluated. A second objective of this study was to provide methods and techniques for evaluating horseback riding enterprises.

Findings from this study should help

outdoor recreation planners to evaluate the importance of horseback riding enterprises and should aid in the provision of equestrian facilities -- namely, horses and trails. Inasmuch as statewide inventories usually do not include information on participant days of use, this study was designed to provide criteria and projection factors by which the horseback riding supply (i.e., the number of enterprises) can be related to the demands for this type of recreation (i.e., the number of people needing horses and the number needing trails).

¹ Others commonly thought of include: swimming, boating, fishing, picnicking, golfing, camping, hunting, nature walking, bicycling, water skiing, snow skiing, hiking, canoeing, and snowmobiling.

² "Enterprise" refers to a unit of a private outdoor recreation business established for a specific recreation activity where users (recreationists) pay a fee for use of the facilities and related services. (A recreation business may include one or more recreation enterprises on a tract of land contained in one ownership.) "Ownership" refers to that area of land considered by the owner as one operating tract on which one or more recreation enterprises are located. It may also be the base for one or more nonrecreation enterprises. Taverns, eating establishment, lodging facilities and permanent trailer courts or parks are considered nonrecreation enterprises in this study.

³ Any single ride in a day constitutes a "participant day". The average number of annual participant days (riding days) per horse studied in this project is 134; only riding animals used for trail rides are considered "horses" and evaluated in participant days use.

PROCEDURE

The 21 ownerships with horseback riding enterprises studied were selected from representative cases chosen by local professional employees who carried out field work for the 1966-67 inventory of privately owned recreation facilities.⁴ They are distributed among 16 counties scattered throughout the state (Fig. 1).

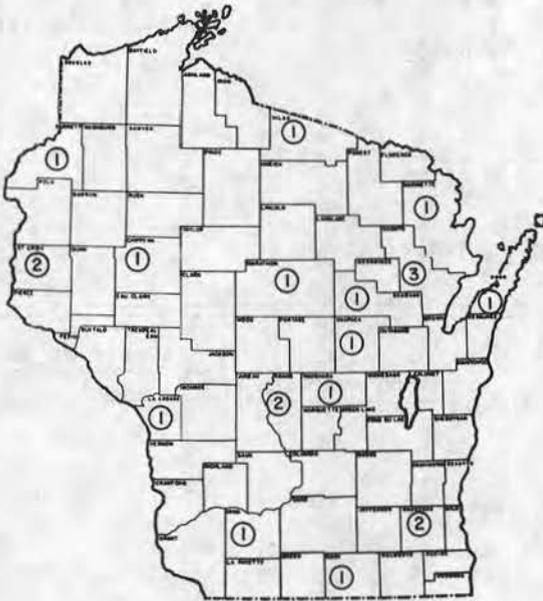


Figure 1. Horseback riding enterprises studied. (Numbers circled are the numbers of such enterprises in each county.)

Research personnel interviewed the owner and/or operator of each enterprise studied. Two survey schedules were completed with each operator and rechecked as necessary after the interviewer personally observed the area and facilities (see Appendix A for schedules used). The Part A - General Business Information Schedule was completed first and followed by the Part B - Schedule H - Horseback

Riding Enterprises. (Separate additional schedules were also completed where the ownership included other outdoor recreation enterprises.)

The two schedules included those items essential for meeting objectives of this research study. The number of years in the recreation business, size of the ownership and the recreation area part, types and size of all recreation enterprises, seasonal length of business, labor and operations information, enterprise expansion possibilities, satisfaction with returns, assistance from technical and financial help sources, cooperation with private and public individuals and agencies, and other related information were obtained on the general business research schedule. Information about the number of riding animals for rent; shelter, feed and service buildings; pastures; fee charges; numbers, miles, width and ownership of trails; trail back-up lands used; number of riders served on weekend and week days; operator's time and sources of help; attractions for equestrian customers; planned future changes and changes in the enterprise since establishment; operator's tenure; riding instruction and horse boarding services; and related types of data and information were covered in the horseback riding enterprise schedule.

The 21 enterprises studied constitute approximately 8 percent of the horseback riding businesses in the state. There is only general assurance, however, that the enterprises studied may be statistically representative of all variations in this industry. To make sure that these enterprises were as representative as possible, two main criteria were followed in each county in the selection of the cases studied. They are (1) that the enterprise must have been in operation for at least 1 year, and (2) that the physical size and quality of the facilities in the enterprise must be representative of other similar enterprises in the county. To meet these criteria, reliance was placed in local professional judgments in preference to a statistical sampling procedure.

⁴ See private outdoor recreation facilities, (Wisconsin) State Soil and Water Conservation Board, 1967.

RESULTS and DISCUSSION

All schedules collected for the 21 sample cases were used in the analyses and evaluations for this study. The analyses do not treat dependent and interdependent factor relationships. Study findings do, however, provide many answers to questions about the physical characteristics and management features of horseback riding enterprises.

4 to 34 horses for rent. There were 325 horses on these enterprises or an average of 15.5 each.⁵ Seven enterprises each had no more than 10 horses, while 6 enterprises had 20 or more horses (Table 1). Eight enterprises had 12 to 19 horses each. However, the number of horses should be considered with the number of days they are available for use. For example, one enterprise with 10 horses was open for business for 62 days (620 horse-availability-days) while another enterprise also with 10 horses, was open for 222 days (2,220 horse-availability-days).⁶

Size of Horseback Riding Enterprises

The 21 enterprises studied had from

TABLE 1

Size of Horseback Riding Enterprises

	All Enterprises	Number of Horses		
		4-11	12-19	20+
No. of enterprises	21	7	8	6
No. horses per enterprise	15.5	7.7	15.1	25
No. horse-availability-days				
Per enterprise	2,642	821	2,028	5,583
Per horse	171	106	134	223
No. annual participant days				
Per enterprise	2,077	1,002	2,262	3,083
Per horse	134	130	150	123
Percentage equivalent use of horses	79	122	104	55
No. acres in ownership per enterprise	243	330	208	187
No. recreation acres per enterprise	111	108	128	93

⁵ Nine enterprises had an average of 3.23 ponies each. Christiansen et al. found an average of 21 "horses and ponies" per enterprise in their Wisconsin survey of 38 enterprises in 1966. There is no separation, however, of riding stock (i.e., how many of these 21 horses and ponies were rented and how many were brood stock, how many ponies were not used on trails and how many trail lead horses were not rented). If the number of animals not rented or used on trails were subtracted, Christiansen's figure would probably approach the number of rental horses per enterprise found in this study.

⁶ The first enterprise had 1,200 participant days of customers and the second had 2,000 participant days.

Horse-availability-days which is the number of horses times the number of days an enterprise is open for business, averaged 171 days per horse for all 21 enterprises studied. This number increases from 106 availability days per horse for the 7 smaller enterprises to 223 days for the 6 largest ones (Table 1). Enterprises with more horses also had longer business trade periods.

Potential volume of trade annually cannot be determined from the number of horse-availability-days per enterprise. The larger enterprises had a potential trade which was almost seven times greater than the potential of the smaller enterprises. However, the actual trade as determined by the number of participant days per enterprise showed that the trade at these larger enterprises averaged only three times the trade at the smaller ones. Therefore, percentage equivalent use of horses was approximately one-half as much for the larger enterprises as that for the smaller and for the medium-sized enterprises.⁷

There appears to be no relationship between the number of horses per enterprise and either the number of acres in the entire ownership or the number of acres used for recreation. Included in the recreation acreages are the number of acres in pasture as well as the number of acres developed for all recreation enterprises on the ownership. Some of the ownerships had large acreages of woodland which had no relationship to the horseback riding enterprise except for riding trails provided in some parts of these wooded areas. The size of the 21 businesses studied averaged 243 acres per ownership (Table 1).

Buildings and Pastures

Provisions were available and used on all 21 enterprises studied for keeping the riding stock on the ownership all year.⁸ There was a barn on each enter-

prise and seven enterprises also had a loafing shed for winter use. Nine enterprises had a housing shed where horses were kept during daytime hours of the riding season. Five enterprises had a separate shed for grooming and saddling the horses. On a few ownerships, housing or grooming sheds were as much as a mile away from the barn but the horses were returned to the barn each night. All but one of the enterprises had a tack room either in the barn or in the housing shed. On one ownership, a paneled truck served as a tack room and during the daylight hours of the riding season, the horses were kept in a corral some distance from the barn.

On most enterprises, the barn served many functions. Nine (43 percent) of the enterprises boarded horses for other owners but these animals were not included as a part of the horses which were available for rent. Many of the operators kept other animals in the barn such as breeding horses and cattle. These animals were considered part of the operator's nonrecreation enterprises.



The average number of horses per each of the 21 enterprises was 15.5 horses.

⁷ Annual participant days divided by annual horse-availability-days gives the equivalent use of horses.

⁸ Some riding horse herds are transported to northern Wisconsin, used during summer months and returned to southern Wisconsin or farther south for the winter months. These horses are provided mainly for a few resorts and youth camps and are not available for general public use. None of the herds on any of the 21 enterprises studied were used in this way.

Availability of pasture for the riding horses was found to be an important consideration in the upkeep and good conditioning of the riding horses. There was an average of 78 acres of pasture per enterprise. Thirty-five acres were in open pasture and 43 acres were in wooded pastures which together had an equivalent grazing capacity equal to 45 acres of open pasture per enterprise. On 11 enterprises, the equivalent acreage of open pasture amounted to less than 2 acres per horse, or an average of 1.2 acres each; on 5 other enterprises there were 2 to 5 equivalent acres of open pasture per horse (an average of 2.9 acres per horse), and on the other 5 enterprises that had 5 or more equivalent acres per horse, it averaged 8.4 acres. On all enterprises during the main riding season, the horses were fed grain and some hay each day and were grazed in the pastures at night. The average size of separate pasture fields for all 21 enterprises was 29 acres, and was 17 acres each on the equivalent open pasture basis.

Recreation Ownerships and Enterprises Operated

On 13 (62 percent) of the ownerships studied, the horseback riding enterprise was the only recreation enterprise. The other 8 ownerships had 1 or 2 additional recreational enterprises each. There were 6 different combinations of enterprises including pond fishing, camping, winter sports, vacation farm, boat rentals and swimming (Table 2).

Eighteen (86 percent) of the ownerships having a horseback riding enterprise also had nonrecreation enterprises. Most of them had 1 and not over 3 such enterprises and 2 ownerships each had 4 nonrecreation enterprises (Table 3). These nonrecreation enterprises involved the operation of eating establishments, lodging facilities, stores, taverns, trailer courts or parks and farms. Eight of these 18 ownerships also had other recreation enterprises in addition to horseback riding and the nonrecreation enterprises.

Only 3 of the 21 recreation businesses studied had no other enterprise on their

TABLE 2

Number of Ownerships Having One or a Combination of Recreation Enterprises

Other Recreation Enterprises Found on the Ownerships	No. Enterprises Per Ownership		
	One	Two	Three
None	13		
Camping		1	
Pond fishing		1	
Winter sports		1	
Vacation farm		1	
Camping & boat rentals			2
Camping & swimming			1
Camping & winter sports			1
TOTALS			
Ownership	13	4	4
Recreation Enterprises	13	8	12

ownerships except horseback riding. Their principal family income was earned by the head of the household off the ownership while his family operated the horseback riding enterprise.⁹

TABLE 3

Number of Operators Having Nonrecreation Enterprises in Addition to Other Recreation Enterprises on Their Ownership

No. Other Recreation Enterprises	No. Nonrecreation Enterprises					Total
	0	1	2	3	4	
1	0	1	2	1	0	4
2	0	2	1	0	1	4
3	3	4	1	4	1	13
Total	3	7	4	5	2	21

⁹ Christiansen et al. (1969) found that on 38 riding stable enterprises in Wisconsin, an average of 23 percent of the total gross income was from wages and other employment.

For 13 (62 percent) of the enterprises studied their horseback riding enterprise provided 100 percent of their recreation business income. They had no other recreation enterprises. For the other 8 enterprises, horseback riding provided from 5 to 80 percent of their gross income in their respective recreation businesses. The 13 enterprises had an average of 17.6 horses and 1,838 participant days of trade for the year as compared to an average of 12 horses and 2,464 participant days per each of the other 8 enterprises. Participant days of trade per horse per enterprise (206 days) on the 8 enterprises was almost double that (104 days) per each of the 13 enterprises.

The intensity of operations of the horseback riding enterprise depended largely on how it fit into the entire business structure on the ownership. Profit motives and net incomes from the horseback riding enterprise alone were extremely difficult to evaluate. This enterprise was rarely responsible for all cost inputs and returns on the ownership. For this reason, it was difficult to make cost allocations.

Although no analyses were made to determine amounts of income from the enterprises, the operator's over-all evaluations were solicited. Generally operators of the horseback riding enterprises indicated that returns were satisfactory. Only 2 operators said returns were not satisfactory and one of them had no other recreation enterprise (but had 2 nonrecreation enterprises), and the other operator estimated that only 5 percent of his gross recreation business receipts was from the horseback riding enterprise (inasmuch as he had 1 other recreation and 3 nonrecreation enterprises).

The amount of time spent by the operator, his sources of help and the number of people helping him followed no single pattern. Only 1 operator spent full time in the business but 2 others gave no time to their horseback riding enterprise. Ten operators spent one-half or one-fourth of their regular working time with their riding enterprise and 8 worked at it only on evenings and weekends.

The operator's wife and/or children usually spent as much or more time than the operator in running the enterprise. This was particularly true when the operator spent less than one-half of his

time with the enterprise (Table 4). Very often, however, such family help was not sufficient to operate the enterprise. On 16 (76 percent) of the enterprises, 1 or more persons were employed who were not relatives of the operator. Only 5 enterprises had no nonfamily employees. Only 3 enterprises had no operator's relatives working in the enterprise.

Fee Charges and Services

Most enterprise rental fees for a trail horse were charged either per ride or per hour. The usual trail ride was for approximately 1 hour per trip. Three enterprises charged \$1.00 for a 1-hour trail ride, one charged \$1.50, one had a \$1.75 fee and 8 charged \$2.00 while one other received \$2.50. These rates remained the same throughout the week.

The other 7 enterprises based their fees on different arrangements. Two charged less for week days than for week-end days, respectively \$1.50 and \$2.00 versus \$2.00 and \$2.50 per hour (or trail ride). On the basis of the total number of riders paying these rates, the weighted average fee was \$1.75 per hour for the first enterprise and \$2.25 for the second. Three other enterprises also charged different fees that resulted in a weighted average price of \$1.75 per hour, even though one of these enterprises charged \$1.00 per one-half hour trip, \$2.00 per hour trip and \$3.00 per 1-1/2 hour trip. Of the other two enterprises, one charged \$1.25 and the other \$1.00 per one-half hour of riding. Another enterprise charged \$1.00 per one-half hour of riding but its trail trips were almost uniformly of one-half hour duration, thus the fee equaled \$2.00 per hour. The last of these 7 enterprises had a \$1.50 rate per trail ride (of 1 hour duration) for all days except on Thursdays when the rate was \$1.00 per ride.

Special rates in addition to the standard rates given above were not common for the enterprises studied. Only two enterprises had special fees. One operator (with 18 horses) who normally charged \$2.00 per hour would charge only \$1.50 per hour if a group reservation for all of his horses were made in advance. Another enterprise with 36 horses had an arrangement with a nearby camp operator whereby for

specific prescheduled weeks, some horses were made available at \$15.00 a week.

Pony rides around a corral varied from 10¢ to 50¢ per ride without a specific duration of riding time established. Most of the 9 enterprise operators with ponies not used on trails kept these animals for good public relations rather than as a profit making part of their business.

Six of the 21 enterprises provided riding instruction. Charges ranged from \$2.50 to \$5.00 per hour including instructions and the use of a horse. Three enterprises charged \$4.00 per hour; each of the other 3 charged \$2.50, \$3.00 and \$5.00 per hour respectively. Trail attendants from the other 15 enterprises

only provided basic instructions on how to mount and handle the horse.

All enterprises had a trail attendant; and except for 3 enterprises, there were always two or more attendants to assist the riders. Seventeen (81 percent) of the enterprises permitted trail riding only in groups. Riders were delayed until enough had arrived to make up a group and until a trail attendant was available. The other 4 enterprises allowed some of the older riders to use the trails unaccompanied by an attendant. The number of attendants per enterprise was related to the number of horses and volume of business. For example, those 3 enterprises having only one attendant each had 60 percent fewer horses and 50 percent less trade than the

TABLE 4

Operator's Time and Sources of Operating Help

Operators and Their Help	Number of Enterprises*	Number of Enterprises (By Time Spent by Operator)				
		Full	One-half	One-fourth	Evenings & Weekends	None
No. of Operators	21	1	5	5	8	2
Sources of help*						
Relatives						
Wife	9	-	1	2	5	1
Children	11	-	1	4	5	1
Other	3	-	2	-	-	1
None	5	-	1	1	2	1
Employees**						
One	3	-	2	1	-	-
Two	4	-	-	2	1	1
Three	11	1	4	2	4	-
None	1	-	-	-	1	-

* Enterprises using more than one source of help are listed under each source, hence the total of enterprises receiving various sources of help is greater than 21.

** Considered "employees" are only those persons not related to the operator -- they do not include any relatives who may receive wages in return for helping to operate the enterprise.

other 18 enterprises that had 2 or more attendants. (On those 3 enterprises, only one attendant was needed.) Trail lead horses were always ridden by an attendant; they were never rented to a customer. Not only were these horses trained for this purpose but also they were not covered by insurance for customer use.

Trails

The number of separate trails used by enterprises ranged from 1 to 7 each. Only 6 enterprises each had only 1 trail while two others had 6 and 7 trails. Four enterprises each had 2 trails, 8 had 3 trails, and 1 had 4 trails.

Miles of trails per enterprise ranged from 2 miles (1 enterprise) to 15 miles (1 enterprise). About one-half of the enterprises each had 3 to 5 miles of trails. The average total miles of trails per enter-

prise (21) was 7.1 miles with 55.5 acres of trail lands. The weighted average length per trail was 3.0 miles (Table 5).

Trails of the 6 enterprises having only 1 trail each averaged 3.3 miles long which is about the same (3.2 miles) as the average trail length for those enterprises having 2 or 3 trails each. However, trails on those enterprises having 4 or more trails each were, on the average, only about one-half as long (1.7 miles per trail).

There was no apparent relationship between numbers of horses per enterprise or between numbers of riders on an average weekend day and characteristics of trails per enterprise measured by number of trails, total miles of trails, or average length of trails. It is apparent, however, that even though the average number of horses per enterprise does not vary greatly between those enterprises with only 1 trail each and those with 2

TABLE 5

Number and Use of Riding Trails

	Avg. for all Enterprises	No. Trails per Enterprise		
		One	Two or Three	Four or More
No. of Enterprises (21)	-	6	12	3
No. of trails/enterprise	2.6*	1	2.7	4.7
Miles per trail**	3.0	3.3	3.2	1.7
Miles of trail/enterprise	7.1	3.3	8.5	9
No. Horses:				
Per enterprise	15.5	12.5	13.8	28
Per mile of trail	2.1	3.8	1.6	3.1
Avg. Per Weekend Day:***				
No. riders/mile of trail**	4.2	7.5	2.6	3.4
No. trail trips/horse**	1.7	1.7	1.8	.9
No. riders	24.5	24	23.7	28.3
No. Participants/year	2,077	1,670	2,150	2,600

* There were a total of 55 trails used by the 21 enterprises.

** Weighted average.

*** These data are averages over the entire season; on some weekend days, number of riders and trail trips per horse are much larger.

or 3 trails each, the number of riders per mile of trail for enterprises having only 1 trail is nearly 3 times larger than the number of riders on those enterprises with only 2 to 3 trails each. The reason for this difference is that those enterprises having only one trail each had an average of only 3.3 miles of trail per enterprise while the enterprises in the other group had an average of 8.5 miles of trail each (Table 5). Even though the number of horses per enterprise is only about 1 more (Table 5) for the enterprises with two or three trails compared with those with only one trail each, the annual participant days of riding is 29 percent greater for enterprises with added trails.

Two factors should be considered that are not reflected in statistical data (like those in Table 5): (1) The total number of riders are not evenly spread over the horse herd in trail groups of equal numbers, therefore, the average number of trips per horse is not a reliable indicator of trail congestion. (2) When an enterprise has 3 attendants, at least 2 trails are highly desirable in order to separate riding groups (so that one group will be on each of 2 trails and 1 attendant will be at the stables organizing customers for the next trail ride). Added trails are also more attractive to the equestrians since they can choose different surroundings on different days of riding.

Less than one-half (47.3 percent) of the number of trail miles used by the enterprises were on their respective ownerships. Sixteen (76 percent) of the enterprises had trails on other privately owned and public lands (Table 6). Only two enterprises did not have any of their trail mileage on their own ownerships. Publicly owned lands contained 28.9 percent of all trail acreage being distributed about evenly between local (county plus township), state and federal ownerships. Over half (57 percent) of the enterprises had some part of their trails on publicly owned lands.

Only 5 of the enterprises made some payment for trail use of lands not within their ownerships. These payments were made by either paying a rental fee or giving certain privileges such as free riding services to members of the landowner's family. No compensations of any type were made for use of publicly owned lands.

Trail widths as estimated by the enterprise operators varied from 3 to 15 feet. Thirteen (61 percent) of the enterprises used trails that generally averaged no more than 6 feet wide. Six more had trails averaging 8 to 10 feet wide while two other enterprises used trails that were 15 and 16 feet wide. The weighted average width of all miles of trails in the 21 enterprises was 6 1/2 feet.

Estimates were made of the acres of backup lands used with riding trails. On some enterprises, these estimates were difficult to make since land uses near the trails were such that riders were not always restricted to the immediate areas by the trails. Backup lands were defined as those areas which either were used or could be used by equestrians. Forested areas with thick undergrowth adjoining trails, for example, were not included since it would be almost impossible for a horseback rider to enter such lands or to see very far into them. Also omitted were adjoining cultivated crop fields which confined equestrians to a short width on each side of the trail.

Even as an average some trails had no more than 2 to 6 feet width of backup lands on each side. Only two enterprises had trails with more than 45 feet of backup lands on each side. (One had 165 feet and the other had 300 feet.) The

Miles of trails per enterprise ranged from 2 to 15 miles.



TABLE 6

Land Ownership of Riding Trails

Type of Owner- ship Lands	No. Enterprises	Miles of Trails		
		Total	Per Enterprises Using Ownership Types	Per all 21 Enterprises
All Types	21	149.5	-	7.11
Enterprise	19*	70.8	3.7	3.37
All Other	16	78.7	4.9	3.74
Private	7**	35.5	5.1	1.69
Public	12**	43.2	3.6	2.05
County	5	6.2	1.2	0.29
Township	3	8.0	2.7	0.38
State	3***	16.0	5.3	0.76
Federal	2***	13.0	6.5	0.62

* Two enterprises had no trails on their ownerships -- one used state lands only and the second used other private and township owned lands.

** Four enterprises had trails on both public and other private lands, and are included in both columns but a total of only 16 enterprises were involved.

*** One enterprise used both state and federal lands.

weighted average width for backup lands on each side of all horse trails was 29 feet. This means an average of 58 feet width of backup land for each unit of trail and a total width of all trail lands of 64 1/2 feet including the horse trail itself at 6 1/2 feet wide.

The ratio of backup lands to trails can be determined from acres of backup lands and acres of paths. For each mile of trail, there were an average of 7.82 acres of trails and backup lands. Of this 7.82 acres, 7.03 acres were backup lands and 0.79 acres were trails themselves -- a ratio of 8.9 acres to 1 acre.¹⁰

Riders Served and Horse Use

Data were obtained on all 21 enter-

prises for number of people riding rental horses by weekend days and by week days (Table 7). Each enterprise operator was open for business for varying periods depending on the availability of his help and on the season(s) during which most customers were expected. Some enterprises, especially in northern Wisconsin, are patronized mainly by summer tourists, consequently spring and fall trade was lacking or much reduced. Other enterprises in southern Wisconsin had a longer trade period, since most of their trade came from local customers and for this reason, they were open in early summer and during late summer and early fall.

Riding operations of some enterprises were confined mostly to June, July and August and to weekends when the operator's

¹⁰ This ratio can also be determined from the average widths per mile of backup lands to trails themselves.

children were out of school and could help run the enterprise. About one-third of the enterprises were open for business for approximately 100 or fewer days annually. An equal number of enterprises were open for periods of around 135 to 180 days. The remaining one-third of the enterprises were open more than 180 days but none had a period of business over 235 days except one that was open all year. The average number of days open annually for all enterprises was 152 days.

TABLE 7

Participant Days Trade and Horse Use

Features	Units
Days open for business*	152
Participant days per enterprise*	2,077
Per horse**	134
Per day open for business	13
Participant days per weekend day	24.5
Per horse	1.58
Per mile of trail	3.44
Participant days per week day	12.3
Per horse	0.8
Trail horses per enterprise**	15.5
Percent equivalent use of horses**	79
Percent annual participant days	
In 90- to 100-day summer period***	82
By riders under 12 years old	36

* Number of days are on an annual basis.

** Comparable data by size of horseback riding enterprises are shown on Table 1.

*** A weighted average including the months of June, July and August.

Five of the 6 enterprises having 20 or more horses each (Table 1) were open for business 195 or more days. The other enterprise in this group had a 145-day trade period. The trade period for these 6 largest enterprises averaged 225 days

each which is 102 days more than the average number of days that the other 15 enterprises were open for business. Consequently horse-availability-days for the largest enterprises were more than double (5,583) the average amount (2,642) for all enterprises. However, average per enterprise for participant days of trade for all enterprises (2,077) was two-thirds as much as that for the 6 largest enterprises (3,083). Percentage equivalent use of horses, therefore, was the lowest (55 percent) for the larger enterprises compared to that for all enterprises (79 percent), for the smaller enterprises (122 percent) or for the middle-sized enterprises (104 percent).

Operators differed in their attitudes about continual, hard use of their trail horses. Horses also differed in their inherent upkeep requirements and performance under daily riding use. Some horses could carry trail riders 2 or 3 times each day and stay in good condition while others could not. Some operators would turn customers away rather than overuse a horse, others would not. One or two horses out of every ten needed occasional rest because of some ailment; as a result, on a seasonal average basis at least 10 percent of the horses were not available for daily riding. Because of these factors plus others such as the type and availability of equipment, shelter, pasture, feed and labor, some operators kept a larger number of horses in proportion to their volume of trade while others kept fewer but higher quality horses.

Trail widths as estimated by the operators varied from 3 to 15 feet.



Generally, the numbers of horses were adequate to meet the volume of riding trade. On only a few enterprises, some trade was not cared for on certain days when the riders wanted horses. Generally, all potential customers were served any time of the season. Only one operator having 30 horses planned to decrease the size of his herd. Two-thirds of the operators indicated no changes to be made in the size of their enterprises. But six (28.6 percent) of the operators planned to acquire additional riding horses. Operators forecasted that in the immediate future, horseback riding demands would increase or remain the same and they planned accommodations accordingly.

Customer Attractions

Attractions and locations influenced demand for riding facilities.¹¹ Operators were asked to appraise their customer attractions from the following sources: (a) from the ownership on which the horseback riding enterprise was located, (b) from other private recreation ownerships nearby, (c) from publicly owned recreation areas nearby, and (d) from nearby population centers. In evaluating the number of customers coming to their horseback riding enterprises from these sources, the operators gave a first and second priority status to the appropriate items above (Table 8). All 21 operators re-

TABLE 8

Customer Attractions by Number of Operator Selections

Sources of Attraction	Single Sources or Combinations of Sources*											No. choices		
	A	AB	AC	B	BA	BC	BD	CB	D	DB	DC	1st	2nd	Total
(A) From enterprise ownership	2	4	1									7	1	8
(B) From nearby private recreation ownerships				2	1	3	1					7	7	14
(C) From nearby public ownerships								1				1	6	7
(D) From nearby large population centers									2	2	2	6	1	7
(E) None													6	6
Totals	2	4	1	2	1	3	1	1	2	2	2	21	21	42

* Alphabetical letters correspond to those letters accompanying the 5 items in the column of sources of attraction. Single letters indicate first priority selections and no second sources of importance. Double letters indicate first and second priority attractions in order left to right.

¹¹ Wilkins and Brumsted indicate for New York State conditions: "Your location may be sufficiently near a large population center to make day-use activities feasible. If large numbers of vacationers visit your area, this may compensate for great distance to urban centers." Horseback riding is considered as a day-use activity.

ported one main source of attraction and 15 reported two. Six operators indicated that there was no second significant source of attraction.

Several combinations of first and second priority items were expected because of the diversity of settings and locations among the 21 enterprises. There were 8 combinations of the 4 positive attraction factors (Table 8).

Potential riding customers from other nearby private recreation ownerships provided an important source of trade for two-thirds (14) of the enterprises studied. One-third of the operators indicated this was the first priority in attraction importance and an equal number gave it second priority (Item B, Table 8). Thirty-nine percent of all selections for positive attractions included this item.

The next most important source of riding customers was from other recreation activity facilities on the same ownership as the riding enterprise. One-third of the operators (7) placed this factor in first priority importance and one additional operator gave it a second priority. Twenty-two percent of all selections for positive attractions included this item.

One operator reported that most of his customers came from public ownerships and 6 operators gave this item second priority. This source of customers was not as significant, however, as the number of riding customers who came from large nearby population centers. Six operators gave this latter item first priority and 1 operator gave it second priority. Each of these items accounted for 19.5 of all selections for positive attractions.

Years Enterprise Established and Size Changes

More than one-half (57 percent) of the horseback riding enterprises studied had been established for 5 or more years. About one-fourth of all 21 enterprises had been operated for 8 or more years including the oldest one which was started in 1930. The 3 newest enterprises were only 2 years old. Nine enterprises (43 percent) were 2-4 years old, 7 (33 percent) were 5-7 years old and 5 (24 percent) enterprises

had been in operation for 8 or more years.

There has been a big change in the size of these enterprises from their first 2 years of operations to 1968. Through these years the enterprises added a total of 118 trail horses to their riding stock, an increase of 57 percent over the number of horses that the enterprises kept during their first two years. The total number of horses in trail herds of 14 (67 percent) of the enterprises increased by 127 horses after two years of initial operations, while the total number of horses for 4 other enterprises decreased by only 9 horses. Number of horses remained the same in 3 enterprises.

The total number of horses on enterprises already established by 1965 was practically the same as in 1968. From 1965 to 1968, the number of horses on 4 enterprises decreased by 35, but these decreases were mostly offset by increases amounting to 28 horses on 8 enterprises. The three enterprises which were established during this period added 50 horses to the total number of horses found on all enterprises.

The 18 enterprises started before 1965 had an average of 9.2 horses each during their first 2 years of operations. They had an average of 14.9 horses in 1965 and 15.3 horses in 1968. The three newest enterprises started since 1965 initially had an average of 13.7 horses each but in 1968 they had an average of 16.7 horses each.

The 5 oldest enterprises were compared to the remaining 16 enterprises for possible effects of years of business on volume of trade and use of horses. These 5 enterprises had an average of 2,540 participant days trade for the season compared to 1,932 days for the others (and to an average of 2,077 for all 21 enterprises). Also, the 5 enterprises had an average of 3,161 horse-availability-days versus 2,479 for the 16 enterprises (and 2,642 for all 21 enterprises). These 5 oldest enterprises had an average of 17.6 trail horses each; however, their percentage equivalent use of horses was practically the same (80 percent) as that for the other 16 enterprises (78 percent). Also, the 5 oldest enterprises were open for business for 161 days compared to 149 days for the other 16 enterprises (and an average of 152 days for all 21 enterprises).

More than one-half of the enterprises studied had been established for 5 or more years.



These data indicate that the 5 oldest enterprises did have more trade than the other 16. At first, this high volume of trade may appear to be a function of the length of time these enterprises had been in operation. Presumably, over the years, each operator could have discovered the number of trail horses needed and the number of days he must stay open for business in order to satisfy his volume of trade (or demand). Volume of trade is not, however, a result of longer years in business. Demand, number of horses and days open for business influence volume of trade. Trade was indirectly reduced by a shortage of family labor on some enterprises when the operator's children were in school; this prevented the businesses from being kept open longer or being opened earlier in the year.

Seventy-six percent (16) of the operators indicated they expected to continue their horseback riding enterprise for 10 or more years. One other operator planned to continue for at least 8 years and 3 operators, for 3 to 5 years. Another operator who expected to continue for only 1 or 2 years indicated that his

enterprise might be discontinued when his daughter who almost singlehandedly operated his small enterprise (4 trail horses) had finished college.

In general, the horseback riding enterprises appeared to be stable.¹² Since 6 of the 21 operators expected to increase their numbers of riding horses and since 3 enterprises that were only 2 years old can be expected to expand normally, it is reasonable to anticipate larger supplies of riding stock.

Public Agency Assistance

Fifty-seven percent of the operators of horseback riding enterprises received technical assistance from certain public agencies. Seven operators received help from their resource county agent (U. W. Cooperative County Extension Service); 7 operators, from the U. S. Soil Conservation Service; 7 operators, from their County Soil and Water Conservation District; and 6 operators, from the Wisconsin Department of Natural Resources. Three operators have received assistance from all 4 of these agencies. This assistance may vary from providing information about the horseback riding supply and demand for the local area, for the region or for the state, to giving specific on-site technical help in considering the particular type of facilities an operator may want to develop. This assistance tends to make enterprises more stable from the time they are established through subsequent years of operation, during which time various adjustments are needed.

Generally the enterprise operators were accustomed to working with many types of professional people, including veterinarians, county agency representatives and others. Two-thirds of the operators were members of associations that further recreation interests and most of them worked with 2 or more such organizations. Approximately one-half of the operators had participated in local or area planning activities to further recreation developments and all operators indicated a willingness to assist in such work if given an opportunity.

¹² The one enterprise that may be discontinued is likely to be replaced because it is located near a state park where there is demand for horseback riding.

Boarding Horses

Less than one-half (9) of the 21 enterprises studied board horses on their ownership. Such an arrangement, although not too different from some other non-recreation enterprises, is often considered "part" of the horseback riding enterprise because of the number of shared facilities. Boarding and riding horses commonly use the same pastures and trails, although they may or may not be housed together during nonriding periods.

Of the total receipts from horse boarding and trail riding fees on 6 enterprises, less than 25 percent (an average of 9 percent per enterprise) of the income came from boarding. For these 6 enterprises that had an average of 17 riding horses each, boarding horses was a secondary part of the business. On the other 3 enterprises which had an average of 20 trail riding horses each, boarding fees accounted for an average of 45 percent of the total receipts from boarding and riding fees. One of these 3 enterprises had a large clientele of boarding horse owners who also paid for riding instructions provided by enterprise instructors.

This study of 21 enterprises primarily treats the horseback riding enterprise separately from nonrecreation and other recreation enterprises. It is worth noting, however, that one business had 5 enterprises involving horses. Trail riding fees accounted for only 9 percent of the total receipts, while riding instruction accounted for 37 percent; boarding horses, for 36 percent; training horses, for 9 percent; and buying and selling horses, for 9 percent. Also, a sixth enterprise was being planned by the operator of this business, namely, the breeding and rearing of high quality riding horses. This enterprise had 30 trail riding horses; 1,800 participant days (users); 5,850 trail riding horse-availability-days; and a low equivalent horse use of 31 percent. Although the actual riding enterprise on this ownership was not its main income source, it did constitute the image and basis on which the entire horse business was established.

Advertisement Media Used

All of the 21 businesses studied used two or more means of advertisement. This was determined from analyses of operator's indications of advertisement media they most relied on in soliciting customers. A total of 8 media groups were considered by the enterprise operators: newspapers, magazines, brochures distributed by them, brochures distributed by others for them, recreation trade journals, travel guides or directories, roadside or area collective signs and others (see Appendix A, Schedule Part A, Item 31). Operators indicated all media used and the priority for the most important four (or lesser number if fewer media were used).¹³ In order to evaluate preferences for different advertisement media because of enterprises operated, analyses of advertisement media used were made for two groups -- those (13) operators with only the riding enterprise and those (8) operators also having other recreation enterprises. The summary of results are shown in Tables 9 and 10.

Brochures from the recreation enterprise were definitely the most important advertisement media used (Table 9). On a weighted basis where 2 points were arbitrarily assigned to a first priority rating, 1.5, to a second and 1, to a third, brochures scored almost double the points of any other advertisement used (Table 10). For example, 7 operators indicated brochures as their most important advertisement media (equals 14 score points), 11 operators gave it second importance (equals 16.5 score points) and 4 operators placed it in third priority (equals 4 score points); giving a total of 34.5 score points. Brochures were considered most important by similar percentages of total media scores (38.9 percent) for enterprise operators having horseback riding as their only recreation enterprise compared to that (35.7 percent) for operators also having other recreation enterprises.

The score ranking for the next three important advertisement media (travel guides or directories, newspapers and roadside or area signs) varied according to the nature of the enterprise (i.e.,

¹³ Recreation trade journals are omitted from further reference in this section since this advertisement media was not used by any of the enterprise operators. Most operators gave priorities for a maximum of only three advertisement media used.

TABLE 9

Advertisement Media Used by Number of Operators Assigning Priorities

Media	Operators Having Only Horseback Riding Enterprise (13)			Operators Also Having Other Recreation Enterprises (8)			All Operators (21)		
	First	Second	Third	First	Second	Third	First	Second	Third
Newspapers	6	1		2			8	1	
Magazines		1				1		1	1
Brochures	(4)	(8)	(2)	(3)	(3)	(2)	(7)*	(11)*	(4)*
Distributed by operator	3	5		3	3	1	6	8	1
Distributed by others	1	3	2			1	1	3	3
Travel guides or directories	1	2	1	2	2	2	3	4	3
Roadside or area signs	1	1	7	1	2	2	2	3	9
Other**	<u>1</u>	<u>—</u>	<u>1</u>	<u>—</u>	<u>1</u>	<u>—</u>	<u>1</u>	<u>1</u>	<u>1</u>
TOTAL	13	13	11	8	8	7	21	21	18***

* Twelve operators assigned brochures as one of their priorities and 5 selected both types of brochures, thus the total of 22 is a reflection of the number of times brochures were selected, not the number of operators.

** Other media include advertisements made in exhibits at tourist shows, placed in the classified section of the local telephone directory, run on theatre screens or distributed by the local chamber of commerce.

*** Three operators made no third selection.

whether or not the operator also had other recreation enterprises or only horseback riding). For example, for ownerships having only horseback riding, travel guides or directories were relatively unimportant (10.6 percent), but for ownerships that also had other recreation enterprises, this advertisement media was important (25.7 percent).

Magazine advertisement was not so important as other means of advertisement. Only 2 operators ranked this media in their priorities (giving it 2.7 percent of total scorings). The "other" media group accounted for 5.0 percent of the total scorings for all media.

Distribution of brochures by the enterprise management itself was three times as important as the distribution of brochures by other organizations or firms for the horseback riding enterprise. The

brochures distributed by the enterprise management most likely are some part of an informal type of advertisement wherein patrons of the enterprise tell their friends about it (called "personal referrals"). It may include patrons receiving the brochures from the enterprise operator or his employees and passing them on to friends.

Eight of the 21 enterprise operators estimated that personal referrals from established customers brought in 75 percent or more of their new customers. One operator estimated that 90 percent of his new trade came from this means of advertisement. Eighteen (86 percent) of the operators indicated that 50 percent or more of their new trade was the result of personal referrals. Two of the other 3 operators estimated that referrals brought in 40 percent of their trade and the third one indicated that 25 percent of his trade came from referrals. If these estimates are reasonably accurate, the new business

brought in by the formal advertisement media cannot be great for many of the horseback riding enterprises. However, all operators

did at least a modest amount of formal advertising to bring their enterprise to the attention of the general public.

TABLE 10

Advertisement Media Scored by Weights*

Media	Operators Having Only Horseback Riding Enterprises		Operators Also Having Other Recreation Enterprises		All Operators	
	Score	Percent	Score	Percent	Score	Percent
Brochures	22.0	38.9	12.5	35.7	34.5	37.7
Newspapers	13.5	23.9	4.0	11.4	17.5	19.1
Roadside or area signs	10.5	18.6	7.0	20.0	17.5	19.1
Travel guides or directories	6.0	10.6	9.0	25.7	15.0	16.4
Other**	3.0	5.3	1.5	4.3	4.5	5.0
Magazines	<u>1.5</u>	<u>2.7</u>	<u>1.0</u>	<u>2.9</u>	<u>2.5</u>	<u>2.7</u>
TOTAL	56.5	100.0	35.0	100.0	91.5	100.0

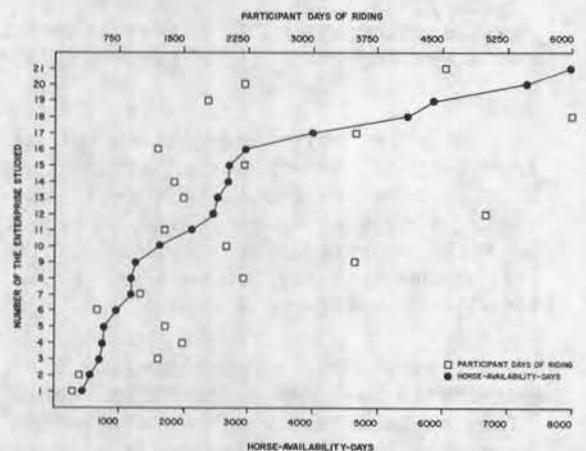
* Scores for each media are derived from the sum of each of the three priorities given in table 9 times its respective weighting factor (2.0 points for first priority, 1.5 points for second and 1.0 for third).

** Other media include advertisements made in exhibits at tourist shows, placed in the classified section of the local telephone directory, run on theatre screens or distributed by the local chamber of commerce.

LIMITATIONS

To test the limitations of the data in this report, 3 enterprise characteristics (namely, number of trail riding horses, horse-availability-days and participant days or users) were selected, based on their importance in this study. Standard statistical calculations were made (Table 11). Wide variations were reflected by High numerical values in the standard deviation reflect the wide range in the scale of enterprise operations (Fig. 2).

Figure 2. Horse-availability-days by enterprises (plotted by array) and corresponding participant days of riding.



From these calculations, 2 conclusions can be made: First of all, the wide variation appears to be characteristic of the horseback riding industry, not a function of sampling levels. Secondly, with only about 8 percent of the 271 enterprises in the state sampled, this variation

reduces the precision of the means for state-wide projection purposes. The variation does not, however, affect the reliability of the projections used in this report and the sampling level is adequate to provide satisfactory basis for the conclusions made.

TABLE 11
Statistical Calculations for Horseback Riding Enterprise Data

No. Enterprises and Enterprise Characteristics	Total Number Included	Enterprises (by No. Horses)		
		4-11	12-19	20 or more
Number of Enterprises	21	7	8	6
<u>Number of Horses</u>				
Range	4-34	4-11	12-19	20-34
Mean	15.5	7.7	15.1	25
Standard deviation	7.6			
Coefficient of evaluation (percent)	49			
<u>Horse-availability-days</u>				
Range	408- 7,990	408- 1,650	1,196 2,730	2,900- 7,990
Mean	2,642	821	2,028	5,583
Standard deviation	2,193			
Coefficient of evaluation (percent)	83			
<u>Participant days (users)</u>				
Range	217- 6,000	217- 2,000	1,000- 5,000	1,200- 6,000
Mean	2,077	1,002	2,262	3,083
Standard deviation	1,467			
Coefficient of evaluation (percent)	70			

SUMMARY of MAJOR FINDINGS

The following findings are not listed by priority of importance.

1. Horseback riding enterprises in Wisconsin, like those covered in this study, annually provide an estimated 673,000 participant days of riding.

2. Size of the 21 enterprises studied varied from 4 to 34 horses each.

Two-thirds of the enterprises had 11 or more horses each, including 6 enterprises averaging 25 horses each. The average number of horses per enterprise was 15.5.

3. Horse-availability-days (the number of days enterprises were open for business times the number of available horses) ranged from 408 to 7,990 days, with an average per each enterprise of 2,642 days.

4. Annual participant days of riders per enterprise ranged from 217 to 6,000 days, with an average per each enterprise of 2,077 days.

5. Percentage equivalent days use of all horses averaged 79 percent each for all enterprises, with the smaller enterprises averaging 122 percent each and the larger enterprises 55 percent each. These are seasonal averages; on a usual weekend day, each horse made an average of 1.7 trail trips.

6. All trail herds were maintained throughout the year on the enterprise ownerships. Barns, wintering sheds, summer sheds, tack rooms, corrals and several pastures were common on most all enterprises. Usually, other livestock besides trail riding horses were also kept. Forty-three percent of the enterprises boarded horses for other owners.

7. Sixty-two percent of the ownerships had no other recreation enterprises except the horseback riding enterprise. However, 86 percent of the ownerships also had 1 or more nonrecreation enterprises. Only 3 of the 21 recreation businesses studied had no other enterprise (either type) on their ownerships except horseback riding. Nonrecreation enterprises involved the operation of eating establishments, lodging facilities, taverns, stores, trailer courts or parks and farms. Other recreation enterprises included pond fishing, camping, vacation farm, boat rentals, swimming, and winter sports. Participant days of trade per trail riding horse on ownerships with 2 or more recreation enterprises was approximately double that per horse on enterprises having only the horseback riding enterprise; total trail riding trade for the season was also about one-third larger on ownerships having 2 or more recreation enterprises.

8. All but 2 of the 21 horseback riding enterprise operators indicated that the income from their recreation business was satisfactory.

9. It was common among the enterprises studied for the operator's wife and/or children or other relatives to spend as much or more time than the operator in running the horseback riding enterprise. Only 3 operators had no relatives working in the business. Most enterprises had 1 or more nonfamily employees; only 5 enterprises had no such employees.

Only 1 operator gave full-time to the riding enterprise while 2 operators put in no time on their enterprises. Eight operators worked in their riding enterprises only during evenings and on weekend days; 5 operators gave this enterprise one-half of their regular working time and 5 others put in one-fourth of their time on their riding enterprises.

10. Rental fees for trail horses were usually charged per hour or per trail ride. Fees ranged from \$1.00 to \$2.50 per hour, with most enterprises having an equivalent rate of \$1.50 to \$2.00 per hour, irrespective of the type of riding arrangements and charges. Weekly or group rates were uncommon. Fees for pony rides around a corral ranged from 10 to 50 cents per ride with varying time durations for a ride.

11. Six (29 percent) of the enterprises provided riding instruction. Charges ranging from \$2.50 to \$5.00 per hour included instruction and the use of a horse. Trail riding horses were used for this purpose.

12. Eighty-one percent (17) of the enterprises had a trail attendant accompanying all riders and the riders were grouped for their trail rides. On the other 4 enterprises, some of the older and experienced riders were not accompanied by an attendant. Three enterprises had only one attendant while all other enterprises had at least 2 attendants and some had 3 or 4. Trail lead horses were ridden only by the trail attendant and were not available for rent.

13. Each enterprise used from 1 to 7 separate riding trails. Trail mileage varied from 2 miles for one enterprise to 15 miles for another, with an average of 7.1 miles of trail per enterprise. About one-half (52 percent) of the enterprises each used at least 3 but not over 5 miles of trails. The (weighted) average length of separate trails was 3.0 miles. Six enterprises used only 1 trail each, with an average length of 3.3 miles. Three enterprises used 4 or more trails each, with an average length of 1.7 miles. All other enterprises used 2 or 3 trails each, with an average length of 3.2 miles per trail.

14. Some variation was usually found in the width of each trail from its beginning to end, but even more variation was

found between average widths of separate trails which ranged from 3 to 15 feet wide. Trails of about 61 percent of the enterprises had an estimated average width of not over 6 feet; approximately one-third of the enterprises' trails were 8 or 10 feet wide and 2 enterprises used trails 15 or 16 feet wide. The weighted average width of all trails used by the 21 enterprises was 6.5 feet.

15. The weighted average width of backup lands on each side of all trails was 29 feet. Backup lands varied in width from 2 to 6 feet for a few trails and up to 300 feet for one trail.

16. The area of land supporting horse trails amounted to an average of 55.5 acres per enterprise. This represented an average width of 64.5 feet of land (6.5 feet in the trail plus 58 feet of backup lands) for 7.1 miles of trails per enterprise. The ratio (in acres) of backup lands to trail lands is 8.9:1.

17. Sixteen (76 percent) of the enterprises used some trails on lands not on their (enterprise) ownerships. Those trails accounted for 52.7 percent of all trail miles used including 28.9 percent on publicly owned lands distributed about equally between local (county plus township), state and federal ownerships. Over one-half (57 percent) of the enterprises had some trails on publicly owned lands which required no payments of any kind for their use. Only 2 enterprises had no trails on their ownerships. Five enterprises paid for trail use on other private ownerships.

18. There was no apparent relationship between the number of horses per enterprise or the number of riders on an average weekend day and the number of trails per enterprise, the miles of trails per enterprise or the average number of miles per trail. Size of business measured by numbers of horses or volume of weekend day trade was not directly related to number of trails, length of separate trails or total miles of trails available to the enterprise. However, the number of riders per mile of trail was approximately three times larger on enterprises with only 1 trail each compared to that for enterprises having 2 or 3 trails each (7.5 riders versus 2.6 riders per mile) although numbers of horses per each of the 2 groups of enterprises was about the same. Total miles of trail used was two and one-half times greater on enterprises

having 2 or 3 trails each compared to that for enterprises with only 1 trail each.

19. The weighted average percent of total (annual) participant days of trail riding was 82 percent for a 90- to 100-day period including June, July and August. Participant days per weekend day was 24.5 riders or an average of 1.58 riders per day per horse and 3.44 riders per mile of trail. Correspondingly, per week day, there were 12.3 participants and 0.8 riders per day per horse. Percentage of participant days by riders under 12 years old averaged 36 percent.

20. With one exception, those enterprises (6) having the longest periods for trade also had the largest number of trail riding horses. Participant days trade was 84 percent greater for these 6 enterprises compared to the other 15 enterprises, but percentage equivalent use of horses for the 6 larger enterprises was only about one-half as much as for the smaller enterprises. Only occasionally on any of the enterprises were there more potential customers than could be accommodated on a particular day.

21. Most of the enterprise operators anticipated larger numbers of potential customers in future years. Two-thirds of the operators planned no changes in their number of trail horses and could accommodate more trade than they had at the time of this study. Six (29 percent) of the operators planned to use more trail horses. One operator who had 30 trail horses planned to decrease this number.

22. Among the attractions augmenting customer trade, the most important was other recreation facilities on nearby private ownerships. The second most important source of attraction was those other recreation facilities on the same ownership as the riding enterprise. Trade coming in as a result of the nearness of the enterprise to large population centers or to recreation areas on public ownerships ranked third and fourth, respectively, as other sources of attraction.

23. One enterprise had been operating for 28 years. Forty-three percent of the enterprises had operated for 2-4 years, 33 percent for 5-7 years, and 24 percent for 8 or more years. Generally the age of enterprise appeared to have

no appreciable impact on volume of trade.

24. As a composite, the 21 enterprises had increased their numbers of trail horses by 57 percent since their first 2 years of business operations. From 1965 to 1968, total numbers of trail horses on the established enterprises remained about the same.

25. Less than one-half (43 percent) of the enterprises boarded horses for other owners. This was definitely a sideline operation for 6 of the enterprises while on the other 3 enterprises, it brought in 45 percent of the total receipts from riding and boarding fees.

26. Enterprise brochures were considered by a majority of the operators as their most important formal advertisement medium. This was true for both those operators having only the horseback riding enterprise and those also having 1 or more other recreation enterprises on their ownerships. Newspapers, roadside signs, and travel guides or directories were other advertisement media considered important by some operators. However, personal referrals by enterprise customers to their friends were considered far more important than any means of formal advertisement; 86 percent of the operators indicated that 50 percent or more of their new trade resulted from personal recommendations by their established customers.

27. Fifty-seven percent of the operators having a horseback riding enter-

prise had received informational and/or technical help directly from one or more of the following public agencies: the Resource County Agent (UW Cooperative County Extension Service), U.S. Soil Conservation Service, County Soil and Water Conservation District, and Wisconsin Department of Natural Resources. Two-thirds of the enterprise operators were members of 1 or more associations furthering recreation interests. One-half of the operators had participated in local or area planning to further recreation developments. Generally, the enterprise operators were accustomed to working with professional people and the operators without exception expressed a willingness to assist, if given an opportunity, in planning for future outdoor recreational developments.

28. Only 2 of the 21 enterprises showed some indication that they had low finances and that any possible expansion of the enterprise was doubtful. (Finances, however, were not low enough to become a major cause for abandonment of the enterprise.) Twenty operators expected to continue their enterprises for several years. One operator, with only 4 trail horses but ample finances, expected to discontinue his enterprise in 1 or 2 years when his daughter would no longer be available to provide the major share of required labor.

All things considered, the outdoor recreation businesses with horseback riding enterprises appeared substantially stable and permanent.

USE of STUDY FINDINGS

From evaluations in this study it is apparent that horseback riding enterprises in Wisconsin provide a large part of the horses and related facilities needed to meet equestrian demands. These enterprises constitute an important segment of the outdoor recreation industry which perennially enhances the state's economy. The horseback riding enterprises are stable and will continue to contribute major supplies (horses and services) needed to meet demands.

The following recommendations are

proposed for use in planning based upon supply-demand needs of horseback riding facilities in the state. All riding data pertains to rental trail horses only unless otherwise indicated.

Projection Factors For Use With Inventory Data

The following projection factors can be applied to statewide inventory data of enterprises with trail horses and related facilities similar to those covered in this study.

- Participant days (users) annually by size of enterprise (as measured by number of horses)

Per enterprise

a. 4-11 horses (avg. 7.7/enterprise)	1,002 participant days
b. 12-19 horses (avg. 15.1/enterprise)	2,262 participant days
c. 20 or more horses (avg. 25/enterprise)	3,083 participant days
d. All enterprises (avg. 15.5/enterprise)	2,077 participant days

Per horse

a. 4-11 horses (avg. 7.7/enterprise)	130 participant days
b. 12-19 horses (avg. 15.1/enterprise)	150 participant days
c. 20 or more horses (avg. 25/enterprise)	123 participant days
d. All enterprises (avg. 15.5/enterprise)	134 participant days

- Participant days (users) per weekend day

Per enterprise	24.5 participant days
Per horse	1.58 participant days
Per mile of trail	3.44 participant days

- Participant days (users) per week day

Per enterprise	12.3 participant days
Per horse	0.8 participant days

- Percent of total annual participant days (users) occurring in 90-100 days including June, July and August as a weighted average for all enterprises

82 percent

- Percent of participant days (users) by riders under 12 years old

36 percent

- Percent of horseback riding enterprises on ownerships also having other recreation enterprises

38 percent

- Horseback riding trails:

a. Average number of separate trails per enterprise	2.6 trails
b. Average number of miles of trails per enterprise	7.1 miles
c. Average number of miles per trail, weighted average for all trails	3.0 miles

- d. Average number of riders/mile of trail/weekend day _____ 4.2 riders*
- e. Percent of enterprises with no trails on their ownership** _____ 9.5 percent
- f. Percent of total trail miles on enterprise (ownership) lands _____ 47.3 percent
- g. Percent of total trail miles on other ownership lands _____ 52.7 percent

	<u>Percent Of Public</u>	<u>Percent Of Total</u>
(1) On state-owned lands _____	37	10.7
(2) On federal-owned lands _____	30	8.7
(3) On township-owned lands _____	19	5.4
(4) On county-owned lands _____	14	4.1
Total on publicly owned lands _____	100	28.9
(5) On other privately owned land _____		<u>23.8</u>
Total (as for g. above) _____		52.7

- h. Trail measurements (based on weighted averages of trails studied)
 - (1) Width of trails (path itself) _____ 6.5 feet
 - (2) Width of immediately adjoining backup lands _____ 58.0 feet
 - (3) Overall width of trail area _____ 64.5 feet
 - (4) Trail area acres per mile of trail _____ 7.82 acres
 - In trail (path) _____ 0.79 acres
 - In backup lands _____ 7.03 acres
 - (5) Average number of acres of trail area per enterprise _____ 55.5 acres
 - (6) Average number of acres of trail area per separate trail _____ 21 acres
 - (7) Ratio of backup lands to trail (path) lands _____ 8.9:1 acres

8. Average number of days open for business per enterprise _____ 152 days

9. Acres in ownership having horse-back riding enterprise:

* (If 2 or more trails and over 3.5 miles/enterprise, use 2.8 riders per mile; but if 1 trail and less than 3.5 miles/enterprise, use 7.5 riders per mile.)

** Enterprises use trails on lands included under "g".

Average number of total acres per ownership-----243 acres
 Average number of recreation enterprise(s) acres per ownership-----111 acres

10. Ponies:

Percent of enterprises having ponies (not included in trail use)-----43 percent
 Average number of ponies, per enterprise having them-----3.23 ponies

11. Percent of enterprises providing riding instruction-----29 percent

12. Percent of enterprises that board horses for other owners-----43 percent

Cooperation With Enterprise Owners

It is apparent from the findings of this research study that the enterprise operators are generally experienced businessmen. They have had close working relations with agencies, associations and others concerned with the provision of good quality recreation facilities for an increasing public demand. There are enterprise expansion possibilities on many of the ownerships and a number of the operators have plans for modest expansions on their

enterprises in the next three years. With fuller understanding of the needs and opportunities for added riding facilities more enterprise operators might carry out substantial developments. There are opportunities for professional personnel in public agencies responsible for outdoor recreation planning to cooperate more closely with owners and operators of horseback riding enterprises. It is recommended, therefore, that planning medium for the state outdoor recreation program should appropriately reflect these considerations and opportunities.



APPENDIX

The inquiry schedule forms used in collecting information and data for this study are included. Their titles are:

Private Recreation Enterprises - User Consumption

Part A - General Business Information, and

Part B - Schedule H - Horseback Riding Enterprises

May 20, 1968

Private Recreation Enterprises - User Consumption
Part A - General Business Information

		<u>Card Columns</u>
		Card #1
1. Card number _____	2. Sample unit number _____	
3. County, name _____ and number _____		3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 6 7 <input type="checkbox"/> <input type="checkbox"/> 8
4. Business name _____		
4a. Operator name _____		
5. Address _____		
6. Years in recreation business here _____		9 <input type="checkbox"/> <input type="checkbox"/> 10
7. Years recreation business established here _____		11 <input type="checkbox"/> <input type="checkbox"/> 12
8. Number previous operators of this business _____		<input type="checkbox"/> 13
9. Total acres in ownership here including this business _____		14 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 17
10. Acres in recreation business part (presently) _____		18 <input type="checkbox"/> <input type="checkbox"/> 20
11. Acres in recreation business when you started here _____		21 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 23
12. Acres initially in recreation business here _____		24 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 26
13. Enterprises in recreation business (Amts.)		
___ 0. Camping - number spaces _____		27 <input type="checkbox"/> <input type="checkbox"/>
___ 1. Swimming beach - acres beach _____		29 <input type="checkbox"/> <input type="checkbox"/>
___ 2. Picnicking site-area(s) - number tables _____		31 <input type="checkbox"/> <input type="checkbox"/>
___ 3. Horseback riding - number horses _____		33 <input type="checkbox"/> <input type="checkbox"/>
___ 4. Lake-River Fishing - number boats (and canoes) for rent _____		35 <input type="checkbox"/> <input type="checkbox"/>
___ 5. Hunting - number acres (land and water) _____		37 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 39
___ 6. Water skiing - number boats (rental) used _____		40 <input type="checkbox"/> <input type="checkbox"/>
___ 7. Winter sports (name: _____) _____		42 <input type="checkbox"/> <input type="checkbox"/>
___ 8. Vacation boarders - number people capacity _____		44 <input type="checkbox"/> <input type="checkbox"/>

- ___ 9. Group camping - number people capacity _____
- ___ 10. Pond fishing - number acres _____
- ___ 11. Deer hunting boarders - number people capacity _____

46 48

49

51 52

14. Operator's work in recreation business:

- | | |
|------------------------------|------------------------------|
| 1. Full time 12 months _____ | 5. Part time 12 months _____ |
| 2. Full time 9 months _____ | 6. Part time 9 months _____ |
| 3. Full time 6 months _____ | 7. Part time 6 months _____ |
| 4. Full time 3 months _____ | 8. Part time 3 months _____ |

(Ft) (Pt)

53 54

15. Operator's wife or female adult relative - work in business
 Full time months _____; Part time months _____

(Ft) (Pt)

55 56

(Use codes from 8 sub-items from No. 14 for column spaces)

16. Operator's children (over 12 years old) working in the business.

(No.) (Ft) (Pt)

- | | |
|---|--------------------------|
| ___ (1) First case: Full time months _____ | } Part time months _____ |
| ___ (2) Second case: Full time months _____ | |
| ___ (3) Third or more: Full time months _____ | } Part time months _____ |
| | |

57 58 59 60

61 62 63 64

65 66 67

(Use reported months in appropriate card columns)

17. Yearly period of business operations (any or all enterprises)

- 1. Opening date (before May) _____
- 2. Opening date May _____
- 3. Opening date June _____
- A. Other opening date _____
- 4. Closing date August _____
- 5. Closing date September _____
- 6. Closing date (after Oct. 1) _____
- B. Other closing date _____
- 7. In addition to above, usually reopened from _____

Contiguous period that business is open.

68

69

to _____ for _____; and

70

8. to _____ from _____.

71

9. (Notations for any special occasions): _____

10. Total number of days open for business in a year _____

72 74

18. Operator's length of residency in Wisconsin (applicable only to head of business):

- ____(1) one year ____ (5) five years
____(2) two years ____ (6) six to ten years
____(3) three years ____ (7) 11 or more, but not lifetime
____(4) four years ____ (8) lifetime

75

19. Age of head of business

- ____(1) 29 years old or under ____ (4) 50 to 59 years old
____(2) 30 to 39 years old ____ (5) 60 to 69 years old
____(3) 40 to 49 years old ____ (6) 70 years and over

76

20. Education of head of business (years in school)

- ____(1) 7 years or less ____ (4) 14 to 17 years
____(2) 8 to 10 years ____ (5) 18 or more years
____(3) 11 to 13 years

77

21. Education of wife of head of business (years in school)

- ____(1) 7 years or less ____ (4) 14 to 17 years
____(2) 8 to 10 years ____ (5) 18 or more years
____(3) 11 to 13 years

78

22. Previous or present other principal occupation(s) of head of business

- ____(0) Clerical ____ (6) Laborer
____(1) Farmer or Rancher ____ (7) Management and Prop.
____(2) Professional and Technical ____ (8) Other
____(3) Sales
____(4) Craftsman, Foreman
____(5) Operative

79

23. Is there any realistic competition for use of these recreation lands for other purposes than as in present business?

- ____(1) Yes ____ (2) No ____ (3) Part of them

Card Columns
Card #2

1

24. Has operator tried to sell business in last two years?

____(1) Yes ____ (2) No ____ (3) Currently trying to sell

2

25. Reasons for trying to sell business (If 24(1) or (3) checked)

____(1) Advanced age ____ (5) Health ailments

3
 First

____(2) Low returns ____ (6) Alternative work opportunities

4
 Second

____(3) Improvement costs ____ (7) Family desires

5
 Third

____(4) Help difficulties ____ (8) Profit on investment

____(9) Other

26. Are returns satisfactory for continuing business somewhat the same as now operated?

____(1) Yes ____ (2) No ____ (3) Maybe

6

____(4) Increased costs anticipated ____ (5) Same or lower costs anticipated

7

____(6) Increased receipts anticipated ____ (7) Same or lower receipts anticipated

8

____(8) Increased returns expected ____ (9) Same or lower returns expected

9

27. Are changes in business planned for in next three years?

____(1) In management ____ (2) In volume of business

10 11

____(3) Acres additional development

12 14

____(4) Added capital costs estimated for expansions and improvements

15 19

____(5) Capital is available ____ (6) Capital availability is questionable

20

28. Expansion acreage possibilities

Are expansion acreages available in present ownership ____ (1) Yes
____ (2) No

21

Are there adjacent acreages suitable for expansion uses ____ (3) Yes
____ (4) No

22

Can the adjacent acreage be purchased or leased (practical costs)
____ (5) Yes ____ (6) No ____ (7) No opinion

23

29. Planning and management assistance to operator.

Indicate sources of assistance--when starting the business and now.

Technical and Financial with personalized service (Initially and at present).

(Ini.) (Pres.)

(Ini.)

(Pres.)

- ____(1) Resource Agent-County _____
- ____(2) Soil and Water Conservation District (County) _____
- ____(3) Wisconsin Division of Conservation (any
representatives) _____
- U.S.D.A.: ____ (4) Soil Conservation Service _____
- ____ (5) Forest Service _____
- ____ (6) Farmers Home Administration _____
- ____(7) Small Business Administration _____
- ____(8) Local Banker _____
- ____(9) Private planning firm _____
- ____(R) Relative or close friend _____
- ____(0) Other (Name) _____

- 24 25
- 26 27
- 28 29
- 30 31
- 32 33
- 34 35
- 36 37
- 38 39
- 40 41
- 42 43
- 44 45

General: (Initially and at present)

(Ini.) (Pres.)

- ____(1) Magazines _____
- ____(2) Trade Association Journals _____
- ____(3) TV and radio _____
- ____(4) Newspapers _____
- ____(5) State government bulletins _____
- ____(6) Federal government bulletins _____
- ____(7) Recreational association or trade group meetings _____
- ____(8) Personally from friends in same type of business _____
- ____(9) Representatives of manufacturing (trade) firms _____
- ____(0) Other (name) _____

- 46 47
- 48 49
- 50 51
- 52 53
- 54 55
- 56 57
- 58 59
- 60 61
- 62 63
- 64 65

30. Cooperation and Coordination

1. In how many associations (furthering recreation) or organizations are you a recorded (dues paying or otherwise) member or cooperator: _____ Number; (Reference names):

2. Have you been an active participant in any endeavors regarding community or area planning needs and developments involving recreation? How many? _____ Number: (Reference name(s)):

3. Would you be interested and willing to participate in such endeavors as indicated in sub-item 2 above (no dues charged)?
____(1) Yes ____ (2) Not interested

66
 (Number)

67
 (Number)

68

4. With whom do you have significant cooperation in current operations of your business?

- ____(1) Recreation association
- ____(2) County government, departments or agents
- ____(3) Soil and Water Conservation District
- ____(4) Watershed association
- ____(5) State agency
- ____(6) Neighboring recreation business operators
- ____(7) Manager of public recreation area
- ____(8) City governments or their agents
- ____(9) Other; name: _____

69 Most

70 Second

71 Some

31. On what advertising media do you rely the most in soliciting customers for your business? (Rank 4 items)

- ____(1) Newspapers
- ____(2) Magazines
- ____(3) Brochures distributed by you
- ____(4) Brochures distributed by organization or firm for you
- ____(5) Recreation trade journal
- ____(6) Travel guides or directories
- ____(7) Roadside or area collective signs
- ____(8) Other

72 First

73 Second

74 Third

75 Fourth

32. Generally, without advent of unforeseeable circumstances how many more years do you expect to operate this business? ____ (1) one; ____ (2) two; ____ (3) three to five; ____ (4) six to ten; ____ (5) over ten

76

33. Generally, what percent of new recreation customers come here because of recommendations by friends who have been here: _____%

34. Interviewer's opinion regarding financial appearances of the recreation business: (1) ____ satisfactory (2) ____ not OK

35. Number of other enterprises (income producing) carried out on the ownership but not covered under item 13 above: ____ number; list name or other description: _____

Interviewer

Date

June 18, 1968

Private Recreation Enterprise - User Consumption
Part B - Schedule H - Horseback Riding Enterprise

Card Columns
Card #9

1. Card Number _____ 2. Sample Unit Number _____

1 3 6

3. County Name _____ and Number _____

7 8

3a. Schedule Unit Number _____

9 12

4. Operator's Name _____

5. Riding stock for rental ____ (A) Number horses; ____ (B) Number ponies; ____ (C) Total

13 16

17 18

6. Fee schedule: \$ ____ (A) Per one hour; \$ ____ (B) Per two hours; \$ ____ (C) For ____ hours; \$ ____ (D) Other per _____

NOTES: (Predominantly by ____ A, ____ B, or ____ C) Other: _____

19

7. Animal housing facilities: ____ (A) Barn with: ____ (B) Number single stalls; ____ (C) Number box stalls; ____ (D) Loafing or shelter shed; ____ (E) Hay storage; ____ (F) Grain storage; ____ (G) Tack room; ____ (H) Saddling and grooming room or space-way; ____ (J) Watering tank or cups in barn; ____ (K) Shed with: ____ (L) Number separate tie spaces or stalls; ____ (M) Main hay storage in separate covered stack or building; ____ (P) Separate shed or building for saddling and grooming

20

21

8. Pasture ____ (A) Total acres; ____ (B) Number separate (fenced) pasture areas; ____ (C) Non-wooded pasture acres

22 24 25

26 28

NOTES: _____

9. Does operator provide horseback riding instructor services for separate fee: ____ (A) Yes; ____ (B) No; ____ (C) Amount of fee per _____

29

10. Trails: ____ (A) Number of separate trails; ____ (B) Total miles of trails ordinarily used by your horses; ____ (C) Miles on your ownership; ____ (D) Miles on other private ownership. Miles on public ownership ____ (E) County; ____ (F) State;

30 32

34 36

____(G) Federal; ____ (H) Other public, name: _____

37

NOTES: (re: trails) _____

39

____(J) Average width of trails; ____ (K) Average width of backup acreage on each side of trails

41

11. Are riders grouped and accompanied by an attendant: ____ (A) Entirely; ____ (B) Partly () percent; ____ (C) Number of operator's trail riding attendants; ____ (D) Number of supervised riding parties that are usually on trails at same time

42

43

12. How many riders do you serve: ____ (A) Number on an average weekend day; ____ (B) Number on an average week day. As an overall consideration what percent; ____ (C) Are over 12 years of age
NOTES RE: (C) If ponies are available: _____

44

45 47

48 49

50 51

____ (D) Total rides in calendar year; i.e., participant-days

52 55

13. What are your usual dates during the year for operations of this enterprise: From ____ (Mo.) ____ (da.) to ____ (Mo.) ____ (da.)

56 58

____ (A) Total Days Open

59 60

What percent of your trade is in about 90 to 100 days around June, July and August: ____ (B) Percent

14. Are there attractions to other nearby outdoor recreation facilities that bring trade to your riding enterprise: ____ (A) On your ownership; ____ (B) On other private recreation ownerships nearby; ____ (C) On public owned recreation areas nearby; ____ (D) Because of nearness to concentration of population; ____ (E) None especially
NOTES (give names and causes): _____

61 1st

62 2nd

15. How many years have you had this enterprise: ____ (A) Two or less; ____ (B) Three to five; ____ (C) Six to ten; ____ (D) Over ten

63

16. How many riding animals did you own: ____ (A) First two years of enterprise; ____ (B) In 1965

64 65

66 67

17. Do you keep your horses twelve months of the year: ____ (A) Yes;

- ____(B) Part of them; ____ (C) None of them 68
 Explain "B" and "C" _____
18. Do you pay any one for any use of trails: ____ (A) Yes; ____ (B) No 69
 Explain "A" _____
19. How important do you consider your horseback riding enterprise as
 a part of your total recreation business: ____ (A) Under 25%; 70
 ____ (B) 25% to 49%; ____ (C) 50% to 75%; ____ (D) Over 75%
20. Do you have definite plans to change your present enterprise either
 physical or management: ____ (A) No; ____ (B) Increase size; 71
 ____ (C) Decrease size; ____ (D) Discontinue enterprise;
 ____ (E) Raise fees 72
 NOTES: (re: above changes): _____
21. How much does the recreation business operator personally serve the
 horseback riding enterprise while it is operative in a year: 73
 ____ (A) Full time; ____ (B) Half time; ____ (C) One-Fourth time;
 ____ (D) Evenings and weekends only ____ (K) None
 It is served by another member of the family: ____ (E) Wife; 74
 ____ (F) Sons or daughters; ____ (G) Other relative; ____ (O) None 75
 ____ (H) Number of non-family employees for enterprise
 NOTE: (Explain labor setup): _____ 76 77
22. Do you also board horses for others: ____ (A) Yes, and percent
 of enterprise business from this source of income; ____ (B) No

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