

School of Environmental Design and Rural Development
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Equine Sector Development in Dufferin County: A Final Assessment Report

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Executive Summary

Develop a Sector Profile

Dufferin County could benefit from a sector profile on the local Equine industry. It has been noted that roughly 85% of horses in Ontario were not accounted for during the previous census of agriculture (Wilton & Caldwell, 2009). In our interviews we uncovered a number of businesses that are not being marketed or close to failing. Identifying “Red Flag” issues through the Business Retention and Expansion survey (BR+E) allows the County and OMAFRA to take immediate action to preserve existing operations.

A sector profile could allow Dufferin.biz to better market the industry and allow Council to create appropriate policies for the sector. Creating a sector profile can be achieved through various methods, some of which include a Business Retention and Expansion (BR+E) Program, recruiting a master’s student in planning, key informant interviews, and online surveys. Dufferin.biz needs to develop a better understanding of their needs and interests and Equine Guelph has voiced its willingness to facilitate an equine survey.

Develop County Level Guidance

Dufferin County is without an official plan, and many agricultural stakeholders could benefit from some kind of upper tier direction. As horses are not accounted for in public policy (Wilton & Caldwell, 2009), it is our recommendation that a regional Equine Committee be developed in order to give the industry a voice and provide county level guidance for future development.

Policy Communication

Farm income generated from breeding, raising, boarding, maintaining, training, or selling horses can qualify the land for the Farmland Property Tax program. Dufferin County should promote and market this opportunity.

Dufferin County could benefit by ensuring prospective land/business owners are aware of the Farmland Property Tax program and crop-share lease agreements. Increased awareness of these opportunities can increase the viability and capacity of existing

equine facilities in the county. There needs to be effective channels of communication between the Municipal Property Assessment Corporation (MPAC), OMAFRA and land owners.

Institutional Support and Partnerships

Partnerships have been proven to be effective in the development of the equine industry. Equine Guelph is an example of a successful partnership between the equine industry and an academic institution.

Dufferin County in partnership with OMAFRA can benefit in the development of workshops that educate existing and potential equine businesses of Best Management Practices (BMP) developed by OMAFRA for managing their operations' impacts on the environment; this will ensure their viability as a farm operation and aid in community relations.

Horse owners and equine operations in Dufferin County can utilize the *Horse Owner Stewardship Guide for the Ontario Landscape* available through the Credit Valley Conservation Authority (CVCA) [made available at www.creditvalleyca.ca/document-category/stewardship/page/8/]. This guide has been developed as a tool to help horse owners and equine facilities to operate in a manner which both sustains and remediates the environment. "It provides a framework to allow [them] to evaluate [their] property and its management"; in essence the guide directs horse owners and farms in identifying what they are doing right and what areas of land management they could improve upon (CVCA, 2007).

A useful recommendation could be partnering with the Ontario Federation of Agriculture (OFA) in voicing their opinions and cautions towards the province's decision to terminate the Slots in Racetracks revenue sharing program. Dufferin County should make themselves an advocate of the horse racing industry.

Facilitate a Regional Equine Committee

The horse industry itself is partly to blame for a lack of organization. Individual stakeholders or businesses need to "get behind the town" in providing a united voice to

sell the industry to Dufferin County Council, and neighbouring Counties. Chautauqua County in New York State, a similar equine centre, also noted that strong stakeholder organization and persistent lobbying for a formal equestrian plan triggered the County Government's initiative to expand the equine sector in the county. Greater lobbying power can lead to greater access to funding.

Equine Trails

An opportunity for the existing Dufferin Active Transportation and Trails (DCATT) Master Plan, a county-wide trail system, is to adopt a stronger equine focus. Should this prove unfeasible, another option for improved Equine trails is to create an entirely new trail system, though this is a more costly solution. Trails have been identified as an important element of Equine tourism in a number of different case studies.

Liability

Dufferin County should examine and consider methods to reduce the liability of Equine businesses and landowners. In Ontario, liability for landowners and Equine businesses has been identified as an issue by interviews in Dufferin County, Wellington County and by the Ontario Trails Strategy (2005). Legislation and insurance programs in NY State together reduce the liabilities of the private landowner, and in turn the county.

Introduction

Dufferin.biz is a collaborative marketing initiative working for the County of Dufferin, its member municipalities and local community groups in order to promote economic growth in the county. Dufferin.biz represents the local businesses and innovative ideas that support the region's existing business community while promoting new investments from outside the community (Dufferin.biz 2012). The initiative has recently identified the equine sector in the county as an underdeveloped niche that has the potential to directly stimulate the economic prosperity for the overall region. Dufferin.biz, on behalf of the County of Dufferin, has therefore sought the assistance of a group of Rural Planning and Development students from the University of Guelph to assess the opportunities for growth in the County's equine sector based on the region's particular attributes. More specifically, the initiative is interested in understanding the array of strategies that municipalities can adopt in order to incentivize investment, growth and ongoing support for the local equine sector.

This report details the outcome of the research initiative undertaken by the students – Ingunn Ósk Árnadóttir, Ryan Deska, Mark Ferguson, Feinan Long, and Kyle Poole – for Dufferin.biz. Dufferin.biz financially supported this project. The key deliverables of the project are:

- A literature review on provincial policies, strategies and regional conditions that impact the equine industry, including bylaws, restrictions and other regulations
- Key informant interviews with current horse owners and farmers
- Case studies of equine sectors in neighbouring or comparable counties in Canada and US
- Identification of solutions to enhancing the attractiveness of the equine industry in Dufferin County
- List of recommendations for municipal and county action that will incentivize growth in the equine sector
- A final report and presentation that will be submitted to Dufferin.biz, the County of Dufferin, and other interested stakeholders

The equine industry combines aspects of the leisure, entertainment and service sectors, drawing customers from all geographic areas and social backgrounds. Hence our report

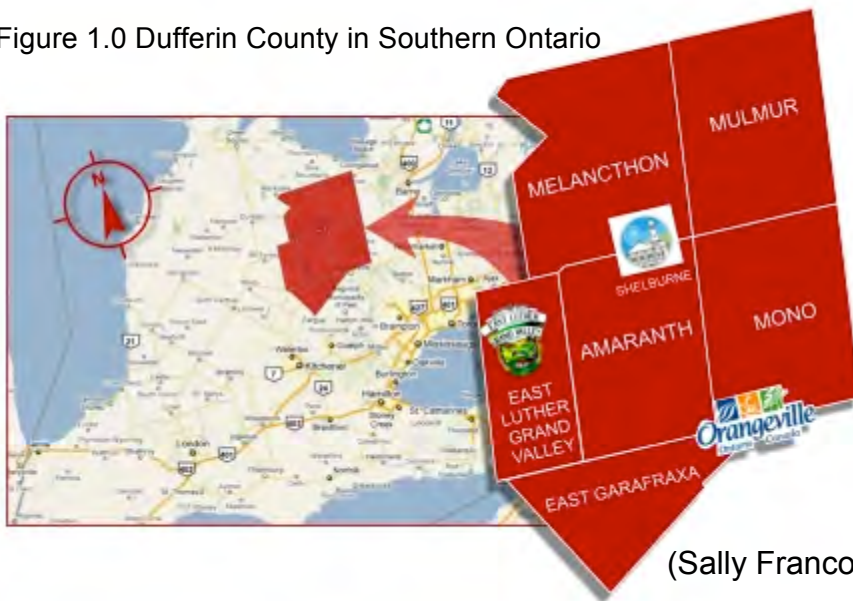
aims to ensure that a diverse range of topics and perspectives have been considered in the formation of this document, not just solely those of stakeholders directly involved in the investment of the industry. However, due to both the size and diverse nature of the equine industry, it would be beyond the scope of this report to examine the details; for example, issues and problems relevant to a farrier are very different from those that affect tack shops, feed mills or stabling facilities. By examining the industry as it is now and looking at current business management and planning theories, this report intends to make useful suggestions as to how these management tools can be better applied to various sectors of the equine industry within Dufferin County.

This report is organized in the following manner: first it introduces Dufferin County's general background and demographics; then it will set out the provincial policies, municipal official plan policies, and programs relevant to the equine sector in Dufferin County; thirdly, it will describe eight case studies of horse farms and two case studies of counties regarding equine development; and finally, it identifies a few key equine-related themes that the literature review, case studies, and key informant interviews conducted for this report have revealed to be relevant to development of the equine industry in Dufferin County.

Dufferin County's Regional Attributes

Dufferin County covers approximately 1,442 km² (557 square miles), with the population estimate of 54,436 in 2006. There are eight municipalities in total, including three towns (Mono, Orangeville, which is the County seat, and Shelburne). The three towns in total comprise about 72% of total population of the county. Over half of the county's population lives in Orangeville. There are also five rural townships (Amaranth, East Garafraxa, East Luther Grand Valley, Melancthon, and Mulmur).

Figure 1.0 Dufferin County in Southern Ontario



(Sally Franco Real Estate Inc., 2011)

Geographical Characteristics

The county contains five major river systems: the Credit, Humber, Grand, Saugeen and Nottawasaga Rivers. Hence there is a strong emphasis in Dufferin County on wetland management, riparian protection, and Source Water Protection. The county is under the jurisdictions of Credit Valley Conservation Authority, which mainly covers Orangeville; Nottawasaga Conservation Authority, covering Mono and Mulmur; and Grand River Conservation Authority, covering the rest of the county.

The county currently does not have an Official Plan, but instead has consolidated a Growth Management Plan (2009) prepared in response to the Places to Grow Act (2005). The latter forecasted Dufferin's total population to reach 80,000 by 2031 (the current population is ~55,000). Based on this forecast, the Places to Grow assessment

has set a target of adding additional 6,000 jobs in Dufferin by 2031 (currently there are about ~21,000 jobs). This means that the county must anticipate and create significant housing and employment opportunities in the next two decades.

Socioeconomic Background and Demographics

Dufferin's economy is traditionally strongly agriculturally based. The majority (i.e. over 70%) of the land base in the county is classified as prime agricultural land, according to the Canadian Land Inventory for Agricultural Lands (2011). Major agricultural product groups in terms of gross farm receipts are cattle (16.5%), dairy (14.9%), potatoes (14.8%), market gardening (6.7%). Approximately 31% of the county's land base is natural heritage features, which may include woodlots, wetlands, endangered species habitat lands, mostly found in Mono and Mulmur.

Dufferin County's geographic proximity to larger surrounding urban areas (e.g. the Greater Toronto Area), combined with its high level of infrastructure servicing, core utilities and relatively low land costs make Dufferin a very attractive marketing base for the Toronto-centred region. The region is attractive to new residents - both consumers and investors - a key factor for potential new equine operations. Compared to the Province of Ontario, where the average income is \$77,967, Dufferin County's average income is higher at \$80,278 (Statistics Canada 2006). The county also has a high percentage of households with average income of over \$90,000; however, most of such high-income households are in the urban centres of Mono (\$108,692) and rural township of East Garafraxa (\$95,359). In comparison, average incomes in Orangeville (\$74,962) and Shelburne (\$66,097) - the most urban centres - are lower than both the provincial and county averages.

Provincial Policies and Official Plans

The Planning Act is the enabling legislation for land use planning in Ontario (Dillon Consulting, 2008). Enabling legislation is “legislation that gives appropriate officials the authority to implement or enforce the law” (Princeton University, 2012). By requiring all decision-makers to be **consistent** with the Provincial Policy Statement (the broad policy direction), the Planning Act connects provincial interests with provincial and municipal planning decisions. The planning act is supported by other acts such as the Places to Grow Act, the Oak Ridges Moraine Conservation Act and the Greenbelt Act (Ontario Ministry of Municipal Affairs and Housing , 2010).

Provincial Policy Statement (PPS)

The PPS:

- sets the policy foundation for regulating the development and use of land;
- supports the provincial goal to enhance the quality of life for the citizens of Ontario; and
- encourages appropriate development while protecting resources of provincial interest, public health and safety, and the quality of the natural environment.

“The long-term prosperity and social well-being of Ontarians depend on maintaining strong communities, a clean and healthy environment and a strong economy” (Ontario Ministry of Municipal Affairs and Housing, 2010, p. 2)

This project was an interesting challenge for the group of planning students as we are taught to uphold what we believe to be “good planning practice”. Working within provincial policies and guidelines, we hope to make some creative suggestions in order to work with what is there. The PPS is a minimum standard and municipalities and Counties do have the ability to go above and beyond the PPS in the creation or review of their official plans and in taking municipal action.

Prime Agricultural Lands

The Dufferin County Growth Management Study notes that roughly 70% of the land base in Dufferin County is classified as prime agricultural land in accordance with the Canadian Land Inventory for Agricultural Lands (Dillon Consulting, 2008). It is

important to understand the limitations associated with prime agricultural land, considering such a large proportion of the County's land base is considered prime.

In section 2.3.1 of the PPS, the protection of prime agricultural areas is a priority in order to ensure long term agricultural use on these lands. **Prime agricultural land** is designated by the Canada Land Inventory as Classes 1, 2, and 3 soils. Specialty crop areas are also included in this designation. **Prime agricultural areas** are those regions where the overall landscape is predominantly prime agricultural land. These areas include prime agricultural land but also include pockets of class 4-7 soil to create continuity in land use. These areas also include regions where there is a significant concentration of productive farming operations (Ontario Ministry of Municipal Affairs and Housing , 2010).

Lot Creation and Lot Adjustments

Creating lots in prime agricultural areas is generally discouraged by the PPS but may be permitted for certain reasons. These include: agricultural uses such that lots are of an appropriate size to support future agricultural operations in the area; agriculture related uses with sufficient size to accommodate sewage and water services; and a residence surplus to a farm operation that exists due to farm consolidation, where new residential dwellings are prohibited from being built on the parcel of land in the future.

The definition of agriculture uses in the PPS is:

*"The growing of crops, including nursery and horticultural crops; raising of livestock; raising of other animals for food, fur or fibre, including poultry and fish; aquaculture; apiaries; agro-forestry; maple syrup production; and **associated on-farm buildings and structures, including accommodation for full-time farm labour** when the size and nature of the operation requires additional employment"* (Ontario Ministry of Municipal Affairs and Housing, 2010, p. 28).

Dufferin.biz was interested in understanding how residential units could be permitted for employees of an equine facility so that farriers, vets, and labourers could live close to the operation. If the operation is of the appropriate scale to be classified as agriculture and justify having employees on site, this is permitted within the PPS.

The Greenbelt Plan

While providing permanent agricultural and environmental protection, the Greenbelt (shown in **Figure 1**) also contains important natural resources and supports a wide range of recreational and tourism uses, areas and opportunities together with a vibrant and evolving agricultural and rural economy (Ontario Ministry of Municipal Affairs and Housing, 2005). According to the vision statement for the Greenbelt Plan 2005, the Greenbelt:

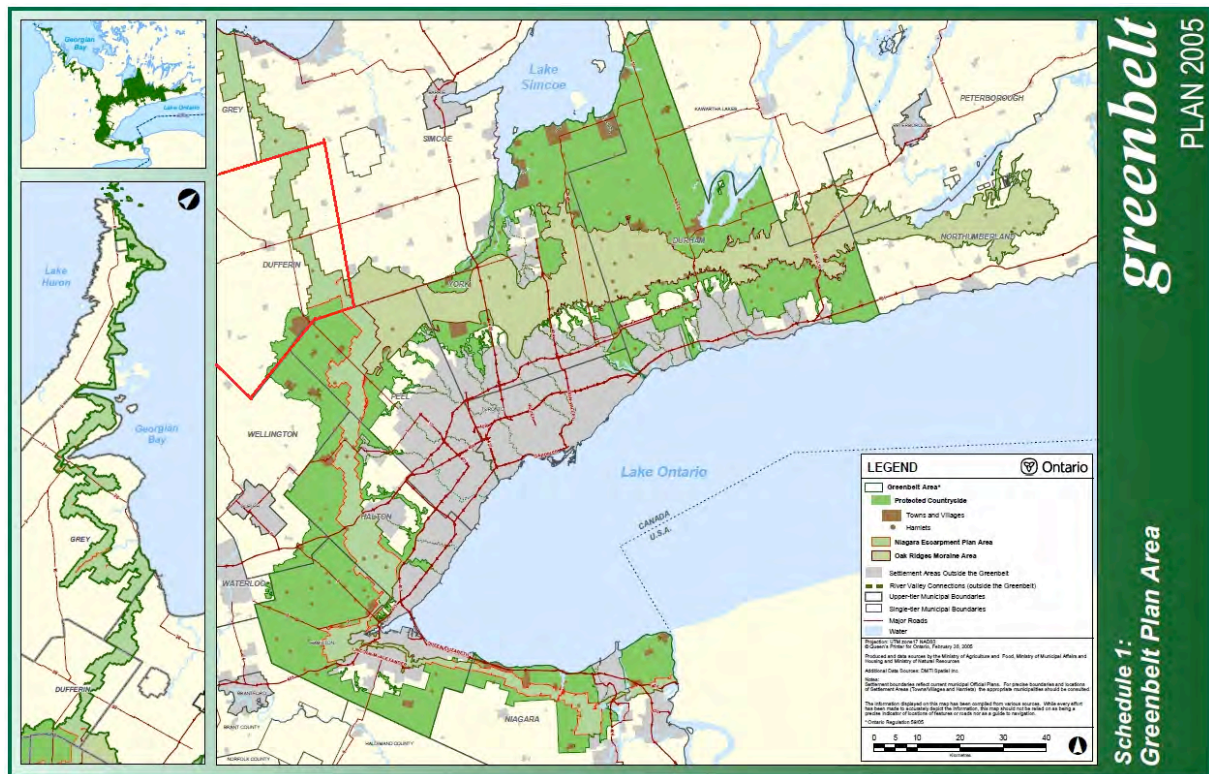
- Protects against the loss and fragmentation of the agricultural land base and supports agriculture as the predominant land use;
- Gives permanent protection to the natural heritage and water resource systems that sustain ecological and human health and that form the environmental framework around which major urbanization in south-central Ontario will be organized; and
- Provides for a diverse range of economic and social activities associated with rural communities, agriculture, tourism, recreation and resource uses.

(Ontario Ministry of Municipal Affairs and Housing, 2005)

Within this list, the first two are most definitely restrictive of future economic development and resistant to altering the natural countryside. The final bullet that discusses economic and social activities surrounding agriculture, tourism and recreation, is a strong fit with some of the Equine business models we have uncovered. Equine tourism and recreation are common businesses in the rural landscape and we believe these will be important to the portion of the Greenbelt region found in Dufferin County. If Dufferin can identify the Equine industry as an important element of their cultural heritage, the Greenbelt Plan as well as the PPS would support the development of a local Equine sector.

The Greenbelt plan includes the “provision of a wide range of publicly accessible built and natural settings for recreation including facilities, parklands, open space areas, trails and water-based/shoreline uses that support hiking, angling and other recreational activities” (Ontario Ministry of Municipal Affairs and Housing, 2005, p. 5).

Figure 1.0 – The Greenbelt in Ontario.



Source: The Greenbelt Act (2005)

Severances and the Greenbelt

There is increased demand for dividing land parcels and getting severances on horse farming plots than for other farm types, because horse farmers typically prefer to stay in smaller lots (Van Patter, 2012). On primary agriculture land, the only residential lots permitted are "Residence Surplus to Farming Operation", which are small, generally about one hectare (Wellington County official plan, 2011). Where horse operations are recognized farms, some counties may allow for the creation of a smaller farm parcel if a horse farmer can demonstrate that a smaller lot is more viable and flexible for their agricultural use. In secondary agricultural lands, there is more flexibility for agricultural parcels, and one residential severance is permitted for each parcel that was in existence in 1999. This can be seen in Wellington County Official Plan (2011), under the chapter creating new lots:

“Agricultural Uses: New lots for agricultural operations shall be of a size appropriate for the type of agricultural use(s) common in the area and sufficiently large to maintain flexibility for future changes in the type or size of agricultural operations. New agricultural lots will normally be a minimum of 35 hectares in size. Smaller lots may only be considered where there is clear evidence that the farmer intends to conduct an agricultural pursuit which can be successful on a smaller property. Where practical, the creation of agricultural lots along the original lots in the Township survey is encouraged even if somewhat smaller than normal lots result.”

It is also seen that the Greenbelt legislation is more restrictive than the county one. Under the lot creation chapter in the Greenbelt legislation (2005), it indicates:

“Chapter 4.6.3: Agricultural uses where the severed and retained lots are intended for agricultural uses and provided the minimum lot size is 40 acres within specialty crop area and 100 acres within prime agricultural areas.”

The Wilton and Caldwell (2009) survey shows that 22.9% of respondents' farms are under 10 acres, and 63.6% respondents have farms up to 50 acres. Both Van Pater and Wilton (March, 2012) agreed that different lot sizes are suitable for horse owners because horse owners are a mixed group with different needs. Many horse owners just want small parcels, even as small as 10-25 acres, but those parcel sizes are not easily found (Wilton, March, 2012).

The Places to Grow Act

The Places to Grow is a provincial program that strives to “plan for growth and development in a way that supports economic prosperity, protects the environment and helps communities achieve a high quality of life across the province” (Ontario Ministry of Infrastructure, 2012). The Places to Grow Act is a 25 year plan to create:

- vibrant, revitalized downtown centres
- complete communities (living, working, learning, shopping and playing)
- housing options for all ages
- focused growth in existing built-up serviced communities

- protected farmland and green spaces
- a greater range of transportation options for reduced traffic and congestion.

(Ontario Ministry of Infrastructure, 2012)

This Act works in unison with the PPS to restrict sprawl and promote the protection of farmland and green spaces, particularly in the Greater Golden Horseshoe Area (GGHA) surrounding the city of Toronto. The GGHA covers approximately 31,465 km² and consists of a total population of 4.2 million, which puts a relatively high average population density (about 136 people per square kilometer) for an urban area. In a study conducted by Elgakar & Wilton (2008) of the equine sector in the GGHA, they noted that the number of horse farms increased with increased proximity to the city of Toronto.

Figure 2.0 – Greater Golden Horseshoe Growth Plan Area



(Ontario Ministry of Infrastructure, 2012)

Equestrian Focus in the Official Plans

We recommend working within the restrictions put forward by the PPS and other associated government legislation including the Greenbelt Act and Places to Grow. To develop a competitive advantage to grow the equine sector, local policy changes are necessary as they create differentiation.

One issue identified by Wilton and Caldwell (2009) is a lack of horse related issues being acknowledged and written into official plan policies. Their survey results suggest, “a unique sector of the rural landscape has been overlooked in government policies and programs” (Wilton & Caldwell, 2009).

Equine Presence in County Level Policy

Dufferin County can become known as a “horse friendly” region and better attract investment through representation of equine issues in county-wide strategies and policies. An equine committee with a presence at council meetings and committees would help Dufferin go above and beyond the existing policies with regards to equine promotion.

“The policies of this Provincial Policy Statement represent minimum standards. This Provincial Policy Statement does not prevent planning authorities and decision-makers from going beyond the minimum standards established in specific policies...” (PPS 4.6)

Municipal Official Plans

Eight municipalities within Dufferin County have official plans. Five of these eight municipal official plans were examined for this report (Orangeville, Shelburne, Amaranth, Mono, and East Luther Grand Valley Township).

None of these municipal official plans explicitly mention the equine sector or provisions that directly pertain to horse operations. However, most of these municipal official plans have in common that they emphasize a) the importance of unique rural character of their communities; b) their respective tourism sectors and how to accommodate the recreational demands of the “vacationing public”; c) and integrating an ecosystem-based approach to managing environmentally sensitive lands. For example, the Township of Amaranth favours farmland parcels that are large in size in order to preserve the open

landscape character of the area (See Township of Amaranth's Official Plan: 3.1.2 Objectives under 3.1. Agricultural Use). Some (i.e. Orangeville, Shelburne) explicitly mention the need to promote trail development for recreational purposes, both motorized and non-motorized, the latter of which may include horseback riding (See Goals section of their respective official plans). **Appendix B** shows excerpts from the official plans of Orangeville, Shelburne, Amaranth and Mono that may potentially impact new equine development in the county.

Case Studies

Horse Farm Case Studies

We used a very informal transect method to develop case study data. With no specific direction in mind, we drove through Wellington County, Caledon and Dufferin County stopping in at different equine facilities to ask questions about their operations, current struggles and/or successes with business and the reasons they first came to the area.

Key themes emerging from these case studies include:

- Crop-sharing and agricultural zoning
- Liability issues
- OLG slot machines
- Aesthetics of the land
- Spinoff Business

Case #1

We visited a farm that had transitioned from a dairy operation into a horse breeding, training and showing operation. A Swiss couple who had farmed dairy all their lives turned their farm into an equine operation when they retired. Horses have always been their passion. Currently the husband breeds and trains roughly 20 jumpers, but they are struggling with gaining client. They need advertising and people to show their horses. The marketing, showing and business side of things is proving to be too much and they may not be able to continue. This farm is zoned as agricultural land because they breed horses and are also active in a crop-sharing program with a local company. This was an interesting case of a farm in transition.

Case #2

We visited a standard bred facility that breeds and trains their horses for harness racing. This was a family business with all three siblings involved in different aspects, from veterinarian to trainer to Farrier. This was the first of many farms to express concern regarding the removal of slot machines from the racetracks in Ontario. Many horses are prone to be slaughtered and many businesses that support this industry segment are at risk of failure. They pointed out that this type of horse requires much specialization so it is a hard industry to transition out of.

Case #3

We spoke to an equestrian centre that offers instruction to the public in the form of a riding school and a training facility for riders that want to board and take instruction. They also train horses and show them for other people. They currently rent the land but prior to that they owned the property, which they bought in 1993. The motivation of this move was to escape Halton Region and their business and signage taxation. The challenge for this business then was to relocate within a ten-mile radius so as to not lose a lot of existing clientele. Perhaps this could inform a radius of contact for marketing materials to prospective landowners.

Equine Marketing: The equestrian industry in their opinion has not done a good job of selling itself to the general public and there are few riders that are entering into the sport in comparison to several years ago. The area is also saturated with facilities whereas 20 years ago there were only three facilities in this locality. Today there are over 20 facilities in the region. Cost is a huge deterrent for most recreational riders to compete. Where it used to cost \$200 a competition to compete, it is now between 400 and 500 dollars.

In their opinion, the horse industry needs to get behind the town in providing a united group in order to sell riding as a great activity and an opportunity to escape the city. The people who grow up in the country may take it for granted, but it is an attractive area to urbanites from Toronto.

Case #4

This facility is also specializing in standard bred horses for harness racing but the owners have an interesting back-story. The owners moved to Ontario (Wellington County) from Quebec roughly ten years ago because the industry in Quebec was struggling for the same reason as what is threatening Ontario – reduced purse money due to reduced incomes from slot machines. They moved to Ontario where the breeding is really good (stallions, brood mare) and the land is beautiful. This particular farm was also engaged in crop sharing to supplement their income as well as to help qualify their property for the Farmland Property Tax Program. They mentioned that this particular kind of horse is treated like an athlete and so there is a lot more money invested in care so the spinoff industries are greater.

Case #5

This facility is very unique to this part of Canada. They own a real cattle ranching operation, with free range Black Angus, still managed by cowboys. While the cattle are still their primary income, they also run guided ranch tours and trail rides on horseback. They raised the issue of liability for the equine tourism and pleasure riding industry in Canada. In the United States, there are a number of examples where legislation has been passed to protect property owners and business owners. Their recommendation to the County is to lobby on their behalf for similar legislation.

Case #6

We spoke to another standard bred facility in Dufferin County who said in more colourful language, that they too are not optimistic of their future in this industry. They will most likely be forced to transition into a different business model and they may even be forced to slaughter their animals.

Case #7

Equine owners in Caledon all cited the equine culture of the area, the trail system and the Caledon Equine Park (CEP) as major reasons for living in the area. The beautiful land and the proximity to the city are also strong reasons for moving to the area. The Caledon Equine Park is estimated to attract \$110,900,000 dollars in annual revenue for the surrounding communities from 16 annual events held locally (Equestrian Management Group, 2011).

Craig Collins of the Equestrian Management Group describes the success of the Caledon Equestrian Park as all about location.

*“When we were first getting started 20 and even 10 years ago, we were considered to be too far from the city. Now we are a **beautiful green space right in the heart of it all**. Since many of our competitors are local, they get to go home at night and sleep in their own beds”.*

(Equestrian Management Group, 2011)

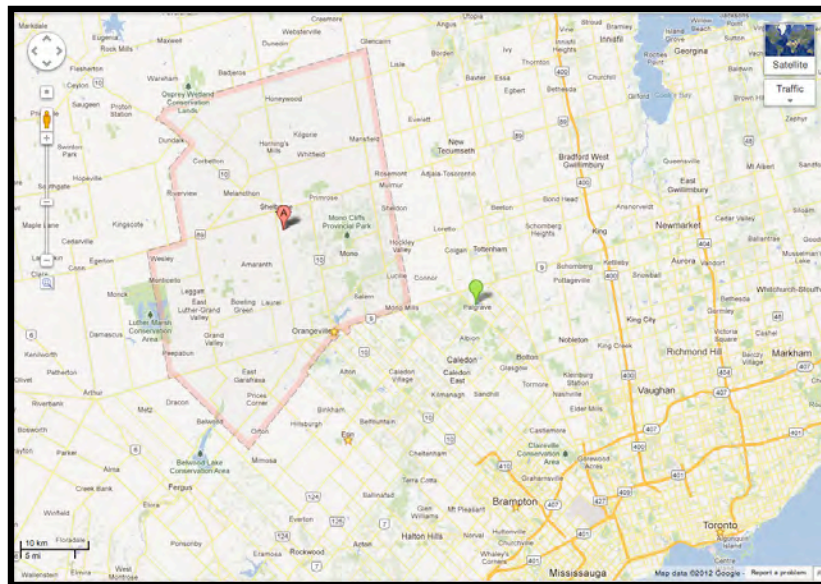
Roughly 85% of Caledon Equestrian Park competitors come from surrounding regions, which include Toronto, Hamilton, Kitchener, Peterborough, Brantford and other municipalities within the Greater Toronto Area (Equestrian Management Group, 2011).

Table 2.1 Pre-PAG attendance at CEP

Visitor Origin	%	#
Local (under 40km)	40%	12,000
Regional (40km to 200km)	35%	10,500
Provincial	15%	4,500
National	5%	1,500
International	5%	1,500
Total Participants / Spectators	100%	30,000
Visitors from outside of Caledon	60%	18,000

(Equestrian Management Group , 2011)

Figure 3.0 – Map of Dufferin County and the CEP



Source: Google Maps, 2012

Case #8 - Using Horses for Autism Treatment

The use of horses in Autism therapy treatments is referred to as Hippotherapy or therapeutic riding. Autistic children exposed to therapeutic horseback riding have been found to develop greater sensory skills and social motivation, with decreased inattention, distractibility, and sedentary behavior (Bass, Duchowny, & Llabre, 2009).

We saw a farm gate sign on highway nine west of Orangeville that described an autism therapy operation, but we were unable to find this facility on the Dufferin County site, the Hills of the Headwaters site nor the Autism Ontario site (Autism Society Ontario ,

2012). This speaks to the need to identify and describe the equine sector in this region, in order to understand where the Municipalities/County can help.

Issues arising from Horse Farm Case Studies

Taxes are going to be a big issue as identified by a number of our interviewees. Cheaper land and lower taxes is something Dufferin County has already and is something that can be leveraged. While this does not directly improve municipal tax revenues, spinoff or support industries for the equine sector are anticipated to be a strong supporter of municipal profitability.

Equine farms may also prove to be an important business model to make smaller farms, with smaller parcels of land, more economically feasible to maintain. This will have positive impacts on the land stewardship and rural heritage as smaller farms will be less likely to be consolidated into larger farms.

Current research examines new types of enterprises developing in rural agricultural areas, where lifestyle and recreation is important and where land units are not meant for economic production (Wilton & Caldwell, 2009).

Farmland Property Tax Program

Arguably the most attractive incentive for an individual or business to develop an equine operation is the potential for their land to qualify under the Farmland Property Tax program. Qualifying properties under the Farmland Property Tax program are taxed at only a quarter (25%) of the municipal tax rate of residential properties (OMAFRA, 2001). This excludes the 1-acre area of land, which a primary dwelling is located on; this is taxed as residential (OMAFRA, 2001). In Ontario, the Municipal Property Assessment Corporation (MPAC) carries out the assessment of properties. MPAC is an independent corporation developed under the Ontario Property Assessment Corporation Act (MPAC, 2011). As a not-for-profit corporation, the MPAC's primary responsibility is to provide landowners, tenants, local governments, and the provincial government with accurate and up to date property and land assessments (MPAC, 2011). With every municipality in Ontario being a member of the MPAC, it is an extremely efficient entity in assessing properties for the purpose of land valuation and taxation (MPAC, 2011).

Farmland Property Qualification Requirements for Equine Operations

In 2005, the government of Ontario and the MPAC realizing the importance of recognizing all forms and types of agricultural activities and land uses within the agriculture sector, made significant improvements in the farm land assessment qualification process for equestrian operations (Government of Ontario, 2005). Currently under s.19 (5) of the Assessment Act, land and buildings used for the following activities are to be assessed as farmland: breeding, raising, boarding, maintaining, training, or selling horses (Government of Ontario, 2005).

The boarding of horses, previously not recognized as an agricultural activity under the Farmland Property Tax program, does not require the landowner to actually own the horses on the operation (Government of Ontario, 2005). Properties that are used for hobby or recreational purposes such as trail riding and public riding lessons do not qualify for farmland classification and therefore are included in the residential class for taxation purposes (MPAC, 2009). Properties being used for the sale of equestrian services and retail such as tack shops are also exempt from the farmland classification; these properties are taxed as commercial properties (MPAC, 2009). It is important to note, that even on properties where farmland qualifying equestrian activities take place a minimum annual gross farm income of \$7,000.00 has to be obtained for the property to be qualified and remain qualified under the Farmland Property Tax program (MPAC, 2009).

The following section details the eligibility requirements and process for existing and developing equestrian facilities. It should be noted here that the Ontario Ministry of Agriculture, Food and Rural Affairs is responsible for notifying the MPAC of Farmland Property Tax program eligible properties (MPAC, 2009). For a property to be eligible for the Farm Property Class Tax Rate, OMAFRA (2001) indicates that the following criteria need to be met:

- The equestrian operation/land owners need to submit a completed multi-year Farm Property Class Tax Rate application by the deadline date.
- The property must be assessed by MPAC as farmland.

- The property portion of the equine business generating a gross farm income over \$7,000.00 needs to be reported to the Canada Revenue Agency
- The owner of the equestrian operation must have a valid farm business registration number.
- More than 50% of the property and the equestrian business needs to be owned by a Canadian citizen, a permanent resident of Canada, or a Canadian owned corporation.

There are numerous exceptions to these requirements that have been put in place in order to compensate for uncontrollable and/or unusual occurrence of events, primarily with regards to the minimum gross farm income requirements and for newly purchased lands (OMAFRA, 2011). Exceptions concerning the reporting of a minimum gross farm income of \$ 7,000.00 requirement usually appear in the form of an abnormal production year, death/illness greatly affecting production profits, and operation/business start-up exemptions (OMAFRA, 2011). Due to the nature of this equine industry study, the start-up exemption is of particular interest. Although properties may qualify for the Farmland Property Tax program, it is possible that they have not met the minimum income criteria; realistic achievement of this income must be demonstrated however, according to the commodity being produced and/or the nature of the farming business (OMAFRA, 2011). It is important to note here that for farmland being newly acquired or purchased, the farmland classification will remain as such for the remaining tax year; landowners will have to complete an application form, as mentioned above, for the following tax year to stop the land from returning to its residential default class (OMAFRA, 2011).

Nutrient Management on Equestrian Farming Operations

Although horse farms can be considered an agricultural activity and an important contributor to the agriculture sector, there are arguments towards the attitude and traditional agricultural knowledge acquired from conventional farming practice. With numerous equestrian business owners having migrated from the more urban regions of the province, long held traditional knowledge of land stewardship may be hindered. A brief explanation of how an equestrian farm will be affected by the provincial requirement of nutrient (i.e. manure) management follows.

Depending on the amount of manure a horse farm produces, it may fall under the legally enforceable regulations of the Nutrient Management Act (NMA). On farm nutrient production is measured using nutrient units (NU). OMAFRA (2011) defines a nutrient unit “...as the number of animals that will give the replacement value of the lower of; 43 kilograms of N or 55 kilograms of P per year as nutrients”. In general it has been accepted that 1 NU is produced by 0.8 large framed horses weighing over 1500 lbs., 1 medium framed horse weighing 500 to 1500 lbs., or 2 small framed horses each weighing less than 500 lbs. (OMAFRA, 2011). If a horse farm produces less than 5 NU per year they are not required to follow any of the nutrient management regulatory plans or strategies (OMAFRA, 2011). Producing between 5 and 300 NU requires the horse farm to develop and execute nutrient management strategies and/or plans; these farms become legally regulated by the NMA if they apply for building permits in order to expand their operation (OMAFRA, 2011). All livestock or animal maintenance operations, regardless of type, are legally regulated under the NMA if they produce more than 300 NU (OMAFRA, 2011). In all cases, equestrian farm operations should take note of and execute Best Management Practices (BMP) developed by OMAFRA and stewardship guides provided by conservation areas, for managing their operations’ impacts on the environment; this will ensure their viability as a farm operation and aid in community relations.

Crop Share Leases as an Opportunity for Equestrian Farms

An option for equestrian operations to remain viable and qualify for the Farmland Property Tax program is for the landowner to participate in an effective crop sharing agreement. Although horse farming can be considered as an atypical or unconventional form of agriculture, they can participate in conventional agricultural practices in order to qualify their land use as agricultural. Through a crop-share agreement, the residual land not being directly used for the equine operation can be used for the conventional agricultural use of crop production (i.e. corn, soybeans, winter wheat, forages, etc.). Crop-sharing is the process in which a landowner (i.e. landlord) allows for another individual or corporation (i.e. tenant) to harvest their land in return for a share of the crop profits. Crop-share agreements are typically based on a 1/3 – 2/3 or 1/4 – 3/4 split

of the crop profits between the landlords and tenant respectively (OMAFRA, 2001). Typically in a crop-share agreement the landlord is responsible for paying the property taxes whereas the tenant supplies all the machinery, labour, and crop inputs (OMAFRA, 2001). It is of utmost importance to note here that in order for a landowner to have their property qualify for the Farmland Property Tax program through the participation in a crop-share agreement, the landlord must share the cost of crop inputs with the tenant (OMAFRA, 2001). In sharing the cost of crop inputs with the tenant the crop share profits will be recognized by the Canada Customs and Revenue Agency as farming income (OMAFRA, 2001).

Further opportunities exist for those equestrian operations whose business is considered recreational or hobby in nature and for those horse farms that are not registered businesses. OMAFRA (2001) states that “a landlord who is not registered as a business can still obtain the reduced tax rate of the Farmland Property Tax program if the renting tenant has a valid farm business registration number”. In essence, horse farms unable to meet the minimum gross farm income requirement for the Farmland Property Tax program can benefit financially by participating in a crop-share agreement on their currently unused land which is suitable for agriculture. Crop-sharing opportunities for landowners are typically available from individual producers who wish to crop-share instead of renting the land, as well as from larger agricultural business such as Sharpe Farm Supplies and Woodrill Farms.

Removal of OLG Slots from Ontario Racetracks

Since 1998, the provincial government, through the Ontario Lottery and Gaming Corporation (OLG), has been participating in a revenue sharing agreement with Ontario’s horse racing industry and hosting municipalities in the form of the Slots in Racetracks program (OHRIA, 2012). After 14 years of financially successful partnership the OLG is pulling the plug on the Slots in Racetracks program (Pink, 2012). Currently about 20% of the slot machines in Ontario are located at racetracks; with the remaining 80% located in off-track casinos (Pink, 2012). The provincial government wants to relocate the on-track slots to off-track locations where they would be more profitable

(Pink, 2012). Dwight Duncan, Ontario's finance minister believes that the \$345 million the province hands out towards the program, in what the government refers to as a subsidy, could be spent in more beneficial forms such as education and road and water safety (Pink, 2012). There is a colossal amount of controversy involving the provincial government and the individuals employed and participating in Ontario's horse racing industry; there are significant well developed arguments against the eradication of this revenue sharing program. In the last 14 years horse racing, including Standardbred and Thoroughbred racing, has proven itself as not only one of Ontario's most profitable forms of gaming but also as the second largest subsection in the province's agriculture sector (OHRIA, 2012). Having generated profits of \$1.1 billion dollars over the last 10 years and providing larger economic contributions than wheat, eggs, poultry, and hogs combined in 2010, the horse racing industry in Canada shows no sign of slowing down (OHRIA, 2012). In an economic study conducted by the Ontario Horse Racing Industry Association in November 2011, the following was concluded about Ontario's horse racing industry:

- Ontario's horse racing industry supports 31,441 full-time jobs; this rises to 60,000 jobs when part-time and casual employment is factored in.
- Approximately \$2 billion dollars are spent in the province of Ontario in the form of expenditures of the horse racing industry; about 80% of these expenditures are spent in rural municipalities.
- \$1.5 billion in salaries and wages are supported by Ontario's horse racing industry expenditures.
- Industry expenditures have increased by 67% from \$1.2 billion in 2000 to \$2 billion in 2010.
- The Ontario government receives on average \$260 million a year from the industry; this is excluding profits generated from slots in racetracks.

With the provincial government's intention on scrapping the Slots in Racetracks program, they are not only crippling an entire industry and the some 60,000 lives and livelihoods that depend on it, they are limiting their own financial benefits arising from their lost share of slot generated profits and racetrack oriented tax revenues; approximately \$780,000 in 2010 (Pink, 2012). Of the profits generated from slot

machines in racetracks, 75% goes to the government, 20% goes towards the horse racing industry, and the hosting municipality receives the remaining 5% (OHRIA, 2012). The 20% of slot profits allocated towards the horse racing industry is split equally between track operators and horsemen in the form of race purses (OHRIA, 2012). Without this portion of funds going towards the race purses, there will be a significant decrease in the number of horse owners able to compete in the industry (Pink, 2012).

The decision to end the Slots in Racetrack program, and in turn the potential collapse of the horse racing industry in Ontario has the potential to severely impact rural municipalities and the agriculture sector in general. For example it has been suggested by Pink (2012) that the foreclosure of one small Standardbred equine operation would result in the following economic losses for rural municipalities:

- \$40,000 in feed from local feed and grain mills
- \$25,000 in veterinary services
- \$700 per week in hay and straw from local farmers

This scenario suggests real negative economic and social consequences for Ontario's rural municipalities. In using Shannon and Mitchell's (2011) Grand River Raceway example we can clearly see how beneficial a horse racetrack can be for a hosting municipality and its surrounding communities. According to Shannon and Mitchell (2011) the Grand River Raceway (GRR) pays around \$1.6 million per year in various taxes. This is nearly double the Township of Centre Wellington's resident tax base (Shannon and Mitchell, 2011). Social services in the County of Centre Wellington benefit from up to 20% of the GRR's tax contributions; this includes policing, healthcare, and infrastructure (Shannon and Mitchell, 2011). In the 2008/2009 race season, the slots in the GRR generated \$44.5 million. As mentioned above, 75% of this revenue is forwarded to the provincial government and 5% goes to the hosting municipality. The \$1.78 million from slot revenues combined with taxes from the GRR accounted for 12.3% of the townships 2009 operating budget (Shannon and Mitchell, 2011).

For the consequences outlined above it is highly suggested that the provincial government refrain from following through with the termination of the Slots in Racetracks revenue sharing program. Dufferin County, in an attempt to aid in the

influencing of the Ontario government, should make themselves an advocate of the horse racing industry. A useful recommendation could be partnering with the Ontario Federation of Agriculture (OFA) in voicing their opinions and cautions towards the province's decisions. The OFA has currently urged the government of Ontario to take a step back and re-evaluate all the potential outcomes related to terminating the Slots in Racetracks program (OFA, 2012). The Ontario Federation of Agriculture (2012) has noted that the "...OLG does not appear to consider, in any way, the potential cost of these proposed changes – they are only looking at the possible increase in revenue. The OLG is gambling and the stakes are Ontario's horse racing industry, rural communities and thousands of small businesses."

County Case Studies

Wellington County Case Study

Wellington County saw the greatest increase in number of horses from 2001 to 2006, of about 50.5% growth (See **Table 1**) (Wilton & Caldwell, 2009). In 2006, Wellington County had the highest horse population of all the counties in Ontario, with an estimated 27,530 horses (Wright, 2008).

Table 1 Horse Statistics for Dufferin and Wellington Counties, as of 2006.

Region County/Regional Municipality City/Town/Village	Estimated Number of Farms	Estimated Number of Horses	Annual Economic Impact (Median = \$1,781/horse)	Investment in Fixed Assets (Median = \$18,250/horse)
PROVINCE OF ONTARIO	48,099	379,412	675.7M	6.9B
Dufferin County	1,061	9,309	16.6M	169.9M
East Garafraxa	176	2,009	3.6M	36.7M
Amaranth	230	1,642	2.9M	30.0M
East Luther Grand Valley	82	390	0.69M	7.1M
Mono	230	2,968	5.3M	54.2M
Mulmur	156	1,229	2.2M	22.4M
Melancthon	187	1,073	1.9M	19.6M
Wellington County	3,221	27,530	49.0M	502.4M
Puslinch	293	4,224	7.5M	77.1M
Guelph/Eramosa	312	4,278	7.6M	78.1M
Erin	441	6,131	10.9M	111.9M
Centre Wellington	488	3,463	6.2M	63.2M
Mapleton	776	4,427	7.9M	80.8M
Minto	339	1,759	3.1M	32.1M
Wellington North	573	3,249	5.8M	59.3M

Source: Wright, 2008

The equine industry has had significant economic impact, including growth of labour opportunities and businesses, in the region. Wellington County is home to many businesses that support the equine industry, such as veterinarians, feed mills, black smiths, farriers, trainers, University support and various equine events (Van Patter, March, 2012). They are all important industries within Ontario, but the most growth recent years has been in the sports and recreation sector, which includes equine

activities like dressage, hunter-jumper, eventing, western pleasure riding, rodeo events, trail-riding, endurance riding, driving, and recreational riding (Wilton & Caldwell, 2009). Examples of the “entertainment” horse industry can be seen in Wellington County, including the racetrack in Elora (Mark Van Pater, March, 2012). Bronwynne Wilton, the manager of a research office at the University of Guelph (March, 2012), elaborates that the “entertainment” horse industry has grown bigger in Wellington County than in other places in Ontario.

According to Mark Van Pater (March, 2012), the business and services offered in this sector are operating because of the existing equine market. If there is a demand from the market, something will be created to meet that demand. The survey by Wilton and Caldwell (2009) about the equine industry in Ontario showed that 26% of 392 survey respondents in Wellington County owned an equine-related business or service. 32% of these employed staff for their businesses.

The Role of the County

According to Van Pater (March, 2012), a planner at Wellington County, the County has done relatively nothing to attract the equine industry. In his opinion, it is not the county’s role to attract one sector in more than another. All sectors need to be treated equally and each use has requirements and policies that need to be followed. Horses are just seen as another agricultural use. It is also important to consider public opinion, as the general public might not be supportive if there was exclusive support for equine development, since the official plan promotes all agricultural uses. The county would engage in promoting the equine sector if the success of the industry was threatened in the future, but otherwise it is not the county’s role to promote it.

Van Pater (March, 2012) further elaborates that some counties may opt to market the equine industry if they were interested. This needs to be done on top of the already “over-allocated” county budgets. There are also problems (i.e. public opposition) when one agricultural use is disproportionately favoured. Perhaps the matter would be viewed differently if this was a county in financial trouble, and hence looking to expand any underdeveloped economic niche or agricultural sector.

The Strengths of Wellington County's Equine Industry

Van Pater (March, 2012) thinks the main strengths of the Wellington County's equine industry consist of the following:

Location

The County's proximity to Toronto is conducive to people commuting and keeping their horses in Wellington. Horse owners are often financially well off, and are therefore able to buy lots in Wellington situated closer to Toronto.

Topography

The Oak Ridges Moraine goes through the county, which is hilly, poor in soil quality, and hence not suitable in certain places for traditional agriculture. However, this type of landscape is suitable for keeping horses. This does not apply for the whole county since much of its land is prime and secondary agriculture land, but the hilly and lower soil quality areas are popular for horse farms.

Van Pater's (March, 2012) view is that the main attractions of the county are the location, the soils, and the "market", which consist of the existing equine service and horse owners. The market has had more influence, and has more influence over the state of the equine industry in the county than the programs initiated by municipalities and economic development organizations.

Land Value

Gayle Ecker (March, 2012), the Director of Equine Guelph, mentioned a big shift in the equine industry presence from Caledon to Wellington County. The main reason for this is the fact that land prices went up in Caledon, making it unaffordable for pasture use. When the land prices are so high, it discourages horse farmers to procure resources for their horses, such as hay from local farmers. Encroaching urbanisation also affected horse farmers, stimulating movement of horse owners. Land prices in Wellington have gone up, but not as much as in Caledon, and there are many horse-related facilities in Wellington that make it conducive for horse owners.

Wilton (March, 2012) have also spoken about the importance of social life among horse owners. Horse owners enjoy horses for various reasons – some for pleasure and other for business – but they seem to prefer to be in vicinity of each other, therefore clustering within Wellington County.

The Erin Task Force Survey

The Erin Task Force for the Business Retention and Expansion (Equine) Committee is carrying out a survey among horse owners in Erin. Ecker (March, 2012) emphasises the importance of co-operation with the Erin municipality in promoting the equine sector. The Council of Erin asked for this survey and the recommendations to be submitted, so they are most likely going to be taken into consideration. This demonstrates a political will to look at the matters of the equine industry within Erin.

Ecker (March, 2012) is not aware of such an extensive survey been made before in Ontario. The Task Force has no instruction to work upon so their survey is very experimental though they spent considerable time researching similar equine studies in Canada and the United States. Learning can be drawn from this process regarding what worked well and what could have been done better or differently.

Wilton (March, 2012) also emphasise that “horse owners” are not just homogeneous group, but can be categorized into many smaller groups with different needs and interests, often separated along whether they have horses for pleasure or for business. This survey is a good opportunity for clarifying what kind of horse owners are in the Erin area and their interest and needs. When that information is clear, it is easier to clarify what infrastructure is suitable for the area and promote proactive equine suited developments. See Appendix A for a detailed description of the Erin BR+E Study.

Trails in Wellington County

According to Van Pater (March, 2012), the county policies regarding trails are more targeted to active (non-motorized) transportation. There are currently several trails in the county, and horseback riding is allowed in the county forests and on trails in county owned forest, which covers about 1100 acres. The county manages a trail spanning from Guelph to Millbank, which is a former railroad now owned by the province and where horseback riding is allowed.

More trails are planned for development in the near future and Wellington County is currently working on an active transportation study. However, the trail that will be promoted will most likely not be tailored towards horseback riding, but more towards active transportation such as cycling and walking. In addition, there is very little public

land in the county relative to privately owned land (Van Patter, March, 2012). Hence even though there is some equestrian focus in Wellington County's trails systems, barriers exist that will most likely slow equestrian trail development within the county in the future.

Recommendations from Wellington

- An equine sector survey, similar to one that the Township of Erin is doing presents an opportunity for Dufferin County to improve the ability to market the region. Before Dufferin County decides that their interest is to develop its equine sector, it is important to understand the barriers, needs and interests of local horse owners (See Appendix A for a detailed description of Erin's Survey).
- Equine Guelph is eager to help with getting the survey started. Representatives from Dufferin County are welcome to contact Equine Guelph for obtaining best practice information on how to conduct such a survey, and their experience with it.
- The creation of an effective communication network that can disseminate information to horse owners, equine media and local media within Dufferin County may prove beneficial. Making the equine industry more visible in Dufferin County may make equine issues a more prominent topic of discussion.
- Demonstrating the financial impacts of the equine industry in the region will be important.
- Horse company clusters can be promoted in order to strengthen the horse industry. All kind of companies can co-operate in the clusters and the clusters can be formal and informal.

Wilton (March, 2012) points out that it may be a good idea to create and promote clusters within the horse industry in Dufferin County. Clusters are geographic concentrations of interconnected companies and institutions within a particular field. Clusters include a range of linked industries and other entities that are important in providing a competitive market environment?. Cluster co-operation is often looked upon as a critical factor for creating competitive advantages for areas since the strength that each company/individual can offer is used in order to make the whole cluster more

competitive. This positively influences the whole area (Porter, 1998). The equine industry in Dufferin County is competing with strong equine service and production sectors from neighbouring counties, including Wellington County. It is therefore important for Dufferin County to utilize all of the strengths that their equine sector has to offer and to promote cooperation between different farms, investors, and companies.

Chautauqua County Case Study

The rural landscapes of Chautauqua County in southwestern New York State had traditionally included a small but noticeable presence of horse owners and stables. The southwestern region of the State, including Chautauqua and Cattaraugus Counties, comprises the bulk of the horse populations. In 2005, there were approximately 197,000 horses reported in the state (U.S. Department of Agriculture 2005). Of these, at least 4,500 horses were found in Chautauqua County, and another 20,000 found in the nine counties adjacent to Chautauqua. For comparison, there were around 379,400 horses in Ontario in 2008, about 9,300 of which were located in Dufferin County (Wright 2008).

A serious look into expanding the equine industry in Chautauqua County began several years ago, when the New York State Department of Environmental Conservation (NYDEC) announced their intention to ban all horse riders from utilizing the large expanse of state-owned forest lands in Cherry Creek, northeast of the county. The members belonging to the local horse owner's association, the Lou Eibl Corral Club, heavily protested this announcement, arguing how they have purchased land and horse-related assets specifically on the basis of the scenic and equestrian charms of Cherry Creek. The Club actively mobilized the support of the Chautauqua County's Department of Planning and Economic Development (CCPED) and the Industrial Development Agency (CCIDA) and lobbied for official development of equestrian trail networks, which would counter NYDEC's plan to limit recreational uses in Cherry Creek. As a result, the county's new Comprehensive Plan (2011) has set as one of its economic development goals to develop and expand the equine sector across the county, starting from the Cherry Creek trails system. Bil Daly, the Director of CCPED, is focused on marketing the equine industry as an underdeveloped niche that is highly compatible with the county's tourism sector and scenic rural landscapes.

A Trails-Based Approach

In accordance with the goal in the Comprehensive Plan, the county has recently consolidated its own Equestrian Trail System Plan, with the technical assistance of consultants from Alta Planning + Design Inc. (CCPED 2011). Mark Geise, the Deputy Director, is calling the trail system a future "horse trails-resort-parks-housing

wonderland” that will be marketed to those outside of the county and in Ontario. The main strategy of the Plan was to link the many small local trails in the county and to create new connections in order to create a master trail that transverse state forestlands, private properties, farms, municipal lands, communities, and private resorts. The Plan also seeks to adapt the existing recreational trail systems used by mountain bikers, hikers, cross-country skiers and snowshoers to become more compatible by use for horseback riders. Overall, the Plan aims to design and implement “cost effective, multi-purpose, sustainable, state-of-the-art trails of national caliber to gain instant national recognition in this increasingly competitive marketplace” (Lorenc and Trantum 2009 p.2). Appendix C shows the proposed equestrian trails in Cherry Creek, Chautauqua County.

It is estimated that the trail development will cost \$3 million. This figure has already been offset through various means: for example, the trail system is proposed to transverse seven private properties and several ski and summer resorts, the owners and/or management of which have granted the use their lands for equestrian trails. The project is also partially funded by local horse riders’ associations, private landowners, and other interested stakeholders, and it is estimated that about 25% of the estimated cost of the trail development will be offset by local in-kind labour and cash donations (Geise, Personal Communication, March 23, 2012). In addition, Lou Eibl Corral Club has agreed under the Adopt-A-Resource Agreement to maintain and monitor the trails after its development. The Plan has also triggered land prospecting in the area. Mark Geise has noted that because of the plans to develop equestrian trails, investors have been prospecting the 100-acre Cockaigne Ski Area in Cherry Creek, recently put up for sale, due to its equestrian potentials (Personal Communication, March 23, 2012). The proposed trail system, therefore, has not only encouraged private properties and local community members to actively participate in developing the local equine sector, but is also attracting private equine-related investments to surrounding areas.

Enhancing Lobbying Power

The rapid development of the equine sector in Chautauqua is partially made possible ever since in 2003, the New York Horse Council (NYHC) – recognizing the importance of the equine sectors in Chautauqua and the neighbouring Cattaraugus County – created a new Chapter of NYHC for these counties. The NYHC represents and supports horse riders associations and equine businesses, and has been credited for driving the success of the NY equine industry. One of its main activities is to lobby state legislators on equine-related zoning laws and regulations. Existing legislations in New York State that reduces liabilities for private landowners contributing their properties to be part of equine trail systems include:

- A law that limits a landowner's liability toward persons using his/her property for most recreational purposes (including horseback riding). This bill provides general protection for landowners from lawsuits if a recreational user gets hurt or killed on their property.
- In Chautauqua County, a Gross Negligence Insurance policy can protect private landowners when horseback riders sue for injuries incurred whilst riding through their properties (Geise, Personal Communication, March 23, 2012)

Pending legislations lobbied by NYHC, on behalf of state's horse owners and leasers, include:

- "The Inherent Risk Legislation", a set of safety standards for the horse industry that can reduce a horse owner's liability if they meet these safety standards.
- "The Helmet Bill" which requires persons under 14 years of age who ride horses to wear helmets and requires certain providers of horses to supply helmets and helmet safety information to children or beginners.
- Another set of bills that exempt horseshoeing supplies and services from sales and use taxes.

If passed, these legislations will lower the costs and risk involved in investing in and operating horse facilities across the state, particularly for small-scale or family-run operations (NYHC 2009).

Recommendations for Dufferin County

Stronger Equine Focus in the Dufferin Active Transportation and Trails Master Plan

Following from the case study of Chautauqua County, there may be opportunity within the existing Dufferin Active Transportation and Trails (DCATT) Master Plan to adopt a stronger equine focus.

The DCATT Master Plan, consolidated in 2010 and implemented starting in 2011, outlines a county-wide trail system that connects on- and off-road trails designed to connect rural and urban communities, to be used for a wide range of non-motorized recreational activities and transportation including cycling, rollerblading and walking. However, the equestrian use of the trails is given a relatively minor consideration in the current Plan, even though it was noted in the DCATT Technical Appendix and Draft Guidelines (2009) for designing the trail system that “if/when organized equestrian clubs come forward with a demonstrated interest in accessing municipal trails in the rural areas, they are embraced as a bonafied user group and they be granted access to key rural off-road trail corridors” (p.9).

Local horse owner associations, horse-related businesses, and the local arms of Ontario Trail Riders’ Association may be able to approach Council with a proposal to re-assess the potential for equestrian use of the proposed trail system, making ammendments to the DCATT Master Plan.

Develop a New and Separate Equestrian Trail System

The advantage to amending the existing trails system proposed by DCATT to accommodate equestrian uses is that it significantly lowers the cost of developing an equestrian trails system. However, the special design requirements of equestrian trails and/or conflict between horseback riders and other trail users may render this option impractical. One alternative is to develop a separate and new system of equestrian trails branching out of the proposed trail system. This option is more costly; however, it is also advantageous as a new equestrian trail system may provide for alternative uses such as snowmobiling, mountain biking, cross-country skiing, and snowshoeing. The current DCATT trail system was mainly designed for non-motorized users like cyclists and walkers. The proposed equestrian trails in Chautauqua County, for example, also

partially overlap with existing snowmobile and skiing trails, and the design of the proposed trails complements the design and amenities requirements of other recreational users. The development of specialized equestrian trails in Dufferin County can offer new tourism and recreational opportunities that are not currently offered by the DCATT's proposed trails.

Currently, the equestrian trails proposal in the county has driven up the price of the land in the Cherry Creek area, i.e. the Cockaigne Ski Area, so it is in the interest of local landowners and businesses to become stakeholders early on during any new trail designing process. In Ontario, over 15,000 landowners have donated or permitted portions of their land to be used as snowmobile trails spanning over 42,000 km, so precedence has already been set. However, the Ministry of Health's Ontario Trails Strategy (2005) notes that private property owners and farmers hesitate to give access to their properties "because of concerns related to liability, trespassing, damage to property, interference with agricultural operations, noise pollution, and the introduction of biohazards and invasive species" (p.10).

The legislation and insurance programs in NY State act to reduce liabilities of private landowners should horseback riders incur injuries on their properties. However, the Ontario Trails Strategy (2005) has noted that the cost of liability insurance in Ontario for having trails on private property is still considered too high by many landowners. Hence finding ways to reduce the cost of liability insurance on private land used for trail purposes may be the focus for future government subsidy programs. In Dufferin County, members of the Ontario Equestrian Federation (OEF) are already covered under Personal Liability Insurances to protect them should their horses cause property or bodily injuries on their properties (OEF 2006). This policy is considered the most optimal and comprehensive, considering that they offer \$5 million in coverage for only a \$35 annual membership fee.

Offering new liability insurance for private property owners may be effective in encouraging the donation of land for equestrian uses. Enforcing the Horse Riding Safety Act (2001) on equestrian trails, which requires that all riders under the age of 18 riding a horse at a commercial riding facility to wear approved helmet and footwear, should further reduce the injury risk on private properties. A discussion paper by Haliburton

Highlands Stewardship Council (2002) suggested that landowners permitting trail use on their lands can reduce liability in the following ways: a) avoidance: prohibit certain access to high risk areas, such as near steep cliffs; b) reduction: regularly inspect, address and warn about hazards where people may enter onto the property (either by invitation or by trespass); c) retention: after assessing risks, make an informed decision to retain some risks, such as small or infrequent losses (e.g. noise pollution, etc.); d) transfer: several means may be used to transfer liability, including insurance, having hold harmless agreements, and contracting out the use and management of public trails (p.16).

Another way to encourage private land donations and allowances is to re-assess land use designations and offer tax exemptions for private properties with portions dedicated to equestrian trails. Since 2004, the Municipal Property Assessment Corporation (MPAC) has classified land used to provide horse trails or horse riding lessons to the public to be *residential* (MPAC 2005). This means that properties with trails are still taxed at residential rates, which is generally 4 times higher than the farm property rates. An amendment or exemptions to this rule – for example, for portions of their land to be taxed at a reduced residential rate – may incentivize more private properties to contribute their land for trail ride purposes.

A final suggestion to incentivize landowners is to amend the Conservation Land Act (1990) to allow land easements to remain in private ownership. Land easements are beneficial to the landowner because they become entitled to income and/or property tax exemptions. The Ministry of Health's Review of Legislation Affecting Trails: Report on Options (2008) has listed this as one of the 32 recommendations that will help create a more supportive legislative environment for the trails in Ontario (Environmental Registry 2008).

Strengthen Stakeholder Groups to Increase Representation of Equine Interests

Mark Geise from Chautauqua County also noted that the strong stakeholder organization (i.e. Lou Eibl Corral Club) and their persistent lobbying for a formal equestrian plan in Cherry Creek was key to triggering the Department's initiative to expand the equine sector in the county (Personal Communication, March 23, 2012). Strong stakeholder

networks and associations are therefore capable of influencing provincial regulations to become more favourable to equine sector development.

The Ontario equivalent of NYHC in New York State is the Ontario Equestrian Federation (OEF), which similarly represents and coordinates horse operations, businesses, enthusiasts, and owners at the provincial level. It is suggested that the Ontario Federation of Agriculture (OFA) and the OEF partner together to help fine tune equine-related provincial regulations. A partnership between OEF and OFA, the latter of which is actively involved with designing and implementing OMAFRA regulations, will help to boost the equine sector by lending it the visibility and representation harnessed by the county's agricultural sector.

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Appendix A: Conducting Further Equine Research for Dufferin County

It has been acknowledged that horses in Ontario are not adequately accounted for in research. In a survey conducted by Caldwell and Wilton, 86% of survey respondents indicated that the horses living on their properties would not have been accounted for during the previous Census of Agriculture (Wilton & Caldwell, 2009). Dufferin County was not counted in the list of Counties and Regional Municipalities in this study. There is definitely a need for greater research on the Equine sector.

The Town of Erin's Economic Development committee is currently undertaking a Business Retention and Expansion (BR+E) study through OMAFRA focused specifically on the equine industry presence in the Town of Erin.

The Township of Erin's Comprehensive Business Retention and Expansion Study

The Town of Erin's Economic Development Committee has long had the ambition to conduct a comprehensive Business Retention and Expansion Study for the region. Faced with limited resources (financial and human) however, the committee decided to take on a single segment study in the region. The Equine focus was inspired by a lecture entitled Destination Equitation where it was learned that for every new horse attracted to the region, \$8000 in annual local spending occurs for every new horse in the region and almost \$30,000 in capital investment (buildings, tractors, fencing, etc.) (Evans, 2010).

The BR+E study is a community based economic development initiative organized through OMAFRA that strives to support existing businesses while looking for ways to improve viability in the area and attract new businesses. The study is a means of engaging the business community in a dialogue while building connections and networks that will last beyond the survey itself. The BR+E is tailored to the local situation in collaboration between OMAFRA and an established leadership team comprised of community volunteers, and/or politicians. It is a structured survey administered by interviewers in person. A task force reviews results where to identify key issues and needs facing the community are summarized, and strategic action plans

are developed. Following the creation of a plan, implementation teams are formed to carry out the specified objectives.

Erin's taskforce is comprised of roughly 6 people who have been meeting weekly since January 1st. There is little to no budget from the town and very little support from Council. We are currently active in the surveying part of the process. There have been 60 businesses selected at random within the database of equine related operations we have identified. Partnership with a marketing committee would have been very useful in getting the word out to the community about the survey to better populate the database and to increase response rates of selected interviewees.

Two major goals of this study are the creation of new businesses and/or jobs and the retention of existing businesses and/or jobs. Red Flags are a very important element of retention and these are addressed immediately following the surveys. Red flag issues are dealt with immediately when:

- The company is about to close or relocate
- The company is about to downsize
- The company is unable to take advantage of an expansion opportunity
- Request for information and/or assistance

(OMAFRA, 2011)

In the case studies of horse owners/businesses undertaken for this report, we have encountered a number of red flag issues. However, we are not equipped with the resources to examine them in greater detail. (see Case Studies of this report).

Other options for developing a sector profile of the equine industry include recruiting a master's student for thesis research, Key Informant Interviews conducted by volunteers and broader online surveys (Wilton & Caldwell, 2009).

"The equine industry in Ontario has the potential for economic development but it will need to get coordinated or no one's going to develop horse-friendly policies and promote equine tourism" (Dallimore, 2011).

Institutional Support and Partnerships

Both the case studies from Chautauqua County and Wellington County (See Section 3: Case Studies) have shown that forming strong stakeholder organizations and institutional partnerships, respectively, are crucial to the regions' equine sector development. The success of the equine industry in Wellington County is a testimony to the advantages of forming institutional partnership with the University of Guelph's Equine Studies programs, as well as with various organizations like Equine Guelph. Equine Guelph, founded in 2003, is a not-for-profit organization serving the equine industry through education, research, healthcare promotion and industry development. There is also a well-documented case in Alabama by Broadway et al. (1994) on the importance of partnerships amongst agricultural universities and veterinary schools that provide educational services and institutional support for horse breeding and maintenance.

“There is a hunger among associations to explore partnerships,” said Michele Harris, Executive Director of the Hills of the Headwaters Tourism Association. Partnerships facilitated by Dufferin.biz may prove extremely beneficial.

Appendix B: Municipal Official Plans: Excerpts Relevant to Equine Sector

Orangeville (2011)

Goals potentially relevant to equine industry:

- Goals on economic growth include boosting tourism & “vacationing public”
- Goals on recreation include promoting off-street trail systems for all “non-motorized recreational activities”; to undertake to implement the Town’s 2008 Trails Master Plan as time and resources permit. (p.5)
- “Using an ecosystem-based approach, to maintain and enhance the environmental health of the Credit River sub-watersheds within which the Town of Orangeville is located” (p.5)

General Policies potentially relevant to equine industry:

- “Orangeville is an important destination for visitors with important natural, cultural, and heritage amenities. Tourism and recreation should play an increasing role in the local economy.” p.12
- Economic Development General Policy D1.6: “Council will encourage the continued operation of various recreation and Credit Valley Conservation facilities in the vicinity. Council will support marketing efforts by Credit Valley Conservation and other bodies of Government to attract tourists to and through the area; and further, Council will support the efforts of the service sector to accommodate this potential market”
- Council is more interested in attracting retail, offices, entertainment, governmental & residential development

Land Use Policies potentially relevant to equine industry:

- Much of Orangeville’s land use policies focus on central business district & urban areas

Permitted Uses under E4. Open Space - Recreation include (p.50):

- Public parks of all types, including fairgrounds and lands owned by Credit Valley Conservation.
- Private parks including picnic areas, campgrounds, swimming areas, pavilions, eating establishments, and other service buildings associated with the park use.
- Private clubs including those for golf, skiing, riding, fishing, hunting, snowmobiling.
- Private lands for organizations relating to youth groups, art groups and other special interest groups.
- Private lands for hiking trails or wilderness areas involving the use of open lands

Policies under E5. Natural Environment, Water Resources and Natural Hazard:

- Focus on sub-watershed management & maintaining groundwater recharges
- E5.3.8: “Where proposed parks, trails or public works would be located within lands designated Open Space Conservation, an Environmental Impact Study will

be undertaken to the satisfaction of the Town and Credit Valley Conservation to ensure that potential impacts on the natural environment are identified” (p.54)

- E5.3.33: “Council will develop and maintain a network of recreational trails, suitable for walkers and cyclists, within or linking the areas designated Open Space Conservation by this Plan. The Town's trails will follow the Trails Master Plan (2008) and provide for connections with the Island Lake Conservation Area and the Credit Valley trail system” (p.58)

Zoning by-laws potentially relevant to equine industry:

- Under 18. Non-Conforming Uses, 18.1: “Any land use existing at the date of the coming into force of the Implementing Zoning By-law that does not conform with the land use designations shown on any of the Schedules to this Plan, should cease to exist in the long term [Minister's Modification No. 23]. In special instances, however, it may be desirable to permit the extension or enlargement of the non-conforming use on lands owned up to the above-noted date in order to prevent unnecessary hardship. Such extensions or enlargements will require the approval of the Committee of Adjustment.” (p.97)

Shelburne (2006)

Their official plan is currently being amended to conform to Places to Grow Act and Provincial Growth Plan for the Greater Golden Horseshoe. Objectives potentially relevant to the equine industry include:

- Objective i) “To protect environmental systems and features in the Town in a manner that recognizes the importance of their conservation” (p.10)
- Objective j) “To promote the use of open space networks throughout the Town by implementing a system of trails and walkways”. (p.10)
- Objective q) “To provide for the conservation of the natural environment including wetlands, woodlands, fish and wildlife habitat and streams, on an ecosystem management basis” (p.11)

Land Use Policies potentially relevant to the equine industry:

- 4.F. Open Space Recreation Designation: the objective is to “provide the land and leisure or recreational activities for groups or individuals of all ages and special interests in keeping with the needs of the community and within the financial resources of the Town” and to “preserve and enhance the natural environment of the municipality” (p.29)
- Where proposal to have Open Space Recreation lands that are commercially-run or under private ownership, four provisions are given (p.31)
- See also land use provisions under the 4.G. Natural Environment (p.32); for example its requirements for Environment Impact Assessment for development proposals on any land located within 50m of any natural feature identified through the Natural Environment designation. (p.34)

Township of Amaranth (2005)

The following excerpts from the official plan are seen to be potentially relevant to the equine sector:

- VISION: The Township of Amaranth will direct growth in a positive manner that protects the environment, is sustainable, socially acceptable, sensitive to the heritage of the community and financially sound.

1.4 BASIS:

- The Township has been essentially rural in character and has faced continuous development pressure as the Greater Toronto Area represents one of the fastest growing areas in Canada. In recent years there has been a recognized out migration of young families from the urban areas to the south into the Township. This migration is the result of an increased ability to work from home and a trend toward more self employment in combination with the desire of many urban area residents to live in an attractive rural environment. These trends will result in increased demand for rural housing and small community living.
- The quality of the life that makes the Township a desirable place to live is created largely by the rural character of the area. Throughout the development of this Plan, Council and the public have indicated a desire to maintain the open landscape character and natural features of the Township.
- Agriculture continues to play an important role in the economy of the Township, the Township's heritage and the quality of the natural landscape. Agricultural lands must be preserved for future agricultural use so that the economy and character of the Township is also preserved.

2.0 OBJECTIVES

- To provide opportunities for economic and social development that will provide a viable and sustainable future for the Township.
- To recognize the importance of agriculture in the Township and ensure that agricultural operations can adapt to changing economic and employment conditions and technology.
- To provide a level of services that recognizes the mix of rural, rural settlements and estate residential uses in the Township and the financial resources of the municipality.

3.1 AGRICULTURAL USE

- To encourage all forms of agriculture and protect the long term ability of farming operations to contribute to the economy and lifestyle of the Township of Amaranth.
- To maintain the open landscape character of the Township by preserving large parcel sizes and minimizing the intrusion of non-agricultural uses into agricultural areas.

3.1.3 Permitted Uses: Lands in the Agricultural designation may be used for the following:

- Agricultural uses that include the use of lands, buildings or structures for the growing of crops, including nursery and horticultural crops, raising of livestock and other animals for food, or fur, including game, poultry and fish, aquaculture, agro-forestry, and maple syrup production subject to the provisions outlined in this Plan;
- A single-detached dwelling for the owner or manager of the farm operation plus an additional single-detached dwelling for full-time farm help subject to the provisions of Section 3.1.5.b;
- A single detached dwelling on existing or approved new lots;
- Home occupations and small scale home industries accessory to agriculture and other rural land uses;
- Agriculture-related commercial and agriculture-related industrial uses that are small in scale and directly related to the farm operation and required to be located in close proximity to the farm operation, such as a grain drying handling and storage facility;
- Farm oriented tourist business' and bed and breakfast uses that do not reduce the agricultural capability of the land, remove farm infrastructure or adversely effect adjacent farm operations;
- Accessory buildings, structures and facilities and site modifications required to accommodate those uses permitted in the agricultural designation;

3.1.5 Development Policies: In addition to the Development Criteria in Section 4, the following policies shall apply:

- Development within and adjacent to the Agricultural designation shall ensure that there are no conflicts with the agricultural uses which may result in new restrictions on the agricultural use. All farm and non-farm development will comply with the Minimum Distance Separation Formulae (MDS) established by the Province in order to minimize odour conflicts between livestock and development, as amended from time to time.
- Agriculture-related commercial and agriculture-related industrial uses that are small in scale and directly related to the farm operation and required to be located in close proximity to the farm operation such as a grain drying handling and storage facility. Other agric-business uses such as abattoirs, livestock marketing or sales yard, a seed cleaning plant, an agricultural produce warehouse or similar agri-business are permitted provided that alternative locations within areas designated other than Agricultural are not available as per Section 3.1.5 g) of this Plan

3.2 RURAL IDENTIFICATION:

- The Rural areas designated on Schedule “A” are lands where the soils are classified as Classes 4 to 7 according to the Canada Land Inventory and the use of land has traditionally been for limited agriculture, hobby farms, residential uses on large lots, recreation, conservation and resource related uses. These lands may also include areas where lot fragmentation has resulted in higher quality lands no longer being capable of being farmed.

3.2.2 OBJECTIVES:

- To encourage agriculture and protect and preserve the long term continuation of farming operations in the Township while permitting nonfarm uses that have a minimal impact on such agricultural uses.
- To provide opportunities for rural land uses that may be incompatible with agriculture and environmentally sensitive areas and which are not suitable for estate residential areas or hamlets.

3.2.3 PERMITTED USES:

- Agricultural uses that include the use of lands, buildings or structures for the growing of crops, including nursery and horticultural crops, raising of livestock and other animals for food, or fur, including game, poultry and fish, aquaculture, agroforestry, and maple syrup production;
- Small scale recreational and tourism related uses such as passive parks and trail uses provided that any detrimental impact of these uses on the scenic qualities and natural environment is kept to a minimum;
- Agriculture-related commercial and agriculture-related industrial uses that are small in scale and directly related to the farm operation and required to be located in close proximity to the farm operation such as abattoirs, livestock marketing or sales yard, a seed cleaning plant, an agricultural produce warehouse or similar agri-business are permitted subject to a rezoning amendment.

3.7 OPEN SPACE - RECREATION

- Open Space - Recreation areas are lands used for public or private outdoor recreation. The designation recognizes existing uses. New uses will require an Amendment to this Plan in accordance with the policies in this Section of this Plan.
- to encourage the development of high quality recreation facilities which are compatible with the natural environment;
- to encourage public access and enjoyment of the Township's rural landscape;
- Permitted uses include recreational and tourism related uses such as campgrounds, country clubs, golf courses, private sports fields, trail uses and private clubs that require large open space areas and recreational amenities;

Township of Mono (2009)

The following excerpts from the official plan are seen to be potentially relevant to the equine sector:

2.0 PURPOSE AND SCOPE

- This Plan is intended as a guide to decisions in both the private and public sectors, which should be made in such a way that, wherever feasible
- existing developments and the natural environment will not be adversely affected by new growth or changes in land use;
- where growth or changes occur, they will be directed in a manner that will enable the provision of more adequate community services at an economical level;

7.0 AGRICULTURAL RESOURCES

- The agricultural industry continues to be affected by significant changes in capitalization, management, operation and marketing trends within various agricultural sectors. The Town will continue to encourage the preservation of prime agricultural areas for long term use for agricultural purposes.

8.0 RESORT AREAS

- to recognize the fact that parts of the Planning Area are well-suited to resort uses related to outdoor recreational activities such as skiing, fishing or hiking;
- to enhance the economy of the Planning Area by permitting commercial uses, which are oriented to resorts, and to other tourist activities, in appropriate locations which will not require the expenditure of public funds for water supply or sewage disposal services.
- To protect resort uses from intrusions by other uses which could detract from the area's attractiveness for outdoor recreation.
- Non-residential uses permitted in Resort areas may include recreational commerce uses such as tourist establishments, recreational facilities, restaurants, service stations and neighbourhood stores; and public and institutional uses such as parks and places of worship. In addition, private clubs and I accessory dwelling per lot may be permitted.

Section 15: Rural areas. In the chapter of rural areas it is written that farming should be done in primary agricultural land. If the land is not used for farming then other small business or use may be done in the farmland, but equine development is not mentioned in that chapter.

PREDOMINANT USES

The predominant land uses in areas designated. Rural shall be uses oriented to the natural environment such as conservation, forestry, agriculture, rural estate and certain related small institutional, small commercial or home trade uses. However, specialized or intensive livestock operations shall be permitted in areas designated rural subject to strict controls. For the purposes of this Official Plan, a specialized or intensive livestock operation is defined as an agricultural operation having greater

than 450 livestock units, or any other lesser minimum which may be defined under Provincial nutrient management, agricultural, or planning legislation (if less than 450 livestock units), located on a lot having a minimum lot size of 100 acres.

Chapter 15: RECREATION

Trails will be located and designed so as not to adversely affect adjoining private landowners. Motorized vehicle trails are encouraged to use abandoned pits or quarries, abandoned railway lines or unused Town roads where disruption of the natural environment would be minimal.

SECTION 14: ENVIRONMENTAL PROTECTION AREAS

The basic objectives which led to the designation of lands as Environmental Protection on Schedule A" are as follows:

- to preserve from development any lands which are subject to environmental problems such as flooding, poor drainage, organic soils, erosion or other detrimental physical conditions;
- to preserve from development any lands having unique natural features such as environmentally sensitive lands;
- to permit, on lands having potential environmental problems or unique natural features, only those uses which require either no permanent structures or structures which will have no detrimental effect on the general preservation of such lands.

The Environmental Protection designation includes those general areas where, because of potential environmental problems or unique natural features, development either should be entirely prohibited or should be discouraged, unless appropriate measures are taken to protect both the environment and the development.

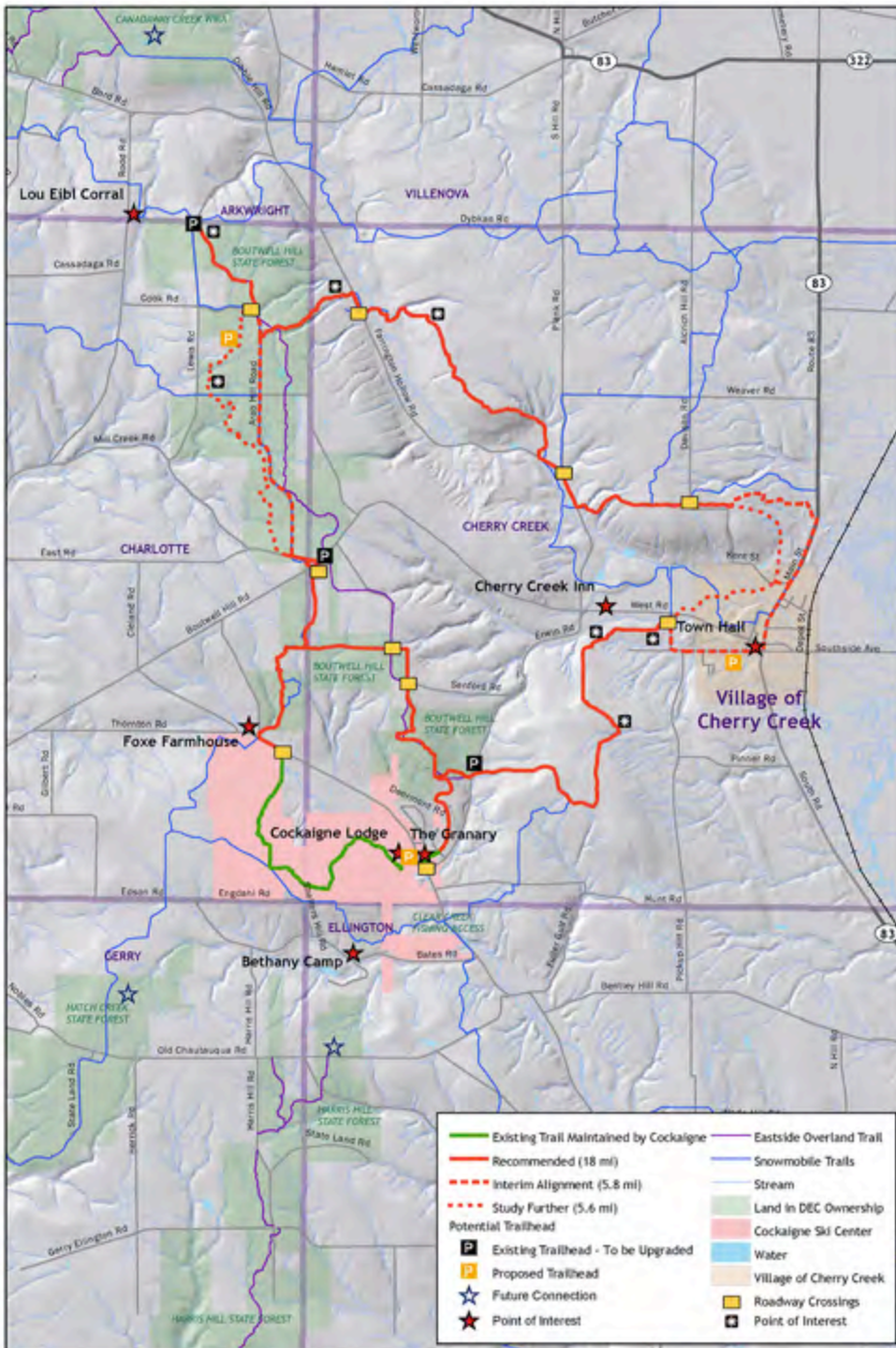
PLANNING POLICIES

The uses permitted shall include agriculture, nursery gardening, forestry, conservation areas, outdoor recreation facilities and similar uses, provided they do not aggravate environmental problems or detract from unique natural features.

Township of East Luther Grand Valley (2011)

Within its Official Plan it is evident there is possibility for equine businesses in the agricultural industry. The Official Plan states in section 5.1.2, that "...the objectives of the agricultural designation are to encourage a diversity of agricultural activities and protect the long term ability of farming operations to adapt to changing market conditions" (p.27).

Appendix C: Map of Proposed Equestrian Trails in Chautauqua County, NY



Recommended Alignments

Chautauqua County, NY
 Chautauqua County Equestrian Trail Plan
 Source: Chautauqua County
 Author: M. Koppell
 Reviewed: B. Wilson
 Date: January 2012



Source: CCPED 2012