

GROWING THE EQUESTRIAN ECONOMY IN CATTARAUGUS COUNTY, NEW YORK

Volume 8

**A Guidebook Published for Cattaraugus County's
Smart Development For Quality Communities Series**



**Prepared For:
The Cattaraugus County Legislature
And its Allegany State Park Perimeter Study**



**Prepared in Collaboration By
The Cattaraugus County Department of Economic Development, Planning and Tourism
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**March 11, 2005
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Front Cover Photos: Top L-R: Ride-In at Holiday Valley (photo by Teri Parker); Teri Parker, President of the Little Valley Rider's Club with her horse Barry (photo by Becky Smith). Bottom L-R: Auction at Orsini's Ranch in Franklinville (photo by Nancy Orsini); Little Valley Rider's Club (photo by Terry Martin).



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Community Leaders and Citizens
in Cattaraugus County, New York

Dear Colleagues:

This Guidebook, Growing The Equestrian Economy in Cattaraugus County, New York, is the eighth volume of Cattaraugus County's Smart Development for Quality Communities Series. It establishes that our County has an important and growing equestrian community.

Cattaraugus County has beautiful communities with 83,955 people in 32 towns, 13 villages and two cities. Located on the western end of New York State between Buffalo and Bradford, Pennsylvania, they offer ethnic diversity and rural and urban lifestyles. This Guidebook encourages equestrian stakeholders and investors to develop and prosper by taking advantage of our County's rural ambiance, open space, village staging areas, and a growing trails network in a setting of great scenic beauty.

Many new facts and ideas are presented in this guidebook by consultants Richard T. Swist and Jo-Anne O. Young. They discuss local and national equestrian economic impacts, and proposals to improve equestrian facilities, events and trails. Proposals to promote equestrian development and problems and challenges faced by the equestrian community are discussed. We offer hope for the future.

This Guidebook can be used by our equestrian and business communities, citizens, investors, and others. It was conceived, supervised and produced by the Cattaraugus County Department of Economic Development, Planning & Tourism. For assistance, please call 716-938-9111 x2307, or write to 303 Court Street, Little Valley, New York 14755 or visit our County's Internet Web Site at www.cattco.org. We urge you to use this information for equestrian and business development purposes.

Sincerely,

Gerard J. Fitzpatrick
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She is a graduate of Roberts Wesleyan College, Houghton College, and is currently completing a thesis for Master of Science in Equestrian Education from Salem International University.



*Jo-Anne O. Young
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Growing The Equestrian Economy In Cattaraugus County, New York

A. Executive Summary

1. Cattaraugus County Has Growth Potentials

Economic development and increased tourism activity are priority goals of Cattaraugus County. Several baseline studies have identified new development potentials that are related to existing and planned assets in the County¹. Certain of these assets have been identified as the foundation for future development activities:

- The planned construction of a freeway in the Route 219 corridor between Springville and Salamanca, New York will create a major north-south travel corridor (which includes the state's largest volume ski resort in Ellicottville).
- Interstate status for Route 17, now officially designated as I-86, and its completion will create a major east-west travel corridor (which as of 2004 also hosts a Seneca Nation of Indians casino at the Salamanca exit).
- The 65,000 acre Allegany State Park and its perimeter communities are major assets (which are located in the broad perimeter around the Route 219 / I-86 interchange).
- Perimeter communities include villages with character and undeveloped potential for tourism, retail and recreational activity (which are beginning to take advantage of Smart Growth, New Urbanism, and Quality Communities trends).
- Public and private multi-use trails, both existing and planned, span the entire county and use certain villages as staging areas for snowmobiling and equestrian activities (which ultimately will link to recreational trails in adjacent counties as well as Pennsylvania).

The County seeks to take advantage of these assets by identifying and recommending economic development and tourism demonstration projects to expand local markets. This guidebook is based on an Equestrian Market Assessment that was prepared for Cattaraugus County by consultants Richard T. Swist and Jo-Anne O. Young, on equestrian potentials. This information can be used to attract private developers and capital into Cattaraugus County, to grow the equestrian economy.

2. The Equestrian Lifestyle Is Growing

The studies completed to date have identified a significant market opportunity in the area of equestrian-related tourism and development. At this time, the base level of equestrian activity in Cattaraugus County is relatively high, and several recent initiatives and proposals have served to underscore a strong growth potential:

¹ Route 219 Economic Strategy Study (Thomas Point Associates and The Saratoga Associates 1995, Updated 2001); Allegany State Park Perimeter Study (The Saratoga Associates, 2002); Mt. Pleasant Commons Subdivision Design for Franklinville, New York (Randall Arendt, 2001), and How Can Rural Villages Be Revitalized? The Cases of Franklinville, Little Valley and Randolph in Cattaraugus County (Richard T. Swist, 2002); and Saving Our Villages (Volume 3 of Cattaraugus County's Smart Development for Quality Communities guidebook series, December 31, 2004).

- The Little Valley Rider's Club holds several equestrian events every year involving more than 150 horses, has 65 miles of private horse trails, and has proposed a multi-faceted equestrian facility to include indoor and outdoor show arenas, stables, parking, campgrounds and support facilities.
- The existing trail network is undergoing significant expansion with the addition of a twelve-mile major link (the START trail) from Salamanca (next to the Allegany State Park) to the Villages of Little Valley and Cattaraugus, with the prospect of further extensions to Zoar Valley and Gowanda.
- An annual equestrian festival is held in Franklinville with trail rides in surrounding hills; equestrians are actively adding trails as well as exploring potentials for new housing development that is designed with facilities and amenities that horse owners desire.

As an economic development objective, the County wants to build upon these initiatives and generate the momentum for new development that eventually can move Cattaraugus County into the first rank of equestrian tourism both statewide and nationally.

The purpose of this Equestrian Market Assessment is to provide the information needed to assess the potential return on additional investments (both public and private) in equestrian-related tourism recreational activities, support businesses, and trail and facility development. In presenting this assessment, this guidebook is intended to serve as a "situation analysis" for a strategic plan that outlines how best to pursue equestrian development in Cattaraugus County.

Cattaraugus County has the following, long history of involvement with horses:

- Horse shows are held by 4-H and other groups (the 4-H has an active horse program).
- Organized trail rides and events are hosted by clubs and private groups, and equestrian skills clinics are held every year.
- Camps offer instructional and recreational riding, and an academy for troubled youth, uses horses as an effective therapy tool.
- Private stables offer riding lessons as well as training and boarding of horses.
- Equestrians own breeding farms.
- An entrepreneur operates a privately run, annual rodeo.
- The Agricultural Society operates a successful County Fairgrounds.
- The Allegany State Park has horse trails and two major, annual riding events.
- The County has a significant group of horse owners who pursue informal enjoyment of their privately owned horses on an individual basis.

3. Equestrian Highlights For 2004

A statewide survey by the New York State Department of Agriculture and Markets in 2000 shows that more than 3,500 equines (horses, ponies, donkeys and mules) live in Cattaraugus County. The total value of these assets, or stock (i.e., the equine themselves) is \$9,800,000 (New York

State has 168,000 equines). A sampling of stables and equestrian businesses is included in **Appendix A**.

These equines form the basis of a successful equestrian economy. There is a separate and self-sustaining, horse-based Amish economy in Cattaraugus County, but is not included in this assessment. The non-Amish equestrian economy, which was studied, is making a separate contribution to Cattaraugus County, and has the potential to grow into a major force in tourism.

In addition to the value of the stock, there is a potential economic impact of \$15,000 to \$20,000 per equine for feed, services and facilities. The overall economic impact of Cattaraugus County's current flow of maintenance and facilities may be in the range of \$50-70 million, although more specific studies will be needed as the equestrian lifestyle expands and future activities are improved.

Consider the following equestrian-related facts, as of 2004:

- Twenty-eight (28) local business and farms are involved in equestrian service and sales.
- Eight (8) local businesses sell feed.
- There are 289 box stalls and 81 tie stalls available privately.
- Two villages, Franklinville and Little Valley, are becoming centers of equestrian activity in Cattaraugus County.
- The brief sample of fifteen (15) horse owners in Cattaraugus County who were contacted by consultant Jo-Anne O. Young, own a total of 51 horses.
- Forty-one (41) horse owners participated in the trail rides, and another 18 horse owners (in addition to trail riders) provided demonstrations during the two-day 2004 Creek Side Roundup in Franklinville, New York (a new event started in 2003).
- The County Fairgrounds offers 178 additional stalls, a one-half mile track, a sand horse show arena with attached show office and grandstands for hosting equestrian events, and ample off-street parking and vending areas.
- The Little Valley Rider's Club is at the center of a privately operated 65-mile recreational trail riding network, which directly connects to the Ellicottville resort community, and to the new, twelve mile START trail (a "Rails-to-Trails project) which runs from Salamanca (near the Allegany State Park) to the Villages of Little Valley (and the County Fairgrounds) and Cattaraugus.
- The Little Valley Rider's Club-Stagecoach West's "Ride and Learn Weekend" in July 2004 attracted more than 500 people, who traveled an average distance of 75 miles to attend.
- Organizations in Cattaraugus County host twenty-eight (28) equestrian events annually.
- Cattaraugus and Chautauqua County equestrians formed a new Chapter in 2004 of the New York State Horse Council. One of their leaders was elected to the statewide Board of Directors of the New York State Horse Council. This new group began developing equestrian trails on state forestland near Onoville Marina in 2004. This includes getting a permit from the New York State Department of Environmental Conservation.

- Another 170 or more equestrian events are hosted in neighboring counties each year.
- There is a solid base of assets upon which to begin growing a stronger equestrian economy.

4. Conclusions

This assessment supports the notion that Cattaraugus County can benefit from an organized initiative to increase equestrian related tourism and development for the following reasons:

- There is a modest, but expanding, asset base.
- There are a number of immediate market opportunities.
- There is evidence that the returns on investment will be acceptable, particularly if lower cost approaches and technical assistance are first utilized, and if events are better advertised.
- The success of previous efforts would suggest that larger investments in facilities, and marketing for future events will strongly impact market share and economic returns, positively.

Notwithstanding these strengths, there are deficiencies that will need to be addressed and assets that must be built up if the County is to move up in the ranks of equestrian tourism and economic activity. Chief among these is the lack of a first class venue for sanctioned horse shows and other larger equestrian events. Such facilities are the cornerstone of a strong equestrian culture and economy. They attract a significant number of visitors and contribute greatly to tourism activity and spending.

Another factor to consider is that horse owners are very protective of their horses and will only entrust them to stabling and boarding facilities that meet accepted standards. The county's equestrian farms and stables must meet expectations of resident and visiting owners for the best possible care and boarding of their animals. Reputation is a fragile commodity that, once lost or tarnished, is difficult to restore. The highest standards must be maintained in the operation of the region's horse-related events and facilities.

In summary, horses are big business:

- The equestrian economy in Cattaraugus County has already developed considerably, even without sustained advertising and marketing efforts.
- A concerted effort to provide public assistance and guidance could lead to a significant acceleration in economic growth related to equestrian ownership and tourism.

Stakeholders in Cattaraugus County's equestrian economy can take the next steps by:

- Using the strategic planning information that is presented in this guidebook;
- Developing specific plans and projects based on good market data and business support;
- Adhering to equine care, health, and stabling standards;
- Developing a regional network of "Bed and Barns" on trail loops;

- Developing an indoor horse arena in order to attract and penetrate larger regional markets so that the equestrian economy in Cattaraugus County can continue to grow.

B. AN EQUESTRIAN VISION FOR CATTARAUGUS COUNTY

The ultimate goal of this market assessment and guidebook is to provide the equestrian and business communities in Cattaraugus County with a strategic plan. A strategic plan can guide equestrian-related tourism and economic development by marketing the County's equestrian lifestyle and assets to the broader region (see **Exhibit No. 1**).

A good strategic plan begins with a vision, and the Cattaraugus County Legislature and Planning Board have developed an overall vision for balanced growth in the 21st century. This vision promotes smart development and quality communities. It is summarized in **Exhibit No. 2**.

Building on this foundation, Terry Martin, Chief Planner for Cattaraugus County, has further refined the County's vision to include horses. It provides a crucial long-term view to 2025, showing where the equestrian and business communities ought to go in the equestrian economy. The equestrian vision is summarized in **Exhibit No. 3**, and includes a proposed concept for an equestrian trail that links the villages of Randolph, Little Valley, Ellicottville and Franklinville to the new twelve-mile START Trail and to State Forest Lands (see **Exhibit No. 4**).

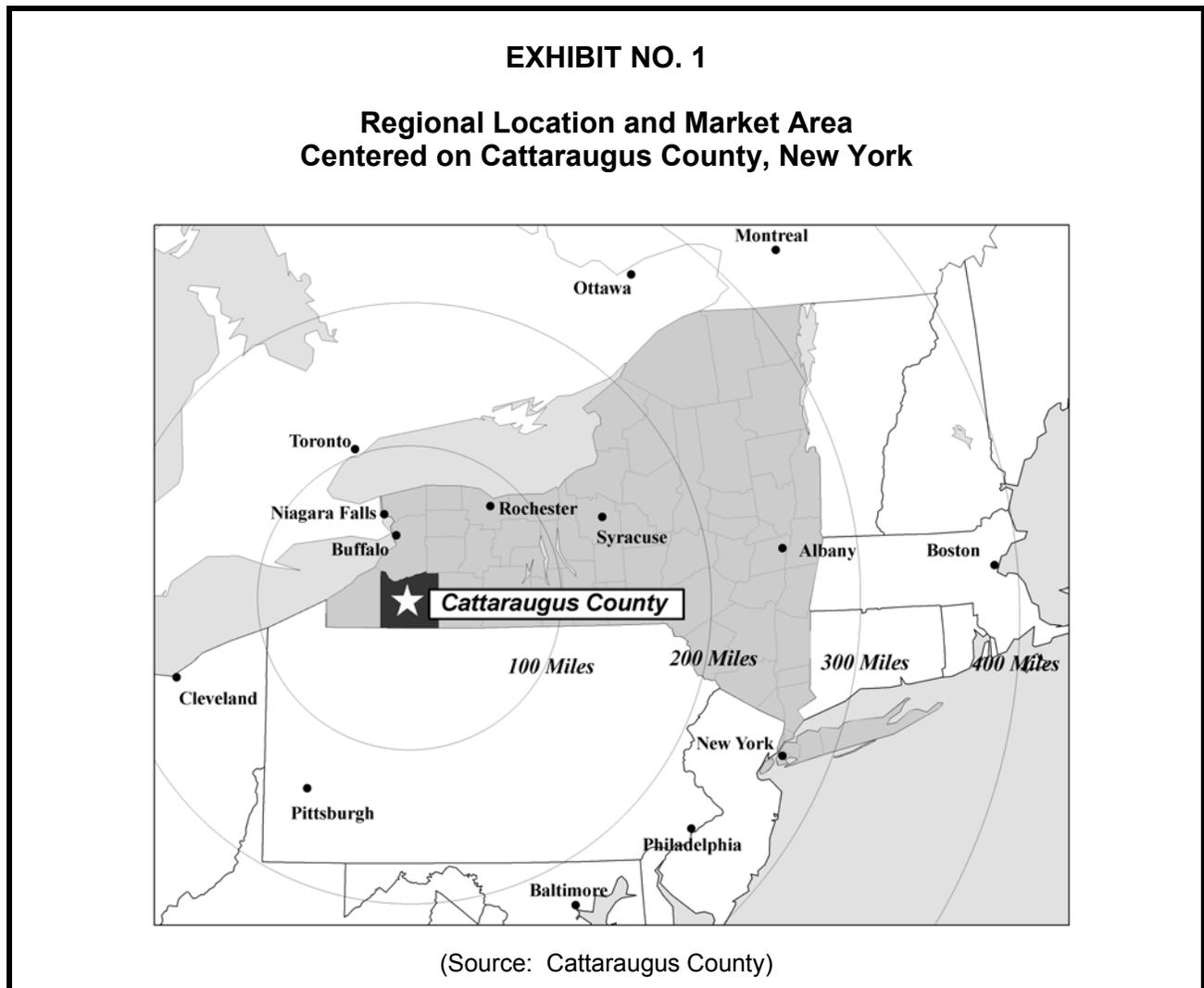


EXHIBIT NO. 2

A Vision Framework For Cattaraugus County, New York

Cattaraugus County has one overarching goal and vision. It is to achieve a balance between rural and urban development trends. This balance is needed in order to protect Cattaraugus County for future generations:

- As a place where people want to live, work, raise their children, retire and invest their earnings and futures.
- As a community of diverse interests and attractions during the four seasons of the year, with a clean environment, creating a sense of excitement and a sense of place and identity.
- As an attractive business setting, drawing people and commerce from a multi-state area and from the global economy, thereby bringing new income into Cattaraugus County and creating jobs, business opportunities, and hope for the future.
- As an attractive community of mixed land uses, rural and urban, productively deployed and working cooperatively (rather than in constant conflict) for the benefit of residents, property owners, business interests, visitors, and the local tax base.

This vision is wholesome, healthy, and robust with opportunities. It portrays a rural community that is blessed not only with great natural endowments, but also by wise decision making and planning. It satisfies diverse interests within Cattaraugus County. It is not easy to give one interest special treatment without affecting or even hurting other interests. A balance is needed.

This vision would encourage new development, but in controlled directions and densities. Growth would continue, but with principles and guidelines. Locations would be selected based on density limits established in carefully designed plans, negotiations, and zoning ordinances.

Of particular interest to a balanced growth policy are techniques that cluster land uses together, preserve open space, exert controls over highway frontage development, separate incompatible uses from each other, prevent environmental problems, coordinate locations, design better subdivisions,

create trail systems, and spread costs over time as well as over a broader base of taxpayers.

Low density residential, commercial, agricultural and recreational uses would be encouraged among the valleys, farms, woodlands, and hillsides. Higher density developments would be encouraged to locate closer to existing villages and urban services, and in the vicinity of major intersections. This would reduce the cost of improvements to roads and for extending water and sewer systems. It would protect the rural areas and open spaces of Cattaraugus County, including its farmland, scenic mountains, valleys, woodlands, and its land, air and water for future generations.

This framework is the basis for implementing the following goal from the Cattaraugus County Planning Board's report, "*Pathway to the Future – Planning for the 21st Century*" (February 26, 1992):

"The overriding effort to achieve economic development, if done without a comprehensive concept of development and without disciplined land use planning, can destroy the quality of life and character of a rural community.

"On the other hand, without economic development, a community may suffer the ill effects of unemployment, decline and blight.

"A balance is therefore needed, Cattaraugus County is not looking for decline, nor is it seeking unbridled development that destroys an established way of life along with the environment. It is seeking instead a planned and well-balanced growth throughout the County".

This vision is for the 21st Century.

Approved on April 26, 2001 by the Cattaraugus County Planning Board. This vision is based on "The 1990s – A Time for New Directions," by Terry H. Martin, Ph.D., published in the county's Pathway to the Future study (1992), and reprinted in the Cattaraugus County Local Land Use and Infrastructure Study, Appendix E, (The Saratoga Associates, March 1996).

(Source: Elements of A Countywide Visioning (Volume 1 of Cattaraugus County 's Smart Development for Quality Communities guidebook series, June, 2001, page 13)

EXHIBIT NO. 3

An Equestrian Vision for 2025 – Step Into the Future

In the Year 2025, trails for riding horses connect the Village of Little Valley to outdoor recreation attractions at Chautauqua Lake, Zoar Valley, Allegany State Park, Letchworth State Park, as well as the county's other villages and attractions such as Franklinville and Case Lake.

Cattaraugus County's 13 villages have made improvements by creating a "sense of place", with distinctive downtowns, community institutions, and public water and sewer systems. These villages, which are linked to each other with trails, are nested in the mountains and valleys that were created by ice-age glaciers. Franklinville and Little Valley in particular are of interest to people who own and board horses, want to live close to outdoor trails, and want to live in planned equestrian communities.

In the year 2025, this trail system extends beyond horseback riding trails and beyond Cattaraugus County. Each trail improvement has helped individual trail users, because it gives them access to the outdoor wilderness for adventure, recreation, reflection, exercise, and fresh air.

Trails now extend throughout Cattaraugus County, and link near-by counties together. This trail net extends (east to west) from Letchworth State Park to Allegany State Park near Salamanca, Zoar Valley near Gowanda, Lake Erie at Sunset Bay, and Chautauqua Lake near Jamestown (with linkages along the way to the region's municipalities and tourism attractions).

The Little Valley "Equestrian Park" is located at the heart of the region's **Enchanted Mountains Recreation Trails**. It is booked solid with new and exciting activities year-round, including indoor shows and events. People come from throughout the northeast corner and mid-west of North America every year to enjoy Little Valley for its outdoor and indoor equestrian activities.

Equestrian enthusiasts enjoy the following attractions and trail loops in the general vicinity of Franklinville and Little Valley (measured from Little Valley):

- Five miles from Amish country;
- Fifteen miles from Onoville Marina;
- Thirty miles from Chautauqua Lake and the City of Jamestown;
- Thirty-six miles from Sunset Bay on Lake Erie;
- Eighteen miles from Zoar Valley (with its seven miles of pristine wilderness);
- Nine miles from the Allegany River;
- Nine miles from the Seneca Allegany Casino;
- Nine miles from Allegany State Park (65,000 acres, with its own trails);
- Nine miles from Ellicottville's four-season recreation community (Historic District downtown, Holiday Valley Ski and Golf Resort and HoliMont Ski Club);
- Twenty miles from Franklinville's Maple and Equestrian Festivals, Park Square Historic District, DeLynn's Art Gallery, Miner's Cabin, proposed equestrian community, one of the region's best trout fishing areas in Ischua Creek, and recreation at Case Lake;
- Forty miles from East Aurora (an equestrian friendly community in Erie County);

EXHIBIT NO. 3 (Continued)

Twenty-eight miles to Olean's urban trail along the Allegheny River, which connects 30,000 people to St. Bonaventure University;

- Seventy-five miles to Letchworth State Park.

The County's villages are surrounded with rolling hills, forests, and scenic valleys. This open setting has natural terrain and vistas loved by horses and their riders. The entire area around Franklinville and Little Valley has become uniquely suited in the marketplace as the region's horseback riding heaven, especially for one to three day rides on trail loops.

In the Year 2025, the popularity of one to three day rides, and trail loop competitions, is increasing nationally. These are "growth" activities in the nation's equestrian markets. Special events are organized every year in Franklinville and Little Valley around horse rides, festivals, shows, and competitions. The United States Equestrian Federation recognizes hunter/jumper shows and dressage competitions as well as breed shows sanctioned by the American Quarter Horse Association, American Paint Horse Association, and Appaloosa Horse Registry. These events draw competitors from New York, Pennsylvania, Ohio, Ontario and beyond. Carriage and sleigh rallies and competitions lend an ambiance that thrills even the non-equestrian tourists.

These events generate a significant level of activity at various times of the year, and the Franklinville and Little Valley communities have become gracious "hosts" to horses and their owners. Many organizers of these events continue making improvements to a variety of trail loops, even up to 100 miles or more. New types of equestrian activities are being added every year by various organizations.

New concepts have been developed nationally and locally for what are called "Bed and Barns". While Bed and Breakfast lodgings are traditionally designed to serve tourists and automobiles, Bed and Barns are now designed to serve people who are riding horses for more than a day's trip. Bed and Barns are located on trail loops.

In the Year 2025, "quality" is the key word for sustaining these events over time, whether indoor shows, trail rides, trail loop competitions, Bed and Barn stops or special endurance races. Quality experiences are spread by word of mouth, as well as by media exposure in regional markets. With time, the resulting images identify certain locations as the "place to go".

Today, in 2004, Cattaraugus County is already becoming one of those "places to go" in the broader region. It has:

- A major Amish touring and retail center near Randolph and Onoville Marina;
- A 200 acre County owned property near Onoville Marina that consultants recommend be converted into a regional staging area for equestrians;
- The "Equestrian Park" in Little Valley with 65 miles of horse trails linked to County Fairgrounds;
- An annual "Equestrian Festival" in Franklinville, with trail rides into surrounding hills;
- Major "ski centers" and Summer resorts in Ellicottville linked to horse trails;
- The 65,000 acre Allegany State Park, with multi-use trails;
- The newly constructed, 12-mile START Trail.

All of these assets are located in the center of the Southern Tier West region, near the interchanges of Route 219 and I-86. Villages such as Little Valley and Franklinville are becoming jumping off points for a variety of equestrian and other adventures in all four seasons, thereby breathing new life into these established communities.

(Source: Based on A New Vision For Recreation Trails In Cattaraugus County, New York (Volume 4, Cattaraugus County's Smart Development for Quality Communities Series, 2005).

EXHIBIT NO. 4

All Trails Lead to Little Valley – A New Concept
A New Equestrian Center for the Region



1. Existing 12-Mile START Trail 2. Proposed Equestrian Trail

Cattaraugus County's Allegany State Park Perimeter Study
Concept by Terry H. Martin
Map by Jeanne Lecese July 2003

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C. EQUESTRIAN ASSET INVENTORY AND ASSESSMENT

The County's ability to generate added economic returns from the "horse economy" is directly related to the extent and strength of its equestrian-related assets. These assets range from public and private facilities (stables and show arenas) to support services and businesses (such as feed stores and veterinarians). In addition to these "hard assets", the County also benefits from the skills, experience and passion of those residents and visitors for whom horses represent a major aspect of their life style and their business lives.

The need for a market assessment became apparent based on a series of meetings with equestrians between 2002 and 2004, and an initial inventory conducted by the Cattaraugus County Department of Economic Development, Planning and Tourism (see **Exhibit No. 5**). This assessment takes the next step, and examines these assets in greater detail.

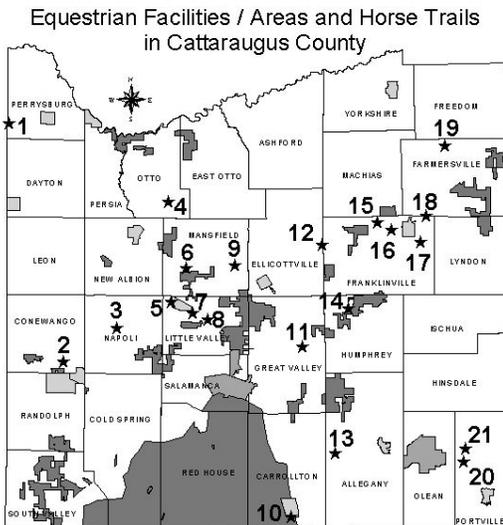
EXHIBIT NO. 5

INITIAL INVENTORY OF EQUESTRIAN ASSETS IN CATTARAUGUS COUNTY

- | | | |
|---|--|---|
| <p>1) <u>North Star Farm</u> – 12591 Route 39, Perrysburg - Horse breeding, boarding, training and instruction facility.</p> <p>2) <u>Amish Country/Randolph Area</u> - Offers blacksmiths, harness makers and a way of life that is based on horses.</p> <p>3) <u>Zaepfel Nature Preserve</u> – Allegany Road, Napoli – Contains multi-use trails.</p> <p>4) <u>R & R Dude Ranch</u> – 8940 Lange Road, Otto - Offers horseback riding, trail rides, buggy rides, sleigh rides, hayrides, camping and horse boarding. They have two-night program for children, and have a bed and barn on their property.</p> <p>5) <u>Cattaraugus County Fairgrounds</u> – Route 353, Little Valley - Has facilities to house 165 horses, a racetrack and an enclosed horseback riding arena.</p> <p>6) <u>Mansfield Coach & Cutter</u> – 6864 Sodum Road, Mansfield - Offers sleigh rides, hayrides, horse drawn carriage rides and fall foliage wagon rides.</p> | <p>11) <u>Whisper Mountain Ranch</u> – Humphrey Road, Great Valley - Horseback riding, buggy rides for special occasions, trail rides, western horse riding lessons and English horse riding lessons.</p> <p>12) <u>Proposed Northrup's Riding / Boarding Stable</u> – Bryant Hill Road, Ellicottville - Indoor horseback riding facility and boarding stable.</p> <p>13) <u>OKAY Corral</u> – 4179 South Nine Mile Road, Allegany - Offers horseback riding lessons and boarding.</p> <p>14) <u>Golden Hills Trails Area</u> – Golden Hill Road, Humphrey - Horseback riding trails accessing state forest land.</p> <p>15) <u>Orsini Lonesome Oak Ranch</u> – County Road 17 and Rogers Road, Franklinville - Miniature horses, horse breeding and sales facility.</p> <p>16) <u>Triple R Campground</u> – 3491 Bryant Hill Road, Franklinville - Rustic, scenic campground owned by horse lovers.</p> | <p>17) <u>Case Lake</u> – Abbott Road, Franklinville - An 80 acre lake surrounded by 136 acres owned by Cattaraugus County. Major plans are underway with the Town of Franklinville to build a park, camping area, pavilion with fireplace, trailer staging area for equestrians, and 3 miles of trails around the lake.</p> <p>18) <u>Boehmer Property</u> – 8186 Kingsbury Hill Road, Franklinville - An equestrian learning center on equine care, riding lessons, shows and 4-H Club support.</p> <p>19) <u>Painted Meadows</u> – 1644 Elton Road, Farmersville - Horse breeding and sales facility.</p> <p>20) <u>Handle Bar Farm</u> – 1468 Happy Hollow, Olean - Horseback riding, horse boarding and offers horseback riding lessons.</p> <p>21) <u>Mohr's Breezy Acres Farm</u> – Haskell Road, Olean - Horseback riding and carriage rides for special occasions.</p> |
|---|--|---|

(Source: By Becky Smith, Tourism Assistant for Cattaraugus County.)

- 7) Little Valley Rider's Club – Route 353, Little Valley - Has horseback riding, camping facilities with 65 miles of horse trails that have access to state land.
- 8) The Crosspatch Horse Ranch – 5281 Baker Road, Little Valley - Guided trail rides, horseback riding getaways and specialty rides. Also boards horses, gives riding lessons, trains horses and sells horses and tack.
- 9) Gentle Thunder Farm – Hencoop Road, Mansfield - Offers horseback riding, trail rides, riding lessons, boarding and equine photography.
- 10) Parkside Stables – 102 Parkside Drive, Limestone - Horse boarding and horseback riding lesson facility.



Source: CCEDP&T (Map produced by Joseph Williams and David Paoletta)

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The following assessment describes the growing number of existing equestrian assets in Cattaraugus County. The ability to grow a strong and vibrant equestrian economy is dependent upon improving these assets. The most critical assets are:

- Stables and stalls for visiting horses;
- A variety of small to medium events;
- Show facilities to host large events (including indoor arenas);
- An extensive trail system with loops for recreational riding and “Bed and Barns”;
- Equestrian support services;
- Hospitality businesses.

These assets are the physical prerequisites to generating economic activity based upon horses and equestrian interests. Over time, as they are improved and expanded, horse owners will begin to move to, and invest in, Cattaraugus County’s equestrian lifestyle (a process that is already occurring).

1. Stables and Stalls / Quality and Health Standards

Tourists interested in the equestrian life style will likely be traveling with their horses, which will need to be boarded at reputable stabling operations. Even those equestrian tourists who leave their own horses at home will be seeking out farms and boarding businesses that offer recreational riding. The bottom line is that an adequate inventory of stables and stalls will be needed, if the County is to realize these new opportunities in the equestrian tourism sector.

The equestrian stabling and boarding farms shown in **Appendix A** are now operating in the County. There are 22 entities with a total of 289 box stalls and 81 tie stalls. Not all of these stalls are available for boarding because these farms have nearly 450 horses and other equines already on the premises. Given that a single large equestrian show or event can attract 200 horses or more, there are clearly some concerns about the adequacy of the current inventory of stalls and boarding facilities.

In addition to the number of stalls, the extent to which the available boarding operations meet accepted standards for equine health and safety must be considered. This market assessment did not endeavor to determine the compliance of existing stabling operations with standards, but it did identify a need for equestrian tourism to recognize that visiting horse owners will demand quality facilities and operations. It is in the best interests of the County’s equestrian and business communities, especially stable owners, to demonstrate adherence to acceptable standards. The following resources are available:

- The New York State Health Department has developed a program that establishes standards. The County and its equestrians and entrepreneurs may want to consider this program, as they get involved in the promotion and development of boarding operations and stabling.
- The County’s equestrian and business communities may also wish to obtain and utilize as a guide the manual published by the Certified Horsemanship Association entitled “Standards for Group Riding Programs”. This manual lists standards for safer equine environments, and is accepted nationwide by the horse industry as a reliable guide.

In preparing this assessment, the consultants noted that there is no central directory of equine boarding operations that can be used by individuals who are planning to visit Cattaraugus County with their horses. Diane Jones, President Emeritus of the New York State Horse Council, has suggested that equestrian business interests in the County may want to consider developing such a directory, including interactive on-line features that facilitate identifying and reserving stalls for out-of-county visitors. This would generate a new source of revenue for local owners, which will grow as a reservation system for horse stalls is developed and advertised to the broader region.

2. Arenas and Show Facilities

Horse enthusiasts hold numerous events each year, as evidenced by the detailed descriptions discussed in Section D below and the listings in the appendices. By and large, horse events are generally categorized as open shows or sanctioned shows. Most horse shows in and around Cattaraugus County are "open" shows, where clubs and individuals have an opportunity to show their horses, outside of officially sanctioned competition. These open shows provide valuable practice and exposure for equestrians, and, because they draw fewer horses and attendees, they can be hosted at smaller arenas and facilities. Many of the farms and boarding operations listed in **Appendix A** have outdoor arenas and can play host to smaller open shows and events.

Open events do not have the drawing power of a show that has been sanctioned by a horse association as an official competition. A sanctioned show could attract 200 or more horses and perhaps 1,000 to 2,000 spectators. The income potential associated with an event of this size makes it a significant market opportunity. However, hosting these major events requires indoor and outdoor arenas and show facilities that are of the highest quality, with the capacity to handle a large number of horses and attendees.

Each sanctioning body has established standards for approving facilities which host sanctioned shows. Most facilities that regularly host such shows have some variation of the following features:

- An indoor ring approximately 80 to 100 feet wide and 250 to 300 feet long;
- An indoor warm-up ring approximately 75 feet wide and 175 feet long;
- Secure, attractive stabling for participants' (competitors') horses;
- Grandstand seating for 1,500 to 2,000 spectators;
- Ample restrooms for participants and spectators;
- Ample showers for participants;
- Utility hook-ups for campers and RVs;
- Safe access from highways for horse trailers, and off-street parking.

To compete for sanctioned events (or even very large open shows), the County's equestrian and business communities would need to examine how best to provide the required facilities. One option is to look at the potential for upgrading the Cattaraugus County Fairgrounds in Little Valley. Another avenue may be offered by the Little Valley Trail Rider's Club's proposal to construct a first class indoor show facility on its 126 acre Equestrian Park, complete with outdoor practice arenas,

and Recreation Vehicle (RV) and traditional camping. This property is located outside of the village (see Section 8 below for a discussion of these proposals).

3. Recreational Trails

Recreational trail riding is a major element of equestrian tourism. Equestrian enthusiasts traveling with or without their own horses seek out areas that have a good network of trails and support services, such as camps, boarding operations and rental businesses. They also seek out trail rides and other equestrian events, social activities, lodging and good restaurants.

Cattaraugus County has an existing, significant inventory of recreational trails. A somewhat uncoordinated effort is underway to expand this network and interconnect its different segments with surrounding counties and states. The build-out of a comprehensive trail network will create a new and significant asset that attracts increasing numbers of visitors, particularly those interested in recreational horse riding.

Cattaraugus County's existing trail networks are shown in **Exhibit No. 6** (this map was developed by consultants, The Saratoga Associates, as part of Cattaraugus County's Allegany State Park Perimeter Study, published in Volume 7 of the County's Smart Development for Quality Communities guidebook series). Additional information is available in Volume 3 of the County's guidebook series, "A New Vision for Recreation Trails in Cattaraugus County, New York".

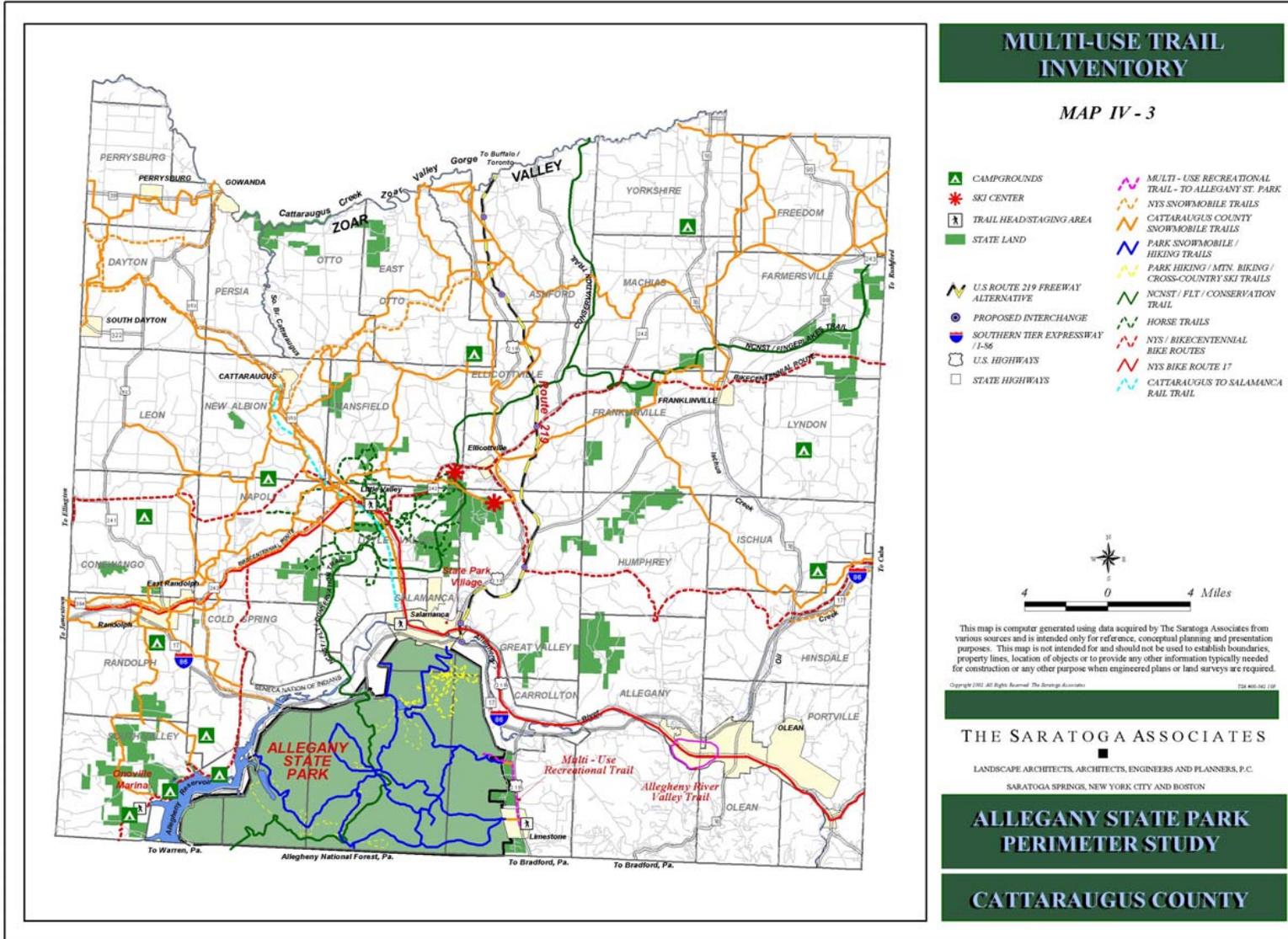
Allegany State Park is an important center of this network, and it plays host to numerous trail rides. A 12-mile "rails-to-trails" project has also recently been constructed, connecting Salamanca (which is located on the edge of Allegany State Park) to the Village of Cattaraugus by way of Little Valley. This trail crosses the Little Valley Rider's Club property and the Cattaraugus County Fairgrounds, connecting these assets to the downtown business district in Little Valley.

There are a number of issues to be addressed in trail development:

- The best way to manage multi-purpose trails needs to be determined, because different uses occur on different trail segments, and a variety of stakeholders are needed to accommodate the full range of users (e.g. horses, snowmobiles, hikers, bicyclists, in-line skaters, and more).
- A significant portion of the existing equestrian trail network traverses private land. Although owners have consented to this arrangement with riding clubs and others, questions of legal liability need to be addressed, particularly if public entities are to promote the trail system for tourism or public recreational purposes (see the discussion in Section 4 below).

The County's Allegany State Park Perimeter studies propose, as a long-term goal, that a trails system be completed by filling the gaps in-between existing trail segments. This will require significant investment of time and money by a variety of stakeholders to achieve. Many of the obstacles are natural, such as crossing the Allegheny River or ascending the mountains into Allegany State Park. Some are jurisdictional, such as crossing Seneca Nation of Indians land. Different trail segments serve different interests, from snowmobiling and mountain biking to hiking, equestrian and nature interpretation. Some segments may require legal easements to assure future access.

While an extensive equestrian trail network can become a major asset, the County and its equestrians have challenges to overcome to make it a reality. These challenges and proposed solutions are discussed in the County's Smart Development for Quality Communities Guidebook Series, "A New Vision for Recreation Trails in Cattaraugus County, New York (Volume 4).



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4. Trail Use and Equine Facility Liability Issues

In a litigious society, the threat of a lawsuit is a constant factor for those either organizing or participating in many recreational activities. Ignoring the possibility of a lawsuit can severely impact or even bankrupt unprepared individuals or organizations. Given this situation, stakeholders' efforts to advance tourism and business development in Cattaraugus County, based upon recreational trail riding and other equestrian activity, must proceed with a firm grasp of liability issues. One of the best sources of information regarding legal liability issues for equine related activities, other than direct legal service, is the New York State Horse Council. This organization has spent extensive time, effort and funds researching these issues and educating legislators for better laws (for more information go to www.nyshc.org).

Generally, horse owners and riders are aware of the risks inherent in their chosen recreation or sport. They assume those risks willingly as a small price to pay for the pleasure they gain. Unfortunately, New York State is one of only a few states that do not have an "inherent risk" law for equine related activities. That lack can make landowners reluctant to grant right-of-way for horseback riders or hikers on their properties, unless liability protection is available without cost to the landowner. Property owners, however willing to cooperate, derive no financial gain from granting the right-of-way, but do have loss of privacy and exposure to liability risk.

The following actions and sources should be considered:

- Adding appropriate signage at trailheads;
- Listing and warning of natural obstacles and dangers inherent in the use of trails, and informing potential users that the use of the trails is at their own risk;
- Consulting with legal experts on equine liability issues is definitely advised. Julie Fershtman, an attorney who specializes in equine issues, has written extensively on this subject and may be a good introductory resource, particularly her book entitled Equine Law and Horse Sense (Horses and the Law Publishing, Franklin, Michigan);
- Consulting with the New York State Office of Parks, Recreation and Historic Preservation may provide insights because it allows horseback riding on certain trails in many State parks. Its approach to handling the liability issue is based on experience and agency legal expertise on how that public agency is approaching this issue;
- Reading, The Equine Legal Handbook by Gary Katz (Half Halt Press, Middletowne, MD), which is another good resource on legal and liability issues;
- Joining the New York State Horse Council, which monitors this issue and operates safety and helmet programs. Individual, Family, and Life Membership include a \$1 Million individual 24/7 liability insurance (www.nyshc.org).

Another aspect of the liability issue is the risk that clubs or organizations take when they sponsor equestrian events that are open to the public. According to information recently provided to the Western New York Dressage Association, liability insurance purchased for club or organization functions is generally structured only to protect the club from potential suits from non-members attending an association function or participating in an event on club or organization property. Members cannot sue the club or organization. Legal assistance is needed when making these determinations.

Given the liability issues involving both property use and event sponsorship, legal experts may want to explore enacting a state law that could effectively limit liability of land owners and sponsoring organizations of equine related activities, if such activities were conducted within industry accepted standards. In the meantime, New York State has a General Municipal Law provision (supported by case law) to protect property owners (see **Appendix B**).

5. Equestrian Support Businesses

As equestrian related tourism increases, so too will the demand for support services. The business listings in **Appendix A** show that there are only a very limited number of support businesses in Cattaraugus County at this time. Basic feed and bedding arrangements appear to be handled through the host farms and boarding facilities, but a greatly expanded show and event program could overtax the current system. Added support through veterinarians, tack shops, farriers and other services would be needed, and represent potential opportunities for entrepreneurs.

As usually happens in a potential growth situation, the question arises as to whether these support services are necessary to attract new economic activity (i.e. visitors and tourism dollars), or if an increase in such activity will generate the market demand necessary to support new businesses. The equestrian and business communities in Cattaraugus County need to be sensitive to this question and be prepared to encourage business development that complements an equestrian market expansion.

6. Hospitality Businesses

Ellicottville and the City of Olean are the major hospitality centers of the County, and have quality restaurants, hotels, bed and breakfasts, and other accommodations. The City of Salamanca is rapidly developing its hospitality sector to serve the new Seneca Allegany Casino. Other areas in the County, particularly those areas currently focusing on equestrian-related development, are not in as good a position. In particular, Little Valley and Franklinville have little to offer in the hospitality sector. This is a weakness that will need to be addressed.

- If the Little Valley Rider's Club's proposed indoor facility is built, it will be difficult to attract major sanctioned or open equestrian events without a stronger inventory of overnight lodging and dining options beyond those offered by event sponsors.
- Further, equestrian visitors are increasingly interested in "bed and barns", in which they and their horses can both be accommodated.
- As the County and its equestrian and business communities expand marketing efforts, they will need to develop a hospitality plan that meets the increasing demand for lodging and meals that will accompany riders and events.

7. Local Equestrians and the New York State Horse Council

There is an extensive informal network of clubs and associations throughout Cattaraugus County and adjacent areas. While there is limited coordination of these organizations at the present time, grassroots efforts are nevertheless being made to improve assets and promote events to the broader region. This newly emerging process represents an intangible asset that can contribute positively to everything from marketing to planning and program design. This process also includes a wealth of expertise and passion regarding horses and equestrian issues among the County's resident equestrian community.

Of particular importance is the creation in April 2004 of the newest chapter of the New York State Horse Council (NYSHC). The Cattaraugus-Chautauqua Counties (“Catt/Chaut”) Chapter provides a strong focal point for equestrian enthusiasts in the Western Region of the state, in an area where they are welcome. The officers of this new Chapter are: President: Kathy Calanni, 5163 Stockton-Brocton Road, Stockton, NY 14787. (716) 595-2263. Email: oldrider@myway.com. Vice President: James Leising, 12503 Cottage Road, South Dayton, NY 14138. (716) 532-3357. Email: lleising@earthlink.net. Secretary: Carole Baldwin, 11363 Bennett St., Silver Creek, NY 14136. (716) 938-4294. Treasurer: Leah Leising, 12503 Cottage Rd., South Dayton, NY 14138. (716) 532-3357. Email: lleising@earthlink.net. Over time, the membership of this new Board may change, but these individuals represent the charter members.

The initial goals of the new chapter are:

- To create an Equine Rescue Society for abused horses;
- To educate the public on proper care of horses;
- To work on preserving and improving multi-use trails and areas for equine use and educating equine users about minimum impact concepts for these trails, so that trails are safe and environmentally sound;
- To help the Western Region develop trails, maintain trails and keep them open for the broader equestrian community;
- To participate in the New York State Horse Council.

Another development that will strengthen Cattaraugus County’s position and influence in equestrian matters is the addition of a new member to the statewide Board of Directors of the NYSHC. Teri Parker, who is the current President of the Little Valley Rider’s Club, and active in both 4-H and the new Chapter, is now representing the southern Western Region. As noted several times in this report, the Horse Council is a major organization in the State’s equestrian affairs. Cattaraugus County’s growing leadership involvement in the Council represents a significant development.

The key to tapping into the existing knowledge and expertise of the equestrian community is to formalize this network of owners and enthusiasts as a communications group. Linking by e-mail and website will help bring everybody together and get them focused on the equestrian initiative. Periodic meetings of focus groups and open discussions can provide important feedback on plans and opportunities and can contribute to creative problem resolution. The potential role of the clubs, associations, and NYSHC Chapter in grassroots marketing is significant.

8. Emerging Centers of Equestrian Activity

Cattaraugus County has two villages where equestrian activities have been increasing: Franklinville and Little Valley. This assessment is based on the findings of previous County studies, and the consultants’ investigations.

a. The Village of Franklinville

Franklinville has the following locational advantages:

- Franklinville is located on Route 16, a state highway, one of the region’s major north-south highways connecting two metropolitan areas (Buffalo to the north, Olean to the south).

- Franklinville is only a one hour drive from the City of Buffalo (using Exit 54 with I-90 to get on Route 400 to Franklinville).
- Franklinville is only a 20 minute drive from the City of Olean and exit 26 on I-86.
- Franklinville is only a 15 minute drive to Route 219 and the ski resorts in Ellicottville, located 12 miles to the west on Route 242.
- Franklinville is located only 30 minutes from Allegany State Park and the City of Salamanca, which is home to the new Seneca Nation of Indians casino, by traveling on Route 98.

Franklinville also has many assets that are working to its advantage as of 2004. The village is building on past successes, as is documented in its plan called "Planning and Development Policies, Village of Franklinville, New York (May 5, 1988):

"The planning efforts that were made by the Village of Franklinville and its citizens in the late 1970's and early 1980's should be continued. In the past, many efforts have been made to preserve Franklinville's heritage and to cope with the apparent decline of the community's local economy...

...These past efforts have created the unique downtown Historic District and the successful, long established Maple Festival which attracts people from throughout the Southern Tier and Western New York regions. These two assets have helped put Franklinville "back on the map". New efforts are needed, however, to continue this process of "preserving" a community's past and "creating" its future at the same time...

...In this manner, the village will be able to show the outside world that the village has started a development process that is working, and that it has an attractive community where people want to live."

More recently, since that 1988 plan was completed, the village and its business community, and county and state officials have worked together to preserve the Park Square downtown (which is on the State and Federal Registers of Historic Places), by taking the following actions:

- Red bricks were installed on Route 16. New York State Department of Transportation (NYSDOT) replaced black asphalt with red bricks as the highway surface on Route 16 within the Historic District, and planted trees. This restores the downtown's distinguished image.
- Underground wires and 23-new street lamps were installed. Niagara Mohawk removed the old poles and overhead wires in Park Square, placing all wires underground or behind buildings, and installed historic style street lamps around the Historic District.
- The Miner's Cabin was given historic status on the State and National Registers of Historic Places. The Miner's Cabin, which is the center of historic records for the Franklinville area, only two blocks from Park Square, is owned by the Ischua Valley Historical Society.
- A housing conservation subdivision was designed. "Rural by Design" consultant Randall Arendt, with graphic assistance from the SUNY/Buffalo School of Architecture, designed one of the most unique and desirable housing subdivision proposals in western New

York for the southern end of the village (see **Exhibit No. 7**). It is designed to bring new development into an older village, and to integrate open space with buildings and roads.

- Connections were proposed between the downtown district and village “edges”. The Cattaraugus County “trails” concept, developed by Terry Martin, includes new proposals to connect the downtown Historic District to the Mt. Pleasant Common subdivision, and to Case Lake and Ischua Creek for pedestrians and trail users (see **Exhibit No. 8**, Proposed Vision for the Village of Franklinville, using trails to link these assets together).

Franklinville has a variety of inter-related opportunities that feed off of each other: a National Register downtown business historic district (Park Square), the famous Miner’s Cabin, a regional trout fishing area along Ischua Creek within walking distance of downtown, an innovative conservation subdivision developed by Randall Arendt for the southern end of the village, and Case Lake, all to be connected by a proposed trails network (see **Exhibit No. 9**, Strategy Assessment of Horses and Development in Franklinville, New York).

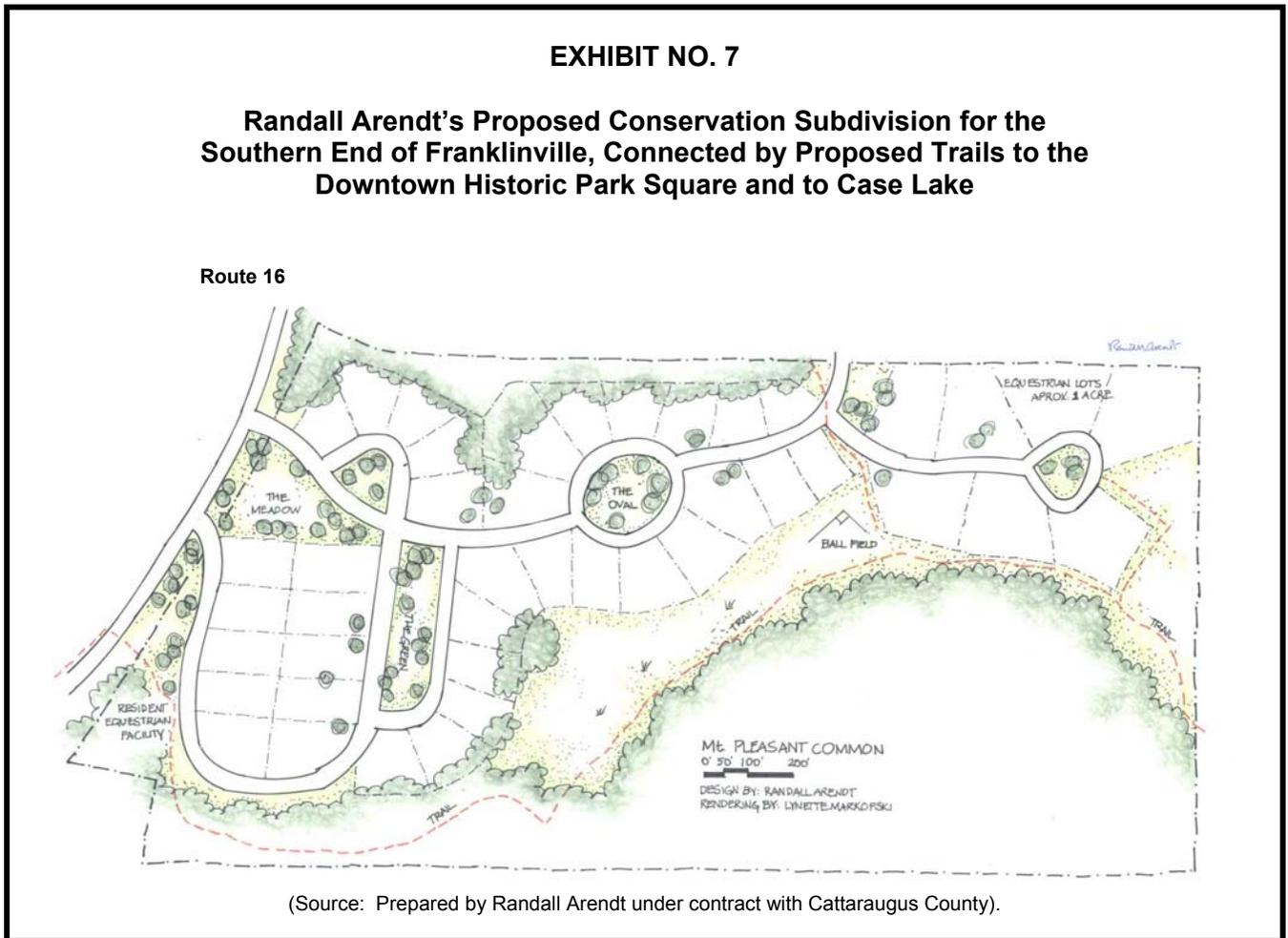
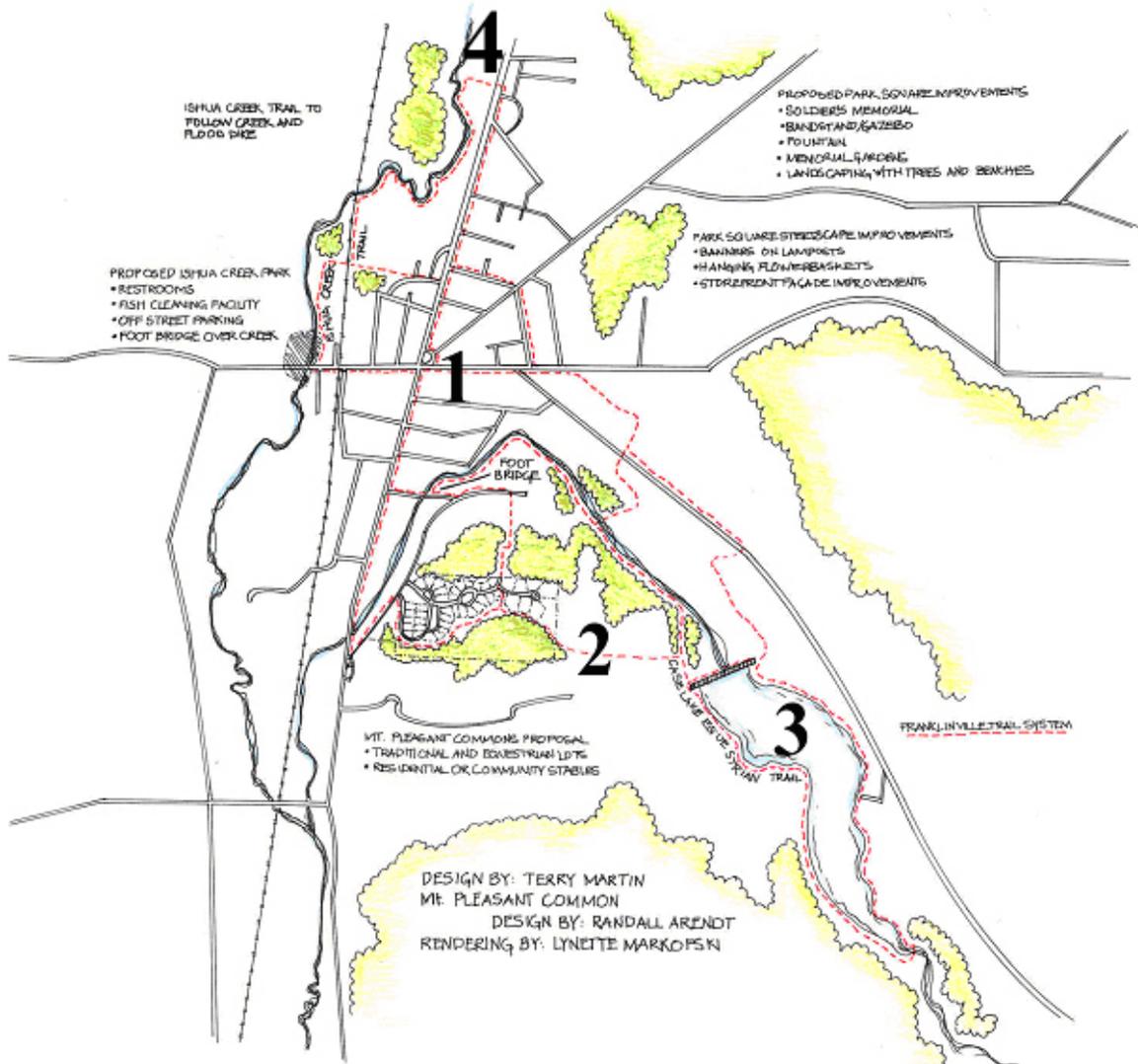


EXHIBIT NO. 8

Proposed Vision for the Village of Franklinville



1. Downtown Historic District (Park Square)
2. Proposed Subdivision and Trails
3. Case Lake
4. Creek Side Round-Up Equestrian Field

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EXHIBIT NO. 9

Strategic Assessment of Horses and Development in Franklinville, New York

Key premise: The village exists in a complex and evolving marketplace. To sell itself to investors in this market, Franklinville must first candidly assess its Strengths, Weaknesses, Market Opportunities, and Market Threats (called SWOT analysis). This strategic process will lead to a new vision, identity and direction that will provide a cornerstone for marketing and revitalization efforts.

Principal SWOT findings:

Strengths:

- Location on north-south travel corridor Route 16, near Case Lake.
- Unique and distinctive Park Square with historic structures in the center of a historic district.
- Annual Maple Festival provides marketing opportunities.
- Village owned land at south end available for housing development.
- An active equestrian community sponsors the annual Creek Side Roundup (equestrian festival).

Weaknesses:

- Many Park Square buildings unattractive and need interior and exterior work; many buildings are for sale and vacant, creating a poor image.
- Park Square and surrounding streetscapes lack an attractive landscaping and planting scheme.
- The equestrian markets are still somewhat problematic.

Opportunities:

- A restored Park Square has the potential to become an attraction in and of itself, due to its unique character and ambiance.
- An arts, crafts, antiquing and cultural orientation represents a niche in the commercial/retail marketplace that fits with a restored historic district.
- Unique development opportunities for equestrian housing development could be oriented toward the same market that is attracted to an arts and crafts orientation, and towards equine support businesses.

Threats:

- The number of vacant and substandard structures on the square represent a challenge to attracting anchor tenants and businesses;
- Housing sales are slow in the county and a new housing development would enter a difficult market unless it is a unique and well-positioned opportunity;
- Local antique and collectible dealers may not see Park Square as a viable business address without a “critical mass” of businesses to draw visitor traffic.

The Vision: By 2025, Franklinville has a village center that is surrounded by a vibrant and dynamic economic life. It is a center of regional arts and crafts. The Village’s physical appearance and design elements enhance its attractiveness and marketability, especially to gallery owners and antique dealers. Park Square is a “traffic-stopping” jewel with the structures around the square restored to create a unique historic district. The Village offers Mt. Pleasant Common, a unique housing development with open space and conservation themes, an expanded equestrian festival, and a planned equestrian community with trails around Case Lake. The industrial economy has retained existing industry and is marketing available development parcels in the industrial zone.

The Mission and Strategic Goals: The **mission** of the Franklinville community is to take action to realize this vision, through targeted investment in infrastructure and physical improvements, and organized marketing programs that sell the Village’s historic assets as a center of regional arts, crafts and culture, linked to equestrian and outdoor recreation opportunities. Two **strategic goals** are of primary importance:

- Pursue a retail strategy centered on the Park Square historic district to create a broader geographic market through its ambience and character that will attract niche retailers, such as galleries and antique dealers, and to hospitality businesses that cater to patrons of these establishments.

EXHIBIT NO. 9 (continued)

- Pursue equestrian-related development centered upon the Creek Side Roundup Equestrian Field, equine support businesses and the village-owned Mt. Pleasant Common subdivision, or on private land around Case Lake. A housing development with a unique equestrian identity, with trails to the Equestrian Field, to downtown Park Square, and around Case Lake, may attract developers and potential buyers.

The Action Plan:

1. Get organized to pursue developments of this scale and complexity.
 - Begin strategic planning that develops a shared vision and strategic goals.
 - Formally adopt Park Square revitalization and Mt. Pleasant Common as village-sponsored projects with immediate priority for development and trails linkages.
 - Explore the feasibility of forming a local development corporation (LDC) to manage the Park Square and Mt. Pleasant projects. The factors to study are political consensus, sources and uses of operating funds, and availability of affordable expertise.
2. Take preliminary steps to define revitalization projects for Park Square and for Mt. Pleasant Common.
 - Inventory sites and structures on ownership, value and structural needs, and engage a qualified contractor, preferably with historic restoration experience, to develop rehabilitation cost estimates for a typical Park Square structure. Extrapolate this data to estimate total rehabilitation costs.
 - Develop a community consensus regarding a planned equestrian community. Acquire information on the regional horse trail system and take steps to link it to a proposed equestrian community site with trail linkages among Mt. Pleasant Common, Case Lake, the Central Business District, and the Creek Side Roundup's Equestrian Field on Route 16.
 - Prepare a scope of services and budget for preparing preliminary designs and project budgets for the two demonstration projects. Identify funding and retain a design firm(s) through a request for proposals or other appropriate process.
3. Secure the funding necessary to undertake the required public investment for these projects.
 - Undertake an aggressive effort to secure maximum seed capital for the LDC to pay staff, consultants, and undertake initial rehabilitation efforts.
 - Conduct research into tax increment financing to position the village to fund the infrastructure that may be needed to attract a qualified housing developer.
 - Conduct research on successful revolving loan programs used for community development projects, and position the LDC to implement such a program.
 - Use cost estimates derived from the preliminary design process to determine what part of the project may require or qualify for public funding.
 - Meet with grant experts to identify programs and determine project eligibility with those sponsors.
4. Begin to address the related market issues.
 - Develop a list of potential investors and developers for the housing development and planned equestrian community and prepare a request for proposals to be distributed to them.
 - Contact outlet mall and plaza developers to discuss the potential for a unique retail outlet development in Park Square's Historic District.
 - Develop a contact list of regional artists, crafters, gallery owners, and antique dealers in anticipation of marketing retail space on Park square.
 - Prepare annual marketing programs, materials and budgets for the Park Square project.

The Absolute Prerequisite: The successful revitalization of the Village will depend upon a solid base of community support and activism. The government leaders, business community and concerned citizens need to find a way to act in concert to develop and pursue the vision presented here. The limited resources of the community must be focused on specific targets if there is to be progress.

Source: Richard Swist May 5, 2003, updated March 11, 2005

b. The Village of Little Valley

The Village of Little Valley has significant locational advantages:

- In addition to being the trailhead for the twelve-mile START Trail, Little Valley is located at the central point between Allegany State Park and Zoar Valley (north-south), which are two of the region's major "nature" destinations.
- Little Valley is located only nine miles from Allegany State Park, which also has horseback riding trails. The state park hosts two annual horseback rides for 200-300 people. Many of the same horse owners, who participate in rides in Little Valley, also participate in rides at the state park.
- Little Valley is located at the intersection of two cross-county highways (Routes 242 and 353, which both feed into Route 219 and I-86). This access gives it efficient access to regional highways for moving horses around to trail and event staging areas in specially designed horse trailers (which are growing in popularity, as well as in size and quality).
- Little Valley has, in addition to equestrian trails, direct links to the region's snowmobile trails. This suggests potentials for sharing trails maintenance by two active volunteer groups: equestrian volunteers in summer months, and snowmobile volunteers on the same trails in winter months.
- Little Valley has the Cattaraugus County Fairgrounds, which just celebrated its 162nd year. It has horse stalls and a track for riding that are used by 4-H Clubs and by the equestrian community for horse shows from May to October with 100 – 200 horses per show.
- Little Valley is the home of the Little Valley Rider's Club, which has 40-50 members, and has been operating for 50 years with approximately 65 miles of private riding trails in the hills around Little Valley.

The village has two significant assets: the County Fairgrounds and the Little Valley Rider's Club. The Cattaraugus County Fairgrounds is located in the northwest corner of the Village of Little Valley, and has the following features:

- A one-half mile racetrack;
- A grandstand that seats approximately one thousand people;
- 178 permanent stalls;
- Room in the infield and inside the dairy and 4-H barns for approximately 200 rented portable stalls;
- Sand horse show arena measuring approximately 125' by 250';
- The infield area of this arena can accommodate a dressage arena, judge's pavilion and warm-up area;
- The horse show arena bleachers can seat approximately 75 to 100 people, and portable aluminum bleachers can be moved to the arena to increase total seating to about 200.

This facility plays host to several equestrian events each year as listed in **Appendix E** and discussed in Section D. However, the County Fairgrounds has multi-use facilities and organizers who sponsor a wide array of events, including the annual Cattaraugus County Fair and a number of motor sports events. The ability of the County Fairgrounds to attract added equestrian events of significant size and impact would be compromised by inevitable scheduling conflicts. Motor sports and equestrian events also are unlikely to occur on the same weekends.

The wide array of events means that fairgrounds facilities are effectively serving multiple purposes, which could be a complicating factor for equestrians seeking clean and dedicated facilities. Although there is some likelihood that more horse shows and events can be booked, a greater market penetration into the broader region would be predicated upon establishing the County Fairgrounds as a dedicated equestrian facility, including constructing an indoor arena. Given its current role as a multi-faceted regional asset with major motor sports events, this is unlikely and perhaps even undesirable.

The Little Valley Rider's Club has the following features:

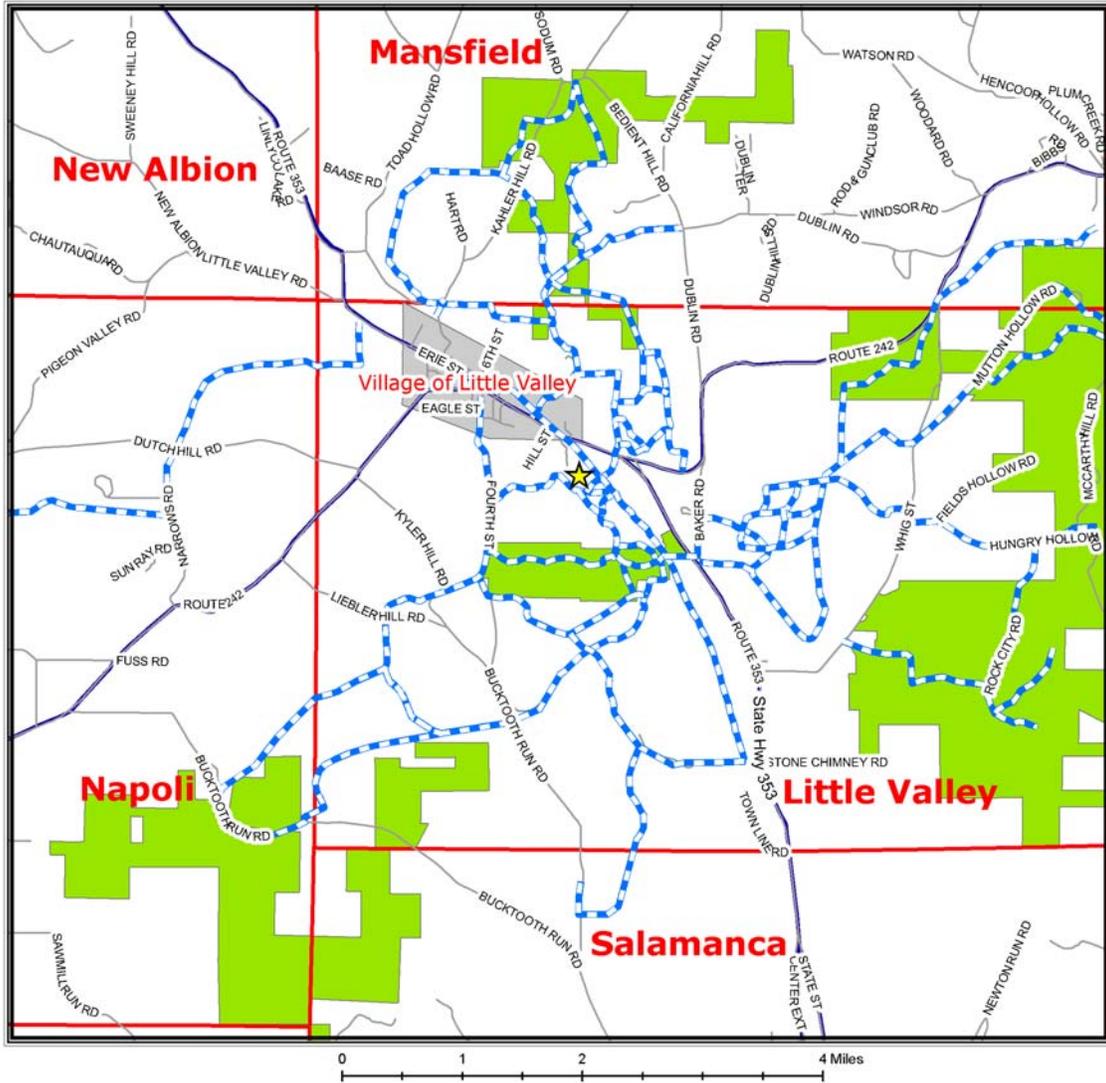
- The Club is an informal membership association that owns the 126-acre "Equestrian Park" on the outskirts of the Village of Little Valley, on the opposite side of the village from the County Fairgrounds (these two destinations are connected by the START Trail).
- The Club holds two annual events on the edge of the village for 150-200 horses, and sponsors daylong rides and weekend activities. Club grounds are also open for horseback riding throughout the year for both guided and unguided trail rides.
- The Club is adding new events for the future, and is planning to make further improvements to the grounds including a stable area, picnic area, new and improved camping facilities, and the proposed indoor arena.
- The facility is the center of an extensive trail network that has been developed over the years by members working with public and private landowners. At the present time, the Club has approximately 65 miles of privately operated horse trails (see **Exhibit No. 10**).
- The Club members have long noted the county's lack of a first class arena and show facility that can be dedicated to equestrian interests and events. The Club has proposed a significant project that would include indoor and outdoor show arenas, stabling for several hundred horses, event parking, and a combined campground and recreational vehicle facility. If built, the total cost of the complete project would approximate \$8.35 million (see **Exhibit No. 11**).

In a case study prepared by Cattaraugus County in collaboration with Randall Arendt in 2001, a proposed vision for Little Valley connects the County Fairgrounds directly to the Equestrian Park that is owned by the Little Valley Rider's Club on the opposite side of the village by way of the START trail (see **Exhibit No. 12**).

Because of the potential, positive impact of an indoor equestrian facility of this magnitude, the County has provided the Club with economic development technical assistance in the area of preliminary engineering help and estimating operating costs and revenues (see **Exhibit No. 13** for a strategic assessment). **Appendix C** is the construction cost estimate for the project and **Appendix D** outlines the operating revenue projections and assumptions.

EXHIBIT NO. 10

**The Little Valley Rider's Club
Inventory of Privately Operated
Equestrian Trails**



Legend

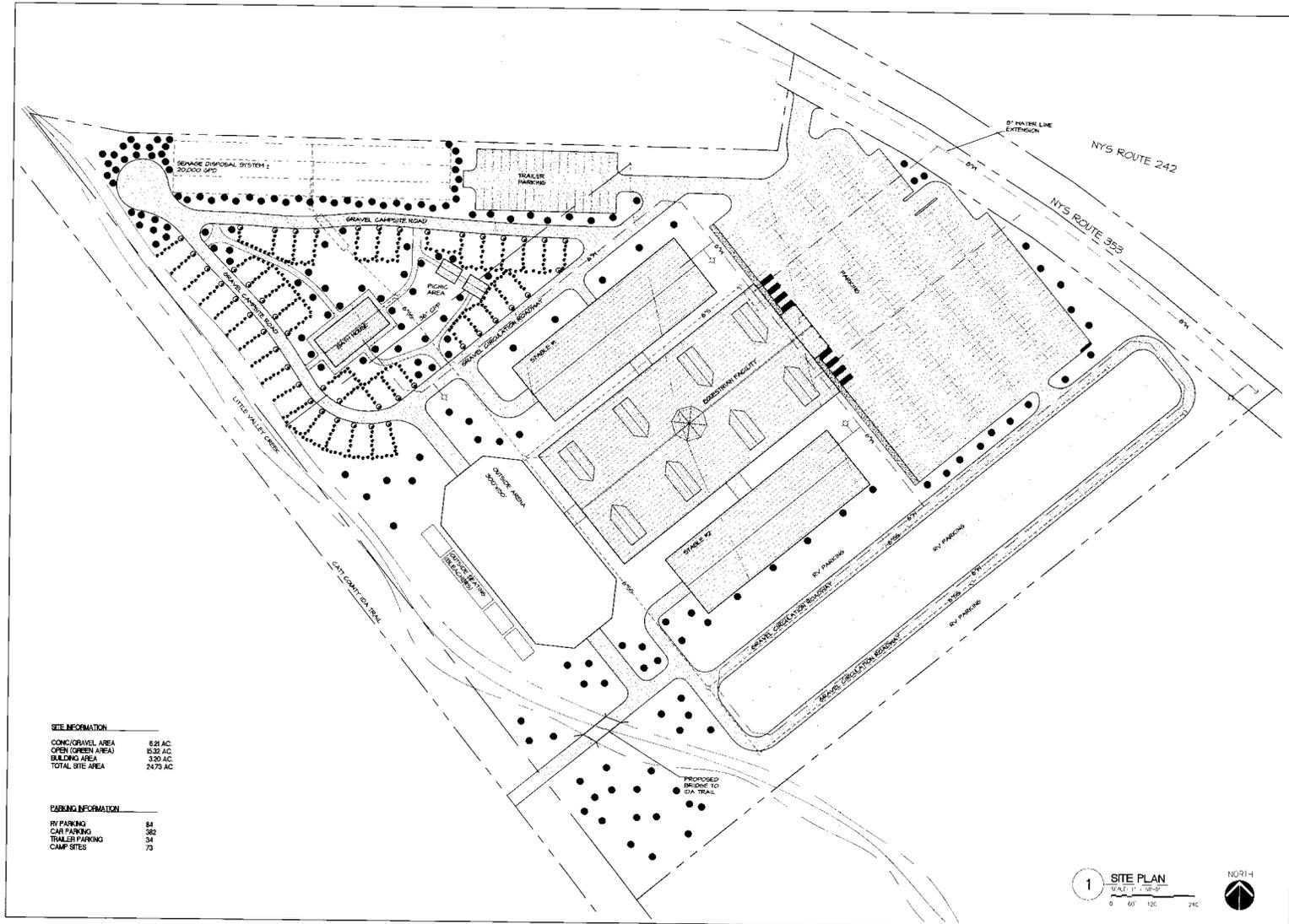
| | |
|---|---|
|  Horse Trails |  Villages |
|  Streets & Roads |  Towns |
|  State Highways |  State Recreational Land |



Prepared by Cattaraugus County
Department of Economic
Development,
Planning & Tourism
303 Court Street
Little Valley, NY 14755
(716) 938-9111
www.cattco.org
February 05 jpw

Cattaraugus County does not endorse or give permission for the use of the trails and is not liable for any claims from riders or landowners. This map is published only as a tool to aid in the planning process.

EXHIBIT NO. 11
Proposed Indoor Horse Arena by the Little Valley Rider's Club



SITE INFORMATION

| | |
|-----------------|----------|
| CONC/PAVEL AREA | 6.21 AC |
| OPEN GREEN AREA | 12.52 AC |
| BUILDING AREA | 3.20 AC |
| TOTAL SITE AREA | 24.75 AC |

PARKING INFORMATION

| | |
|-----------------|-----|
| RV PARKING | 84 |
| CAR PARKING | 352 |
| TRAILER PARKING | 34 |
| CAMP SITES | 73 |

1 SITE PLAN
 SCALE: 1" = 120'-0"
 0 60' 120' 240'



Harrison Engineering, P.C.
 1000 N. 10th Street, Suite 200, Little Valley, NY 14755
 Tel: 716.833.1234 Fax: 716.833.1235

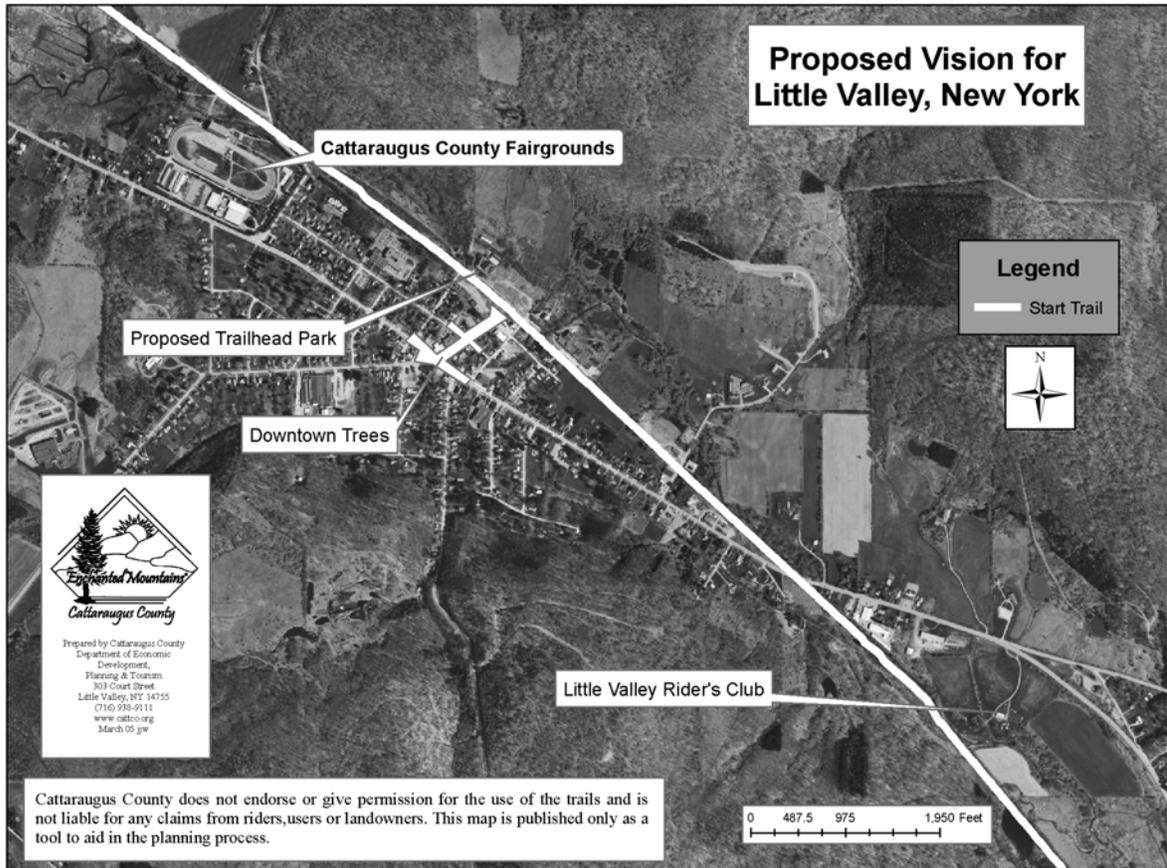
Project No.: _____
 Client: Little Valley Rider's Club
 Date: December, 2022
 Scale: As Shown

THIS PLAN IS ONE OF THE SETS OF THE PROPOSED CONSTRUCTION OF THE LITTLE VALLEY RIDER'S CLUB INDIOR HORSE ARENA. THE CLIENT HAS REVIEWED AND APPROVED THIS PLAN AND THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT TO THE BEST OF HIS KNOWLEDGE AND BELIEF. THE CLIENT HAS REVIEWED AND APPROVED THIS PLAN AND THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT TO THE BEST OF HIS KNOWLEDGE AND BELIEF. THE CLIENT HAS REVIEWED AND APPROVED THIS PLAN AND THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT TO THE BEST OF HIS KNOWLEDGE AND BELIEF.

NEW CONSTRUCTION:
 LITTLE VALLEY EQUESTRIAN CENTER
 SALAMANCA - LITTLE VALLEY ROAD (RTE. 353)
 LITTLE VALLEY, NY 14755

Sheet No. _____
 Of _____
 Job Number: 01-020

EXHIBIT NO. 12



(Source: "Proposed Vision for Little Valley, New York", by Terry H. Martin, A Design Guidebook for Towns and Villages in Little Valley New York, Volume 2 of Cattaraugus County's Smart Development for Quality Communities Guidebook Series, April 2001, page 42).

EXHIBIT NO. 13

Strategic Assessment of Horses and Development in Little Valley

A. Executive Summary

In Cattaraugus County, successful village revitalization may depend upon developing unique identities that give villages a market niche to pursue. For the Village of Little Valley, horses and equestrian activity may be the basis of a new identity as the “horse capital” of Western New York. Most revitalization success stories are built upon a sustained effort that achieves a continuing series of small victories. They require a good vision to which everybody subscribes and a leadership organization that has persistence and staying power.

Little Valley has the raw materials to embark upon this type of effort, and the local equestrian interests, after two group meetings, have demonstrated their willingness to move forward by agreeing to some positive first steps in organization and marketing. Therefore, the prospect for initial small victories is good, which in turn can build momentum for the continuing string of them that is needed.

B. Situation Analysis – Village of Little Valley

Little Valley’s identity or niche should reflect its asset base and respect the reality of the market. The relative strengths and weaknesses of the village determine its attractiveness in the market. Assessing market opportunities will identify where the greatest chance of success may lie.

Horse-related strengths include:

- 1) County Fairgrounds infrastructure/ event hosting;
- 2) Little Valley Rider’s Club event hosting at its Equestrian Park, and 65 miles of private horse trails;
- 3) Horse farms, bed and breakfasts, and service establishments;
- 4) Significant horse expertise;
- 5) START trail and existing trail network;
- 6) Small, but vital group of downtown businesses.

Horse-related weaknesses include:

- 1) Limited hospitality infrastructure;
- 2) Public trail mileage too limited for state-wide market;
- 3) START equestrian trailhead design unclear;
- 4) Downtown businesses not horse-oriented;
- 5) Horse expertise not organized;
- 6) A covered arena is needed, either at the County Fairgrounds or Little Valley Rider’s Club.

Market opportunities include:

- 1) Significant regional horse population and local equestrian-related businesses;
- 2) Huge horse markets;
- 3) County Fairgrounds and the Little Valley Rider’s Club’s “Equestrian Park” are underutilized assets;
- 4) Show and event market largely untapped;
- 5) START trailhead design and vacant county structures;
- 6) Linking scheduled horse events to downtown development;
- 7) Horse-related retail and service opportunities (horse sales and auctions, riding centers, tack shops, stabling, veterinary and health care services, trailer sales and service, clothing, feed, training and instruction, gifts, collectibles, arts and crafts, specialized travel services, books, maps, and videos);
- 8) Links to Allegany State Park and Ellicottville recreation and hospitality
- 9) DEC trail development and state forestland;
- 10) Four season trail potential, snowmobiles in Winter, equestrian in Summer.

EXHIBIT NO. 13 (Continued)

Market threats include:

- 1) Batavia Downs and Hamburg Fairgrounds pursuing indoor arenas;
- 2) Competing facilities better organized with better hospitality industry;
- 3) Horse market fragmented;
- 4) Fort Erie, Ontario pursuing horse tourism.

Assessment of the Village's Strengths and Weaknesses - Little Valley's core strengths and assets can support a revitalization effort centered on equestrian interests. Unique factors – horse facilities and trails, events, expertise, START trail – give the village a head start that other villages could not duplicate. The village's weaknesses are not structural and can be corrected through added trail development, trailhead design, and organization and planning. Little Valley could become a significant attraction in the horse market, providing utility and events to the horse enthusiast, while giving the village an identity in the marketplace.

Assessment of the Village's Market Opportunities - Local and regional demand for an enhanced equestrian experience is very strong. An organized exploration of target markets by the existing equestrian expertise could begin to stratify and target the market opportunities. A modest increase in trail riding and horse events can be the start of related retail and commercial development.

C. Recommendations

The Village of Little Valley should develop a strategic revitalization plan based upon the horse economy. The following strategic goals need to be considered in developing the plan:

- 1) **Develop a leadership organization to develop a horse economy centered on Little Valley.** Equestrian interests have already suggested that a subcommittee of the Little Valley Chamber of Commerce be expanded to take on this role.
- 2) **Undertake a targeting exercise to focus development and marketing efforts.** The two primary opportunities are recreational trail riding, and shows and events. The horse interests have strongly suggested that recreational trail riding represents the immediate opportunity.
- 3) **Prepare to access a larger recreational market by developing a unified approach to trail development.** The state and county have already initiated work in this area for snowmobiles and horses.
- 4) **Pursue show and event markets by developing plans for an indoor arena at Little Valley.** Horse interests will contact the County Fairgrounds and Little Valley Rider's Club to determine strategy and direction.
- 5) **Prepare retail, commercial and hospitality development strategies.** The equestrian interests have agreed to "package" existing facilities and businesses around the trail riding experience and seek county tourism funding for a marketing brochure.

Next Steps

- 1) The concept of Little Valley as the Horse Capital of Western New York needs to be incorporated into a vision and strategic plan that is considered and adopted by the community.
- 2) The emerging local horse interests need to organize a leadership group to promote and market recreational trail riding in the near term.
- 3) The County, the Cattaraugus Local Development Corporation (START Trail), the new Chapter of the New York State Horse Council, and the State need to develop a regional horse trail network that links Little Valley to Allegany State Park.

Source: Richard Swist, June 4, 2002, updated March 11, 2005.

The bottom line at this point is that this is a very significant undertaking for the members of the Club. There are very real challenges to overcome in the areas of finance, management and marketing. Nevertheless, the proposed project represents a good opportunity to create an asset that can provide entry to a much broader and more significant market segment. The Club's long history and Little Valley's locational advantages are strengths.

Although more market study will be needed to determine ultimate project feasibility, work done elsewhere strongly suggests that the economic returns could be significant for the county and its hospitality businesses. The following discussion on the impact of this potential market was prepared by one of the consultants, Jo-Anne O. Young, who also prepared the discussion in Section E below.

The market impact of the proposed indoor facility and related developments could be significant. A study was conducted in the Netherlands 22 years ago to determine the impact that horses had on the national economy. The study included horse-related activities and businesses, such as children's pony clubs, competitions in dressage and jumping, trotting races, breeding and sales of horses, production and sale of horse feeds and equipment, farrier and veterinary work, transport of horses, restaurant and hotel use by competitors and spectators at equestrian venue competitions and exhibitions. The study revealed that horse-related activities, businesses, and competitions brought more income into the country and generated more tax revenue than the entire flower industry for which Holland is internationally famous (Source: Mr. Carol Eijkenaar, F.E.I. judge and trainer).

In the United States, well-planned sites for equestrian venue activities and for those seeking to live the equestrian lifestyle are known to help the local economy in which they are developed, as long as the facilities meet the needs and desires of the area, and are conveniently located for easy access. Also inherent in the successful development of an equestrian venue site is the advertising of the site, with a realistic pricing structure that matches the capabilities of the population segment it is designed to serve. "Best kept secrets" like Little Valley need to be shared and made well-known in order for them to thrive and grow.

An article in the June 2004 issue of *Equestrian* magazine, the official publication of the United States Equestrian Federation (USEF), is recommended reading. The article entitled: "We're Talking Money, Honey – New Equine Facilities are Finding Creative Ways to Contribute to the Economy", outlines how several new equestrian facilities contribute to the economic health of their locales. The USEF is the national governing body for equestrian sports, overseeing nationally and internationally recognized competitions.

Equestrian communities are also proving to be popular in a variety of locales across the country (see the June 2004 issue of the *Equestrian* magazine for an article entitled "Lifestyle: Equestrian Communities". In fact, there is such a community in western New York: Mendon Equestrian Village, located southeast of Rochester in Mendon, New York. Designed for residents who want to live near their horses, and have access to convenient, beautiful facilities, Mendon Equestrian Village:

- Rents the use of its indoor riding arena to area groups for special events;
- Stabling is available on this site for permanent boarders, but no stabling is available for outside groups renting the use of the indoor arena on a one or two day basis for clinics or riding-related educational seminars;

- The indoor arena may be rented at \$500/day if the event has 40 or less participants. A proportionally higher rate is set if there is a higher number of participants. (Source of rates: Western New York Dressage Association board meeting minutes, August 4, 2004).

Another equestrian community, the High View Farm in Pittsford, New York offers the following:

- Hosts hunter/jumper shows, usually unsanctioned on Saturday and United States Equestrian Federation sanctioned on Sunday, using the same USEF licensed judge for both days, with an average net profit of \$6,500 per day.
- The facility is also rented by outside groups (example: American Quarter Horse Association sanctioned shows) for a fee of \$800 per day, according to the owner, Jack Frohm.

It would be wise for members of the Little Valley Rider's Club to visit the sites of the above-mentioned venues. By speaking with the owners and managers, they will get a clear picture of the challenges and rewards in establishing, running and maintaining a top class facility.

9. Assessment of Overall Strengths and Weaknesses

Clearly, there is a base of assets in Cattaraugus County upon which to grow a stronger equestrian economy. There is a substantial in-county horse population and a well-established equestrian lifestyle with a dedicated community of owners and enthusiasts. Their knowledge and expertise will be vital to the success of any development effort.

There are certain physical assets that can be effectively utilized in the early stages of an equestrian marketing effort. These include the County Fairgrounds and the wide array of farms and boarding establishments that currently offer stables, stalls, paddocks and pastures for resident and visiting equines. The trail system, while in its infancy, is nevertheless in use by hundreds of recreational riders every year and can be marketed as an adjunct to the County's overall tourism program. The villages of Little Valley and Franklinville show significant potentials as staging areas for gaining access to the trails networks.

Notwithstanding these strengths, there are deficiencies that will need to be addressed and assets that must be built up, if the County is to move up in the ranks of equestrian tourism and economic activity. Chief among these is the lack of a first class venue for sanctioned horse shows and other larger equestrian events. Such facilities are the cornerstone of a strong equestrian culture and economy. They attract a significant number of visitors and contribute greatly to tourism activity and spending.

A first class facility that is in use most weeks of the year can also drive ancillary segments of the equestrian economy, such as support service businesses, associations, and the hospitality industry. Additionally, the kind of event and show venue envisioned by the Little Valley Rider's Club can serve to unify the equestrian interests in the County around the goal of growing the resident and transient horse population along with the number of people who want to visit Cattaraugus County almost exclusively for its equestrian attributes.

The final word on assets must address the standards issue. Horses are valuable commodities. As noted above, the 3,500 equines resident in the county have a market value of \$9.8 million. The value of horses coming from surrounding counties is even greater. It is understandable that owners are very protective of their horses and will only entrust them to stabling and boarding facilities that meet accepted standards.

The county's equestrian farms and stables must achieve and maintain a recognition in the region as meeting the demands of resident and visiting owners for the best possible care and boarding of their animals. Reputation is a fragile commodity that, once lost or tarnished, is difficult to restore. The County and its equestrians and entrepreneurs must promote the highest standards in the operation of the region's horse facilities.

10. Recommended Actions

The equestrians and entrepreneurs in Cattaraugus County should seriously take action on the following recommendations in this decade:

- Develop an interactive database of boarding facilities that maintain industry standards, and link it to tourism promotion websites.
- Develop a program to increase the number of stalls available for transient equines.
- Review the facility issue in more detail and determine the appropriate course of action on developing a major show venue, either at the County Fairgrounds or at the Little Valley Rider's Club or some combination thereof, utilizing the START trail which connects the two venues to the downtown business district.
- Begin to resolve trail development issues and set defined goals and objectives for completing a comprehensive trail system in particular; the extensive state forest land that is scattered between Randolph, Little Valley, Ellicottville, and Franklinville should be incorporated as vital areas for trails development.
- Systematically address "soft" trail issues of insurance, liability, and jurisdiction.
- Link recreational trail map and riding opportunities more effectively into the websites that promote equestrian tourism.
- Develop lists of target equestrian support businesses and have the business community set a priority of identifying and assisting such businesses.
- Review existing protocols and standards for equine health and care in boarding and events, and work with providers to meet those standards without fail.
- Promote the applicable standards in tourism marketing and websites.
- Create a database of all riding clubs, equestrian associations, and individual owners to create a core group of supporters and resources for extending equestrian marketing and promotion.

D. EQUESTRIAN EVENT SCHEDULE AND MARKET ASSESSMENT

The national market for all things equestrian is huge, totaling billions of dollars annually. The broadest definition of this market includes the value of the horses themselves, their care and feeding and breeding, equine transportation, horse shows and events, racing, recreation, planned equestrian communities and tourism. The extent and array of equestrian economic activity makes it one of America's "big businesses".

Cattaraugus County is fortunate to be starting with a relatively good base of existing equestrian events and activities in the following "growth" environment:

- There are numerous shows, events and trail rides, many of which already attract a significant number of attendees and generate acceptable economic returns, even though they rely primarily upon volunteer promotional efforts, with little or no coordinated advertising and marketing.
- The Villages of Franklinville and Little Valley are emerging as equestrian activity centers.
- In addition, neighboring counties and regions host many other events that help to create a critical mass of horse-related activity in the broader region that can attract visitor interest and additional spending.

The question for Cattaraugus County is how best to gain a larger share of this very large market. Given the County's existing asset base, it appears that a market growth strategy based upon incremental enhancement of facilities, events, support services and tourism is most feasible. In particular, pursuing growth through larger and more frequent equestrian shows and events may represent the best immediate market opportunity, i.e. the "low hanging fruit".

1. Events in Cattaraugus County

The Cornell Cooperative Extension 4-H Horse Program for Allegany and Cattaraugus Counties annually publishes "Equine Enlightenment" which lists horse-related competitions and activities around western New York. The 2004 listing for Cattaraugus County, augmented by events garnered from other sources, is included as **Appendix E**. From April through October 2004, 28 separate events were scheduled, ranging from trail rides to horse shows to training programs. The organizers of these events ranged from private stables to organized riding clubs to the New York State Horse Council's newly formed chapter for Cattaraugus and Chautauqua Counties.

Taken individually, these events represent relatively small undertakings, managed mostly by volunteers. Nevertheless, the existing base of events represents an opportunity for growth at the grass roots of equestrian activity. With technical assistance in the areas of marketing and organization, perhaps to be provided by the County or volunteer professional advisors, each event can experience steady growth. This approach to "event enhancement" would have several benefits:

- Each event would grow and draw more visitor interest.
- A core group of skilled organizers would develop.
- Cross marketing efforts among shows and events would be facilitated.

2. Events in Surrounding Counties

Even more equestrian events are held in the areas adjacent to Cattaraugus County, as outlined in **Appendix F**. Over 170 equestrian related shows, events and programs were held in the region outside Cattaraugus County from January through December of 2004. The Houghton College Equestrian Program in Allegany County sponsors a particularly strong program of training and other events throughout the year and represents a good ongoing resource on all equestrian matters. The extensiveness of Houghton's program offers the following opportunities for Cattaraugus County's growing equestrian program:

- First, there is simply the opportunity to experience and learn from the organizers of an extensive array of programs. The sponsors of many of these events have considerable experience, as well as mailing lists, databases and marketing materials that can tap into equestrian interests over a broad geographic area.
- Second, opportunities for cooperative programming exist where event organizers are perhaps looking for new venues in other counties or are looking for additional sponsors and workers.
- Finally, this larger group of event organizers may provide a stronger sponsorship base for a major undertaking, such as the proposed Little Valley Rider's Club equestrian show facility. The encouraging news is that horse-related events and gatherings are occurring regularly. A base level of activity has been established in Cattaraugus County and in the region.

3. Competitive Activity

The objective should be to grow Cattaraugus County's equestrian economy. This will require attracting new spending by tourists and holding new and larger horse shows, rides and events. It is important to underscore that the County is not the only municipal entity that views this approach as a potentially viable economic or tourism development strategy. Other areas of the United States and Canada are focused on this market, and their aggressiveness and early success in market penetration will make it more difficult for the County and its equestrians to succeed, if they do not organize and market themselves more effectively.

Areas proximate to the County have a head start in their development efforts. With a finite amount of discretionary equestrian tourism spending each year, any region that locks up a large share of that spending will be a threat to the success of its competitors. **Cattaraugus County is poised on the threshold of going after that share, and only needs to get organized for a more aggressive program.**

Fort Erie, Ontario in Canada is one municipality that is relatively close to Cattaraugus County geographically and has decided to pursue equestrian tourism. An ongoing program to develop trails and facilities has tentatively identified equestrian trails as the third phase of the program. Given Fort Erie's location within 60 miles of the County, their strategy must be considered a potential future threat unless further research determines that certain market factors such as international border crossing delays and niche market parameters minimize the threat and establish the two initiatives as complementary, rather than competitive.

4. Assessment of Opportunities

There are assets for equestrian related tourism in Cattaraugus County that have facilities and organizing capacity. Each existing event represents an opportunity for incremental growth, if organizers can receive technical assistance, particularly in marketing and promotion.

An annual 10 per cent increase in attendance at each event would increase attendees and begin to have economic impact. This level of growth would double attendance and participation in seven years. A 15 percent annual growth rate would double attendance in five years. Clearly, setting and realizing even modest goals for growth can begin to have a major impact.

This “micro” approach is a grassroots, incremental program by the private sector to “grow the equestrian business” within Cattaraugus County’s existing parameters of sites and resources. As noted earlier, the limitations in stabling, show facilities, and equestrian and hospitality services will eventually constrain this strategy by placing an upper limit on growth. The opportunity to greatly accelerate the drive toward a strong equestrian economy will then require the introduction of a “macro” approach that focuses on facility and support service development. A “macro” approach may require some public sector assistance.

The bottom line on immediate opportunities, whether “micro” or “macro”, however, is that the presence of 28 equestrian shows and events in Cattaraugus County and 171 in the region outside the county, and increasing numbers of equestrians throughout the region who are showing an interest in Cattaraugus County, strongly supports the notion that a market exists right now and it can be grown.

The guidebook does not assess national and regional markets for sanctioned horse shows. The County and its equestrians and entrepreneurs should undertake a specific review of that market, which is comprised of the largest and highest impact equestrian events. Such a review would require a separate study. The parameters used to select venues and schedule events for a study of national markets would be critical as the County reviews the extent of support for developing new facilities, such as a transformation of the County Fairgrounds, or support for the Little Valley Rider’s Club and its proposed indoor horse arena project at its existing 120 acre Equestrian Park on Route 353 on the outskirts of the Village of Little Valley, which is connected by the START trail to downtown Little Valley and to the County Fairgrounds.

5. Recommended Actions For Public and Private Sector

- Create a communications network linking event organizers in the County (Public Sector).
- Develop a technical assistance program for equestrian event organizers within Cattaraugus County (Public Sector).
- Create a database of all regional equestrian events and shows, including sponsors and contact information (Private Sector).
- Establish a goal of regular annual increases in each existing event (Private Sector).
- Work with the core group of organizers to determine what new events may attract additional participants and visitors (Private Sector).
- Research the sanctioned horse show market to help determine feasibility of a larger show venue (Private Sector).

E. ECONOMIC IMPACT ASSESSMENT

Although many equestrian activities are scheduled in and around Cattaraugus County each year, there is not a great deal of information available regarding the economic impact of these events. As part of this study, the consultants recommend:

- That more disciplined economic impact studies be conducted of equestrian assets;
- That more detailed surveys be made of the two events in Little Valley and Franklinville, in order to develop a better picture of attendance and economic impact as these venues are improved over time;
- That better records and data be gathered regarding certain other equestrian events that are held annually in Cattaraugus County.

1. The Need For Better Data and Analysis

Although this study represents a start in assembling the economic data that can support public investment in equestrian facilities, and guide events and marketing, much remains to be done. This study recommends that the county equestrian community develop an approach to gathering baseline data from all events of any consequence. Over time, this will yield a better picture of spending and travel patterns and can provide a stronger basis for County investment and technical assistance from the business development and banking communities.

Assembling financial data for each event will provide important information to sponsors regarding costs and revenues and steps that need to be taken to insure meeting financial expectations. Expectations will vary. Some sponsors simply hope to break even while others are trying to meet fundraising goals. **In any case, measuring financial performance will be a key factor in determining how to improve events from year to year. Developing an event budget early in the planning process can help sponsors to manage the process and make basic decisions regarding fees and sponsorships.**

Gathering financial data need not be an overly burdensome process, but sponsors would need to account for all income and expenses. The following steps should be considered:

- Sponsors should designate one individual or a small committee to be responsible for the financial management of each event.
- For most events, a financial report can be summarized in no more than two pages, one outlining sources of income and the other expenditures. Income can be broken down by certain basic reporting categories:
 - Event or show entry fees;
 - Public admission fees;
 - Food and concession revenues;
 - Parking fees;
 - Camping or lodging fees;

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- Revenue from sales of souvenirs or other goods or services;
- Sponsorship revenue;
- Sale of program advertising.
- Expenditures can be similarly grouped:
 - Prizes;
 - Costs of goods sold;
 - Contract service payments for concessionaires or other service providers;
 - Insurance;
 - Fees for speakers or other participants.
- It would be helpful if the financial performance were to be reported in the same format as the budget, thus allowing sponsors and other interested parties to determine if revenue objectives were met and expenses were contained.

Financial data is usually measured and accounted for by event sponsors, but there is a need to begin measuring the indirect financial impacts of equestrian events on the County's economy. Indirect financial impacts are difficult to determine because event participants and attendees may spend money in more venues than just the event grounds. Surveys are a good method of collecting data and information regarding individual behavior and opinions. An "event evaluation" form can be filled out by each attendee with a request that they complete it and return it at the conclusion of the event. Often, an incentive such as a door prize may be awarded through a random drawing for attendees who submitted a completed evaluation.

This approach to data gathering requires time and attention both before the event – to develop and print the questionnaire and organize the incentive – and after the event – to compile data and analyze results. But importantly, the approach requires very little time during the actual event, when sponsors and organizers are busy managing an array of activities.

The survey process should focus on gathering two broad categories of data:

- First, what was the respondent's opinion regarding the overall event as well as each individual activity or program? This feedback is crucial to determining what worked and what did not work in the eyes of the participants and attendees. Their opinions will be an invaluable guide to constantly improving the programs, generating greater interest, and attracting better attendance every year.
- The second category of data deals with personal characteristics and spending patterns. The information that would be useful includes:
 - Place of residence (usually noted by zip code);
 - Means of travel;
 - Overnight accommodations utilized;

- Household income;
- Range of spending broken down by lodging, food, entertainment and other categories.

These types of data will help determine the extent to which an event is attracting out-of-town visitors and how much is being spent on average. Of particular interest would be information suggesting what would persuade visitors to stay one extra day in Cattaraugus County, to enjoy the County's diverse amenities.

Adding data gathered from all sponsored events will begin to reveal the cumulative impact of the equestrian shows and events in Cattaraugus County each year. It will also provide a benchmark that can be measured against in succeeding years to see if goals regarding growth in attendance and economic impact are being met, and showing where improvements are needed.

The data gathering undertaken by event sponsors will begin to quantify the magnitude of the equestrian contribution to Cattaraugus County's tourism economy. However, shows and events constitute only one facet of the overall equestrian economy, which includes all of the direct and indirect impacts of horse ownership. Further study will be needed to verify the actual impact.

Some studies have demonstrated that the direct and indirect local and regional economic impact of horse ownership (in addition to the value of the equines) is in the range of \$15,000 to \$20,000 per horse. If that formula were to be valid for Cattaraugus County and its 3,500 equines, then the overall economic impact of the equestrian economy would be in the range of \$50-70 million.

2. Franklinville Creek Side Round-Up – October 1-3, 2004

For the second year, equestrian supporters in and around Franklinville organized the Creek Side Round-Up to showcase the area's interest in horses and to begin to develop a higher level of interest in marketing the area to other horse enthusiasts. One of the County's consultants, Jo-Anne O. Young, worked with SUNY-Buffalo students to develop information regarding the event.

The results of the Franklinville survey of the Creek Side Round-Up indicated an improvement from the event's initial effort in 2003. Highlights from the 2004 event are:

- The second year had a higher turnout. SUNY-Buffalo students cooperated in collecting information on Saturday, October 2 by doing an actual head count. The highest number of attendees (not including vendors and workers) on Saturday at any given hour was 110 people. This turnout, most likely suffered from the windy, cloudy weather with occasional cloudbursts. (Source: Al Gerstung, event Chairman).
- Sunday's attendance was lower than Saturday's, despite lovely sunny weather. Data collected by J. O. Young reveals that, although the event was scheduled to open at 10:00 a.m. with demonstrations, none of the demonstrators were there until the afternoon. Until 11:30 a.m. no attendees showed up, although some vendors were present. By noon there were 17 attendees. At 1:00 p.m. there were 23 attendees, increasing to 29 by 1:15 p.m., to 42 by 1:45 p.m., hitting a peak of 50 at 2:00 p.m., tapering to 45 attendees at 2:45 p.m. At the scheduled closing time of 3:00 p.m. all attendees left. By 3:30 p.m. the vendors and demonstrators had packed up and left and the grounds were pretty much empty.
- A total of sixteen horse units participated in the parade.

- According to health records checked at registration, over 80 horses participated in the weekend event in one or more capacities: in the parade, in a demonstration, or in one of the trail rides.
- Total revenues for the Creek Side Roundup (from donations, trail rides, meals, 50/50 drawing and Chamber of Commerce sales) were \$2,107.50 and expenses (painted sign, plastic chain, port-a-toilets, advertising, cookbooks, food, bells, horse head ties, halter and lead ropes) were \$1,559.39. There was a net profit of \$548.11, augmented by a subsequent donation of \$500.
- When interviewed, Ginger McCarthy of McCarthy's Tack indicated that she and her husband Jack came to support the event, as they feel it has a good future. She did say that she thought the program looked more like a horse show prize list, and that perhaps people did not realize it was somewhat like a small scale "Equine Affair" with shopping opportunities. Their total sales for the weekend were only around \$25.
- In addition to the attendance at the Creek Side Grounds, Julie Phillips indicated that 24 people went on the Saturday trail ride (at a cost of \$10 per participant, for total income of \$240) and 27 people went on the Sunday trail ride (at a cost of \$15 per participant).
- However, the trail ride started and ended at the far end of town, dispersing everyone. It drew those participants away from the vendors, rather than drawing them closer to the activities and shopping opportunities that were available at the Creek Side Grounds.

The Franklinville Equestrian Committee has made changes for the next event, which is scheduled for the first weekend in October 2005. These include:

- Adjusting the parade, perhaps suspending it for several years while the trail rides are expanded and improved.
- Expanding the trail rides, which had received good reviews.
- Putting people and horses, and the beginning and ending of trail rides, closer to the vendors and demonstrators.
- Advertising months in advance in the region and with the New York State Horse Council.
- Horse rentals and riding lessons, although in demand, will not be offered due to insurance and liability issues.

3. Little Valley Rider's Club "Ride and Learn" Weekend – July 9-11, 2004

One of the County's consultants, J. O. Young, attended this event and recorded her impressions. She also discussed outcomes with the organizers and conducted a survey to gather information regarding attendees and their reaction. The results of this event review are discussed below.

The "Ride and Learn" weekend was held for the first time at the Little Valley Trail Rider's Club "Equestrian Park" on July 9-11, 2004. It was a success.

A summary of highlights:

- The grounds were spacious and thoughtfully laid out, so that even though there were large numbers of vendors, participants and workshop presenters, the grounds did not appear crowded.

- An estimate of attendance for the weekend was a total of approximately 750 attendees. (Source: Little Valley Trail Rider's Club President, Terri Parker).
- A total of \$1000 was collected for parking fees (\$1 fee per vehicle) and camping fees (\$14 per site) for the weekend. The random sample survey conducted of participants and attendees on Saturday and Sunday showed that attendees tended to come in groups. A few of the attendees came by themselves, but most came with other people in the same vehicle, with an average of 3.3 persons coming in each vehicle.
- The average distance traveled to get to the Ride and Learn weekend in Little Valley (by surveyed attendees) was 75 miles, with the closest attendee coming just 12 miles, and the farthest attendee coming 185 miles in order to attend.
- The Crosspatch Farm, located less than a mile from the Little Valley Trail Rider's Club Equestrian Park, brought trail horses to the Ride and Learn grounds and provided guided trail rides for a fee to those who wished to ride the club's trails, but had not brought their own horses. Between the "for hire" trail rides and the self-guided rider's on their own horses, the trails saw use over the weekend by approximately 600 riders. (Source: Jim and Dolly Little, owners of the Crosspatch Farm).
- 80% of the surveyed attendees heard about the Ride and Learn weekend through flyers, either received in the mail or given out by Stage Coach West Tack Shop. 20% of the surveyed attendees heard about it through word-of-mouth personal recommendation.
- Response to the event was 100% enthusiastic. The most attractive and appreciated features of the weekend were:
 - The peace, tranquility and beauty of the spacious setting;
 - The opportunity to ride on marked trails;
 - The content of the workshops presented by featured speakers;
 - Most often mentioned - the opportunity to learn up-to-date information relevant to trail riding and camping, and the high quality guest speakers presenting that information.
- Surveyed attendees were unanimous in stating they would come back again next year for this event. When asked what they would like to see added for next year, the most common response was "more of the same". Other suggestions were:
 - More hands-on opportunities in workshops (to actually practice the skills being taught);
 - More port-a-potties near the creek area;
 - More community (local) vendors of trailers, campers, etc.;
 - Speakers on endurance riding;
 - The absence or elimination of woodchuck holes;
 - Shade for the bleachers area.

- 47% of surveyed attendees did not spend any funds for housing in order to attend the event. Of the 53% who paid for housing, one-fourth spent \$40 on housing and three-fourth spent \$5 for the Little Valley Trail Rider's Club camping fee on the grounds.
- The amount spent by surveyed attendees on food at this event ranged from \$0 to \$50 per person, with the average per person expenditure on food being \$11. This would not be representative of most horse-related events, since, at this particular event, two free meals were provided for attendees by the sponsors of the Little Valley event (Stagecoach West Tack Shop).
- Survey respondents unanimously agreed that the location of the Little Valley Trail Rider's Club was easy to find.
- The number of horses owned by survey respondents ranged from one to thirteen, with an average number of 3.8 horses owned per respondent. All respondents had at least one horse at home.
- As would be expected at an event of this type, all of the survey respondents indicated that they participated in trail riding. In addition:
 - 13% also take riding lessons;
 - 27% also compete in horse shows;
 - 13% game (compete in timed western pattern races, like barrel racing);
 - 67% pleasure ride (leisure riding for recreation, but not out on trails);
 - 7% compete in endurance rides.

4. Economic Impact of Other Equestrian Events

In addition to the Little Valley and Franklinville events discussed above, data was gathered, to the extent it was available, regarding other activities that occurred throughout 2004 in Cattaraugus County. At this point, it is clear that many of the recurring events in the County are organized on a volunteer and low budget basis.

It is recommended that more attention be paid to developing data regarding attendance, spending patterns and economic impact of the following types of events:

- The April 3 Tack Auction held at Lonesome Oak Stable on Bakerstand Road, Franklinville, drew 70 to 80 participants, with gross sales of \$619.00 on tack and equipment and \$263.00 in gross sales of food for consumption on site. This represents a 25 percent increase in gross sales from the first Tack Auction, held there in November 2003, when gross sales to 55 participants were \$493.00 and food sales were \$207. (Source: Al Gerstung).
- The Little Valley Trail Rider's Club Memorial Day Weekend Trail Ride is one of just two trail rides they hold with a fee, and run as a fund raiser. (All of their other trail rides are free, and non-club members are welcome, but donations are gratefully accepted.) Early registration fee is \$50 per person, and late registration is \$60 per person. For the registration fee, participants get the trail ride, six meals, and two square dances with a live band. The event had 147 paying

participants. (Source: registrar Cheryl Keesler). A profit for the club of \$2000 was generated. (Source: Club President, Teri Parker).

- The Bonanza Open Horse Show was held June 4-6 at the Cattaraugus County Fairgrounds in Little Valley. This is at least the twentieth year that the Cattaraugus County Horse Program Development Committee has offered this competition. Proceeds (profits) earned from this show are placed in the 4-H Horse Program account, and are used to finance the many youth programs sponsored by Cornell Cooperative Extension of Cattaraugus County. They are also used to improve the quality of the educational equipment and information used by both 4-H youth and 4-H Club Leaders.
- Nineteen gaming classes are offered each evening, with divisions for Walk-Trot, Novice and Junior/Senior Riders. All classes are timed events, judged on accuracy and speed in completing the prescribed pattern for a specific class. Saturday and Sunday classes (40+ classes each day) included fitting and showmanship, conformation, hunt seat, saddle seat, western pleasure and equitation, reining, trail, driving, command and "Simon Sez" classes.
- A total of approximately 200 horse/rider combinations were recorded as making entries for this weekend. The total funds collected through entry fees, stabling fees, and camper fees was not available, nor was the cost of ribbons, judge, stall stripping refunds, facility rent (\$200/day), paybacks, and other awards. However, the total proceeds earned for support of the Cattaraugus County 4-H Horse Program account from this show was \$1800. (Source: Cattaraugus County Agricultural Society).
- The organizers of the Lou Eibl Corral "Gathering Days" June 7 and the Spring Trail Ride, both held in Allegany State Park in the Camp Ten area, did not have data on attendance, but did report that the combined event produced a gross income of \$4,000 to \$5,000. There were no figures on expenses/profit/loss. (Source: Betsy Chamberlin).
- The 4-H Schooling/Qualifier Show was held June 25-26-27 at the Cattaraugus County Fairgrounds in Little Valley. The Horse Program Development Committee sponsored it. Nineteen Gaming classes were offered each evening on Friday and Saturday for a total of 38 gaming classes. A total of 103 classes in western, hunt seat, saddle seat, trail, driving and accuracy games (such as egg-and-spoon, command, etc.) were offered during the day on Saturday and Sunday. The entries were restricted youth to 19 years old and under, but not restricted to 4-H members. The placing of 4-H members was used to determine qualification to compete at the State Fair in Syracuse.
- A total of 60 horse and rider combinations entries were registered for the weekend, with \$2,281.25 collected in entry fees, stabling fees, and in camper fees. Cost of judges (\$650 fees plus \$94 meals), refunds (\$43), facility rent (\$780), and ribbons (\$400); equaled total expenses of \$1967. The total proceeds earned from this event for support of the Cattaraugus County 4-H Horse Program account from this event was \$314.25.
- This show is mainly run as an educational event, rather than a fundraiser, and in the past has been run at a small financial loss. Because of the late date of the Cattaraugus County Fair (in August), this earlier show is needed to determine which 4-H members qualify to represent the Cattaraugus County in 4-H horse show competition at the State Fair. (Source: Patty Bailey, show manager 716-373-6022).
- The Lou Eibl Mid-Summer Trail Ride was organized and run on July 17. This trail ride crossed Cattaraugus Creek several times, so it took place partly in Cattaraugus County and partly in Erie

County. There was a total of 45 participants, who each paid a \$20 fee to cover the 4 hour and 35 minute trail ride and lunch, generating a gross income of \$900 and a net profit for the Lou Eibl Corral Club of \$125. (Source: Bill Hopkins).

- Results from the open horse shows (draft and light horse) held as a part of the Cattaraugus County Fair show that a total of 400 horses competed or were exhibited. Premium money paid out was \$6,585 to the breed show winners, \$825 to draft show winners, \$525 to open show winners and \$290 to pony show winners. Income was \$22,337 from the breed show, \$1,304 from the open show, and \$320 from the draft show for a total income of \$23,961. Net profit was \$7,700 from the breed show and \$1,000 from the open and draft competitions for a total net profit of \$8,700. (Source: J. O. Young, reviewing records).
- The Allegany “Shut Up & Ride” 50/100 Mile Endurance Ride was held in Allegany State Park on September 11-12. Details regarding the total number of entries, entry fees, park and camper fees were not available.
- The Fall Classic Horse Show put on by Cornell Cooperative Extension, Cattaraugus County 4-H Horse Program was held September 17-19, with Gaming Classes Friday evening, and a mix of English, Western and Trail classes on Saturday and Sunday. Again, details regarding entries and fees were not available.

5. Assessment of Economic Impacts

The equestrian lifestyle is having a positive impact in Cattaraugus County, although the following observations need to be studied in further detail:

- The current level of economic impact from most events being held in the County can be characterized as modest at best.
- Making a good assessment of the situation is complicated by the lack of record keeping by many sponsors and uneven reporting in other cases.
- In some instances, useful data regarding out-of-town visitors and travel and discretionary expenditures are not compiled at all.
- These smaller events constitute the most accessible opportunity for the County to begin to grow the equestrian economy, although technical assistance will be an important support requirement (also discussed in Section F).
- As part of the support effort, equestrians, entrepreneurs and the new Chapter of the Horse Council should consider assisting organizers in using standard data gathering and record keeping. This will help develop a more comprehensive database on attendance and economic impact. This information will provide justification for public and private investments in marketing and support, and will permit results to be tracked from year to year.
- Looking at the broader picture, more general conclusions may be drawn from the national and statewide experience in equestrian development and tourism. Statistics developed by the New York State Horse Council and others clearly indicate a higher level of affluence and travel spending among horse owners in general.

- Although more detailed research is warranted, it is safe to assume that enhancing the County's share of equestrian tourism will yield commensurate economic benefits.

6. Recommended Actions

- Develop standard record keeping forms and procedures for equestrian events.
- Provide technical assistance to event organizers regarding record keeping and data collection.
- Develop a database that can organize and analyze the key results of equestrian events including attendance and economic impact.
- Undertake a more detailed analysis of the market for equestrian tourism and establish parameters for target market share to allow the stakeholders to track progress on equestrian economic development.



Horses in Park Square, Franklinville, New York during Parade at the Creek Side Round Up. Photo by EDP&T

Stagecoach West's Ride and Learn Weekend held at the Little Valley Rider's Club's "Equestrian Park". Photo by Bonnie Hall



F. RECOMMENDED STRATEGIC ACTIONS

This strategic assessment supports the notion that Cattaraugus County can benefit from an organized initiative to increase equestrian related tourism and development for the following reasons:

- There is a modest but expanding asset base.
- There are a number of immediate market opportunities.
- There is evidence that the returns on investment will be acceptable, particularly if lower cost approaches, and technical assistance are first utilized, and if events are better advertised.
- The success of these early efforts could be expected to support larger investments in facilities and marketing for future events, which in turn would more strongly impact market share and economic returns.

With that general approach in mind, the following strategic initiatives are suggested.

1. Strengthening the Asset Base

A modest and phased approach to building up the county's equestrian assets can yield good results without a need for significant investments. Although a first class show facility would certainly put the county on the map of equestrian centers, the management and marketing infrastructure to support this type of development still needs to be nurtured to insure success. Therefore, several lower cost initiatives are suggested. As noted in Section C above these include:

- Make the most of the show and event venues that currently exist. This would include modest investments in improving the County Fairgrounds for equestrian events and working with the owners of private arenas and exhibition fields to upgrade them to accept bigger events and bigger crowds.
- Bring the existing inventory of stables and stalls up to acceptable standards by providing technical assistance to owners and helping with necessary physical improvements. As equestrian tourism and events pick up, provide incentives to owners to expand the inventory of stables to accommodate the increased demand. Stakeholders could market the availability of these stables and stalls for rental during the larger events and rides. An on-line interactive directory would facilitate locating and reserving stalls for out-of-county visitors.
- Make the ultimate goal of creating a comprehensive recreational trail network a high priority. Shows and events happen on weekends, but trail riding is an everyday attraction to a large number of visitors and tourists. Completing the trail system and developing good signage, user-friendly maps, and effective marketing efforts will deliver results. Addressing the trail deficiencies means tackling some difficult issues such as insurance and liability, but these problems must be resolved if the trails are to become a part of equestrian tourism.
- Anticipate the need for additional support services and hospitality businesses as tourism increases. Although entrepreneurs will look for evidence of market development before they make significant investments, the County and its equestrian and business communities can bring opportunities and incentive programs to the attention of investors with a demonstrated interest in horses.

- Establish a stronger partnership with the Little Valley Rider's Club as it continues to assess the feasibility of the proposed new regional indoor horse arena at their Equestrian Park. The project can have a major impact, but must be considered a high risk undertaking at this point. There are unanswered questions regarding the strength of the market, the Club's need to further improve its capacity to manage and market a complex undertaking, and the ability to finance the project through conventional bank financing. This does not mean that the project should be made a lower priority. Rather, a concerted effort to assess and then limit the risk would help get to a decision.

2. Pursuing Immediate Market Opportunities

The ability to gain access to larger markets for equestrian tourism is limited by deficiencies in the asset base. More arenas, stables, trails and bed-and-barns are needed to gain entrée to bigger markets. But those improvements will take months or even years. In the interim, the appropriate market focus is on incremental growth of the existing base, which is represented by the current roster of shows and events, and the existing trail and riding infrastructure.

- Organize to double attendance at existing events within the coming five years. This will require creating a core group of advisors to work with a County-sponsored technical assistance program. The assistance would be oriented toward effective event scheduling and organization, pursuing sponsorship revenue, and increasing attendance through better marketing and promotion.
- Encourage the creation and expansion of equestrian-related business in Cattaraugus County. Business development is expected to reduce deficiencies in the asset base in future years. Entrepreneurs are at the center of this objective (see **APPENDIX H** for a sampling of business development ideas related to the equestrian industry, included with permission of author).
- Develop a small number of new showcase events that would complement the existing schedule and provide an opportunity to draw new visitors and equestrian enthusiasts into the annual program. The core group of advisors could be looked to for guidance on the nature and scale of event that could attract a new audience.
- Develop expertise in the national and regional markets for large, sanctioned horse shows. This knowledge will be an important element in assessing the viability of the Rider's Club project. It will also position the County to market any new facility to the maximum extent possible.
- Distribute information on the economic impact of the equestrian lifestyle to County stakeholders (see **APPENDIX I** for examples, included with permission of NYSHC and authors).

3. Strategic Positioning for Individual Villages

Although the County and its equestrians and entrepreneurs are taking leadership roles in assessing and organizing equestrian based development, there is also a role for villages in the overall effort. Opportunities exist for villages to establish stronger identities as horse-friendly areas and to sponsor programs and events catering to equestrian interests. Further, municipal facilities can be designed and built to accommodate horses and riders, which can add to a municipality's market allure when visitors are deciding where to spend discretionary travel dollars and investments for equestrian-related housing.

A major element of the County's planning activity in recent years has been focused on revitalizing villages through a strategic review of their assets and opportunities, accompanied by recommended actions the municipalities can take to start toward a new vision. Two of these strategic reviews – Franklinville and Little Valley – directly address the opportunities inherent in the equestrian economy. Those strategies are included as **Exhibits 9 and 13**. This work was completed in 2002-2003 under a separate contract dealing with "Village Visioning".

4. Management Issues

Generating the best results from equestrian tourism will require a defined management focus among stakeholders, to address and resolve the issues discussed in this assessment. The following options should be considered:

- Equestrian development is expected to benefit from County level support, especially if County time and technical assistance were dedicated to achieving progress and results on the key issues. Although staff time can be spread over a number of existing staff persons, there are considerable benefits to be realized from developing base expertise on equestrian issues, which is a highly specialized field. The County may want to consider designating one staff person as the lead on defining and delivering results in this area.
- The newly formed Chapter of the New York State Horse Council for Cattaraugus and Chautauqua Counties may want to take ownership of this equestrian initiative, to move it forward among equestrians and horse owners themselves, on a volunteer basis. The new Chapter should be encouraged to focus on only a few demonstration projects at a time.
- Individuals, equestrian-related businesses, Chambers of Commerce and local economic development and planning groups may also want to take leadership roles for certain projects in their respective areas, such as the Franklinville Chamber of Commerce.



*Covered Wagon rides at the Little Valley Rider's Club "Equestrian Park".
Photo by Bonnie Hall*

*Trail Riders in front of the Clubhouse at the
Little Valley Rider's Club "Equestrian Park"
Photo by Bonnie Hall*



G. CONCLUSION AND NEXT STEPS

Horses are big business. Cattaraugus County is blessed with a high level of horse ownership and a group of ardent and enthusiastic equestrian supporters. While the asset base is perhaps not as strong as the level of support and show activity would warrant, this situation can be improved over time, with an organized grass-roots effort and County and state technical assistance.

Nevertheless, the key ingredients appear to be in place to start Cattaraugus County on a path toward greater equestrian tourism and economic development activity.

The findings of this initial Equestrian Market Assessment support the following general conclusions:

- A carefully crafted plan to augment the equestrian assets, coupled with incremental increases in show and event attendance and spending, can be expected to move the market upward.
- From that point, continually increasing levels of investment in assets and market opportunities will be justified.

Stakeholders in Cattaraugus County's equestrian economy can take the next steps by:

- Using the strategic planning information that is presented in this guidebook;
- Developing specific plans and projects based on good market data and business support;
- Adhering to equine care, health, and stabling standards;
- Developing a regional network of "Bed and Barns" on trail loops;
- Developing an indoor horse arena in order to attract and penetrate larger regional markets so that the equestrian economy in Cattaraugus County can continue to grow.



Stagecoach West's Ride and Learn Weekend at Little Valley Rider's Club. Photo by Bonnie Hall

APPENDICES



Appendix A

Equestrian Stables, Barns, and Horse-Related Businesses

There are numerous private stables, boarding stables, training and breeding facilities, and other horse-related businesses in Cattaraugus County. The following list is not comprehensive, but provides an indication of the extent of the existing business base. As with the database of equine owners (referenced above), a longer-term goal is to expand and maintain a fully up-to-date business listing.

1. B & N Trophies, 10 Delaware Park Center, Olean, NY 14760 (716-373-3364). Annual sales of \$7,000 for horse show ribbons and \$4,000 for horses' show trophies.
2. Barb Loveless horse farm, Peth Road, Great Valley, NY 14741 (716-945-2830). The facility includes 8 box stalls, 20 tie stalls, private trails, a round pen for riding and 7 pastures. Boarding, training, breeding and occasional lessons are offered. The Loveless family uses their Halfingers for logging, and sell around 4 horses per year. There are currently 25 horses on the premises. Family members take care of the facility and the horses.
3. Camp Li-Lo-Li (Cathy Whitcomb, director), 8811 Sunfish Run Road, Randolph (716-945-4900). This site offers trail rides as one of its activities for the summer campers. There are 14 horses on the premises.
4. Con-Lin Ranch, George and Linda Reitz, 4258 Bakerstand Road, Franklinville (716-676-2689). The facility includes 8 box stalls, a 40'x60' indoor arena with loamy clay-straw footing, turnout pastures and paddocks. There are 5 Quarter Horses on the premises, with three of the mares expecting foals in February/March 2005. George and Linda train their own horses for showing and sale. They send their mares out to be bred to high quality AQHA stallions.
5. The Crosspatch, Jim and Dolly Little, 5281 Baker Road, Salamanca (716-938-6313). The facility includes 25 box stalls, 7 tie stalls, a 60'x100' indoor arena with sand footing and a 150'x250' outdoor arena with sand and gravel footing, 3 pastures and 6 turnout paddocks. Trail rides, lessons, training of horses, and breeding services of the Little's APHA registered stallion are offered. There are currently 45+ horses on the premises. In addition to Jim and Dolly Little (the owners) working, there is one full time employee and one part time employee.
6. D & B George's Painted Meadows, Donald and Bonnie George, 1644 Elton Road, Farmersville, NY 14060 (716-676-3401). The facility includes 20 box stalls, 16 tie stalls, 4 pastures and 3 turnout paddocks. The construction of an arena is in planning. Horses bred and raised on the premises are offered for sale. Stud service by 12 foundation bred registered Quarter Horse (AQHA) and Paint (APHA) stallions is offered. A production sale is planned for 2005. There

are currently 135 horses on the premises. There are no employees. The owners do all the work.

7. Dunham's Sport Horses, Virgil and Sheila Dunham, 5334 Allegany Road, Little Valley (716-938-6279). This facility includes 20+ box stalls, a 60'x120' indoor arena with sand footing, a 100'x180' outdoor arena with sand footing, two small round pens with grass over sand footing and trails on a 100 acres site. There are currently 20 horses and 3 ponies on the premises. Included in that number are a Hanoverian and a Thoroughbred stallion, which are both offered for stud service. Boarding, training, breeding, riding lessons and trail rides are offered. There are two employees: Florence Thornbury, CHA Master Instructor and Clinic Instructor, who teaches advanced level lessons; and Annette Preston, who teaches the lower level lessons. Family members do the rest of the work.
8. Dusty Lane Stables, Fran Smith, 3454 Bakerstand Road, Franklinville (716-676-3407). The facility includes 13 box stalls, a 100' diameter round pen with sand footing, and 6 pastures (3 with run-in sheds) located on 200 acres that border State Land. There are currently 5 horses and 1 mini-donkey on the premises. Boarding is offered both overnight and monthly. Potential boarders must provide references. Riding lessons and trail rides are offered on a limited basis, on the client's own or the facility's lesson horses. There are no employees – all work is done by the owner and family members.
9. Gentle Thunder Farm, Annie Widger, 7067 Hencoop Road, Ellicottville (716-699-2940). This facility includes 4 box stalls, 12 tie stalls, a 60' diameter round pen with sand footing, 5 pastures, 1 turnout paddock and trails located on a 45 acres site with access to an adjoining family-owned additional 80 acres. There are currently 19 horses on the premises. Boarding, lessons, and trail rides are offered by the owner. Training is offered at this site by Lisa Williams of Ellicottville (716-699-8368) acting as an independent contractor. Lisa is a trainer certified by Kenny Harlow.
10. Golden Stride Walker Ranch, Lori Northrup owner, Barbara Loveless manager, 4966 Bryant Hill Road, Ellicottville, NY 14731 (716-699-2399, barn; 716-699-4635 house). This facility includes 10 box stalls, 6 pastures, 3 turnout paddocks, an outdoor arena 60' x 120' with coarse sand footing, and trails. Tennessee Walking horses are bred at this facility. There are currently 10 horses on this facility. There is one fulltime employee. Plans are for the construction of an indoor arena and expansion into a horse boarding business in the near future.
11. Handlebar Stable, Al Morrow, Haskell Road, Olean, NY 14760 (716-372-5778). This facility includes 8 box stalls, a 45' x 60' outdoor riding area with sand/grass footing, and 5 pastures. There are currently 13 horses on the premises. Boarding, lessons and trail rides are offered. There is one employee besides the owner.

12. Hope Hill Dressage, Patricia and Kevin Brown, 9412 Laidlaw Road, Franklinville, NY (716-676-2191). The facility include 5 box stalls, 1 5 acre pasture, and a 75'x200' outdoor arena with sand footing. There are currently 4 horses on the premises. Training and riding lessons are offered (usually at the client's site) by Patricia, who is a CHA certified riding instructor and who competes actively through Third Level in Dressage, in jumping, and in eventing.
13. Hunter Hill Farm, Daniel and Christa Heckathorn, 7512 Cadiz Road, Franklinville (716-676-5937). The facility includes 9 box stalls, a 90'x150' outdoor arena with grass footing, and two large pastures set on 140 acres. There are currently 6 horses (mostly purebred Arabians, 1 in foal for spring 2005) and 1 dwarf-mini horse on the premises. Boarding is offered. Riding lessons are available by appointment, taught by Christa, who is a CHA certified instructor. Dan and Christa train their own horses for trail riding and for showing in dressage. They send a mare out to be bred to a high quality Arabian stallion.
14. Lofty Meadow Stables, Sarah Boehmer, 8186 Kingsbury Hill Road, Franklinville (716-676-9951). The facility includes 14 box stalls, a 44'x44' indoor arena, a 90'x130' outdoor arena with sand footing, 3 pastures and 1 turnout paddock. There are currently 14 horses on the premises. Boarding, training and lessons are offered. There are no employees. All work is done by the owner and the boarders.
15. Lonesome Oak Stable, Tony Orsini, 3598 Bakerstand Road, Franklinville (716-474-5340). This facility includes 20 box stalls, a 60'x80' indoor arena with sand footing, a 90'x140' outdoor arena with sand footing, 2 pastures, and 1 turnout paddocks. Boarding, training (for boarders' horses and horses raised by the owner only) and riding lessons are offered. There are currently 12 horses on the premises. Horses are occasionally offered for sale or lease. There are no employees – the owner does the work.
16. Mansfield Coach & Cutter, Mr. & Mrs. Smrek, 6864 Sodom Road, Little Valley, NY 14755 (716-938-6315). This facility includes 7 tie stalls, a 100' x 250' outdoor arena with grass footing, 5 pastures, 1 turnout paddock, trails and a 5 mile cross country course. Carriage or sleigh rides are offered in season. Restoration of antique horse drawn vehicles is also offered. There are currently 9 horses (2 riding horses, 6 driving horses, and 1 miniature Sicilian donkey) on the premises. There are no employees, as the owners do all the work.
17. Mohr's Breezy Acres, Rae and Joe Mohr, 2003 Haskell Road, Olean (716-372-3006, barn 716-372-1471). The facility includes 14 box stalls, a 75'x150' outdoor arena with sand footing, a small indoor arena, and 3 pastures. There are currently 10 equines (7 horses, 2 minis and 1 burro) on the premises: 4 horses belong to the owners, and the rest belong to Al Russell, who leases the facility. Horse-drawn carriage rides are offered by the owners for weddings, anniversary parties, etc. All work is done by the owners and the leaser.

18. Morgan's Trailer & Horse Sales, Jim and Sharon Morgan, 1341 Eagle Street, Sandusky, NY 14133 (716-492-3022). The facility includes stabling and pasture for sale horses, repair shop for trailers, and sales lot for horse trailers. There are currently 10 horses on the premises. Jim and Sharon sell approximately 75 horse trailers per year.
19. North Star Farm, Jean Flagler, P.O. Box 298 (south side of route 39 between Allegany Road and Mosher Road), Perrysburg (716-532-3390). The facilities include 24 box stalls, a 72'x120' indoor arena with sand footing, a 250'x300' outdoor arena with grass footing and a sand track, 5 pastures, and 3 turnout paddocks. There are currently 23 horses on the premises. Boarding, training, breeding, and lessons are offered. Lessons are taught by Jean Flagler, who is a CHA certified riding instructor. Occasionally horses are offered for sale. There are 2 employees (the owners).
20. OK Corral, Sharon Washington, 4179 South Nine Mile Road, Allegany (716-373-1728). The facility includes 14 box stalls, 2 tie stalls, a lighted 200'x250' outdoor arena, 3 to 4 large pastures and access to nearby trails. There are currently 18 horses on the premises. Boarding is offered. Riding lessons for novice to intermediate level Rider's are also offered.
21. Painted Meadows, Gary and Joanne Hitchcock, 3879 West Branch Road, Allegany (716-372-4009). This facility includes 9 box stalls, 2 tie stalls, 4 pastures and a 100'x200' outdoor arena with sand footing, located on 50 acres, about half of which is cleared and half is woodland. There are currently 9 horses on the premises. Boarding is offered. Breeding to the registered AQHA (Quarter Horse) and APHA (Paint) stallions on the site is available.
22. Parkside Stables, Brenda Stack owner, 102 Parkside Drive, Limestone, NY 14753 (716-925-7442) This facility includes 6 box stalls, 12 tie stalls, 8 pastures, 2 turnout paddocks, a 75' x 150' outdoor arena with sand footing, trails on the property as well as direct access to trails in Allegany State Park. An indoor arena is currently under construction, with plans to have it ready for use this winter (2004-2005). There are currently 23 horses on the premises. Boarding, training and riding lessons are offered. Breeding is offered by one of the boarders, who keeps a stallion there. In good haying years, hay is offered for sale on a limited basis. There are two employees in addition to the owner.
23. Payne's Stables, Dick and Sue Payne, 2148 Haskell Road, Olean (716-372-1759). This facility includes 14 box stalls, 10 paddocks and pastures, an outdoor grass 300'x300' grass paddock also used for riding, and an indoor arena 40'x70' with sand footing. There are currently 6 horses on the premises. Boarding is offered on a limited basis. Dick and Sue also have Haskell Valley Veterinary clinic, which is a small animal practice only. However, Dick (Dr. Richard Payne, DVM) does approximately \$7,000 per year of chiropractic adjustment work on equines.

24. Perkins Stables, 5761 Heinz Road, West Valley, NY 14171(716-942-6316), Dawn & Gary Perkins. This facility includes 8 box stalls, 3 tie stalls, a 40' diameter round pen, 4 pastures, and 1 turnout paddock, and access to trails adjoining the property. Boarding, training, lessons and trail rides are offered. Hauling of horses for hire is occasionally available. There are currently 8 horses on the premises. There are no employees – the facility owners do all the work.
25. Snow Stable, Roger and Rhonda Snow, Route 242, Little Valley (716-938-6439). Details on the number of stall and horses on premises were not made available. Horses are occasionally offered for sale.
26. Sports Locker, 711 West State Street, Olean, NY 14760 (716-373-1411) Machine embroidery of shirts, jackets, caps, etc., have equestrian logos available. (\$375+/year for Houghton College Riding Camp)
27. Wetland Farm (division of Randolph Free Academy/New Directions Program), Sam Passamonte, director, 356 Main Street, Randolph (716-358-3636, ext. 253). This facility includes 21 box stalls, 3 pastures, a 60'x80' outdoor arena and a 100'x120' outdoor arena, both with sand footing, tack room, wash stall, office and classrooms. There are currently 11 horses on the premises. Suitable horses for the program are acquired through tax-deductible donations. Limited boarding is offered, with restrictions. Riding lessons (outside of the classes held for the clients) are offered on a limited basis as a community service. There are 5 employees: a program director, 3 teachers, and a barn worker.
28. Whisper Mountain Ranch, Brad, Peggy and Sue Bingerman, 5100 Humphrey Road, Great Valley, NY 14741 (716-378-9451). This facility includes 15 box stalls, 2 pastures, 2 turnout paddocks, and trails. Training, lessons, and trail rides are offered, as well as breeding stud service with a registered Quarter Horse stallion and occasional sale of horses. There are currently 23 horses on the premises.

The following businesses are involved in selling horse feed in the County:

1. Pierce Milling, Church Street, Delevan, NY: Sell approximately 20 tons/week (80 tons/month). Also process into pellets 10 tons/week for other feed dealers 800-834-2740
2. Worth Smith, 1624 West State Street, Olean, NY: Process in Olean and sell there and at stores in Salamanca and Eldred, Pennsylvania. Sell approximately 2.5 tons/week (10 ton/month). 716-372-6400
3. Franklinville Home Center, 3016 Bakerstand Road, Franklinville, NY: Sell a few bags of Blue Seal Horse feeds as ordered by customers – a few hundred pounds per week. 716-676-9964

Smart Development for Quality Communities

4. New Cow Palace, 72 Hillside Drive, Limestone, NY: Horse feed sales average 7.5 tons per month. 716-925-7019
5. Moonrise Farms, 219 Main Street, Randolph, NY 14772: Sell 19 tons/month. 716-358-6877
6. Vail Hardware, Inc, 104 Main Street, Little Valley, NY 14755 716-938-6681
7. Agway of Allegany, 13 East Union, Allegany, NY 14706: Total of sales of all types of horse feed is about 8 tons per month. 716-373-0460

APPENDIX B

TRAILS LIABILITY AND STATE STATUTES

New York Recreational Use Statute

New York Consolidated Laws

GENERAL OBLIGATIONS LAW

ARTICLE 9: Obligations of Care

TITLE 1: Conditions on Real Property

§ 9-103. No duty to keep premises safe for certain uses; responsibility for acts of such users

1. Except as provided in subdivision two,
 - a. an owner, lessee or occupant of premises, whether or not posted as provided in section 11-2111 of the environmental conservation law, owes no duty to keep the premises safe for entry or use by others for hunting, fishing, organized gleaning as defined in section seventy-one-y of the agriculture and markets law, canoeing, boating, trapping, hiking, cross-country skiing, tobogganing, sledding, speleological activities, horseback riding, bicycle riding, hand gliding, motorized vehicle operation for recreational purposes, snowmobile operation, cutting or gathering of wood for non-commercial purposes or training of dogs, or to give warning of any hazardous condition or use of or structure or activity on such premises to persons entering for such purposes;
 - b. an owner, lessee or occupant of premises who gives permission to another to pursue any such activities upon such premises does not thereby
 - (1) extend any assurance that the premises are safe for such purpose, or
 - (2) constitute the person to whom permission is granted an invitee to whom a duty of care is owed, or
 - (3) assume responsibility for or incur liability for any injury to person or property caused by any act of persons to whom the permission is granted.
 - c. an owner, lessee or occupant of a farm, as defined in section six hundred seventy-one of the labor law, whether or not posted as provided in section 11-2111 of the environmental conservation law, owes no duty to keep such farm safe for entry or use by a person who enters or remains in or upon such farm without consent or privilege, or to give warning of any hazardous condition or use of or structure or activity on such farm to persons so entering or remaining. This shall not be interpreted, or construed, as a limit on liability for acts of gross negligence in addition to those other acts referred to in subdivision two of this section.

2. This section does not limit the liability which would otherwise exist
 - a. for willful or malicious failure to guard, or to warn against, a dangerous condition, use, structure or activity; or
 - b. for injury suffered in any case where permission to pursue any of the activities enumerated in this section was granted for a consideration other than the consideration, if any, paid to said landowner by the state or federal government, or permission to train dogs was granted for a consideration other than that provided for in section 11-0925 of the environmental conservation law; or
 - c. for injury caused, by acts of persons to whom permission to pursue any of the activities enumerated in this section was granted, to other persons as to whom the person granting permission, or the owner, lessee or occupant of the premises, owed a duty to keep the premises safe or to warn of danger.
3. Nothing in this section creates a duty of care or ground of liability for injury to person or property.

NYS Recreational Use Statute (General Obligations Law) p. 2

HISTORY: Add, L1963, ch 576.

THE NY FOREST OWNER 29:4; 7; Jul/Aug 1991

Landowner Legal Rights: Liability and Duty Owed Persons Using Your Property

By DAVID J. COLLIGAN

Perhaps the question asked most often by landowners upon learning that I am an attorney is what happens to them if someone is hurt upon their premises. An owner, lessee, or occupant of premises whether or not posted, owes no duty to keep the premises safe for entry or use by others for hunting, fishing, organized gleaning, (whatever that is), canoeing, boating, trapping, hiking, crosscountry skiing, tobogganing, sledding, speleological (cave exploration) activities, horseback riding, bicycle riding, hang gliding, motorized vehicle operation for recreational purposes, snowmobile operation, cutting or gathering of wood for noncommercial purposes, or training of dogs.

The law goes on to say there is no duty to give warning of any "hazardous condition or use of or structure or activity on such premises" to persons entering

for the above-mentioned reasons. My advice is to warn if there is a known danger which is under the owner's control, such as a structurally defective barn, a target shooting area, an old well or foundation, if for no other reason than to avoid an unnecessary injury to someone. Also, the law does hold farmers liable for gross negligence or reckless behavior, and failure to warn of very dangerous situations may constitute gross negligence. Under no circumstances is malicious or willful failure to guard or warn against a condition, use, structure, or activity protected from liability. Just in case you're wondering (most do), spring guns, booby traps, unleashed wolves, starved and released Bengali Tigers, 30 foot Anacondas and other deliberate but passive "protective" devices also create liability.

A very common misconception is that by giving permission to someone to use your property you create liability where there was none. This is simply not the case. However, if a fee is received for the use of the property, then you do owe that person a duty to keep the premises safe. This is important to remember as hunting leases become more common.

Ref: N. Y. General Obligations
Law, Section 9-103

David Colligan, a member of NYFOA's Niagara Frontier Chapter, is a practicing attorney with a Buffalo law firm (Watson, Bennett, Colligan, Johnson & Schechter; 600 Fleet Bank Building, 12 Fountain Plaza, Buffalo 14202) and regularly provides articles on legal matters of interest to forest owners. Mr. Colligan can be reached at (716) 852-3540.

Appendix C

Little Valley Rider's Club Project Cost Estimates

Engineer's Estimate of Feasible Construction Cost – January 17, 2003

| Item Description | Estimate | Div. Subtotal |
|---|------------------|----------------------|
| Soft Costs | | |
| General Requirements (Bonds, Mobilization, Consultants) | 250,000 | 250,000 |
| Site Construction | | |
| Excavation, Backfill, Earthwork | 201,795 | |
| Water Line Extension and Water service | 182,640 | |
| Septic System | 101,425 | |
| Bridge Over Little Valley Creek to START Trail | 100,000 | |
| Gravel Parking | 107,385 | |
| Utilities | 5,500 | |
| Site Improvements (Drainage, Fencing, Sidewalks) | 301,255 | |
| Subtotal | | 1,000,000 |
| Stable Construction | | |
| Stable #1 300'x100' | 750,000 | |
| Stable #2 300'x100' | 750,000 | |
| Subtotal | | 1,500,000 |
| Equestrian Center Construction | | |
| Shell Construction | 3,600,000 | |
| Interior Finishes and Furnishings | 400,000 | |
| Subtotal | | 4,000,000 |
| Bathhouse, Restrooms, Picnic Area | | |
| Bathhouse, Restrooms Construction | 125,000 | |
| Picnic Shelters, Tables and Site Improvements | 75,000 | |
| Subtotal | | 200,000 |
| Construction Subtotal | 6,950,000 | 6,950,000 |
| Contingencies 20% | 1,400,000 | 1,400,000 |
| Total Cost Estimate | 8,350,000 | 8,350,000 |

NOTE: The Little Valley Rider's Club is designing a site utilization and facility plan that will accommodate a multi-phased development that will spread these development costs over a long-term planning and construction schedule.

Appendix D

Little Valley Rider's Club Preliminary Revenue Estimates

LITTLE VALLEY EQUESTRIAN CENTER
PRELIMINARY REVENUE ESTIMATES - AGGRESSIVE PRICING SCENARIO

| <u>Assumptions by class of event:</u> | <u>Revenue</u> <u>Units</u> | <u>Open</u> <u>Horse Shows</u> | <u>Sanctioned</u> <u>Horse Shows</u> | <u>Horse</u> <u>Expos</u> |
|---|--------------------------------|-----------------------------------|---|------------------------------|
| Average Attendance | | 500 | 1500 | 2000 |
| Attendees Per Car | | 1.5 | 1.5 | 1.5 |
| Number of Horses | | 100 | 200 | 200 |
| Number of Days | | 2 | 2 | 2 |
| Per Capita Spending on Concessions | | \$20 | \$20 | \$20 |
| Percentage Charge on Concessionaire's Gross | | 20% | 20% | 20% |
| Car Parking Fee | 382 | \$3 | \$3 | \$3 |
| Trailer Parking Fee | 34 | \$5 | \$5 | \$5 |
| RV Space Rental per Day | 84 | \$5 | \$5 | \$5 |
| Stall Rental Fee per Day | 300 | \$15 | \$15 | \$15 |
| Building Rental Per Day | 1 | \$1,600 | \$1,600 | \$1,600 |
| Open Arena Rental Per Day | 1 | \$600 | \$600 | \$600 |
| Operating Revenues: | | | | |
| Building Rental | | \$3,200 | \$3,200 | \$3,200 |
| Concessions | | \$4,000 | \$12,000 | \$16,000 |
| Commissions: | | | | |
| Parking Revenue* | | \$2,000 | \$2,292 | \$2,292 |
| Trailer Parking Fees | | \$340 | \$340 | \$340 |
| RV Spaces - Max. | | \$840 | \$840 | \$840 |
| Stall Rentals | | \$3,000 | \$6,000 | \$6,000 |
| Outdoor Arena Rental | | \$1,200 | \$1,200 | \$0 |
| | | <hr/> | <hr/> | <hr/> |
| Horse Event Revenues | | \$16,780 | \$28,072 | \$30,872 |
| Camp Site Rentals (Including water and electric service) | 73 | \$26 | | |
| Maximum Daily Revenue | 73 | \$1,898 | | |

*Parking Revenue is maximized by Spaces of 382 at \$1,146 per day assuming only one parking fee per space per day.

LITTLE VALLEY EQUESTRIAN CENTER
PRELIMINARY REVENUE ESTIMATES - AGGRESSIVE PRICING SCENARIO
Operating Revenue Sensitivity Analysis

| | <u>Scenario</u> | <u>Open Horse Shows</u> | <u>Sanctioned Horse Shows</u> | <u>Horse Expos</u> | <u>Total</u> |
|----------------|-----------------|-------------------------|-------------------------------|--------------------|--------------|
| Units Per Year | A | 5 | 2 | 0 | 7 |
| | B | 10 | 4 | 0 | 14 |
| | C | 12 | 8 | 1 | 21 |
| | D | 14 | 12 | 2 | 28 |
| | E | 16 | 16 | 3 | 35 |
| | F | 18 | 20 | 4 | 42 |

| | <u>Scenario</u> | <u>Open Horse Shows</u> | <u>Sanctioned Horse Shows</u> | <u>Horse Expos</u> | <u>Total Show Revenue</u> |
|-------------------------|-----------------|-------------------------|-------------------------------|--------------------|---------------------------|
| Gross Operating Revenue | A | \$83,900 | \$56,144 | \$0 | \$140,044 |
| | B | \$167,800 | \$112,288 | \$0 | \$280,088 |
| | C | \$201,360 | \$224,576 | \$30,872 | \$456,808 |
| | D | \$234,920 | \$336,864 | \$61,744 | \$633,528 |
| | E | \$268,480 | \$449,152 | \$92,616 | \$810,248 |
| | F | \$302,040 | \$561,440 | \$123,488 | \$986,968 |

| | <u>Scenario</u> | <u>% Occupied</u> | <u>Gross Rev.</u> | <u>15% Commission</u> | <u>Total LVRC Revenue</u> |
|--|-----------------|-------------------|-------------------|-----------------------|---------------------------|
| Camp Site Rentals (Including water and electric service) - Six Month Season - mid-April to mid-October | A | 20% | \$69,846 | \$10,477 | \$150,521 |
| | B | 30% | \$104,770 | \$15,715 | \$295,803 |
| | C | 40% | \$139,693 | \$20,954 | \$477,762 |
| | D | 50% | \$174,616 | \$26,192 | \$659,720 |
| | E | 60% | \$209,539 | \$31,431 | \$841,679 |
| | F | 70% | \$244,462 | \$36,669 | \$1,023,637 |

Operating Expense Analysis

Fixed Expenses:

| | |
|-----------------------------|------------------|
| Marketing Manager | \$35,000 |
| Secretary - Bookkeeper | \$15,000 |
| Taxes & Benefits (25%) | \$12,500 |
| Utilities - Base | \$6,000 |
| Insurance - Base | \$6,000 |
| Maintenance & Supplies | \$15,000 |
| Advertising & Promotion | \$10,000 |
| Miscellaneous Expenses | \$5,000 |
| Total Fixed Expenses | \$104,500 |

Horse Show Expenses - Per Event

| | |
|--------------------------------|----------------|
| Security Personnel | \$960 |
| Parking Personnel | \$640 |
| Utilities | \$250 |
| E.M. Services | \$300 |
| Janitorial Services | \$450 |
| Total Variable Expenses | \$2,600 |

LITTLE VALLEY EQUESTRIAN CENTER
PRELIMINARY REVENUE ESTIMATES - AGGRESSIVE PRICING SCENARIO

Operating Income Analysis

| <u>Scenario</u> | <u>Total LVRC Revenue</u> | <u>Fixed Expenses</u> | <u>Variable Expenses</u> | <u>Total Oper. Expenses</u> | <u>Operating Income</u> |
|-----------------|---------------------------|-----------------------|--------------------------|-----------------------------|-------------------------|
| A | \$150,521 | \$104,500 | \$18,200 | \$122,700 | \$27,821 |
| B | \$295,803 | \$104,500 | \$36,400 | \$140,900 | \$154,903 |
| C | \$477,762 | \$104,500 | \$54,600 | \$159,100 | \$318,662 |
| D | \$659,720 | \$104,500 | \$72,800 | \$177,300 | \$482,420 |
| E | \$841,679 | \$104,500 | \$91,000 | \$195,500 | \$646,179 |
| F | \$1,023,637 | \$104,500 | \$109,200 | \$213,700 | \$809,937 |

Debt Service Capacity

| <u>Scenario</u> | <u>Operating Income</u> | <u>Coverage Adjustment Less: 20%</u> | <u>Available for Debt Service</u> | <u>Annual Debt Service Constant</u> | <u>Maximum Serviced Debt</u> |
|-----------------|-------------------------|--------------------------------------|-----------------------------------|-------------------------------------|------------------------------|
| A | \$27,821 | \$5,564 | \$22,257 | 10.29728% | \$216,142 |
| B | \$154,903 | \$30,981 | \$123,923 | 10.29728% | \$1,203,452 |
| C | \$318,662 | \$63,732 | \$254,930 | 10.29728% | \$2,475,699 |
| D | \$482,420 | \$96,484 | \$385,936 | 10.29728% | \$3,747,946 |
| E | \$646,179 | \$129,236 | \$516,943 | 10.29728% | \$5,020,193 |
| F | \$809,937 | \$161,987 | \$647,950 | 10.29728% | \$6,292,440 |

LITTLE VALLEY EQUESTRIAN CENTER
PRELIMINARY REVENUE ESTIMATES - AGGRESSIVE PRICING SCENARIO

NOTES AND ASSUMPTIONS

1. The bulk of the event variables, attendance, attendees per car, etc. have been derived from the study prepared by Saratoga Associates for an equestrian facility for Batavia Downs. Some minor variations such as the constraint of parking revenues have been input based on the physical constraints of the current design parameters.
2. Camp site rentals are based on checking with a number of facilities in New York and Pennsylvania and include the daily charges for water and electric of approximately \$4.00 per day in addition to the base site charge of \$22.00. It has also been assumed that the camp ground facilities will be managed by a professional camp ground management company willing to pay a commission equal to 15% of gross revenues for the use of the sites and subordinate facilities.
3. The operating revenue sensitivity analysis is based on an array of horse show events ranging from a minimum of 7 to a maximum of 42. Based on the Batavia Downs study, 42 events annually would represent virtually 100% market penetration. It is far more likely that a 50% to 60% penetration would be achieved, but only after several years of successful marketing and performance at the facility as currently conceived. It is worthy of note that the greatest advantage noted for the Batavia Downs location was the high concentration of hotel and motel rooms available to support the facility. This does not appear to be the case in Little Valley.
4. As concerns the camp site rental commission revenue, a 50% overall occupancy would probably require 80% to 100% occupancy in the peak months of June, July and August to achieve that percentage for the full 6-month operating period proposed.
5. Fixed expenses assumes a paid staff of two persons, a Marketing Manager and a person Friday. The other operating expenses are best guesses. The relatively low insurance cost is based on the assumption that the horse show sponsors will be required to provide show specific coverage for all appropriate classes of risk including personal injury. Initially, advertising and promotion expense may need to be considerably more than the budgeted figure once the operation is up and going.
6. Variable expenses assume the use of contract services for security, parking, emergency medical ("E.M.") services and janitorial services.
7. Debt service capacity is a function of determining the amount of debt that a given level of operating income can sustain. The operating income is reduced by 20% in order to provide the minimum 125% coverage ratio required by most mortgage lenders. The annual debt service constant is that for a 15-year mortgage loan at a 6.0% interest rate.

Appendix E

Equestrian Events in Cattaraugus County, New York

The 2004 edition of the "Equine Enlightenment" lists horse-related competitions and activities around western New York. It is published by the Cornell Cooperative Extension 4-H Horse Program of Allegany and Cattaraugus Counties (previously published solely by the Cattaraugus County 4-H Horse Program as a service to horse enthusiasts throughout western New York). The following are listings in that publication and from other sources of events that were scheduled to take place in Cattaraugus County in 2004:

- April 3 Tack Auction, indoor arena, Lonesome Oak Stable, 3598 Bakerstand Road, Franklinville, NY

- April 24 Volunteer Orientation, North Haven Therapeutic Riding & Aquatic Center, 2914 Gowanda Zoar Road, Gowanda, NY

- May 1 Aurora Trail Rider's, Inc. Amish ride, off Route 62, Leon, NY
Host: Amy Riedel (716-941-9284)

- May 3 to North Haven Therapeutic Riding Session 1
June 26

- May 8 Trail Ride & Dish to Pass Lunch, Little Valley Trail Rider's Club, Route 242/353 intersection, Little Valley, NY
Cattaraugus/Chautauqua Chapter NYS Horse Council Meeting

- May 16 Plow Day Demonstrations, Creek Side Grounds, Route 16, Franklinville, NY

- May 28-31 Annual Memorial Day Trail Ride, Little Valley Trail Rider's Club
Route 242/353 intersection, Little Valley, NY

- June 4-6 Bonanza Open Horse Show, Cattaraugus County Fairgrounds, Little Valley, NY (Cattaraugus County Horse Program Development Committee)

- June 7 Gathering Days, Allegany State Park, NY Betsy Chamberlin
(716-652-0851)

- June 11-13 Lou Eibl Trail Ride, Allegany State Park, NY, Betsy Chamberlin
(716-652-0851)

- June 25-27 4-H Open Schooling Show, Cattaraugus County Fairgrounds
Little Valley, NY (Cattaraugus County Horse Program Development Committee)

- June 27 Aurora Trail Rider's, Inc. Franklinville Ride, Coal Chute Road, Franklinville, NY Host: Dave Blendinger (716-496-7549)

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- July 5 to
Aug 28 North Haven Therapeutic Riding Program Session 2,
2914 Gowanda Zoar Road, Gowanda, NY
- July 9-11 Ride & Learn Weekend, Little Valley Trail Rider's Club, Route
242/353 intersection, Little Valley, NY
- July 17 Lou Eibl Mid Summer Trail Ride, Bill Hopkins 716-496-7221
- Aug 1 Cattaraugus County Fair Open Horse Show, Draft Horse Show, Fairgrounds,
Little Valley, NY
- Aug 4 Cattaraugus County Fair Pony Pull, Fairgrounds, Little Valley, NY
- Aug 6-7-8 Cattaraugus County Fair All Breed Horse Show, County Fairgrounds,
Little Valley, NY
- Aug 14 Trail Ride and Dish to Pass Lunch, Little Valley Trail Rider's
Club, Route 242/353 intersection, Little Valley, NY
- Aug 29 Lou Eibl Allegany Timed Pleasure Ride, Allegany State Park,
Salamanca, NY
- Sept 3-6 Annual Fall Trail Ride, Little Valley Trail Rider's Club
Route 2914 Gowanda Zoar Road, Gowanda, NY
- Sept 11 Trail Ride and Dish to Pass Lunch, Little Valley Trail
Rider's Club, Route 242/353 intersection, Little Valley, NY
- Sept 11-12 Allegany "Shut Up & Ride" 50/100 Mile Endurance
Ride, Allegany State Park, NY
- Sept 17-19 Fall Classic Open Horse Show, Cattaraugus County Fairgrounds,
Little Valley, NY (Cattaraugus County Horse Program Development
Committee)
- Sept 19 Mansfield Coach & Cutter Hunter Pace: Cross Country ride with jumps, dish
to pass luncheon to follow.
- Oct 1-3 2nd Annual Creekside Roundup Weekend, Creekside
Grounds, Route 16, Franklinville, NY
- Oct 9 Trail Ride & dish to Pass Lunch, Little Valley Trail Rider's
Club, Route 242/353 intersection, Little Valley, NY
- Oct 10 "Ride in the Park", Allegany State Park, NY Sponsored by
Cattaraugus/Chautauqua Chapter of NYS Horse Council

Appendix F

Equestrian Events in Surrounding Counties

- Jan 30-31 Carol Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or joanne.young@houghton.edu) Allegany County
- March 12-13 Certified Horsemanship Association Region 5 Conference (open to public), workshops on improving riding and teaching skills, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young(585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) Allegany County
- March 24-27 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) Allegany County
- April 8 “Right from the Start” foal training clinic, Grandview Farms, Maple Grove Road, Bemus Point, NY Dawn Samuelson (716-386-2419) or Lori Conti (716-386-2299) courgarlou64@alltel.net Chautauqua County
- April 11 Allegany County Saddle Dusters Game Fun Show, Watson’s Tack, Route 19, Belmont, NY Cindy (585-268-5647) or Tara (585-593-1156) Allegany County
- April 17 WNYDA/HC Challenge Series Dressage Show, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) Allegany County
- April 17-18 Horsemen’s Fair (Tack Auction 2 pm April 18), PM Saddle Club, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121), Mick Cooper (814-887-5339), Bob Okerlund (814-778-5272) McKean County
- April 18 Windy Pines Open English, Western & Game Show, 2922 Two Rod Road (corner of Two Rod Road. & Jamison Rd), East Aurora, NY. (716-652-7883 or 716-537-2616) Erie County
- April 23-24 WNY Equine Classics 18th Annual Spring Consignment Horse & Tack Auction, Bippert’s Farm, Elma, NY Barbara Dygert (716-668-3581 evenings, 716-668-4328 days, 716-863-6019 mobile, bdygert@localnet.com , www.nyequineclassics.com) Erie County
- April 24 Hunter/Jumper Show, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) Allegany County

Smart Development for Quality Communities

- Apr 28-May1 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) *Allegany County*
- April 30 Windy Pines Game Show, 2922 Two Rod Road, East Aurora, NY (716-652-7883 or 716-537-2616) *Erie County*
- May 4 Barrel Racing, Stage Coach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) Chautauqua *County*
- May 7 Musical Quadrille Exhibition, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) *Allegany County*
- May 7 Cattle Penning, Attica Rodeo & Show Association, Inc., Exchange Street, P.O. Box 58, Attica, NY 14011-0043 *Wyoming County*
- May 8 Horse Show (Conformation Halter, English, Western, Games classes), Attica Rodeo & Show Association, Inc, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043, Sandy Brewer (585-493-3471) *Wyoming County*
- May 9 Allegany Saddle Dusters Pointed Game Show, Allegany County Fairgrounds, Angelica, NY Cindy (585-268-5647 or Tara (585-593-1156) *Allegany County*
- May 11 Barrel Racing, pointed with BRWNY, Stagecoach West, Irving, NY Kathy Wells (716-992-4414), Linda Watroba (716-337-0460) Chautauqua *County*
- May 12-13 Walter Zettl Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) *Allegany County*
- May 13 Barrel Racing, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY Kelly Foster (585-591-2124) *Wyoming County*
- May 14 Cattle Penning, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY *Wyoming County*
- May 15 Open Horse Show, Rushford Rodeo & Horse Show Corp., Bel-Max Arena, Rushford, NY John Simpson (585-437-5433) *Allegany County*

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- May 15-16 Parelli Natural Horsemanship – Love, Language & Leadership Seminar, Erie County Fairgrounds, Hamburg, NY www.parelli.com (1-800-642-3335) **Erie County**
- May 16 Team Penning, P.M. Saddle Club, McKean County Fairgrounds, Smethport, PA. Mick Cooper (814-887-5339), Dave Okerlund (814-778-5331), Mike Cooper (585-968-0081) **McKean County**
- May 16 AHANY Open All Breed Show, Stagecoach West, Irving, NY Jen Fry (716-675-7834 **Chautauqua County**
- May 16-21 Certified Horsemanship Association: Riding Instructor Certification Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) **Allegany County**
- May 18 Barrel Racing, pointed with BRWNY, Stagecoach West, Irving, NY Kathy Wells (716-992-4414), Linda Watroba (716-337-0460) **Chautauqua County**
- May 20 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316), Mike or Lynette Reynolds (585-493-3498. **Allegany County**
- May 21 Cattle Penning, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY **Wyoming County**
- May 22 Big Loop Hunter Pace, Eldred, PA Jo Ann Squier (585-624-1853, www.chandellefarm.com click on “Big Loop” **McKean County**
- May 22 WW Big Rock Ranch 2004 Team Penning, , Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254) pwlogging@netsync.net **Potter County**
- May 22 Erie County 4-H Training Show, Erie County Fairgrounds, Hamburg, NY Linda Wieland (716-685-2540) **Erie County**
- May 23 Grandview Farms “First Time” Horse Owners Orientation clinic, Grandview Farms, Maple Grove Road, Bemus Point, NY Dawn Samuelson (716-386-2419), Lori Conti (716-386-2299), cougarlou64@alltel.net **Chautauqua County**
- May 23 Windy Pines Open English, Western & Game Show, 2922 Two Rod Road, East Aurora, NY information (716-652-7883 or 716-537-2616) **Erie County**

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- May 25 Barrel Racing, Pointed with BRWNY, Stagecoach West, Irving, NY Kathy Wells (716-992-4414), Linda Watroba (716-337-0460) **Chautauqua County**
- May 27 Empire Barrel Racing Association & Pole Bending, Pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316), Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- May 28 Cattle Penning, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY **Wyoming County**
- May 28 Gaming Show, P.M. Saddle Club, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121), Stephanie Okerlund (814-642-9457), Bob Okerlund (814-778-5272) **McKean County**
- May 28 Windy Pines Game Show, 2822 Two Rod Road, East Aurora, NY, information (716-652-7883 or 716-537-2616) **Erie County**
- May 29 WW Big Rock Ranch 2004 Game Show, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254) pwlogging@netsync.net **Potter County**
- May 30 Open Horse Show, P.M. Saddle Club, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121), Stephanie Okerlund (814-642-9457), Bob Okerlund (814-778-5272) **McKean County**
- May 30 AHANY Open All Breed Show, Stagecoach West, Irving, NY, Jen Fry (716-675-7834) **Chautauqua County**
- May 30 Watson's Tack Auction, held for Allegany Saddle Dusters, along with ASD's Poker Run/Trail Ride, at Steve Middaugh's, Route 19N, Belfast, NY Cindy (585-268-5647), Nicci (585-268-7199) **Allegany County**
- May 31 Memorial Day Parade, Belfast, NY Mounted groups welcome. Contact Allegany Saddle Dusters for further information. See above. **Allegany County**
- June 1 Barrel Racing, pointed with BRWNY, Stagecoach West, Irving, NY Kathy Wells (716-992-4414), Linda Watroba (716-337-0460) **Chautauqua County**
- June 2-4 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) **Allegany County**

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- June 3 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-492-6316), Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- June 4 Cattle Penning, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY 14011 **Wyoming County**
- June 4 Grand View Farms One Day Clinic: In-Hand Trail Class, Grand View Farms, Maple Grove Road, Bemus Point, NY, Dawn Samuelson (716-386-2419), Lori Conti (716-386-2299) **Chautauqua County**
- June 5 Allegany County Saddle Dusters Parade, Cuba, NY – part of Cuba Dairy Week celebrations, Cindy(585-268-5647), Nicci (585-268-7199) **Allegany County**
- June 5 United States Equestrian Federation/United States Dressage Federation recognized/pointed Dressage Competition, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) **Allegany County**
- June 6 Long Ears and Friends Driving Club 1st Annual Fun Show, Bel-Max Area, Rushford, NY 14777, Judy Kempston (585-493-2013), Mark Yount (585-322-9229), Charlene Fast (585-786-0519) **Allegany County**
- June 8 Barrel Racing, pointed with BRWNY, Stagecoach West, Irving, NY, Kathy Wells (716-992-4414), Linda Watroba (716-337-0460) **Chautauqua County**
- June 10 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY, Gary or Dawn Perkins (716-942-6316), Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- June 11 Cattle Penning, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY 14011 **Wyoming County**
- June 11-13 AHANY (Arabian Horse Association of New York) Eastern Classic Horse Show, Pointed with Arabian Horse Association & United States Equestrian Federation “A” rated, Batavia Downs, Batavia, NY Marlene Kriegbaum (716-655-1536, mkriegbaum@adelphia.net) **Genesee County**
- June 12 WW Big Rock Ranch 2004 Team Penning, Route 44, Shinglehouse, Pa, Phil or Kathy Williams (814-697-7254, pwlogging@netsync.net) **Potter County**

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- June 12 Horse Show, conformation then English, Western & Games, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY 14011 Sandy Brewer (585-493-3471) **Wyoming County**
- June 13 Windy Pines Open English, Western & Game Show, 2922 Two Rod Road, East Aurora, NY (716-652-7883 or 716-537-2616) **Erie County**
- June 13 Allegany County Saddle Dusters pointed Game Show, Allegany County Fairgrounds, Angelica, NY Cindy (585-268-5647) or Tara (585-593-1156) **Allegany County**
- June 15 Barrel Racing, pointed by BRWNY, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua County**
- June 17 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316), Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- June 18 Windy Pines Game Show, 2922 Two Rod Road, East Aurora, NY (716-652-7883 or 716-537-2616) **Erie County**
- June 18 Cattle Penning, Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- June 19 WW Big Rock Ranch 2004 Game Show, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- June 19 Rushford Rodeo & Horse Show Corporation – Open Horse Show (English, Western & Games), pointed with RRHSC, Bel-Max Arena, Rushford, NY John Simpson (585-437-5433) **Allegany County**
- June 19 Big Loop Hunter Pace (series), Big Loop Farm, Eldred, PA Jo Ann Squier (585-624-1853 or www.chandellefarm.com click on “Big Loop”) **McKean County**
- June 19 Sardinia Saddlers 4-H Horse Show, pointed with 4-H, Erie county Fairgrounds, Hamburg, NY Jennifer Barber (716-496-7586) **Erie County**
- June 20 P.M. Saddle Club Team Penning, McKean County Fairgrounds, Smethport, PA Mick Cooper (814-887-5339) or Dave Okerlund (814-778-5331) or Mike cooper (585-968-0081) **McKean County**
- June 22 Barrel Racing, pointed by BRWNY, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua County**

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- June 23-26 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) *Allegany County*
- June 24 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316) Mike or Lynette Reynolds (585-493-3498) *Allegany County*
- June 25 P.M. Saddle Club Gaming Show, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121) or Stephanie Okerlund (814-642-9457) or Bob Okerlund (814-778-5272) *McKean County*
- June 25 Cattle Penning, Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 *Wyoming County*
- June 26 WW Big Rock Ranch 2004 Team Penning, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) *Potter County*
- June 26 South Towns Young Rider's 4-H Show, Erie County Fairgrounds, Hamburg, NY Linda Wieland (716-685-2540) *Erie County*
- June 27-Jul 2 Houghton College Riding Camp, Family Week, 9823 School Farm Road, Houghton, NY Michelle LaBarre (585-567-8142 or Michelle.LaBarre@houghton.edu) *Allegany County*
- June 27 P.M. Saddle Club Open Horse Show, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121) or Stephanie Okerlund (814-642-9457) or Bob Okerlund (814-778-5272) *McKean County*
- June 27 Lou Eibl Corral Open Horse Show, Windy Pines Farm, 2922 Two Rod Road, East Aurora, NY (716-537-2616 or 716-652-7883 or 716-496-7221) *Erie County*
- June 27 Open All Breed Horse Show, (Halter, Showmanship, English, Western, Games) Stagecoach West, Routes 5 & 20, Irving, NY Kim Poehlmann (716-735-6542) *Chautauqua County*
- June 29 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) *Chautauqua County*
- July 1 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316) Mike or Lynette Reynolds (585-493-3498) *Allegany County*

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- July 2 WW Big Rock Ranch 2004 Game Show, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- July 2 Cattle Penning, Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- July 3 WW Big Rock Ranch Trail Ride, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- July 3 WW Big Rock Ranch Tack Sale, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- July 3 WW Big Rock Ranch 2004 Team Penning, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- July 3 AHANY Open All Breeds Show, Stagecoach West, Irving, NY Jen Fry (716-675-7834) **Chautauqua County**
- July 4 Allegany County Saddle Dusters Parade – for Independence Day - Andover, NY Cindy (585-268-5647) or Nicci (585-268-7199) **Allegany County**
- July 4 “Fun on the 4th” Open Horse Show (English, Western, Walk-Trot, Fun Games), Sardinia Town Park, Sardinia, NY Judy Feine (716-496-5551 or sasiequine@juno.com) **Erie County**
- July 4 – 9 Houghton College Riding Camp Co-Ed Week, 9823 School Farm Road, Houghton, NY Michelle LaBarre (585-567-8142 or Michelle.LaBarre@houghton.edu) **Allegany County**
- July 6 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua County**
- July 8 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316) Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- July 9 Cattle Penning, Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- July 10-16 Houghton College Riding Camp, Girls Week 1, 9823 School Farm Road, Houghton, NY Michelle LaBarre (585-567-8142 or Michelle.LaBarre@houghton.edu) **Allegany County**

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- July 10 Horse Show (Conformation, English, Western, Games) Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY
Sandy Brewer (585-493-3471) **Wyoming County**
- July 11 P. M. Saddle Club Team Penning, McKean County Fairgrounds,
Smethport, PA Mick Cooper (814-887-5339) or Dave Okerlund (814-778-
5331) or Mike Cooper (585-968-0081) **McKean County**
- July 13-14 Walter Zettl Dressage Clinic, Houghton College Equestrian Center, 9823
School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-
498-2170 or Joanne.Young@houghton.edu) **Allegany County**
- July 13 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy
Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua
County**
- July 15 Empire Barrel Racing Association & Pole Bending, EBRA pointed, Hoss
Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316), Mike or
Lynette Reynolds (585-493-3498) **Allegany County**
- July 16 Windy Pines Game Show, 2922 Two Rod Road, East Aurora, NY (716-
652-7883 or 716-537-2616) Erie **County**
- July 16 Cattle Penning, Attica Rodeo & Show Association, Exchange Street
Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- July 16-18 Allegany County Saddle Dusters Trail Ride at Sugar Hill (near Watkins
Glen), bring dish to pass. Shelly (585-237-5150) or Cindy Davis (585-268-
5647) Organized from **Allegany County**.
- July 18-23 Houghton College Riding Camp, Girls Week 2, 9823 School Farm Road,
Houghton, NY Michelle LaBarre (585-567-8142 or
Michelle.LaBarre@houghton.edu) **Allegany County**
- July 20 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy
Wells (716992-4414) or Linda Watroba (716-337-0460) **Chautauqua
County**
- July 22 Empire Barrel Racing Association & Pole Banding, EBRA pointed, Hoss
Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316), Mike or
Lynette Reynolds (585-493-3498) **Allegany County**
- July 23 P.M. Saddle Club Gaming Show, McKean County Fairgrounds,
Smethport, PA Ginny Eppley (814-887-4121) or Stephanie Okerlund
(814-642-9457) or Bob Okerlund (814-778-5272) **McKean County**

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- July 23 Cattle Penning, Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- July 24 WW Big Rock Ranch 2004 Team Penning, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- July 25-30 Houghton College Riding Camp, Girls Week 3, 9823 School Farm Road, Houghton, NY Michelle LaBarre (585-567-8142 or Michelle.LaBarre@houghton.edu) **Allegany County**
- July 25 Windy Pines Open English, Western & Game Show, 2922 Two Rod Road, East Aurora, NY (716-652-7883 or 716-537-2616) **Erie County**
- July 25 P.M. Saddle Club Open Horse Show, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121) or Stephanie Okerlund (814-642-9457) or Bob Okerlund (814-778-5272) **McKean County**
- July 27 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua County**
- July 28-31 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY Jo-Anne Young (585-567-8142 or 716-498-2170 or Joanne.Young@houghton.edu) **Allegany County**
- July 29 Empire Barrel Racing Association & Pole Bending, EBRA pointed, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316), Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- July 31 Big Loop Hunter Pace, Big Loop Farm, Eldred, PA JoAnn Squier (585-624-1853 or www.chandellefarm.com and click on Big Loop) **McKean County**
- July 31 WW Big Rock Ranch 2004 Game Show, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- July 31 Rodeo (Qualifiers must have ridden in previous 5 Fridays to participate), Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- July 31 Year End Awards Show, Erie County Fairgrounds, Hamburg, NY JoAnne Campbell (716-941-4942) **Erie County**

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- Aug 1-6 Houghton College Riding Camp, Girls Week 4, 9823 School Farm Road, Houghton, NY Michelle LaBarre (585-567-8142 or Michelle.LaBarre@houghton.edu) *Allegany County*
- Aug 3 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) *Chautauqua County*
- Aug 5 Empire Barrel Racing Association & Pole Bending, EBRA pointed, Hoss ridge, Centerville, NY Gary or Dawn Perkins (716-492-6316) Mike or Lynette Reynolds (585-493-3498) *Allegany County*
- Aug 6-8 47th Annual Rodeo, Attica Rodeo & Show Association, Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 Wyoming County
- Aug 7-8 Candy Apple Classic AQHA Shows & Futurities, pointed with AQHA, WNYQHA, ESQHA, Erie County Fairgrounds, Hamburg, NY *Erie County*
- Aug 8 Allegany County Saddle Dusters Pointed Game Show, Allegany County Fairgrounds, Angelica, NY Cindy (585-268-5647) or Tara (585-593-1156) *Allegany County*
- Aug 10 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells, (716-9924414) or Linda Watroba (716-337-0460) *Chautauqua County*
- Aug 12 Empire Barrel Racing Association & Pole Bending, EBRA pointed, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316), Mike or Lynette Reynolds (585-493-3498) *Allegany County*
- Aug 13 WW Big Rock Ranch 2004 Game Show, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) *Potter County*
- Aug 13-15 Allegany Saddle Dusters Scavenger Hunt/Trail Ride, Phillips Creek State Land, Belmont, NY (Bring dish to pass) Cindy (585-268-5647) or Nicci (585-268-7199) *Allegany County*
- Aug 14 WW Big Rock Ranch 2004 Team Penning, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) *Potter County*
- Aug 17 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) *Chautauqua County*

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- Aug 19 Empire Barrel Racing Association & Pole Bending, EBRA pointed, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-492-6316) or Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- Aug 20 WW Big Rock Ranch Team Penning, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- Aug 20-22 Erie County Fair, multiple types of equestrian competitions, Hamburg, NY Lloyd Longnecker (716-867-5643) **Erie County**
- Aug 21 Horse Show (Conformation, English, Western, & Games) Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- Aug 24 Cattle Penning, Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- Aug 25-28 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or joanne.young@houghton.edu) **Allegany County**
- Aug 26 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316) or Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- Aug 28 Big Loop Hunter Pace, Eldred, PA JoAnn Squier (585-624-1853 or www.chandellefarm.com and click on "Big Loop") **McKean County**
- Aug 31 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua County**
- Sept 1-2 Walter Zettl (Olympic coach) dressage clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or Joanne.Young@houghton.edu) **Allegany County**
- Sept 2 Empire Barrel Racing Association & Pole Bending, pointed with EBRA, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316) or Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- Sept 3 P. M. Saddle Club Gaming Show, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121) or Stephanie Okerlund (814-642-9457) or Bob Okerlund (814-778-5272) **McKean County**

Smart Development for Quality Communities

- Sept 3-5 Silver Spur All-Arabian Show, pointed with Arabian Horse Association and USEF "A" rated, Erie County Fairgrounds, Hamburg, NY Marlene Kreigbaum (716-655-1536 or mkriegbaum@adelphia.net) **Erie County**
- Sept 5 P.M. Saddle Club Open Horse Show, McKean County Fairgrounds, Smethport, PA Ginny Eppley (814-887-4121) or Stephanie Okerlund (814-642-9457) or Bob Okerlund (814-7788-5272) **McKean County**
- Sept 7 Barrel Racing, BRWNY pointed, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua County**
- Sept 9 Empire Barrel Racing Association & Pole Bending, EBRA pointed, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316) or Mike or Lynette Reynolds (585-493-3498) **Allegany County**
- Sept 10 Windy Pines Game Show, 2922 Two Rod Road, East Aurora, NY (716-652-7883 or 716-537-2616) **Erie County**
- Sept 11 Open Horse Show, pointed with RRHSC, Rushford Rodeo & Horse Show Corporation, Bel-Max Arena, Brooks Avenue, Rushford, NY John Simpson (585-437-5433) **Allegany County**
- Sept 11 Horse Show (Conformation, English, Western, Games), Attica Rodeo & Show Association, Inc., Exchange Street Arena, P.O. Box 58, Attica, NY 14011-0043 **Wyoming County**
- Sept 11 WW Big Rock Ranch 2004 Team Penning, Route 44, Shinglehouse, PA Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) **Potter County**
- Sept 12 Allegany County Saddle Dusters Pointed Game Show, Allegany County Fairgrounds, Angelica, NY Cindy (585-268-5647) or Tara (585-593-1156) **Allegany County**
- Sept 14 Barrel Racing, pointed with BRWNY, Stagecoach West, Irving, NY Kathy Wells (716-992-4414) or Linda Watroba (716-337-0460) **Chautauqua County**
- Sept 15-18 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or Joanne.Young@houghton.edu) **Allegany County**
- Sept 16 Empire Barrel Racing Association & Pole Bending, EBRA pointed, Hoss Ridge, Centerville, NY Gary or Dawn Perkins (716-942-6316) or Mike or Lynette Reynolds (585-493-3498) **Allegany County**

Smart Development for Quality Communities

- Sept 18 WW Big Rock Ranch 2004 Game Show, Route 44, Shinglehouse, PA
Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net)
Potter County
- Sept 19 Windy Pines Open English, Western & Game Show – Rivendell Show,
2922 Two Rod Road, East Aurora, NY (716-652-7883 or 716-537-2616)
Erie County
- Sept 19 P.M. Saddle Club Team Penning, McKean County Fairgrounds,
Smethport, PA Mick Cooper (814-887-5339) or Dave Okerlund (814-
778-5331) or Mike Cooper (585-968-0081) McKean County
- Sept 25 Big Loop Hunter pace, Big Loop Farm, Eldred, PA JoAnn Squier (585-
624-1853 or www.chandellefarm.com and click on “Big Loop”)
McKean County
- Sept 25 WW Big Rock Ranch 2004 Team Penning, Route 44, Shinglehouse, PA
Phil or Kathy Williams (814-697-7254 or pwlogging@netsync.net) Potter
County
- Oct 1-2 Allegany County Saddle Dusters Trail Ride, Dish to Pass, Carlton Hill,
Wyoming, NY Shelly (585-237-5150) or Cindy (585-268-5647)
Allegany County event, held in Wyoming County
- Oct 2 Homecoming Horse Trial & Dressage Competition, Houghton College
Equestrian Center, 9823 School Farm Road, Houghton, NY 14744
(entries due by September 27) Jo-Anne Young (585-567-8142 or
Joanne.Young@houghton.edu) Allegany County
- Oct 8 Windy Pines Game Show, 2922 Two Rod Road, East Aurora, NY (716-
652-7883 or 716537-2616) Erie County
- Oct 10 Allegany County Saddle Dusters Game Fun Show, Allegany County
Fairgrounds, Angelica, NY Cindy (585-268-5647) or Tara (585-593-
1156) Allegany County
- Oct 16 Big Loop Hunter pace, Big Loop Farm, Eldred, PA JoAnn Squier (585-
624-1853 or www.chandellefarm.com and click on “Big Loop”)
McKean County
- Oct 17 Windy Pines Open English, Western & Game Show, 2922 Two Rod Road,
East Aurora, NY 14052 (716-652-7883 or 716-537-2616) Erie County

Smart Development for Quality Communities

- Oct 20-23 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744
Jo-Anne Young (585-567-8142 or Joanne.Young@houghton.edu)
Allegany County
- Nov 13 Houghton College Equestrian Program Ride-A-Test Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or Joanne.Young@houghton.edu) *Allegany County*
- Nov 17-20 Carel Eijkenaar Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or Joanne.Young@houghton.edu) *Allegany County*
- Nov 22-23 Walter Zetl Dressage Clinic, Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or Joanne.Young@houghton.edu) *Allegany County*
- Dec 11 Houghton College Christmas Fun Show (English, Western & Games), Houghton College Equestrian Center, 9823 School Farm Road, Houghton, NY 14744 Jo-Anne Young (585-567-8142 or Joanne.Young@houghton.edu) *Allegany County*

Appendix G

Websites

Websites for references to Cattaraugus county research and further resources and information:

Cattaraugus County Websites:

www.chamber.franklinvilleNY.org Franklinville Area Chamber of Commerce

www.littlevalleyriders.com Little Valley Rider's Club

www.ellicottvilleroдео.com information on the annual rodeo held at Sommerville Stables in Ellicottville, NY

www.northstarfarm.com website for Jean Flagler's Paint horse business in Perrysburg

www.rrduderanch.com website of the Recreation Ranch in East Otto, NY

Equestrian Organization Websites:

www.nyshc.org website for the New York State Horse Council, source of information about NYS laws and bills that affect horses, horse-related activities and horse owners; active group that works and lobbies to effect improvements in trails accessible to the public, better laws to promote the horse industry and protect the rights of horse owners.

www.usdf.org official website for the United States Dressage Federation, source of educational information about dressage, competitions, etc.

www.nass.usda.gov/ny information about the 2000 USDA Equine Survey can be found at this website

Equine Insurance Websites:

www.agrinish.com 1-800-821-5558 Agri-Risk Services, Inc. Insurance for Horses, Trainers, Farms, clubs

www.BroadstoneEquine.com Broadstone Equine Insurance Agency, USEA Official Equine Insurance Provider, 888-687-8555 International Transit, Commercial Liability, clubs & Events

www.horse-insurance.com Horse Insurance Specialists, Inc. Stable Liability; Loss of Use; Care, Custody & Control; Farm owners; Horse Club Liability; Horse Show Liability; Horse Owner Liability. 800-346-3271

Licensing and Standards Websites:

www.cha-ahse.org Certified Horsemanship Association, the association for horsemanship safety and education, 5318 Old Bullard Road, Tyler, TX 75703
800-399-138 Resource for industry standards for instruction, facilities and equipment, horse care

www.equestrian.org official website for the United States Equestrian Federation, source of rules, standards, licensing of officials, granting of national recognition of competitions in hunters, jumpers, dressage, eventing, and breed shows (such as Morgans, Paso Finos, Hackneys, Andalusians, etc.)

Planned Equestrian Community Websites:

Sarah's Way: <http://www.carriage-barn.com/sw.html>

Have It All: <http://uplandfarm.com/haveitall.htm>

Will Rogers: <http://willrogerseqranch.com>

Trail Development Websites:

Fort Erie: <http://www.vaxxine.com/forterieonca/townhall/whatsnew/inides.html>

Hodgemoor Riding Association (UK): www.hodgemoor.org.uk/riders/home/html

Roxbury Horse Association: <http://hometown.aol.com/roxburyhorseassc/rhahome.htm>

APPENDIX H

January 2001

Volume 5.1

Blue Ribbon Consulting, LDO, LLC 273 Poor Farm Road, New Ipswich, NH 03071 603-878-1694 E-mail: Lisa@horseconsulting.com

Blue Ribbon Business

Business Management and Leadership Topics for the Horse Industry



SMALL BUSINESS MANAGEMENT

Healthy, Wealthy and Wise

Financial Strategies for a Sound Horse Business

Just as you are considered to be an individual and separate from other individuals, your horse business is considered to be an entity of its own, separate from you. Just as your blood circulates through your veins and keeps you alive, cash runs through your business and is what keeps it alive. If there isn't enough cash to keep circulating, you'll find your horse business losing its feet. The following financial strategies will assist you in keeping your horse business alive and sound.

- 1) *Keep your personal and business records separate.* Establish separate banking accounts for both, and don't co-mingle bill payment.
- 2) *Know thyself.* What are your own comfort levels for risk? Talk this over with an attorney and accountant to determine what form of business is best for your enterprise. A sole proprietorship is the simplest form, but in this form of business you as the owner assume all the risks of your business. If you organize under another form of business, your personal financial risk is minimized.
- 3) *Conduct a financial analysis of your horse business.* A financial analysis examines the trends that your business is experiencing. To do this you'll need:
 - ~ at least 3 years of balance sheets and income statements. This is a good way for you to make friends with these financial statement tools too. You wouldn't groom a horse without a hoof pick, so don't try to run your business without these basics either;
 - ~ one year cash flow projection, broken down by month;
 - ~ history of your horse business;
 - ~ history of the horse industry and your sector in it;
 - ~ any data to make comparisons to others in the same line of business.

You will use this information to examine your business by comparative financial statements

(categorizes by dollars), common size financial statements (categorizes by %), and ratio analysis.

Ratio analysis reveals the relationships of two financial categories. Contrary to many people's perception, numbers are not mechanical, and don't necessarily mean one thing or another. A ratio analysis provides clues and symptoms of the underlying conditions of your horse business. This analysis can point to an area needing further analysis. Ratios can be thought of as flags – green, yellow, and red.

- 4) *Understand your cash flow cycle.* You may do the math to figure out that annually your revenue will generate a profit for your horse business. A cash flow projection asks you to take a realistic look at when the money comes in and when it goes out, or the way cash moves through your horse business. If you're required to make big payments early in the year, for insurance or hay for example, and your income isn't generated until 4 months later when the weather is good, you will experience a cash flow crisis unless you've made prior plans for short-term coverage of this expense. This short-term debt coverage will most likely cost you something, in terms of interest, which then has an effect on your profitability. If you haven't taken this added expense into consideration in your pricing, you may discover that your margin is much narrower than you originally projected. Remember that your income tax is paid with your profit, but your BILLS are paid with cash! The key to good cash flow management is to remain solvent at all times. Prepare three estimates: low, high and most likely. Be conservative when estimating cash receipts, and liberal when estimating cash disbursements. Signs of good cash flow are that costs are in order, sales and collections are working together, and your horse business profit margins are protected. Signs of bad cash flow are decreasing liquidity (refers to the ability to turn assets into cash), excessive short-term debt, missed discounts on payments, and slow collections.
- 5) *Construct a budget and use it.* If you've put your cash flow projections together you really have

accomplished the construction phase. Review your budget monthly. Is there a large variation in your projection and reality? If so, why? Have you included a line item to account for money that you'll put aside for emergencies, and to replace equipment? All businesses encounter unexpected expenses, but if you plan ahead for these occasions they will be easier to work through, and your business will survive. If you're experiencing many unexpected expenses, your budget was not constructed with enough knowledge and research. Another point to remember is that your budget will grow with your business.

- 6) *Evaluate your operating expenses.* How can you reduce these? Any reduction you make here adds to your bottom line. Ideas here include:
 - ~Can you reduce your long distance phone bill by sending email for some communications that you previously would have phoned?
 - ~Are your insurance rates the best you can get for a reliable product? Do some comparison-shopping close to renewal time, but remember to compare apples to apples.
 - ~Can you make your marketing money work more effectively for you, or better yet, find ways to get the exposure you need for less? Check with your professional associations for collaborative opportunities they may offer. Consider establishing cooperative advertising with some of your peers. Contact your local trade journal to see if they will establish some cooperative efforts.
 - ~How can you use the internet to increase your operating efficiency? Do you publish a newsletter that you can distribute on-line instead of in hard copy, thus saving paper and postage costs? Have you looked into free list serves that can help you with this? Remember that if you distribute this way, that it must be with the recipient's prior permission. How about ordering your office supplies on-line? Many stores offer free delivery, which saves you travel time and gas money.



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LDO, LLC
 273 Poor Farm Road
 New Ipswich, NH 03071

~How's your inventory? Do you store too much grain and hay at one time, so that some of it gets spoiled and needs to be thrown out? Do you have extra tack sitting around getting moldy because it never gets used? If you sell tack or other products, does it turn over in a timely fashion? You don't want your money tied up in a product that doesn't sell, just as you don't want to run out of one that does.

- 7) *Collect what's owed to you regularly.* Do you give credit to your clients and customers? If so, how are your collections? Do you invoice on a regular basis? Do you have many accounts that are way overdue? Your accounts receivables count towards your revenue, but not if you can't collect. It's not money in the bank until it's at least money in your pocket!
- 8) *Look for help.* If the financial end of the business is not the part that comes naturally to you, get help. If you don't have enough hours in the day, get help. The Small Business Development Center and SCORE will provide free assistance with some of these projects. Check with your professional associations to see what they offer. You may find an MBA candidate that will work for you on a project basis for a low fee. You can also hire consultants and accountants to assist you.

The bottom line is this: Have a financial strategy, review it regularly, make readjustments as needed, and get help. As your business grows you'll be considered a horse business that's healthy, wealthy, and wise!

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Blue Ribbon Business

Business Management and Leadership Topics for the Horse Industry



SMALL BUSINESS MANAGEMENT

Top Ten Horse Business Concerns

Do you sometimes feel all alone running your horse business? You've discovered how difficult it can be to get away from your daily business demands in order to connect with your peers and colleagues. You know what you're dealing with for issues in your horse business. But what about everybody else? Are they experiencing the same problems, or have you somehow gone off track without realizing it?

Through a poll conducted at horse seminars, workshops and other equine-related meetings over the last 18 months, the following issues emerge as the Top Ten Concerns.

1) Finding and training employees - Horse businesses are generally labor intensive. Those horses that we love and are so passionate about are a 24/7 proposition. The work to care for them is hard physical labor no matter what the weather is like. Not only do the employees need to be able to handle the physical labor, they also need to understand horses well enough to handle them safely for basic care needs.

Some horse businesses resign themselves to constant turnover for these basic labor jobs. Others understand that there may be some turnover until that rare person comes along that is interested in working on a long-term basis. Once that person has surfaced, these horse businesses do their best to reward them and provide incentives for keeping them. Health benefits, vacation, and flexible work hours for emergencies are a few ideas. Providing farm clothing (like a polo shirt or jacket with the farm logo), transportation to shows, lessons, or use of a horse, and other continuing education opportunities are other incentives.

2) Generating revenue and managing the money for financial viability - Or in other words "cash flow." You can't survive without this ability. It really is the blood of your business. If all your money comes in when it's supposed to, and that amount is more than the bills that are due, then you're golden. But it doesn't always happen that way. There may be some months that your business is slow - perhaps the winter months in colder climates because you can't give lessons to your boarders if you don't have an indoor. Or if you have a breeding stallion, you will also experience seasonal fluctuation. Or

if you own a horse facility in the southern part of the country, you could fill it three times over in the winter, but it's a ghost town in the summer.

There may be months that your expenses spike. Do you buy your hay all at once during the summer? Do you get a tractor-trailer load of bagged bedding? It's easy to see how there may be some months during the year that you experience a negative cash flow, and you must be prepared for this. Preparing a cash-flow projection will give you a leg up to seeing when these fluctuations will occur. Knowing this ahead of time, you can determine short-term financing options, rather than be caught off guard. One method would be to negotiate payment to the supplier on terms. Or you may decide to write yourself a short-term loan on your farm credit card. Be sure to negotiate the lowest interest rates possible in either case.

3) Insurance - Can't live without it, but you feel "insurance poor," and it shapes most of what you do. You are well advised to do your homework in this arena, and find a reliable source that gives you good service. Don't ever make assumptions about what you are covered for - always ask your agent, and ask them to put it in writing and/or show you in the policy. If you are planning any new programs, or thinking about adding onto your services, check with your agent before you do. You may be adding something that needs additional coverage, and you will want to add that cost to your pricing.

Yes, we all know horse businesses that operate without insurance too. Many of these businesses are able to charge less for their services because of this. Although it may sometimes seem attractive to abandon this expense, realistically you are accepting a very big risk. One accident could be what shuts your business down when you are unable to absorb the cost of the loss - be it a fire or a fallen rider. And nowadays, many discerning consumers are asking about what coverage your horse business carries.

4) Finding and keeping customers - This relates to your marketing abilities. If you have a good horse product or service, but you don't get the word out to the right audience, you won't be in the horse business very long. If you don't take good care of the customers you have attracted, remember that there is always someone else out there that is willing to. To be really successful in finding and keeping your customers, step outside of your shoes as the horse business owner, and step into your prospects shoes. How will they hear about you - what publications do they read, what events do they go to,

what websites do they bookmark and go to often? Then once you've gotten a new customer treat them well by having a customer service policy for their feedback, complaints, suggestions and problem solving. According to studies, it will cost you five times more to get a new customer than it will to bring back an existing one.

5) Keeping costs down – Be sure you know what the baseline costs are to start out with. The following example illustrates the point. Many horse business owners work in another career full-time and hire horse care help. Sometimes this staff is comprised of several people that clean the stalls and/or feed. What horse business owners have often discovered upon doing the work themselves for a few weeks is that they use less bedding and that their feed bill is reduced because of one consistent person doing the feed measuring. It's not that the employees are being wasteful, rather they may all have their own variation in bedding amounts and feed portions. If you as the owner/manager have performed this work to establish the baseline, you can then determine if your help is heavy handed or skipping things that shouldn't be. Utilities can also be affected in a similar manner.

Another means to keep costs down could be to buy in bulk whenever possible. You may form an informal cooperative with other horse businesses to split commonly used supplies. Be sure to do your homework on purchases as well. Comparison-shopping is worth your effort.

6) Horse health issues – In the horse business, the horse is either the product you sell or the primary tool to the service you provide. Horse health issues are costly in two ways: the veterinarians bills may be very expensive; and the time the horse will need off to recover means maintaining the animal while it is not producing any income. If a health issue affects an entire herd, the results can be devastating to your horse business.

Proactive health management habits will keep this aspect to a minimum. Regular attention to the horse's use and fitness, worming, teeth, feet, diet and annual inoculations are worth the cost. Examining the horse at regular intervals to observe any changes in condition, behavior, or soundness can also detect a problem before it gets very far along. Beyond that, strive to keep your horse's contact limited to other horses that you know have a clean bill of health.

Even with a conscious and conscientious approach to your horse's health, there are some things that are beyond your control. The outbreak of disease such as West Nile Virus offers an example. Until the new vaccine was developed for WNV, you could take all the precautionary procedures possible, but it was still very difficult to totally rule out your horse's exposure to mosquitoes. Another example is Mare Reproductive Loss Syndrome that the industry experienced in early 2001.

7) Environmental concerns and government regulations – Water quality issues top the bill here. These relate primarily to manure management – when horses are kept in large herds; when manure is stored in a pile for long periods of time and is not part of a nutrient

management plan or composting operation; when horses are pastured on wetlands areas; when horses are allowed free access to streams and other bodies of water; when run-off from the stable area may be a problem.

Regarding government regulations, as any industry matures, it generally becomes more regulated. In many instances the horse industry has taken steps to develop professional programs and solutions to problems from within its own community, rather than have those unfamiliar with the horse industry set our stage. Still, this is an area where our industry needs stronger communication channels, more education, and greater participation by all.

8) Land issues, open space, zoning – This is a growing area of concern. Our population continues to grow, but we can't make more land. Horse keeping and enjoyment takes land, and helps supply open space because of this. The largest group of equestrians is the recreational rider, who primarily trail rides. In the context of our entire population however, equestrians are but one user group of many vying for places to ride. How to keep land available for all uses is one issue. How all the user-groups can get along and share the land is another issue.

Zoning issues relate largely to the whether horses can be kept on small tracts of land, and whether they can be kept in cities. Horses have been kept in cities for centuries for transportation and work purposes. The key to these issues lies in how the horses are managed. Land size is not as significant as care, use and exercise, and manure management. Another question that arises is whether stables are agricultural or commercial, which can also impact financing, tax implications, and resale options.

9) Making payroll - This is a subset of #2, financial viability. If you can't pay your employees, you may be headed into a backwards spiral. Without them, you can't take good care of the horses and the customers.

10) Personal health – In many small businesses, the owner is chief cook and bottle wash, wearing many hats and in some cases wearing all the hats. Obviously, maintaining good health is crucial. Do you eat a balanced diet and get proper exercise, sleep, and relaxation? If health becomes an issue, the business may experience serious setbacks and even shut down as a result. What systems do you have in place in case of a serious illness or accident? Do you have health benefits that cover your health care costs? Do you have operational and business records written down and in a place they can be easily located? Who else might be able to take over for you, at least for a short-term period? Taking good care of yourself must be a top priority, and having an alternate strategy may prevent future headaches.

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Blue Ribbon Business

Business Management and Leadership Topics for the Horse Industry



SMALL BUSINESS MANAGEMENT

Demystifying Business Planning: Concept, Customer, Cash

I hear it over and over - "I found an example of a business plan, but it really has nothing to do with horses." What is really needed here is a translation from business speak into horse business speak. The underlying issues of business planning are universal, just as the underlying fundamentals of good horsemanship. Sometimes the uninitiated believe that there is a business plan out there that has already been written, that they can grab off the shelf and run with. But there is no cookie-cutter approach to planning your horse business. Your concept itself is very subjective, and there are regional variations in costs and practices. Your concept is your "baby." Be prepared to give your baby the time and attention it deserves.

Research

As you work on your horse business plan, you will be doing lots of research. You will learn more about the horse industry and how it fits into the economy than you know now. You will learn about past trends and keep a sharp eye for developing trends, not only in the horse industry, but also with the American public in general. You'll take a look at any regulations, licenses, and other business-shaping aspects that will affect your horse business. As an industry grows and develops, it is prone to more regulation. The horse industry is no exception. Environmental, safety, and animal health and welfare issues are key areas to investigate.

You will study your competitors in depth. You may get to know them better than even they perhaps know themselves. Many horse business start-ups make the mistake of only eyeing the full-page glossy ads of prospective competitors, and then making the leap to thinking "Well these ads are EXPENSIVE! Look at how SUCCESSFUL these folks are." Dig deeper and you may find that this business owes many others lots of money. Or you may discover that it is a hobby business. In any case, you want to know more about your competitor than just how they compare to you for services and prices.

You will develop a profile of your prospective customer, one that gives you a deeper understanding of how to provide satisfaction for them and therefore success for you. Is your primary audience the youth market with a zest for competition, or perhaps the

professional woman who longed to ride as a child, or perhaps families who live the equestrian lifestyle? Each of these audiences will have some similar and some different needs. Identifying these is the start to keep them coming down the bridle path to your horse business door.

You will construct budgets to project how the money will move in your business, as well as what financial needs you may have as you grow and expand. Better to take a hard look at the numbers ahead of time than have them sneak up on you and bite you in the back. You will also examine where you will get the supplies and services that your horse business requires to operate. Hay, grain, shavings, farriers, and vets all come into play here, as well as contingency plans if needed.

As you conduct this information gathering you will make new acquaintances and discover new resources that will serve you well as your business grows. You will also discover a lot about the character of those you network with. Some are very open and sharing, with a belief that the marketplace expands with all new entrants. Others are closed, some are suspicious, and some fear that they may lose some business when you open yours. This is all more background for you about the culture and environment you will be operating in.

Peer and Professional Review

Once you have written your plan, test the waters. Ask at least one other person in a similar horse business to review it for a reality check. Choose someone that you trust, respect, and that is successful. Having it reviewed by more than one provides even more critical, and perhaps crucial, input. If horses are your strength, and the business aspects are secondary to that, having a business-oriented peer outside the industry review your plan may provide additional benefits. Since this is your baby and can be a subjective process, it is this review stage that can interject much needed objectivity. Consider what your reviewers have offered you and whether you need to re-think and reshape your plans in any way.

Try not to be in a rush when you are preparing your plan. This process can take several months to accomplish unless you can devote yourself to it entirely. For a simple straightforward business plan you will need to allocate 20-40 hours of time. The time commitment increases for more complicated concepts. Do not be discouraged or overwhelmed because of the time element. It is all well worth it. Business planning provides you valuable added depth to your decision making process.

Concept, Customer, Cash

As a horse business entrepreneur taking the first steps of developing a business plan, you will need to consider three core areas: I) Concept, II) Customer, and III) Cash.

I) Concept: This is your "dream" and why you will succeed. It covers the nuts and bolts of how your dream will be achieved.

A) Vision – This is the fun part. Be creative, think boldly, be idealistic. Where do you see your dream 10-20 years from now? At the Olympics? Breeding top winning stock? Coaching the nations best equestrians? Providing therapeutic benefits to riders and/or horses? These are but a few dreams.

B) Mission statement – Your purpose for existing simply stated and easily related

C) History – Where your business has been if expanding to the next level; how the dream originated if you are a start-up

D) Legal structure – Sole proprietorship, LLC, partnership, incorporation

E) Organization structure and management – Key people and tasks, chain of command, and qualifications that show why you will be successful with this horse business.

F) Competition – Analysis that shows who the competition is and where you fit into the herd

G) Product, service or program overview – What you are offering to the market place

II) Customer: This is who will join you in your dream, and how they will hear about your dream. It covers your market research and plan. It is here that you'll become a super sleuth, learning as much as you can from research, surveys, interviews, market tests and more.

A) Location – Where you will locate and why

B) Product features and benefits – A more intimate description of what and why; what your market advantages may be

C) Target markets - Needs and sensitivities

D) Customer demographics – Can you paint a picture of what your customer looks like, lives like, and buys like?

E) Distribution – Channels that you will utilize to get your products, services, programs to market.

F) Promotion – Business image, advertising, public relations

G) Pricing – Cost basis, competitor basis, market share basis

III) Cash: Sharpen your pencils and take off the rose-colored glasses that you put on to develop your vision and concept. This aspect is how your dream will become a reality. It covers what will be needed to get started and what will be needed as the business grows. It's important to realize that it is not unusual for a business to lose money during its start-up phase, and that for some horse businesses the start-up phase is very long and can be from 6 to 10 years. In this day and age of instant gratification, horse business plans are often written

showing the business breaking even and/or making hefty profits in year one. Do not write your plan this way merely to convince, or perhaps fool, yourself. The horse businesses that do make a profit right away may have been developing their client base at another stable or horse business prior to going on their own. Or they may have a business advantage, like they just inherited the farm mortgage-free. It is crucial to have realistic financial projections. In preparing them talk to lots of people already in the same horse business.

The other thing to realize is that just because your horse business may lose money initially, it doesn't mean that it always will. Your financial projections will also show when your horse business will become profitable, because you utilize proper planning and business management.

A) Initial investment or start-up funds –

Shows how much you need to spend before you even open the doors; will include facilities and equipment needed to start business

B) Income statement – Shows profit or loss for a specified period of time

C) Cash flow – Shows how the money will come in and go out monthly over a years time

D) Balance sheet – Shows what is owed compared to what is owned

E) Sensitivity analysis – Shows what may result if the best of all possible worlds don't happen

F) Break-even analysis – Shows how much business is needed to start to turn a profit

G) Ratio analysis as appropriate – Shows your financial aspects as % which can be more meaningful than raw numbers

These are the key components of the process. Once these aspects have been given due attention, be sure to examine the fourth "C" – Controls.

IV) Controls: Monitoring your business for performance and legal and regulatory adherence. Be sure to put this into your schedule. If you don't pause to see what is working and what isn't working, you can't make the necessary improvements. With honest evaluation you could turn your losing business into a winner, or better yet, keep your winner in the champion circle.

A) Marketing review – Ensure that you are making the most effective use of your marketing budget.

B) Legal services – Be prepared for legal situations by searching out counsel you trust.

C) Accounting services – Work with someone that understands the horse industry.

D) Record keeping – Horse health, equipment purchase and repair, employee, and other – tedious work perhaps, but these are crucial.

E) Computerization – A wonderful tool to keep track of all the above.

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Blue Ribbon Business

Business Management and Leadership Topics for the Horse Industry



PROFESSIONAL DEVELOPMENT

The Horse Professional's Code of Conduct

Wow. Proposing a Code of Conduct for horse professionals could be a daunting task. Anyone who has been part of the horse industry for many years will recognize that it is a highly diverse industry. This diversity offers a tremendous wealth not only to those that are involved for a lifetime, but also to those who participate for a shorter term. But just as it provides us with endless opportunity, it can also be the jumping off point for differing opinions, the inability to unite, and industry division. Is it possible to propose a code of conduct that applies to all disciplines and all breeds? Maybe, maybe not. The underlying question for professionals is this: How do we want others, whether lifers or short-termers, to experience and regard the industry? This question has great depth to it. The answer may prove to be a key to industry survival.

People who have had initial experiences with a professional may tend to generalize that the experience is what they will find everywhere in the horse industry. You've probably heard someone along the line say, "Well, you know how horse people can be!" Though I have countered this statement on many occasions with, "Don't you think that any group or person can be that way," this statement speaks volumes. It connotes that their experience has been perhaps inconsistent at best, and dishonest, unfair, taken advantage of, negative and back-biting at worst. The fact of the matter is that one bad apple can spoil the whole bunch. Bad apples can be found in any environment, not just the horse industry. The way a professional in any industry treats their clients and prospects is really a reflection of that individual and not the industry as a whole, though a professional is seen as an "ambassador" for their industry.

More often than not, horse professionals are very hard working and passionate about their chosen career. The work requires long hours, varied climates and environments, and the ability to work

independently. In many instances there is no boss or supervisor to provide direction or support. With these considerations in mind, the proposed Code of Conduct is meant to serve as a motivator to horse industry professionals. When days have gotten too long and tempers may have grown short, when facing an uphill challenge, when stumbling over an obstacle that came out of nowhere, when countering any negative human frailties, think of part of the Code that helps to pull you through. Imagine that you are the host or hostess for a traveler who has signed on for a luxury trip. You don't know how long they are staying for, but you sure want them to be treated well, happy with their trip, and recommend their experience to others. You, your customers, and the horse industry as a whole will all be better for it in the long run.

1) Take the High Road – How do you handle gossip? The rumor mill is an ugly place, and the best way to handle it is to stay away from it. Opinions, off handed remarks, and competitive jealousy are the mark of a weak or insecure business. If someone else tempts you into such a conversation the best response is to withdraw. Saying that you won't comment on the topic is one way. Reminding that there is always more than one side to a story is another. In some circumstances you may be able to turn the situation around to the gossiper – ask them how they know this to be true, did they have a first hand encounter or have they spoken directly with the subject of the gossip, and are they sure the situation is not taken out of context and misinterpreted. Bear in mind that most gossipers won't be convinced that their story could be wrong, off base, and/or just in poor taste.

How do you handle requests for referrals to other horse businesses? And how do you deal with it when the request deals specifically with a business that has a mixed reputation? One way to deal with this is to develop a list of horse business peers that you are comfortable referring to. Perhaps you all agree to refer to one another as a professional courtesy and networking circle. Then simply state that this is the group you can happily refer to. If

pressed beyond that, state that you don't know enough about the other businesses to make a referral. Another method for making referrals is to provide education to the inquirer. Many articles have been written about how to find a good trainer, instructor and riding facility. As a means to educate the public, you can keep copies of these articles available to hand out or mail. Be sure to ask the source for permission to distribute the article in this fashion.

2) Seek Win/Win Solutions – In most situations where there is conflict, there are more possible solutions than “I win, you lose.” Take a step back from your position. This is not easy to do. Then evaluate what you are looking for, and what the other person is looking for. There are probably ways both of you can be accommodated. Make the suggestion that there are other solutions that you both haven't considered, and take some time to explore what they might be. Try to think about it like this: I will be happy if this happens AND you will be happy if this happens, rather than I will be happy OR you will be happy but one of us has to give up. Using AND often changes perspectives enough to find a good solution for both.

3) Be Mindful of What You Project - As a horse industry professional you are a role model, whether you are aware of that or not. People look up to you and they want to emulate you. Remember too, that this principle works both ways – they either want to be like you or they point you out as an example of what not to do. The quote “If you can't be a good example, you'll have to stand as a horrible warning” states this principle very succinctly.

4) Have an Open Mind - Encounter other aspects of the industry from a learning perspective. Though you have your preference and expertise in discipline, breed, etc., it's a big horse world with much to be gained by learning from others. A learning attitude gets others to let their guard down as well, so you may communicate to one another synergistically rather than defensively. More opportunities open to you this way as well.

5) Keep the Promises You Make – Whether verbal or as part of your advertising, deliver what you say you can. If you can't deliver it, don't promise it. Think about the story of The Emperor's New Clothes. If you make grandiose statements that you can't back up about your facility, your programs, your breeding stock, or your skills, the public will see in short order that the emperor is naked.

6) Share Your Career Passion – Work to entice newcomers into the wonderful world of horses. This can be done through your horse business and/or through horse associations you may be a member of. Open Barns, speaking opportunities about the enchantment and enrichment horses offer, field trips for the local schools to a horse fair, show or other event all help to spread the good word.

Be a mentor to junior riders, trainers, and horse caretakers. Today's youth is tomorrow's future.

Offer neighborly support to a fellow professional that may be getting started. Remember that the pieces of the pie don't necessarily all get carved smaller when a new horse business opens. The pie more often becomes bigger.

7) Expand Your Knowledge of the Industry as an Industry- Time after time people are surprised to hear the importance the equine industry has in the US economy. Can you relate this information to others? If you make all or part of your living with horses, understanding the economics, as well as legislative, regulatory, environmental, and health and welfare issues that the industry faces as a whole is a professional responsibility. If we aren't aware of the industry and ready to participate in it, someone else will have the chance to make our decisions for us – and their choices may stand in opposition to ours.

8) Look Before You Leap, Listen Before You Speak – Make informed decisions about your horse business. Take the time to do adequate research when considering how to grow. After all, you don't know what you don't know, but you are apt to discover much of it through investigation. No one sets out to make bad decisions, but jumping in without doing your homework can set the stage for just that. A thoughtful approach, listening as you go, will give more weight to your words and actions.

9) Give Back to the Industry – Find a cause and get behind it. Whether it be helping your breed or sport association, volunteering to work with youth, therapeutic, or at-risk populations, contributing efforts to a rescue shelter, or participating with your state horse council your time and professional experience will be greatly appreciated. The rewarding relationships and networks you create this way may surprise you.

10) Take Good Care of Yourself! – You can't offer the best you've got to give if you never take a little time off. Horse industry work can easily consume many hours, day after day after day. It is up to you to schedule a few minutes of down time for yourself. You will be far more productive if you are refreshed than if you are burned out. Remember to structure your schedule in a way that recognizes that you've got to get up tomorrow and do this all over again.

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APPENDIX I

STATISTICS ON THE ECONOMIC IMPACT OF EQUINE AND EQUESTRIAN EXPENDITURES (NATIONAL, STATE AND LOCAL)

The Force of the Horse in the United States

(Source: American Horse Council 1996 Study; Horse Industry Alliance
Diane K. Jones, President of the New York State Horse Council 1/23/01)

National Statistics:

- One in every 35 Americans is involved with horses
- 7.1 million in total
- One of the largest industries in the USA
- National economic impact \$112.1 billion
- Supports \$1.4 million full-time jobs
- 6.9 million horses in total
- 2.9 million involved in recreational activities
- Recreational activities have a \$28.4 billion national economic impact
- Generate full-time employment for 317 thousand peoples
- \$1.9 billion taxes paid
- Median income \$60K, 38% under \$50K, 21% over \$100K

New York State Statistics:

- Economic impact \$4.8 billion
- 258 thousand people participating
- 50 thousand full-time jobs
- 146,000 horses
- Largest agricultural industry in New York
- New York State Department of Environmental Conservation (DEC) and the Office of Parks, Recreation and Historic Preservation (OPRHP) provide some of the best trail systems in the Nation

Future:

- It is projected that \$31 trillion of disposable income will be available in the next ten years.
- A major representative portion will be horse related, as 33% of American households want to become involved in riding.

USDA Equine Survey 2000 - County Breakdown for Western New York
(by Carol Schmelz, Vice President of Western Region, New York State Horse Council)

| County | Number | Acres | Density of Equines Per Square Mile | Rank in State by Numbers |
|-------------|--------|---------|---------------------------------------|-----------------------------|
| Allegany | 2,500 | 664,343 | 2.21 | 38 th |
| Cattaraugus | 3,500 | 847,426 | 2.64 | 15 th |
| Chautauqua | 3,800 | 694,709 | 3.50 | 12 th |
| *Erie | 7,200 | 674,857 | 6.83 | 2 nd |
| Genesee | 2,100 | 317,688 | 4.23 | 35 th |
| Niagara | 3,000 | 342,228 | 5.61 | 20 th |
| Orleans | 1,400 | 250,982 | 2.21 | 47 th |
| Wyoming | 1,800 | 381,638 | 3.02 | 40 th |

As far as density of equines per square mile in the eight western New York counties, you can see that Erie County is in first place followed closely by Niagara. There was only a 5% drop in the number of equines statewide in the past twelve years, however, Niagara and Wyoming counties equine populations remained stable during that interim.

Horses, owned by people located in the cities and first ring suburbs of Erie and Niagara Counties, are usually housed in the second ring suburbs. In Erie County, there are heavy concentrations of horses in Clarence, Orchard Park, and East Aurora. In Niagara County, the heaviest equine populations are in the towns of Lewiston, Royalton, Pendleton, and Lockport. These second ring suburbs, where the equine populations are the most highly concentrated, are the locations now facing the most pressure from development.

Owning horses typifies rural living. It tends to be a way of life rather than a hobby. Vacations and family outings center around horse activities and/or horse club or showing activities. In order to have their animals and lifestyle easily accessible to them, most horse owners choose to buy property outside the cities and first ring suburbs.

One way to preserve open space and reduce urban sprawl in the Buffalo/Niagara region is to designate and protect horse trails in suburban and rural areas. Bridle paths should be planned in the second ring suburbs and rural areas, which connect to parks, riding areas, horse farms and other public lands. The equine industry in New York State has an economic impact of 4.8 billion dollars. This initiative – to designate and protect horse trails – would demonstrate to horse owners that they are welcome in a community and encourage them to stay, thus protecting open space and farmland. Communities would benefit because the services that the towns are required to provide for individual homeowners and businesses would be curtailed.

More information about the 2000 USDA Equine Survey can be found at this website:
www.nass.usda.gov/ny

Horses Are Big Business In New York State:

- New York State is one of the country's most important centers for equestrian activities. It is home to some 168,000 horses worth nearly \$1.7 billion.
- Approximately 920,000 acres of land in the state are devoted for equine purposes. About half of that acreage is fenced for pasture.
- Associated assets of all equine property in New York State totals nearly 46.2 billion.
- Almost half of all the equine properties are designated as non-farm, non-commercial properties. In other words, about half of all the horses in NYS are housed on smaller private parcels of land owned by individuals and families.
- 81% of most operations in this state consider themselves to be involved with recreational or pleasure riding or driving. Approximately two thirds of these equines are used for pleasure, showing, competition, breeding, or racing.
- Overall the industry provides 11,200 jobs annually.
- There has been a 65% increase in equine related assets since the 1988 survey.
- Total expenses per equine average \$4,188 per horse per year
- Thoroughbreds and Quarter Horses dominated the field.
- Thoroughbreds had the highest average value per horse
- Followed by the Warmbloods and Standardbreds.
- The average light breed of horse is valued at \$4,950.
- Ponies increased in value to \$2,600 per head.

Information compiled from Dept. of Ag & Markets NY Equine Survey 2000
Website: www.nass.usda.gov/ny

Here is the breakdown to feed, groom, stable, & enjoy these horses each year:

New York horse owners spend:

- \$3.71 billion on land, fences, and buildings
- \$745 million on vehicles, equipment, tack, feed & supplies on hand
- \$523 million for operating expenses
- \$181 million for purchase of capital equipment
- \$118 million for tack, equipment, and clothing
- \$100.7 million on feed
- \$88.3 million for hired labor
- \$68.3 million for purchase of equipment
- \$63 million for purchase or improvement of equine related real estate
- \$54.8 million boarding and training fees
- \$49.5 million for purchase of equines
- \$32.6 million on health care services
- \$23 million on farrier services
- \$22 million on breeding fees
- \$18.8 million on bedding
- \$14.8 million on shipping and travel
- \$8 million on fuel
- \$1.1 million spent on horse trailers and shipping vans

Information compiled from Dept. of Ag & Markets NY Equine Survey 2000

Website: www.nass.usda.gov/ny

Equestrian Costs Add Up

By Bonnie Davis, Freelance Writer

There isn't a group of trail users that spends more money on their trail "vehicles" than equestrians! Like all trail users, the initial investment to purchase that "vehicle" be it shoes, bikes, snowmobiles, canoes, backpacks, and so on, is nothing compared to the overall month in, month out, year in, year out costs. The problem with a horse vs. a trail "vehicle" is that it's alive. A horse can't be ridden down a trail and then at the end of a day, forgotten.

To maintain my trail use as a horsemen, my "vehicles" - two horses named Bud and Sig-are constantly costing me money! Unlike the hiker who can toss his hiking shoes in a closet, a biker who can park his bike in a garage, or even a boater who docks his boat, an equine "vehicle" has to be housed in special areas specifically zoned for horses. And then fed. Since most cities frown on keeping horses in garages and they don't fit in closets, a board or stabling bill keeps counting up over the years. Even if one is fortunate to have property to keep the horse on, equine "upkeep", plus equipment to ride the equine "vehicle" is required. And since the equine "vehicle" won't fit in the backseat or trunk of a car, can't be towed behind another vehicle at 55 mph, and definitely won't sit in the open bed of a pickup truck, a horse trailer has to be purchased if horsemen want to ride trails within just a few miles of the barn, stable,

or pasture. Add all this money up and the equestrian trail user has quite an ECONOMIC IMPACT/VALUE in the trail users community.

About three years ago, I attended a meeting where the statement was made: "Horsemen just tear up trails. They don't contribute to trail economics!" That set me to thinking. Since my two geldings, are used exclusively for trail riding-no showing, no parades, no breeding-I went home, sat down with pencil and paper, and began figuring how much money I've spent over the last 25 years.

These figures included costs for horses, shoes, vet bills, boarding, trailers, and trucks to tow those trailers. All spent in one specific area-Santa Clara County, California. I left out costs for hauling horses to trails over 100 miles from Santa Clara County such as to National Forests, Parks, BLM lands, and out of state trails. I totaled dollars spent only in Santa Clara County because if it weren't for trails in this county, I would not have my horses boarded in Santa Clara. I would have loaded Sig and Bud up and headed to another stable somewhere else that offered trails close to the barn, plus surrounding areas that I could easily haul to.

After a couple days of number crunching, I came up with the mind boggling figure of \$215,000 for equine

"vehicle" costs, which included purchase prices, boarding, shoes, vets, and feeds required to keep Bud and Sig in shape for trail riding. Add to that costs of trailers, trucks, fuel, tires, license fees, etc., and the grand total tops \$308,000 spent over a consecutive 25 years period from 1992 to 1997! And those costs were "cheap" compared to equine "vehicle" care today!

Equine trail riders have a HUGE economic value and impact on trail economics in any county, city, or state in which they may live and trail ride. If we are to maintain and keep trails open for all trail users, other trail groups should tally not only their own dollars, but include the economics of other trail riders when figuring the dollars and cents brought into an area because of trails. We all spend money to enjoy our particular trail use. The problem for horse owners is that we as equine trail riders don't take the time to figure out our dollar values! Why? Basically because we don't want to KNOW how much money we SPEND on our equine trail partners and "vehicles".

For questions or comments, write to Bonnie Davis at PO Box 14130 Fremont, CA 94539, phone (510) 657-5239, or fax (510) 683-9162.

Source: Blue Ribbon Magazine, April 1999.

What's a Trail Really Worth?

Article and Photographs by Bonnie Davis

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Bonnie Davis

TO ADVOCATE preserving, developing, or expanding equine use on trails, horsemen have always cited rights, tradition, and recreation. That used to work if horsemen formed a united front. But with more users demanding a wider use pattern, we need to include other trail values so we can maintain a hoof-hold on trails.

And in addition to the problem of more users, there are fewer trails. At the national Rails to Trails gathering in 1993, a National Park Service official reported that the country's trail system had shrunk from more than 200,000 miles of trails to around 120,000 miles of trails.

It does the American Quarter Horse Association or the American Paint Horse Association no good to promote pleasure trail riding programs with awards, ribbons, and recognition if the Paint and Quarter Horse owners have no trails to ride.

Today the bureaucratic trail planning system usually includes the buzzwords "financial cost" and "economic impact." Trails today have become dollars and cents in budgets. Trail users must present economic impact figures on just how much money a trail or trails generate.

But when an agency begins to talk about financial costs, just what do they mean?

Financial costs are the actual dollars and cents involved in putting and maintaining a trail on the ground. This will include costs of buying trail easements or land, surveying trail routes, planners to plan the actual trail route, surveyors to map the alignment, equipment to move rocks, environmental impact reports, public hearings, notices, fences, gates, bridges, and administrative costs.

Horse trails used to be among the cheapest to develop and maintain. A horse can cover just about any terrain with minimal trail construction. Horses can use wildlife trails. A horse goes around large objects, trees, rocks, and can even cross streams or rivers in water. Although a horse tends to muck up a wet trail with hoof holes, the same horse will come along in dry weather and after a few trips over the surface, smooth it back out.

Because of the high demand for trails, there are fewer horse-only trails. Trails are now referred to as multiuse trails—horse-hiker, horse-biker, horse-hiker-biker. These new trails have become expensive because they require multiuse surfaces, multiuse minimum widths, and multiuse liability coverage.

To defend equine use on trails in cities, counties, national forests, parks and wilderness areas, economic impact

figures are needed. Economic impact figures offset financial costs and prove to officials that equine trail users not only have a tradition, a right, and a recreation benefit, but an economic impact to local, state, and federal governments as well.

Economic impact is the dollars and cents generated because of a trail. These are monies spent by trail users for trail riding. Generated dollars. Money circulated that would not be there if the trail was not there. These are the figures we horsemen have to compile and present to agencies evaluating equine use on trails and the viability of keeping a trail.

How does a group find economic impact figures? How does a group go about "dollar and centing" it? Who do you talk to?

The answers are, right in your own barn . . . on your own trails . . . among



There are two kinds of impact considerations here. Volunteers improving the trail make an economic difference. And, the animals have less environmental impact than would a heavy truck hauling in the gravel.



Horse trails are easiest to develop and maintain, because the animals operate on a dirt tread.

your own riding companions . . . with your own economic impact generated by your horse.

The majority of horses owned in this country are pleasure horses. Any breed association can provide figures on the percentage of horses they have registered that are pleasure riding and trail mounts. They aren't shown. They aren't breeding stock. They aren't race horses. They're backyard, barn, stall, paddock, corral, pasture-boarded pleasure horses. They're used for pleasure riding, on trails, anything from a system with hundreds of miles to a minisystem around a city or county park.

Unlike bikers and hikers who can go home, take off their hiking boots or park their bikes, a pleasure trail horse can't be parked and forgotten. A horse has to be fed. He has to be maintained. He has to be housed. So the biggest economic impact of a trail system is the cost of maintaining the animal used on a trail system—the horse.

Where is your horse boarded? Do you board in a barn or stable that is on or close to a trail system or park? If those trails were closed to you, would you stay in that same barn or move to another barn that is on an open trail system for horses? What do you pay per month in board bills to have your horse close to that trail system? That figure multiplied by 12 will provide the yearly total economic impact paid by you to a stable owner for boarding your horse on that trail.

At the Ed Levin County Park in Santa Clara County, Calif., 24 miles of park multiuse trails were fenced. Horsemen who had ridden in the park for the previous 24 years were reduced to an 8 a.m. opening and a dusk closing. In fact, gates were often closed at 2 and 3 in the afternoon and not unlocked for a day or two.

After a few months of complaints and counter complaints, a meeting was held with park staff, county park direc-



Economic impact figures should include estimates of the value of volunteer work. Here, volunteers use a team in an area that forbids power equipment.

tors, individuals who boarded horses around the park, park trail users, and trail users who trailered horses into the park. More than 100 horsemen attended, along with some of the stable owners. And some economic impact figures were presented to park personnel.

Nine stables near the park house more than 1,200 horses used primarily in the park for trail riding. Board bills range from \$125 up to \$250 per horse per month.

As one stable owner stated, "My place has 150 horses. More than 125 of them are ridden in the park on the trails as pleasure trail animals. I took a couple days and asked each of my boarders why they're at my place and where they ride. Most of 'em said they rode in the park and are at my place because I've got easy access into the park for trail riding. If these trails are closed or unreasonably restricted, I'm going to lose easily 95 to 125 boarders because these people are going to move someplace else so they can have a trail to ride on. Most of them don't own trailers so they can't trailer out to some other trail someplace else. I can't have that kind of a loss and stay in business.

So when those restrictions go up and those gates are locked, remember park staff is affecting not only my business but the monies I put into the county."

Using this stable's economic impact, average board bill is \$205 per horse per month. With more than 125 boarders stabling directly because of the park and trails, a dollars and cents figure of \$25,625 is generated each month from trail riders. Multiply this figure out for 12 months, and each year \$307,500 is generated as an economic impact because of the park and trails. And this is a conservative figure using only 125 boards at \$205 per month. Other boarders also use the park and trails but don't consider it as the primary reason for boarding at this stable.

Projecting my own economic impact statement, I stable two horses at another barn on the edge of Levin Park. I board there specifically because of its proximity to trails—across the pasture and I'm in the park, on a trail, and can ride park trails for 20 miles or take a county connector trail and ride for up to 100 miles. To keep my two horses in this stable, I pay \$370 a month. For 1993 alone, my economic impact to Santa

Clara County via the stable owner was \$4,440. Add the other 112 horses in this barn to my figures and the total for this barn is \$253,080 yearly. Add the other eight barns to this figure and a conservative economic impact for boarding horses around Ed Levin Park for trail riding would be several million dollars per year.

In addition to this impact of boarding, vet and shoeing bills were calculated. That came to 1 million dollars per year. Feed stores and tack stores also profit from the horse owners around Ed Levin Park. Plus there were figures on horses trailered in; all had to pay park entrance fees of \$3 to ride the trails. So these estimates were totaled at 5 million dollars per year and presented to park staff on what the trails of Ed Levin Park are really worth to Santa Clara County.

The outcome of the meeting was received about 30 days later in a letter from the director of the Santa Clara County Parks and Recreation Department, and addressed to all horsemen and stable owners who had attended the meeting. The letter stated, "After a thorough staff review, it was decided that gates in Ed Levin Park would be closed between the hours of dusk and dawn by park personnel, but will not be locked."

This was just one trail system in one park. The horseman on a trail is a visible aspect of trail use, but the economic impact of that horseman is just beginning to be realized.

Horse trailer license fees should be accounted for. Simply count the number of trailers in the area, call the department of motor vehicles for an estimate of license fees, and multiply by

number of trailers to get a yearly economic impact. A portion of license fees goes to the county or city, and part to the state. So when one horse owner sells a trailer because of lack of trails to haul to in a reasonable distance, not only do the city and county lose revenue, but the state as well.

On top of trailer fees, add the cost of fuel for the towing vehicle. And don't forget those other dollars spent by horse owners when returning from a trail ride—dinner at a local restaurant, groceries bought at the local grocery store, and so on.

In some highly populated areas, rental strings also use trails. What's the economic impact of the rent string? They pay a business license, a percentage fee, and insurance premiums to the park or trail system. They hire individuals to lead groups and maintain the property, so employment is also an economic impact when figuring a trail's worth. If the trail was closed, how much money would a park or county lose because of the closure of that rent string?

The same concept applies in national forests, parks, and wilderness areas. Is there a commercial packer or dude ranch in the area? What is the firm's economic impact on the area? Would they still be taking fishermen or hunters out if high country trails were closed to horse use?

What is the economic impact on tourist trade of the area? How much is spent in air fares getting there? In motels, restaurants? At local stores for clothing and gear? All are directly related economic impacts because of a specific horse-related service in a specific area using a specific trail.

Some businesses close to trails cater to trail users, and their very existence can be directly related to trail users. For example, a small deli-restaurant in Fremont, Calif., located on the Alameda Creek Trail, has placed hitch posts in a small grove of trees off to one side of the establishment. On a Sunday, all 18 hitch posts have horses tied to them as riders sit at picnic tables in the trees enjoying lunch.

According to the owner, Al Wilson, "I'd say 25 percent of my weekend business comes from the horsemen on this trail. I also get a lot of hikers and bikers from the other trail, but I'd never have thought a trail could help me out with business like this has. It was sort of an afterthought when we opened, and business on weekends was slow. If I lose this trail business I would definitely feel an impact. I'd probably lay off one or two of my weekend help."

So economic impact extends not only to the actual trail user but to support businesses that derive an income from the individuals who use the trail.

In addition an economic impact can be generated for the agency owning the trail. The sales of T-shirts, jackets, books, patches, plus parking fees at trail heads, sale of maps, trail permit fees, etc., are all monies derived for an agency because of the trail. If the trail wasn't there, there would be no sales.

All of the volunteer hours spent developing and maintaining trails are economic impacts, too. Those hours and the cost of hauling volunteer personnel, equipment, and volunteered stock in to do the work are economic impacts and should be calculated and documented. Volunteer economic impacts are generated dollars to keep and maintain trails with no financial cost to the agency.

As more and more users begin to venture out onto trails, there is going to be more demand for trail space. As agencies feel budget cuts and less tax monies flow in, trails are going to suffer. Trail users who want to maintain their particular trail use or expand their trail systems must look beyond the tradition, the right, and the recreation aspects of trails. Trail users with the best economic impact statistics to offset financial costs are the ones who are going to hold on to critical trail space.

Facts and figures documenting what a trail is really worth can help the equine community be among the next century's trail users.

The author lives in Fremont, Calif., and is a free-lance writer active in environmental matters. 🐾



Bulletin board notices show the multiuse nature of this trail.

WITH A SHARP PENCIL – figuring my economic value

26 years boarding minimum two trail horses to maximum five trail horses in same stable:

Direct Economic Value dollars –

\$150/mt board bill per horse:

| | | |
|---|------------|-------------|
| \$150 x 312 mts. (26 yrs) = \$46,800/horse x 2 horses | = \$93,600 | |
| \$150 x 72 mts. (6 yrs) = 10,800/horse x 2 horses | = 21,600 | |
| \$150 x 48 mts. (4 yrs) = 7,200/horse x 1 horse | = 7,200 | |
| | | = \$122,400 |

\$50/6 wks shoeing per horse:

| | | |
|---|----------|-------------|
| 26 yrs x 52 wks = 1352 wks – 6 = 225 shoeings x 2 horses = 450 x \$50 = | \$22,500 | |
| 6 yrs x 52 wks = 312 wks – 6 = 52 shoeings x 2 horses = 104 x \$50 = | 5,200 | |
| 4 yrs 2 52 wks = 208 wks – 6 = 34 shoeings x 1 horse = 34 x \$50 = | 1,700 | |
| | | = \$ 29,400 |

\$300 yr/horse for vet bills (shots, wormings, floating, emergencies):

| | | |
|---|------------|-------------|
| \$300 x 26 yrs = \$7,800/horse x 2 horses | = \$15,600 | |
| \$300 x 6 yrs = 1,000/horse x 2 horses | = 3,600 | |
| \$300 x 4 yrs = 1,200/horse x 1 horse | = 1,200 | |
| | | = \$ 16,320 |

\$20/mt supplemental feed (grain, pellets, vitamins, extra hay, etc.):

| | | |
|---|------------|-------------|
| \$20 x 312 mths (26 yrs) = \$6,240/horse x 2 horses | = \$12,480 | |
| \$20 x 72 mths (6 yrs) = 1,440/horse x 2 horses | 2,880 | |
| \$20 x 48 mths (4 yrs) = 960/horse x 1 horse | 960 | |
| | | = \$ 16,320 |

Tack, equipment, bridles, blankets, bits, repairs, etc.:

| | | |
|----------------------------|------------|-------------|
| 3 saddles | = \$ 4,600 | |
| 4 bridles | 1,200 | |
| misc. (\$500 yr x 26 yrs.) | 13,000 | |
| | | = \$ 18,800 |

With a Sharp Pencil

Page 2

Cost of horses:

| | | | |
|--|------|-------|------------|
| Two Patches (purchased in San Jose, 1969) | = \$ | 850 | |
| Chip (purchased in San Jose, 1971) | | 250 | |
| Red (purchased in Milpitas, 1972) | | 950 | |
| Sam (purchased in Hollister, 1973) | | 750 | |
| Flint (purchased in Hollister, 1973) | | 500 | |
| Quincey Que (purchased in Milpitas, 1975) | | 650 | |
| Sig's Hi Caliber (purchased in Coyote, 1989) | | 2,500 | |
| Bud (purchased in Coyote, 1989) | | 1,000 | |
| | | | = \$ 7,450 |

Totals -- \$122,400 board bills of horses
29,400 shoeing bills of horses
20,400 vet bills for horses
16,320 supplemental feed
18,800 tack, equipment, etc.
7,450 cost of horses over 26 years*

*- no resale value (horses are simply retired)

**= TOTAL DIRECT ECONOMIC VALUE TO SANTA CLARA
COUNTY BECAUSE OF TRAILS IN THAT COUNTY**

\$214,770.00

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With a Sharp Pencil

Page 3

Indirect Economic Value dollars –

(Indirect Economic Impact dollars are spent to support or expand an activity and are not required spending to maintain an activity.)

| | | |
|--|----------|---|
| 1975 Miley Horse Trailer | \$ 2,800 | |
| 1994 Featherlite Horse Trailer | 12,937 | |
| 1966 Ford Pickup | 3,800 | |
| 1985 Ford 350 Diesel Truck | 14,750 | |
| 1986 Vacationeer Camper | 9,218 | |
| | | = \$ 43,505 |
| Fuel for towing vehicles | | |
| \$75 av. X 312 mts (26 yrs) | | = 23,400 |
| Meals on the road or going/after a ride: | | |
| \$50 av. X 312 mts (26 yrs) | | = 15,600 |
| Books, maps, permits, fees: | | |
| \$150/yr x 26 years | | = 3,900 |
| Clothing (boots, hats, belts, jeans, t-shirts, etc.) | | |
| \$300/yr x 26 years | | = 7,800 |
| Totals - \$43,505 vehicle/trailer costs | | |
| 23,400 fuel costs | | |
| 15,600 meal costs | | |
| 3,900 books, maps, permits, fees | | |
| 7,800 clothing | | |
| | | = TOTAL INDIRECT ECONOMIC VALUE TO SANTA CLARA COUNTY BECAUSE OF TRAILS IN THAT COUNTY |
| | | <u>\$94,205.00</u> |

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With a Sharp Pencil

Page 4

***Total Direct and Indirect Economic Value to the horse industry
In Santa Clara County alone because of trails and pleasure trail
Riding in that area:***

| | |
|------------------------------------|-----------------------|
| <i>Direct</i> | = \$214,770.00 |
| <i>Indirect</i> | = \$ 94,205.00 |
| <i>Total Economic Value</i> | = \$308,975.00 |

(These numbers do not include 'haul out' dollars to other parks, national forests, states, etc.)

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Your Own Sharp Pencil – figuring your economic impact

Direct Economic Value dollars –

Monthly Board Bill:

\$____/mt x 12 mts. = \$_____ horse per year = \$_____

Shoeing/trims per horse:

\$____/shoring x ____ shoeing per year = \$_____ per horse = \$_____

(Shoeings/trims every 6 weeks = roughly 9 shoeing/trims per year)

(Shoeings/trims every 8 weeks = roughly 7 shoeing/trims per year)

(Shoeings/trims every 10 weeks = roughly 5 shoeing/trims per year)

Vet bills per horse:

\$____ x month (or year) = \$_____ horse per year = \$_____

Supplemental feeds per month:

\$____ x month (or year) = \$_____ horse per year = \$_____

Tack, equipment, bridles, bits, repairs, etc.:

\$____ x year = \$_____ = \$_____

Cost of horse(s):

_____ = \$ _____

_____ = \$ _____

Totals (add all columns on far right) = *Total Direct Economic Value* \$ _____

Prepared by: _____

Your own Sharp Pencil

Indirect Economic Value dollars –

Cost of trailers, towing vehicles:

| | | |
|-------|---|----------|
| _____ | = | \$ _____ |
| _____ | = | \$ _____ |
| _____ | = | \$ _____ |

Fuel for towing vehicles:

\$ _____ av. per month x 12 months = \$ _____

Meals:

\$ _____ av. Per month x 12 months = \$ _____

Books, maps, permits, etc.:

\$ _____ av. per month x 12 months = \$ _____

Clothing:

\$ _____ av. per month x 12 months = \$ _____

Totals (add all columns on right) *Total Indirect Economic Value* \$ _____

TOTAL DIRECT ECONOMIC VALUE DOLLARS = \$ _____

TOTAL INDIRECT ECONOMIC VALUE DOLLARS = \$ _____

TOTAL ECONOMIC VALUE TO YOUR COMMUNITY = \$ _____

Prepared by: _____

**A NEW GUIDEBOOK SERIES BY CATTARAUGUS COUNTY
FOR THE 21ST CENTURY**

Cattaraugus County has published a new series of guidebooks called the **Smart Development for Quality Communities Series**. These guidebooks are designed especially for Cattaraugus County and its 47 municipalities, and are advisory only. They show us how to create a new and better future. These guidebooks are:

- **Elements of a Countywide Vision**
A Guidebook Published for Cattaraugus County's Smart Development for Quality Community Series – Volume 1
- **A Design Guidebook for Towns and Villages in Cattaraugus County**
A Guidebook Published for Cattaraugus County's Smart Development for Quality Community Series – Volume 2
- **Saving Our Villages**
A Guidebook Published for Cattaraugus County's Smart Development for Quality Community Series – Volume 3
- **A New Vision for Recreation Trails in Cattaraugus County**
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A Guidebook Published for Cattaraugus County's Smart Development for Quality Community Series – Volume 8

Each guidebook in this series offers new pathways into the future. They present new knowledge for stakeholders in Cattaraugus County, showing how to promote our villages, cities and other areas that already have infrastructure, and protect our greenways and rural open spaces while promoting outdoor recreation. These guidebooks are growth-inducing, community friendly, and environmentally safe.

Cattaraugus County

A Place to Grow



*Trail Riders at Equestrian Park, Little Valley, New York
Photo courtesy of Jo-Anne O. Young*

Welcome to New York!

