



DELAWARE VALLEY  
UNIVERSITY

*IMPACT OF THE EQUINE INDUSTRY  
ON THE ECONOMY OF SOUTHEASTERN  
PENNSYLVANIA*

*October 10, 2017*

John M. Urbanchuk  
Assistant Professor and Chair, Agribusiness  
Project Director

Sarah M. Young, VMD  
Assistant Professor, Equine Science and Chair, Animal Science

Ms. Cory H. Kieschnick  
Associate Professor and Chair, Equine Science and Management

Ms. Christine Seel  
Assistant Professor and Co-Chair, Business and Information Management



DELAWARE VALLEY  
UNIVERSITY

## *ACKNOWLEDGEMENTS*

This study was commissioned by the Chester-Delaware County Farm Bureau and funded in large part by a grant provided by the Pennsylvania Department of Education.



### **Special Thanks to:**

Mr. Dan Miller, President, CDCFB  
Mr. Duncan Allison, Chair, CDCFB Equine Study Group

The Chester Delaware County Farm Bureau is very grateful to the following donors who have financially contributed to this project.

Chester County Commissioners  
Ms. Michelle Kichline  
Ms. Kathi Cozzone  
Mr. Terrence Farrell  
Pennsylvania Horse Breeders Association  
Ms. Mary Hazzard – SoundHorse Technologies  
Caroline and Greg Bentley  
Janet and Howard Robinson  
Ms. Carol Davidson  
Mr. William Pape  
Mr. Duncan Allison

Refreshments provided courtesy of Oxford Feed and Lumber and  
Brandywine ACE Pet Farm

Report photographs courtesy of Sarafina Photography



*IMPACT OF THE EQUINE INDUSTRY  
ON THE ECONOMY OF SOUTHEASTERN  
PENNSYLVANIA*

**EXECUTIVE SUMMARY**

The equine industry is an important part of the agricultural sector of the Pennsylvania economy and the 10-County Southeastern region of the Commonwealth. This region is made up of Berks, Bucks, Chester, Delaware, Lancaster, Lebanon, Montgomery, Philadelphia, Schuylkill, and York Counties. According to the 2012 USDA Census of Agriculture this Region accounts for 36 percent of the equine population and 32 percent of the equine farms in the Commonwealth of Pennsylvania. The survey on which this analysis is based indicates that there were more than 50,000 equines in the 10-County Region, 9.3 percent more than reported five years ago. The equine sector, its allied industries and the horse people who train, maintain, compete, and enjoy equine pump \$ 386 million in direct spending on goods and services into the Southeastern Pennsylvania economy. This industry also provides an annual payroll of almost \$160 million. This income in the form of wages and salaries is spent largely within the 10-County Region and multiplies throughout the economy as it is spent and re-spent. The increases in final demand by the commercial horse industry create and support jobs in Regional businesses and their suppliers, and generates additional income for all Pennsylvanians.

- ❖ The equine industry directly and indirectly accounts for nearly 670 million of additional economic activity for the economy of the 10-County Region of Southeastern Pennsylvania.
- ❖ The equine sector supports more than 6,550 jobs in all sectors of the Regional economy.
- ❖ The output and employment supported by the equine industry generates more than \$500 million in household income annually for Pennsylvanians.
- ❖ Taxpayers benefit from \$58 million in tax revenue generated by equine activities. While the majority of these receipts are provided by business, sales and personal income taxes the equine industry provides an estimated \$8.8 million in property tax revenue on equine related property.

## IMPACT OF THE EQUINE INDUSTRY ON THE ECONOMY OF SOUTHEASTERN PENNSYLVANIA

Residents and tourists driving around Southeastern Pennsylvania frequently are taken with the bucolic nature of the countryside characterized by fields of crops and forages and carefully maintained pastures populated by horses and other equine. Careful observers will also notice numerous riding stables and other businesses offering a wide range of services from boarding to recreational riding, lessons, instruction, equine supplies and veterinarian services. Most people do not take note of the economic activity that supports this industry and the contribution the full range of equine makes to the regional economy.

This fast-growing component of Pennsylvania agriculture makes a significant contribution to the economy as dollars spent on the goods and services required to maintain equine circulate throughout the entire regional economy. In addition, the continued existence of equine plays a major role in maintaining open space and agricultural production

### **BACKGROUND AND OBJECTIVE**

Delaware Valley University (“DVU”) was commissioned by the Chester-Delaware County Farm Bureau (“CDCFB”) to estimate the contribution of the equine industry to the economy of a 10-County Region of Southeastern Pennsylvania.<sup>1</sup>

The region consists of Berks, Bucks, Chester, Delaware, Lancaster, Lebanon, Montgomery, Philadelphia, Schuylkill, and York Counties. According to the 2012 USDA Census of Agriculture this Region accounts for 36 percent of the equine population and 32 percent of the equine farms in the Commonwealth of Pennsylvania. The Region is home to the two leading equine counties in Pennsylvania, Lancaster and Chester.

The purpose of this study is to update the analysis with a focus on the 10-County Region and provide information on the contribution the industry makes to the

---

<sup>1</sup> This study was funded in part by a grant from the Pennsylvania Department of Education under the Jobs Training and Educational Programs

Regional economy. The last study of the equine industry in Pennsylvania was conducted and published by Penn State University in 2003 and examined equine in the entire Commonwealth.<sup>2</sup>

This information will be provided to policy makers in the Legislature, local government officials, equine industry participants, and the general public to demonstrate the importance and contribution of the equine industry.

## **METHODOLOGY**

The spending associated with the equine industry circulates throughout the entire Regional economy several-fold.

Consequently, this spending stimulates aggregate demand, supports the creation of new jobs, generates additional household income, and provides tax revenue for the State and local governments. We estimate the impact of the equine industry on the 10-County Southeastern Pennsylvania Regional economy by applying expenditures by the relevant supplying industry to the appropriate

final demand multipliers for value added output, earnings, and employment.

This study utilizes IMPLAN (Impact Analysis for Planning) economic model to develop this understanding of the economy, including the sectors that support the equine industry, the links between them, and the level of economic activity. IMPLAN is a commonly used economic input-output (I-O) model. I-O models are constructed based on the concept that all industries within an economy are linked together; the output of one industry becomes the input of another industry until all final goods and services are produced. I-O models can be used both to analyze the structure of the economy and to estimate the total economic impact of projects or policies. For this analysis, a model for the Regional economy was constructed using the most recent IMPLAN software and data and used to estimate economic impacts of the equine industry. Detail regarding the IMPLAN model and how it was used is presented in Appendix A.

---

<sup>2</sup> Pennsylvania Horsepower: Pennsylvania Equine Economic Impact Study. Penn State College of Agricultural Sciences. May 2003



### Survey Design

Data for analysis was collected primarily via an on-line survey.<sup>3</sup> Survey questions were developed by the DVU project team and were reviewed and approved by the Chester Delaware County Farm Bureau. Questions were designed to anticipate the range of possible answers and to offer a practical number of mutually-exclusive, all-inclusive options. A web-based version of the questions was designed using a premium account on SurveyMonkey®, the industry-leading provider of cloud hosted surveys used by 99 percent of Fortune 500 companies. It provides robust design, hosting, and analysis tools to its premium subscribers

An informational website ([sepaequine.org](http://sepaequine.org)<sup>4</sup>) was created to describe and promote the

---

<sup>3</sup> Printed questionnaires were distributed to communities in the Region that were presumed to have limited access to the Internet, i.e. Amish in Lancaster and York Counties.

survey and to serve as a starting/ending point for survey participants. This website was indexed and submitted to search engines to make it easier to find by word of mouth. Search terms such as, “PA Equine Survey” and “Southeastern PA Equine” returned the website in the top three results on google.

The survey was hosted by SurveyMonkey® using a customized URL. SurveyMonkey® branding was suppressed and the SEPA Equine logo was displayed throughout the survey. The start, end, and disqualification pages were customized and hosted on [SEPAAEquine.org](http://SEPAAEquine.org).

Visually, the survey used consistent logos, color schemes, photographs, and fonts to create uniformity and brand recognition across web sites, printed materials, and advertisements.

The electronic survey’s 34 questions used branching logic to deliver only the applicable questions when possible to

<sup>4</sup> [sepaequine.com](http://sepaequine.com) was registered as well, and it served as an alias for [sepaequine.org](http://sepaequine.org) in order to capture traffic from users who assume the website suffice to be “.com”

streamline and focus respondents efforts. For example, respondents without equine business activities skipped questions about employee payroll.

Multiple choice questions and exhaustive lists of drop-down options were used whenever possible for data integrity and analysis of results. All fill-in responses employed data validation to ensure consistent data types in responses (e.g., numeric data for dollar amounts, standard units of measure), while allowing broad ranges of possible answers. These limits were explained in the instructions, with further detail provided in the event of an attempt to submit answers which did not meet the criteria.

The purposes of the survey were stated in the introduction and subsequent questions were consistent with these purposes. Questions which might be perceived as sensitive, such as the amount of spending on certain aspects of equine activity, were asked towards the end of the survey.

The last question was open-ended and it solicited additional comments on issues affecting equine operations.

A paper version of the survey was also deployed in order to capture data from the non-Internet using population. This 1-page (double-sided) version asked identical questions but employed more write-in options due to space constraints. Data validation for these paper entries was completed by student workers upon data collection and during manual entry into the electronic survey. A copy of the survey questionnaire is attached as Appendix B.

#### Survey Deployment and Promotion

The website was used as a primary gateway for directing qualified respondents to the survey itself. The survey project was promoted in advertisements in the Pennsylvania Equestrian, via a printed solicitation letter and business cards widely distributed to individual equine owners, equine related businesses, and others in the Region, and by word of mouth by the Chester-Delaware County Farm Bureau. To coordinate with other promotional efforts, the survey was promoted on social media (Facebook and Twitter) sites focused on equine activity in the Region of interest.

A Quick Response (QR) code was created and printed on the solicitation letter, business cards and displayed in the header of every page on the website. Respondents opting to use mobile devices to complete the survey could access it quickly by scanning or tapping the QR code. Both the website and the survey had alternate versions optimized for mobile devices.

SurveyMonkey's® “anonymous” features were used in accordance with the assurances of anonymity offered participants in the survey. This setting remained in effect during the entire collection period. This feature instructs SurveyMonkey® not to capture or relay any metadata (e.g., IP address of client device) and to report only survey answers.

Qualified survey respondents who successfully completed the survey were invited to enter a drawing for one of five \$100 Amazon gift cards. These entries, by email address only, were gathered by a separate, password protected survey for which the password was only given out at the conclusion of a validated survey submission. There were 312 unique submissions to this drawing.

#### Collection of Responses:

Early in the survey, at the third question, the respondent identified the primary Pennsylvania county/municipality in which he or she conducts equine activity. The participant could only continue further in the survey if one of the subject counties was selected. If the respondent's equine activities were not in these counties, the survey would exit to a custom disqualification page on the website with an explanation of the target areas of study. These responses were flagged as “disqualified” survey entries.

The survey was open from its initial pilot in mid-November until May 5th. Peak activity for the survey occurred in January (30 percent of valid responses), while peak activity on the website was in March (28 percent of all visits).

There were 1,175 survey responses initiated, 96 were disqualified because they did not conduct equine activity in the subject counties. There were 462 responses which were not finalized by the respondent submitting his or her answers in the last step. These were treated as abandoned entries. Most of these partial



responses contained some answers to the early questions but no information about spending activity. It is very likely that these respondents did not have that information at their disposal during their initial attempt at the survey and their answers are later represented in the “complete” surveys. Only surveys in which participants actively submitted their answers (617) were presented for inclusion in this study.

Data was aggregated for the Region and segregated by County. In addition to the regional analysis, individual analyses were conducted for Chester and Delaware, Bucks, and Montgomery Counties.

### **THE REGION’S EQUINE INDUSTRY**

The survey discussed above indicated that there were nearly 50,300 horses, ponies, mules and donkeys in the 10-County Region in early 2017. The distribution of equine by county within the Region reported by respondents, compared to the 2012 USDA Census of Agriculture, is shown in Table 1. Lancaster and Chester Counties continue to dominate equine in the Region.

Table 1  
Equine Numbers by County, Southeastern Pennsylvania, 2017

	USDA 2012	Survey 2017	Change
Lancaster	18,885	21,599	14.4%
Chester	9,723	10,299	5.9%
York	5,024	5,212	3.7%
Bucks	3,371	3,626	7.6%
Berks	3,091	3,259	5.4%
Lebanon	2,471	2,605	5.4%
Montgomery	2,172	2,343	7.9%
Schuylkill	823	841	2.2%
Delaware	291	306	5.2%
Philadelphia	119	135	13.4%
Region	45,970	50,225	9.3%

This represents a 9.3 percent increase over the population reported in the 2012 USDA Census of Agriculture. Survey respondents report that Thoroughbreds, Warmbloods and Quarter Horses are the most prominent breeds in the Region. The distribution of breeds reported by survey participants is shown in Figure 1.

Figure 1  
Most Popular Breeds  
(Total 50,225 Equine)

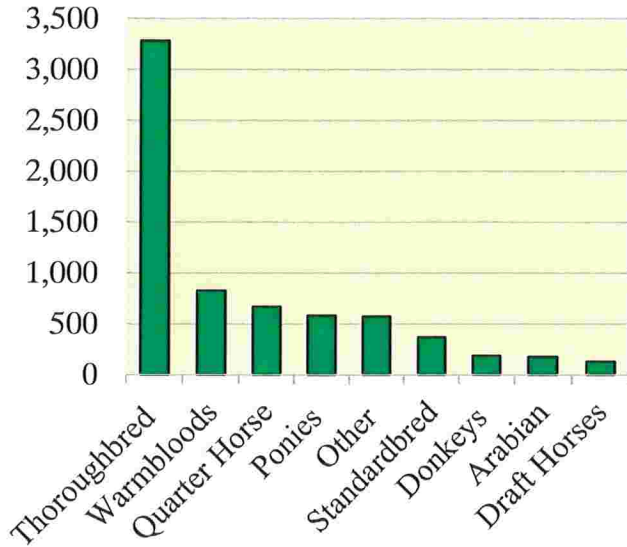
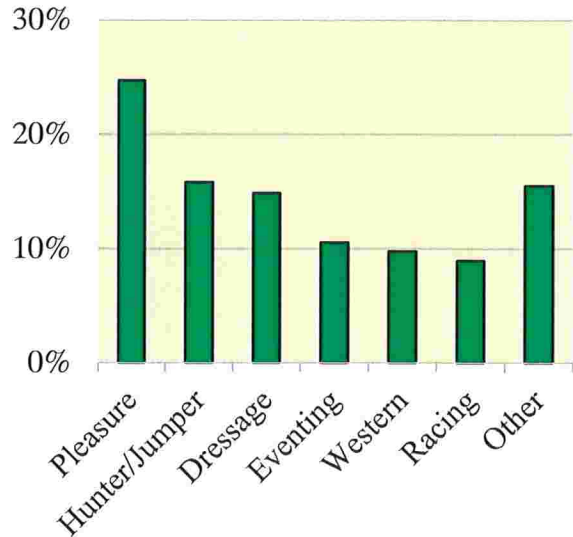


Figure 2  
Most Popular Equine Activities  
(1,234 responses)

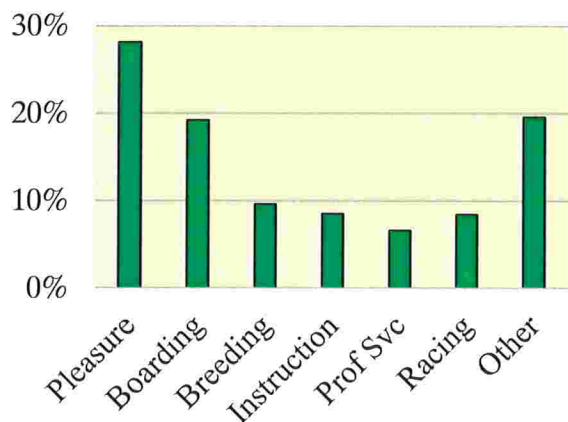


Pleasure riding is the most frequently mentioned equine activity in the Region followed by Hunter/Jumper activities and Dressage. Fain in Montgomery County is the Nation’s oldest and largest outdoor horse show and dressage is a major event.

Reflecting activities, the leading areas of equine involvement in the Region are pleasure and trail riding, boarding and training and breeding.



Figure 3  
Equine Involvement  
(1,094 responses)

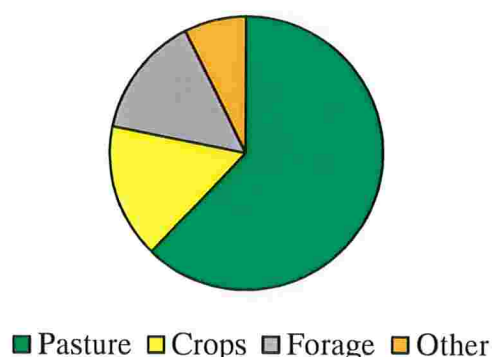


Equine are an integral part of Pennsylvania’s agriculture sector. As will be detailed in the next section, purchased feed and hay together represent the most significant cost for horse owners. Most of this feed and hay is produced in the Region. Further, the maintenance of pasture and forage acreage to support equine preserves open area and keeps land in agriculture.

The survey indicates that nearly 70,000 acres in the Region are devoted to equine. This amounts to about five percent of the land in farms in the Region. As might be expected more land is devoted to pasture for equine than any other activity. Reflecting equine numbers Lancaster and Chester counties devote the largest number of acres to equine

and account for more than two-thirds of the equine acreage in the Region.

Figure 4  
Acreage Devoted to Equine  
10-County Region



### INDUSTRY EXPENDITURES

The economic impact of the equine industry is generated by spending which represents the purchase of output from supplying industries. As detailed in Table 2, equine industry participants in the 10-county region of Southeastern Pennsylvania spent \$546.2 million on a wide range of good and services to support the 50,225 equids in the region. This amounts to an average spending of \$10,875 per animal.



Spending on goods and services accounted for 70 percent of expenditures or \$386.4 million while labor costs (wages and salaries) totaled \$159.8 million.<sup>5</sup> Purchased feed and forages (hay) and purchases of equine were the largest expenditure categories followed by boarding and capital improvements. Spending by category reported by the survey is detailed in Table 2.

Table 2  
Southeastern Pennsylvania Equine Expenditures, 2017 (Thou \$)

Total Spending	\$546,193
Wages & Salaries	\$159,829
Goods and Services	\$386,364
Purchased Feed	\$72,420
Purchases of Equine	\$55,828
Equine Boarding Expenses	\$33,311
Capital improvements	\$24,069
Breeding expenses	\$17,695
Hay	\$17,572
Veterinary / Health	\$17,532
Vehicles (including trailers)	\$16,640
Lessons and Training	\$14,054
Farrier	\$13,566
Competition / show	\$9,799
Tack / bridle / saddles	\$9,629
Repair and maintenance	\$9,384
Bedding	\$9,054
Property Taxes	\$8,820
Property Insurance	\$8,539
Fuel and utilities	\$7,183
Rent / lease	\$6,575
Farm equipment	\$6,567
Fencing	\$5,365
Personal Equipment	\$5,309
Equine Insurance	\$4,999
Equine Related Clothing	\$2,665
Accounting and Legal Fees	\$2,662
Advertising and Marketing	\$759
"Other"	\$6,369

<sup>5</sup> Wages and salaries include estimates of the value of volunteer and “work for service”.

## ECONOMIC IMPACT

The impact of the equine industry on the economy of the 10-County Southeastern Pennsylvania Region in 2017 is summarized in Table 3. The full impact of the spending for annual operations of the equine industry is estimated to have contributed more than \$668 million to the Region's value-added output, or GDP, in 2017. GDP is the total value of the goods and services produced by businesses in the Region. It is equivalent to the sum of labor income, taxes paid by the industry, and other property income or profit.

Table 3  
Economic Impact of the Equine Industry:  
2017

	GDP (Mil 2017\$)	Employment (Jobs)	Income (Mil 2017\$)
Direct	\$391.6	4,538	\$334.0
Indirect	\$82.5	774	\$50.5
Induced	\$194.2	1,245	\$116.5
Total	\$668.4	6,556	\$501.0

The contribution to GDP by the equine industry is largely provided by the agriculture and retail sectors. Agriculture includes feed, hay, bedding and equine bred for purchase. The retail sector reflects expenditures for goods that are not necessarily produced in the

region but are purchased at retail establishments in the Region. This includes tack and saddles, clothing and personal equipment, vehicles and farm equipment, fences, and other goods not specifically identified. These two industry sectors account for more than half of the GDP contribution from equine.

Three types of effects are measured with a multiplier: direct, indirect, and induced effects. Direct effects are the known or predicted changes in the economy. Indirect effects are the business-to-business transactions required to produce direct effects (i.e., increased output from businesses providing intermediate inputs). Finally, induced effects are derived from spending on goods and services by people working to satisfy direct and indirect effects (i.e., increased household spending resulting from higher personal income).

The combination of value added (GDP), labor income, and employment represent the net economic benefits that accrue to the Region as a result of increased economic output generated by the equine industry.

### Employment

Jobs are supported by the economic activity generated by the equine industry. These jobs include not only those directly involved in equine (direct employment) and supporting industries (indirect employment), and all other industries that benefit from the dollars circulating through the Regional economy because of equine (induced employment). Employment represents the annual average number of employees, whether full or part-time, of businesses producing output. In the survey, we asked respondents to indicate the number and wages of full time employees as well as the number of volunteer and “work for service” employees.

### Income

Economic activity and associated jobs produce income for households in the Region. The economic activities generated by the equine industry put more than \$500 million into the pockets of households in 2017. Labor income is the sum of employee compensation (including all payroll and benefits) and proprietor income (income for self-employed work). As is the case with GDP, the direct impact on income by the equine industry is largely concentrated in agriculture and retail

services. The value associated with volunteer and “work for service” does not involve a cash outlay by equine employers, this does represent an opportunity cost that should be included.

### Tax Revenue

The combination of GDP and household income supported by the equine industry contributed an estimated \$58.2 million in tax revenue for the State and local governments.

## **CONCLUSION**

The equine industry is a multifaceted, vibrant and important component of Pennsylvania’s agriculture sector. The estimated \$668 million of annual spending on wages, goods, and services by industry participants circulate throughout the Regional economy generating additional economic activity, supporting jobs, and household income for Households in the Region.

In addition to the economic contributions, the equine industry also plays a significant role in helping keep land in agricultural use, maintaining open space, and preserving the rural character of areas that support equine.

## **APPENDIX A IMPLAN Methodology**

We estimated the impact of the equine industry on the economy of the ten-county Southeastern Pennsylvania Region by applying expenditures by the relevant supplying industry to the appropriate final demand multipliers for value added output, earnings, and employment.

To understand how the economy is affected by an industry such as equine, it is necessary to understand how different sectors or industries in the economy are linked. For example, equine owners and managers buy feed and forage from the agriculture sector; which in turn, buys inputs from other suppliers such as seed, fertilizer and plant protection products that also purchase products from a range of other industries. Similarly, equine owners purchase the services of veterinarians and farriers who buy pharmaceutical and metal from supplying industries. These are referred to as backward linkages. Use of equine for activities such as training and instruction and pleasure by individual owners is a forward linkage.

The household sector is linked to all sectors as it provides the labor and management

resources. In turn, changes that affect incomes of the household sector typically have significant impacts compared to a change in the sales of other sectors. This is because households typically spend most of their income on both retail and service goods and this is a critical component of the economy

This study uses a data-based economic model known as IMPLAN (Impact Analysis for Planning) to develop a model of the ten-county Region of Southeastern Pennsylvania, including sectors that support the equine industry and the links between them. IMPLAN is a commonly and widely used economic input-output (I-O) model. I-O models are constructed based on the concept that all industries in an economy are linked together; and the output (i.e., sales) of one industry becomes the input of another industry until all final goods and services are produced. I-O models can be used both to analyze the structure of the economy and to estimate the total economic impact of projects or policies. For this analysis, a model for the 10-county Region of Southeastern Pennsylvania economy was constructed using current IMPLAN software and the

most recent data available.

IMPLAN models provide three economic measures that describe the economy: value added, income, and employment.

- Value added is the total value of the goods and services produced by businesses in the country and is generally referred to as GDP. It is equivalent to the sum of labor income, taxes paid by the industry, and other property income or profit.
- Labor income is the sum of employee compensation (including all payroll and benefits) and proprietor income. In the case of this analysis, demand for purchased feed and hay for equine supports farm income through higher crop receipts than would be the case without the equine industry.
- Employment represents the annual average number of employees, whether full or part-time, of businesses producing output. Value added including labor Income and employment represent the net economic benefits that accrue to the nation as a result of increased economic output.

Three types of effects are measured with a multiplier: direct, indirect, and induced

effects. Direct effects are the known or predicted changes in the economy. Indirect effects are the business-to-business transactions required to produce direct effects (i.e., increased output from businesses providing intermediate inputs). Finally, induced effects are derived from spending on goods and services by people working to satisfy direct and indirect effects (i.e., increased household spending resulting from higher personal income).

## **APPENDIX B**

### **EQUINE SURVEY QUESTIONNAIRE**





Photo Courtesy of Sarafina Photography

# Southeastern Pennsylvania Equine Industry Survey

Please return completed survey to:  
Mr. John M. Urbanchuk,  
Assistant Professor and Chair, Agribusiness  
ATTN: Equine Survey Delaware Valley University  
700 East Butler Ave  
Doylestown, PA 18901

## Location

In what county and township / borough are your equine activities located? *If you participate in equine activities in more than one location, please indicate the primary location of your equine activities.*

\_\_\_\_\_ County, please specify the township or borough: \_\_\_\_\_

## Equine Involvement

Which of the following best describes you equine involvement? (Check all that apply)

- |   |  |
|---|--|
| <input type="radio"/> Equine boarding and/or training                     | <input type="radio"/> Racing                       |
| <input type="radio"/> Equestrian instruction                              | <input type="radio"/> Trail (competition/pleasure) |
| <input type="radio"/> Agricultural purposes/transportation                | <input type="radio"/> Government/municipal         |
| <input type="radio"/> Breeding  | <input type="radio"/> Academic/educational         |
| <input type="radio"/> Professional Services (veterinarian, farrier, etc.) | <input type="radio"/> Other (therapeutic, etc.)    |
- Please specify: \_\_\_\_\_ Please specify: \_\_\_\_\_

## Discipline

What is your discipline? (Check all that apply)

- |                                       |                                 |  |
|---------------------------------------|---------------------------------|--|
| <input type="radio"/> Dressage        | <input type="radio"/> Pleasure  | <input type="radio"/> Driving                      |
| <input type="radio"/> Eventing        | <input type="radio"/> Endurance | <input type="radio"/> Racing                       |
| <input type="radio"/> Hunter / jumper | <input type="radio"/> Western   | <input type="radio"/> Agriculture / transportation |
- Other (therapeutic, etc.) Please specify: \_\_\_\_\_

## Relocated Equine Activities

For how many months of the year, if any, do you typically relocate your equine activities out of state?

Months of the year activities NOT in Pennsylvania: # \_\_\_\_\_ ("0" if equine activities are in PA year-round)

If any equine activities are relocated, how many horses / equine are relocated for that time?: # \_\_\_\_\_

## Equine Inventory

Equine Inventory: Number of equine owned / managed as of July 1, 2016

	# Owned	# Managed		# Owned	# Managed
Thoroughbred			Ponies		
Standardbred			Miniature Horses		
Arabian			Donkeys		
Quarter Horse			Burros		
Warmbloods			Mules		
Draft Horses			Other (not listed)		

Please specify "other" breed(s): \_\_\_\_\_

## Acreage

If you are the proprietor, how many acres do you dedicate to equine? *Please round to the nearest whole number*

	# of Acres		# of Acres		# of Acres
Pasture		Indoor / outdoor ring		Crops	
Forage		Track		Other (not listed)	

Number of acres (if any) enrolled in: *Please round to the nearest whole number*

	# of Acres		# of Acres
Agricultural preservation		Conservation easement	
Agricultural easement		Other easement/preservation	

## Equine Business Type

Which of the following best describes the business structure or entity of your equine concern?

- |   |   |
|---|---|
| <input type="radio"/> Family farm         | <input type="radio"/> Corporation / LLC                               |
| <input type="radio"/> Sole Proprietorship | <input type="radio"/> Individual horse owner (no business activities) |
| <input type="radio"/> Partnership         | <input type="radio"/> Other Please specify: _____                     |

## Employees

Total number of employees (full time, part time, apprentices, and working students): # \_\_\_\_\_

Total annual wages and benefits for full and part time employees: \$ \_\_\_\_\_

Estimated annual value of volunteer or "work for service" (payment-in-kind) exchange. Such as, bartering or non-cash payment of goods or services: \$ \_\_\_\_\_



Photo Courtesy of Sarafina Photography

*Southeastern Pennsylvania  
Equine Industry Survey*

*www.SEPAEquine.org*

**The financial data we request is  
crucial to estimating the economic impact.  
We appreciate your attention to the  
questions on this page.**

**Spending on Equine Related Goods and Services**

Dollars spent for goods and services (annually) for equine and personal equipment:

Purchases of equine: \$ \_\_\_\_\_

Tack / bridle / saddles: \$ \_\_\_\_\_

Clothing for equine related activities: \$ \_\_\_\_\_

Personal Equipment: \$ \_\_\_\_\_

Dollars spent for goods and services (annually) for daily care:

Equine boarding expenses: \$ \_\_\_\_\_

Feed: \$ \_\_\_\_\_

Hay: \$ \_\_\_\_\_

Bedding: \$ \_\_\_\_\_

Dollars spent for goods and services (annually) for services:

Veterinary / health: \$ \_\_\_\_\_

Farrier: \$ \_\_\_\_\_

Lessons and training: \$ \_\_\_\_\_

Accounting and legal fees: \$ \_\_\_\_\_

Advertising and marketing: \$ \_\_\_\_\_

Equine insurance: \$ \_\_\_\_\_

Property insurance: \$ \_\_\_\_\_

Dollars spent for goods and services (annually) for competition or breeding costs:

Breeding expenses: \$ \_\_\_\_\_

Competition / show expenses (entry fees, transport, lodging): \$ \_\_\_\_\_

Dollars spent for goods and services (annually) for capital / property costs:

Fuel and utilities: \$ \_\_\_\_\_

Taxes (property tax on equine-related land and buildings only): \$ \_\_\_\_\_

Capital improvements: \$ \_\_\_\_\_

Repair and maintenance costs: \$ \_\_\_\_\_

Rent/lease (rental of land, buildings, equine, vehicles, equipment): \$ \_\_\_\_\_

Vehicles (including trailers): \$ \_\_\_\_\_

Farm equipment (dedicated to equine): \$ \_\_\_\_\_

Repair and maintenance costs: \$ \_\_\_\_\_

Fencing: \$ \_\_\_\_\_

Dollars spent for other goods and services (not listed): \$ \_\_\_\_\_

*Please describe "other" goods and services:*

**Future Investment**

Anticipated investment over the next two years, if any (estimated \$ amount):

Property: \$ \_\_\_\_\_

Structures: \$ \_\_\_\_\_

Equine: \$ \_\_\_\_\_

Equipment: \$ \_\_\_\_\_

Vehicles, including trailers: \$ \_\_\_\_\_

Farm equipment dedicated to equine activities: \$ \_\_\_\_\_

**Conclusion and Comments**

Would you use a centrally located equine facility in your county? (Example: The Horse Park of NJ)  Yes  No

Additional comments on issues affecting your equine operation (feel free to attach additional paper if more space is required):

Thank you for completing our survey