

MARYLAND HORSE PARK SURVEY

AUGUST 8, 2005

The Maryland Stadium Authority, in conjunction with the Maryland Department of Business and Economic Development and the Maryland Horse Industry Board (a division of the Maryland Department of Agriculture), is exploring the merits of a proposed new Maryland Horse Park. The facility will be designed for use by Maryland citizens and as a tourist destination for out-of-State visitors. The horse park is anticipated to offer facilities capable of hosting major national and international horse shows and provide campgrounds, offices for equine-related business and trade organizations, a museum, an amphitheatre and space for conferences and educational programs.

The analysis will evaluate the potential market demand, preliminary site plan, design and location for the proposed new Maryland Horse Park as well as the potential economic and fiscal benefits associated with the project. Six municipalities recently responded to a nomination of potential sites for the proposed new Maryland Horse Park and are currently being evaluated.

As part of our evaluation, we are interested in receiving input from prospective user groups in terms of the following:

- Location of the proposed horse park
- Proposed facility features (i.e. number of show rings, number of stalls, etc.)
- On-site and off-site amenities (i.e. lodging, food, other services)
- Potential usage (i.e. type, frequency, time of year, attendance, etc.)

Because we are trying to obtain input from a wide variety of prospective users on several issues, all of the questions on the survey may not be pertinent to you and/or your organization. Please answer the appropriate questions as best you can as they relate to your opinions and/or those of the organization(s) that you represent.

If you have already completed a similar survey for the proposed new Maryland Horse Park, then please do *not* complete this survey.

KPMG will be tabulating the results of this survey. When completed, please fax your completed survey to 813-435-2256 or mail it to the following address:

Susan Sieger
KPMG LLP
100 North Tampa Street, Suite 1700
Tampa, Florida 33602

Thank you in advance for your participation.

Sincerely,

Alison L. Asti, Executive Director
Maryland Stadium Authority

J. Robert Burk, Executive Director
Maryland Horse Industry Board

Ms. Susan Kenney, Project Manager
Department of Business and Economic Development

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| | |
|-----------------------|---------|
| Name/Title: | |
| Name of Organization: | |
| Address: | |
| Telephone: | E-mail: |

For each component listed below, circle the number to the right that best describes its importance to your organization.

| Component | Scale of Importance | | | | |
|--------------------------------------------------------------------|---------------------|----------|------------|----------|-----------|
| | Not at all | Not very | No Opinion | Somewhat | Extremely |
| 5,000-seat enclosed arena | 1 | 2 | 3 | 4 | 5 |
| Outdoor Amphitheatre (competition, festivals, tradeshow, concerts) | 1 | 2 | 3 | 4 | 5 |
| Boarding facilities for horses | 1 | 2 | 3 | 4 | 5 |
| Boarding facilities for hounds | 1 | 2 | 3 | 4 | 5 |
| Steeplechase course | 1 | 2 | 3 | 4 | 5 |
| Polo Fields | 1 | 2 | 3 | 4 | 5 |
| Cross Country course | 1 | 2 | 3 | 4 | 5 |
| Jousting | 1 | 2 | 3 | 4 | 5 |
| Driving/Carriage course | 1 | 2 | 3 | 4 | 5 |
| Campground facilities | 1 | 2 | 3 | 4 | 5 |
| Parking for trailers and/or RVs | 1 | 2 | 3 | 4 | 5 |
| Utility connections for trailers and/or RVs | 1 | 2 | 3 | 4 | 5 |
| A museum | 1 | 2 | 3 | 4 | 5 |
| Gift shop | 1 | 2 | 3 | 4 | 5 |
| Business offices | 1 | 2 | 3 | 4 | 5 |
| Auction pavilion | 1 | 2 | 3 | 4 | 5 |
| Conference facilities | 1 | 2 | 3 | 4 | 5 |
| Education facilities | 1 | 2 | 3 | 4 | 5 |
| A training track | 1 | 2 | 3 | 4 | 5 |
| Space available for equine retirement | 1 | 2 | 3 | 4 | 5 |
| A visitor center | 1 | 2 | 3 | 4 | 5 |
| Full commercial kitchen | 1 | 2 | 3 | 4 | 5 |
| Banquet and catering facilities | 1 | 2 | 3 | 4 | 5 |
| Snack bar | 1 | 2 | 3 | 4 | 5 |

MARYLAND HORSE PARK SURVEY (cont'd)

AUGUST 8, 2005

Please take a moment to help us understand your involvement in the equestrian industry, characteristics of your organization and the design features that you require in order to host events at the new Maryland Horse Park.

Number of members in your organization?

- Between 10 and 50
- More than 50 but less than 100
- More than 100 – *Please estimate* _____

Types/activities of riding: (please check all that are applicable)

- Dressage
- Cross country
- Steeplechase
- Combined training
- Hunter/jumper
- Western
- Polo
- Other: _____

Please estimate where your members reside.

- _____ % from MD
- _____ % from PA
- _____ % from DE
- _____ % from VA
- _____ % from _____ (*list*)

Please list the facilities where you currently host events:

How often would your organization likely use the new Maryland Horse Park?

- _____ number of shows/events
- _____ number of days per show/event

What would you estimate the attendance to be at each show/event?

- _____ number of participants per show/event
- _____ number of spectators per show/event

What time of the year would your event utilize the new Maryland Horse Park? (*Please check all that apply*)

- Spring
- Summer
- Fall
- Winter

What geographic location for the new Maryland Horse Park would best suit your organization?

- Southern Maryland
- Central Maryland
- Western Maryland
- Eastern Maryland
- Other: _____

What is the average length of your event?

- _____ Move-in/move-out days
- _____ Event days
- _____ Total usage days

How many show rings should there be? _____

How many horse stalls would you require at each show/event? _____

Please check desired Off-Site Amenities (*please check all that apply*)

- Restaurants
- Hotels
- Campgrounds
- Retail/Shopping
- Other attractions or recreational facilities

Please list _____

Ideally, how close do the amenities (i.e. hotel, restaurants, etc.) need to be to the new Maryland Horse Park in order for you to utilize them?

- Less than a mile
- No greater than 5 miles
- No greater than 10 miles
- No greater than 25 miles

MARYLAND HORSE PARK SURVEY (cont'd)

AUGUST 8, 2005

How much do you estimate spending on lodging *per night*?

- Less than \$75
- \$75 to \$150
- \$150 to \$200
- Over \$200 – *Please Estimate \$* _____

How much do you estimate spending on meals and retail/merchandise *per person, per day*?

- Less than \$25
- \$25 to \$50
- \$50 to \$75
- Over \$75 – *Please Estimate \$* _____

How much do you estimate spending on horse-related supplies/services (e.g. entry fees, stalls, feed, bedding, medicine, shoeing/farrier, training etc.) *per event*?

- Less than \$75
- \$75 to \$150
- \$150 to \$200
- \$200 to \$300
- Over \$300 – *Please Estimate \$* _____

If you are an equine goods/service provider, would you be interested in leasing office and/or retail space at the new Maryland Horse Park?

- Yes
 - _____ SF of office space
 - _____ SF of retail space
- No
 - Why not? _____
- Depends on the terms

Additional Comments:

Please list below additional features that your organization would like to see at the new Maryland Horse Park.

Do you think a new Maryland Horse Park would be a benefit to the Maryland Horse Industry?

THANK YOU FOR COMPLETING THIS SURVEY!

Please *fax* your completed survey to 813-435-2256

Or *mail* it to

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