

Technical Report



**PLANNING
DECISIONS**

Research & Planning

The Economic Impact of the Equine Industry in Maine

For:
The Maine Harness Racing Promotion Board
and
The Maine Farm Bureau Horse Council

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I. Executive Summary

There are about 35,000 horses in Maine working, racing, assisting with rehabilitation and therapy, and providing recreation and enjoyment to their owners. Maine's horses race at state fairs and draw crowds to local showing events. They graze in Maine's open spaces, and consume hay grown in Maine fields. They are trained by Maine trainers and treated by Maine veterinarians. In short, Maine's equine industry is vast, diverse, and far-reaching. The purpose of this report is to summarize the economic impact of the equine industry in Maine.

The Economic Impacts of the Maine Equine Industry

The total economic impact of the equine industry on the state of Maine is made of three components: the direct effects, the indirect effects and the induced effects.

The direct effects are the sales, income and employment created by equine related purchases in the state. The indirect effects are the purchases by businesses up and down the supply chain resulting from the direct impact business. For example indirect effects can include the purchases of medicines made by a vet's office. The induced effects are the purchases made by employees of both the direct impact business and indirect impact businesses. These can be purchases made by employees at grocery stores, movie theaters, etc.

Table 1
Economic Impacts of the Equine Industry in Maine

Activity	Sales (\$million)	Jobs	Income (\$million)
Direct Impact	\$191	3,650	\$66
Indirect Impact	\$44	475	\$14
Induced Impact	<u>\$129</u>	<u>1,575</u>	<u>\$50</u>
Total Impact	\$364	5,700	\$130

The direct, in-Maine, sales associated with the equine industry in 2006 amounted to approximately \$191 million. Based on average Maine employment and income levels for industries receiving this money these sales are estimated to support about 3,650 jobs earning a total income of approximately \$66 million.

In total the \$191 million in business sales associated with the equine industry generates total sales for Maine businesses of approximately \$364 million and support an estimated 5,700 jobs earning about \$130 million in income.

The Fiscal Impacts of the Maine Equine Industry

The economic activity from the horse industry creates tax revenue for the state and local municipalities. The yearly taxes generated are presented in Table 2.

Table 2
Fiscal Impacts of the Equine Industry in Maine

Tax Category	Taxes (\$million)
State Government	\$15.3
Sales and Gross Receipts	\$9.2
Income	\$3.7
Licenses & Other Taxes	\$2.4
Local Government	\$11.3
Property Taxes	\$10.5
Excise & Other Taxes	\$0.8
Total Tax Revenue	\$26.6

The Equine Industry's Impact on Land Use in Maine

In addition to its contributions economically, the equine industry is important because of its impact on the preservation of Maine's open space and rural character. Horses are kept in open plots. Their hay, used for food and other uses, is grown on agricultural lands in Maine. Also, horse owners take their equines to public lands for trail riding and other uses.

Table 3
Open Space Needed for Maine Horses

	Acres
Acres of Pasture for Maine Horses	169,322
Acres of Hayfield for Maine Horses	56,700
Total Land Required by Maine Horses	226,022

The equine industry uses about 265 square miles of land for horse pasture and keeps about 89 square miles of land in Maine in active hay fields (based on an

average of 1.62 acres of hay field needed per horse) to feed and care for their horses. For both open pasture and hay production it is estimated that the equine industry directly uses about 354 square miles of agricultural land in Maine.

This study also found that there are 87,500 trips taken to Maine's public lands (for example National and State parks, land under conservation easements, etc) for trail riding and other uses per year.



II. Introduction

Purpose

There are about 35,000 horses in Maine working, racing, assisting with rehabilitation and therapy, and providing recreation and enjoyment to their owners. Maine's horses race at state fairs and draw crowds to local showing events. They graze in Maine's open spaces, and consume hay grown in Maine fields. They are trained by Maine trainers and treated by Maine veterinarians. In short, Maine's equine industry is vast, diverse, and far-reaching. The purpose of this report is to examine and explain the economic impact of the equine industry in Maine.

The equine industry is defined here as all activities involved in breeding, raising, selling and using horses for commercial and recreational purposes. This includes pleasure horse owners, racing horse owners, working horse owners, boarding facilities, rehabilitation facilities, therapeutic riding facilities, vets, farriers, racetracks, showing events and other horse shows and also riders who do not own their own horses but are involved in the industry.

Economic impact in this report includes the business sales, jobs, personal income and state and local tax revenues generated as a result of the equine industry.

The scope of this report goes beyond that of the study completed by the University of Maine in 2000 entitled, "The Contribution of the Harness Racing Industry to the Maine Economy"¹. The University of Maine study looked only at the harness racing industry; this report considers other elements of the equine industry in Maine as well, such as pleasure horses.

In addition to estimating the economic impact of the equine industry in Maine, this report also analyzes the impact of the horse industry on patterns of land use and agricultural land preservation. As open space in Maine disappears to development, the contribution made by the equine industry is becoming all the more important.

An article entitled "Strength in Numbers: How Economic Impact Studies Shape the Horse World" published in the January 2007 edition of Equus magazine explains how economic impact studies not only demonstrate the economic importance of the equine industry on a regional or state level, but also influence public policy. Economic impact studies "*...may influence whether (horse owners) will be able to ride on...public trails... and/or whether a horse park in (the horse owner's) area will receive government funds*". It is hoped

¹ The Contribution of the Harness Racine Industry to the Maine Economy. October, 2000. Department of Resource Economics and Policy Staff Paper, REP 491.

that this study will play such a role in Maine, both describing the industry and highlighting the public policy issues it affects.

Layout of Report

This report is divided into the following sections:

- Methodology - Outlines how data was collected and interpreted, including an explanation of a survey of Maine horse owners conducted for this study.
- Economic Impacts of the Equine Industry - Displays the total economic impact of the equine industry in Maine.
- Fiscal Impacts of the Equine Industry - Presents the tax impacts of the equine industry.
- Impact of the Equine Industry on Land Use - Outlines how the equine industry affects land use in the Maine. The data in this section is based on the results of the study survey.
- Expenditures Made on Maine Horses - Presents the total amount of direct expenditures made by industry participants throughout Maine. This section also outlines the total value of all equine related assets in the state.
- Harness Racing Data - Outlines the wagering data for different racing tracks and simulcast facilities throughout the state. Also presents the purses paid out to racing horse owners.
- Results of Survey - Displays the total responses to each of the questions in the Equine Survey. The data presented in this section are not extrapolated to the entire horse population in Maine.

III. Methodology

This study is based upon data collected from three sources: 1) a survey administered to Maine horse owners (see *Appendix A* for copy of the survey), 2) personal interviews with operators of equine related facilities and fairs, and 3) data from federal and state equine related offices and other equine related publications.

This study looks at the harness racing industry and other aspects of the horse industry (which includes pleasure horse owners, boarders, working horse owners, rehabilitation facilities and the supporting activities for these types of owners). For the purposes of this study the non-racing portion of the horse industry is referred to simply as "Pleasure Horse Owners".

Surveys

The primary method of data gathering was through the administration of mail-based and web-based surveys. Potential respondents to the survey were identified through their affiliations with Maine horse clubs. The names and addresses of Maine horse clubs were collected through the MaineHorse.com website.

Understandably, many of these horse clubs were not willing to release the names of members and their corresponding addresses. In these cases a notice was sent to the president of the club who then disseminated the notice to the members. Members could either contact the survey administrator for a copy of a mail based survey or could log on to the website provided in the notice (see *Appendix B* for a copy of the notice).

The survey was also advertised in several places. A notice was printed in the April and May issues of The Horses Maine, a monthly equestrian newspaper printed and distributed in Maine. A notice, and link, was also posted on several websites including the Maine Farm Bureau's website, the University of Maine Co-operative Extension's website and Planning Decision's website.

Mail surveys were sent to participants whose addresses were known (including racing horse participants, who have to register their horses to race). In all, 121 mail surveys were sent back and 212 participants logged on to complete the online surveys.

Interviews

Interviews were conducted face-to-face with managers and operators of the State's racetracks and fairs. The purpose of these interviews was twofold: 1) to get a better understanding of the harness racing industry in Maine, and 2) to

estimate the amount of direct employment at these establishments and be able to identify their sources of revenue and expenses.

Other Data Used

Data was also taken from various reports and publications including: The Maine State Harness Racing Commission's *Annual Report*², The American Horse Council Foundation's *Economic Impact of the Horse Industry on the United States*³, and The Maine Department of Agricultural Food and Rural Resource's *Maine Agricultural Fair Annual Report*⁴.

IMPLAN

IMPLAN (IMPact Analysis for PLANning) is the computer program used to estimate the economic and fiscal impacts of the equine industry in Maine. IMPLAN is a computer input-output modeling program originally developed by the U.S. Department of Agriculture Forest Service for resource management planning. It contains a mathematical representation of the purchasing patterns that take place between sectors of an economy. A sector is a grouping of industries in an economy and is based on the NAICS (North American Industry Classification System) code as used by the U.S. Federal Government. IMPLAN uses 509 sectors in its model.

Built into the IMPLAN data files are all of the industry sales, employment and income data for each sector of the Maine economy. IMPLAN uses the Maine data along with national purchasing patterns (national input- output matrices) to create regional models.

Total Horse Population Estimates

In order to extrapolate the survey results in this report to the entire state, a base population of horses and race horses was estimated.

The 2002 US Census of Agriculture⁵ inventoried 12,738 horses in the State of Maine. This, however, is only an inventory of identified participants who respond back to the Census survey, and not an estimation of the true number of horses in Maine.

A closer estimate is provided by the 2005 study, *The Economic Impact of the Horse Industry in the United States*, which estimated the total horse

² Maine State Harness Racing Commission. "Annual Report". Various years.

³ American Horse Council Foundation; Deloitte. "The Economic Impact of the Horse Industry on the United States". 2005.

⁴ Maine Department of Agriculture; Food and Rural Resources. "Maine Agricultural Fair Annual Report". Various years.

⁵ US Department of Agriculture. "Maine State and County Data, Volume 1. Census of Agriculture". 2002.

population residing in Maine to be 37,854 horses. The estimate was based on the number of horses stabled in Maine for at least half the year.

The Economic Impact of the Horse Industry study was based upon a stratified random sample of horse owners throughout the US. The responses provided to these surveys, along with sample weights, were used to estimate the 95% confidence intervals for horse numbers in Maine. The lower bound of the confidence interval was 22,814 and the upper bound was 52,893. The study estimated the total number of horses in Maine to be 37,854. In speaking with leaders in the horse industry it was decided for the purposes of this study that the total number of horses in the State is about 35,000.



The economic impacts derived in this study are from expenditures made by horse owners, not from sales of businesses. It is for this reason that getting a good estimate of the horse population in Maine is important.

According to the Maine Harness Racing Commission, the number of horses who started at least one race during the past three years is 1,375 horses. This, however, does not include young horses not yet old enough to race (but are being trained to be racers), or retired racing horses that are used for breeding.

The Economic Impact of the Horse Industry on the United States study estimated that 9.16% of the total horses in the United States are racing horses. For the purposes of this study it is estimated that out of the total 35,000 horses in Maine, about 3,200 are racing horses and 31,800 are pleasure horses.

IV. Economic Impact of the Equine Industry

The impact of Maine's equine industry on the state's economy is measured in terms of business sales, employment and income. The results were gathered from two different sources:

1. The impact of expenditures by horse owners and industry participants; and,
2. The impact of Maine's racetrack and simulcast betting facility operations.

The results of this section are derived from direct spending made by equine industry participants. *Section VII. Expenditures Made on Maine Horses* of this report present the direct spending and impact data used in computing the total economic impacts of equines in Maine.

The impact of out-of-state visitor spending who are spectators to the State's different racing (and other horse related) events is not included in this analysis because it is impossible to estimate within the parameters of this study the number spectators who travel from out of state to watch harness racing events.

The main problem here is that for all fairs, other than Union, admission to the racetracks is free once people enter the fairgrounds. There is no way of knowing how many people attend the races. Beyond that, it is impossible to know or estimate, with existing data, the number of people who attend State fairs simply to watch the harness racing.

A suggested follow-up to this study would be to interview people who attend harness racing at fairs and racetracks to find out: 1) the percentage of people who came from out-of-state; 2) how many paid admission to the fair exclusively to see the harness racing vs. how many watched it because it was part of the fair; and 3) how much out-of-state racetrack visitors spend in Maine.

Out-of-state racetrack visitor spending is not thought to have a major impact on the state's economy. For example, the Bangor Raceway manager estimated that the majority of the people who attend the raceway are from the immediate area, not from out of state. However, this isn't to say there is no impact. For this reason, the economic impact results presented below are, if anything, a bit conservative.

Before the results of the analysis are presented, an outline of the underlying economic impact theory follows below.

Economic Impact Theory

Three different economic effects are tabulated when doing an economic impact analysis:

- The Direct Effect - The sales, income and employment created by one particular economic activity: a new investment, a given business activity or a given consumption expenditure;
- The Indirect Effects - The purchases by businesses up and down the supply chain resulting from the direct impact business; these are the inter-industry spending patterns resulting from the initial direct impact; and,
- The Induced Effect - The purchases made by employees of both the direct impact business and the supply chain businesses.

Attempting to measure all these effects individually would be virtually impossible. While all businesses know their major customers, they track sales for accounting and management purposes, not for the sake of tracing the flows of industrial sectors throughout the economy. The web of economic inter-connection is complex, and spending, like ripples in a pond, moves quickly from the point of original impact; the only way to measure an industry's total impact is to use an input-output model explicitly designed to capture those interconnections.

A multiplier summarizes the total impact within an economy that can be expected from a change in a given economic activity (Miller & Armbruster). In this case, the existence of the horse industry is considered a change in the local economy. For this report, three multipliers are used to measure the economic impact of the equine industry's economic activities. They are:

- Sales (Output) Multiplier - estimates the total change in local sales (or output) resulting from a change in sales at a basic industry (a change in this case means the difference between there being no aquaculture industry and there being one). Multiplying this number by the industry's sales will result in the total output produced in the local economy that is influenced by/related to the industry.
- Employment Multiplier - estimates the total change in employment in a local economy resulting from an initial change in employment at a basic industry. Multiplying this number by the industry's employment will result in the total employment in the region that is influenced by/related to the industry.

- **Income Multiplier** - estimates the total change in income in the local economy resulting from a change in income at an industry. Multiplying this number by the total income earned by employees working within the aquaculture industry will result in the total income that could be earned in the local economy that is influenced by/related to the industry.

A local economy contains both inflows and outflows of money. Inflows are dollars spent within the Maine economy originating from outside the State. These dollars originate either from local products sold outside the State or from visitors to the region spending their "outside" money locally. An outflow is local money spent outside Maine, either on imported products or on visits away. These are dollars that come from, or are produced within Maine, but are not spent locally. They "leak" out of Maine.

The Maine economy is made up of transactions that take place within the State: the flow of money between local households and local businesses and among local businesses creates spending and jobs within Maine. These purchases cycle through the economy and create additional spending. Measuring the cycling of dollars through the economy illustrates the economic impact the equine industry has on Maine.

The more money circulates within a given region, the greater its multiplier effect on the local economy. Conversely, the sooner a dollar of new spending "leaks" out of a region, the weaker its multiplier.

Economic Impact of Maine’s Equine Industry

Table 1
The Economic Impact of the Equine Industry in Maine

Activity	Sales (\$million)	Jobs	Income (\$million)
Direct Impact	\$191	3,650	\$66
Indirect Impact	\$44	475	\$14
Induced Impact	<u>\$129</u>	<u>1,575</u>	<u>\$50</u>
Total Impact	\$364	5,700	\$130

Source: IMPLAN Pro 2.0 operated by Planning Decisions, Inc.

The direct, in-Maine, sales (of both capital and operational equine inputs) associated with the equine industry in 2006 amounted to approximately \$191 million. Based on average Maine employment and income levels for industries receiving this money these sales are estimated to support about 3,650 jobs earning a total income of approximately \$66 million.

The indirect, or supply chain, impact of the \$191 million in business sales amounts to approximately \$44 million in sales. These sales support an additional 475 jobs earning an income of about \$14 million.

The induced, or consumer spending, impact of the direct and indirect spending equals approximately \$129 million. These sales support another estimated 1,575 jobs earning about \$50 million in income.

In short, the sales multiplier is approximately 1.91, the employment multiplier is approximately 1.56 and the income multiplier is approximately 1.97. This means that the \$191 million in business sales associated with the equine industry generates total sales for Maine businesses of approximately \$364 million and support an estimated 5,700 jobs earning about \$130 million in income.

Below the numbers presented above are broken into the economic impacts of expenditures by harness racing participants and by pleasure horse participants as well as the impacts of the operations of the state's racetracks and off-track betting establishments.

Economic Impact of Racing Horse Owner Expenditures

Table 2
Economic Impact of Expenditures on Racing Horses

Activity	Sales (\$million)	Jobs	Income (\$million)
Direct Impact	\$25	600	\$9
Indirect Impact	\$6	50	\$2
Induced Impact	<u>\$15</u>	<u>200</u>	<u>\$6</u>
Total Impact	\$46	850	\$17

Source: IMPLAN Pro 2.0 operated by Planning Decisions, Inc.

The direct, in-Maine, spending associated with expenditures by racing horse owners in 2006 amounted to approximately \$25 million. Based on average Maine employment and income levels for the sectors receiving these funds, these expenditures are estimated to support about 600 jobs earning an aggregate income of approximately \$9 million.

The indirect impact of the \$25 million direct spending is approximately \$6 million. These sales support an additional 50 jobs earning an income of about \$2 million.

The induced impact of the direct and indirect spending is estimated to be approximately \$15 million. These sales support another 200 jobs earning approximately \$6 million in income.

The sales multiplier for these expenditures is approximately 1.84, the employment multiplier is approximately 1.42 and the income multiplier is approximately 1.89. In basic terms, this means that the \$25 million spent by racing horse owners generates total sales for Maine businesses of approximately \$46 million and support an estimated 850 jobs earning about \$17 million in income.

Economic Impact of Pleasure Horse Owner Expenditures

Table 3
Economic Impact of Expenditures on Pleasure Horses

Activity	Sales (\$million)	Jobs	Income (\$million)
Direct Impact	\$146	2,550	\$50
Indirect Impact	\$33	350	\$10
Induced Impact	<u>\$99</u>	<u>1,200</u>	<u>\$38</u>
Total Impact	\$278	4,100	\$98

Source: IMPLAN Pro 2.0 operated by Planning Decisions, Inc.

The direct spending associated with expenditures by participants in the pleasure horse industry in 2006 was approximately \$146 million. This spending created 2,550 jobs and \$50 million in income for the different industry sectors receiving these funds.

The indirect impact of the \$146 million direct spending amounts to an additional \$33 million in business sales. These sales support an additional 350 jobs earning an income of about \$10 million.

The induced impact of the direct and indirect spending amounts to almost \$100 million in additional business sales. The result of these sales is another 1,200 jobs earning approximately \$38 million in income.

Therefore, the sales multiplier for these expenditures is 1.90, the employment multiplier is 1.61 and the income multiplier is 1.96. In basic terms, this means that the \$146 million spent by pleasure horse participants generates total sales for Maine businesses of approximately \$278 million and support an estimated 4,100 jobs earning about \$98 million in income.

The multipliers for pleasure horse owners are different than the multipliers for racing horse owners (presented earlier) due to different spending patterns.

These different spending patterns mean that pleasure horse owners, as compared to racing horse owners, purchase different inputs from different industry sectors for their horses. This means the money circulates through the State economy differently.

Impact of Racing Facilities (Racetracks and Simulcast Facilities)

The results of this section are from personal interviews with track operators and betting facilities in the state rather than surveys.

In the previous study, *The Impact of Harness Racing in Maine* the estimated economic impact of horse racing facilities was based on the revenue earned by the establishments. Part of this revenue is used to pay prizes and purses to horse owners; these winnings, however, are already tabulated in this report as expenditures made by the owners for upkeep and training of their horses. To avoid double counting, this section measures the impact of racing facilities based on the number of people they directly employ. This includes the business operations (business sales, purchases, salary to employees) but not the payment of prizes and purses.

Approximately 500 people are directly employed by Maine’s racetracks and fairs (about 240 people) and simulcast betting facilities (about 260 people).

Table 4 presents the total economic impacts of the operation of live racing and off-track betting facilities in the state.

Table 4
Economic Impact of Live Racing and Off-Track Betting Facilities

Activity	Sales (\$million)	Jobs	Income (\$million)
Direct Impact	\$20	500	\$7
Indirect Impact	\$5	75	\$2
Induced Impact	<u>\$15</u>	<u>175</u>	<u>\$6</u>
Total Impact	\$40	750	\$15

Source: IMPLAN Pro 2.0 operated by Planning Decisions, Inc.

The direct business sales in 2006 at live racing and off-track betting facilities amounted to approximately \$20 million. These sales created 500 jobs and \$7 million in income.

The indirect, or supply chain, impact of the \$20 million in business sales amounts to an additional \$5 million in business sales, supporting an additional 75 jobs earning an income of about \$2 million.

The induced, or consumer spending, impact of the direct and indirect spending amounts to almost \$15 million in additional business sales, with another 175 jobs earning approximately \$6 million in income.

The \$20 million in sales at these live racing and off-track betting facilities results in approximately \$40 million in total sales for Maine businesses and support an estimated 750 jobs earning about \$15 million in income.

V. The Fiscal Impact of the Equine Industry

The fiscal impact of the equine industry is the tax revenue it generates for state and municipal governments. These are taxes paid on the total economic impacts presented in Table 1, and are derived from two sources:

1. The indirect business taxes (property, sales, fuel, excise, licensing, etc.) paid to state and local governments by the equine related businesses and by the businesses linked through the project's indirect and induced impacts;
2. All of the taxes paid by the individuals and households earning incomes from the direct, indirect and induced sales generated by the equine industry; and,

In addition to the numbers presented below there is another source of tax revenue from the equine industry to the State. That is in the form of the distribution of money wagered on both in-state and out-of-state races. This money is put back into the racing industry whether through purse supplements, fair stipends or to the harness racing commission and promotional board and is presented in *Section VIII. Harness Racing Data*.

Indirect Business Taxes

A major source of money flowing through the economy is the indirect taxes paid by all businesses as part of the cost of operation, including property taxes, fuel taxes, licensing fees, excise taxes and sales taxes. Part of every dollar of sales revenue coming to a Maine company flows to state and local governments in the form of these indirect taxes.

Using the direct, indirect and induced spending generated by the equine industry, it is estimated that the total indirect business taxes accruing to the State of Maine and local governments is approximately \$21.3 million. Table 5 summarizes these results.

Table 5
Indirect Business Taxes Generated by the Equine Industry

Tax Category	Taxes (\$ million)
State Government	\$10.2
Sales and Gross Receipts	\$9.2
Licenses & Other Taxes	\$1.0
Local Government	\$11.1
Property Taxes	\$10.4
Excise & Other Taxes	\$0.7
Total Tax Revenue	\$21.3

Source: IMPLAN Pro 2.0 operated by Planning Decisions, Inc.

Personal Taxes

Personal taxes of all kinds (sales, income, fuel, licensing, etc.) are paid by the individuals earning incomes as a result of the equine industry (Table 6). The \$130 million in income earned as a result of the equine industry (see Table 1 earlier) is estimated to generate \$5.3 million in state and local tax revenues.

Table 6
Personal Taxes Generated by the Equine Industry (\$ million)

Tax Category	Taxes (\$ million)
State Government	\$5.1
Income	\$3.7
Other	\$1.2
Motor Vehicle	\$0.2
Local Government	\$0.2
Property Taxes	\$0.1
Excise & Other Taxes	\$0.1
Total Tax Revenue	\$5.3

Source: IMPLAN Pro 2.0 operated by Planning Decisions, Inc.

VI. The Equine Industry's Impact on Land Use

According to the Brookings Institution Metropolitan Policy Program's report⁶, from 1980 to 2000 about 869,000 acres of rural land in Maine was altered for residential and commercial development. This represented a loss of 17 percent of the state's developable land.

In addition to its contributions economically, the equine industry is important because of its impact on the preservation of Maine's open space and rural character. Horses are kept in open plots. Their hay, used for food and other uses, is grown on agricultural lands in Maine. Also, horse owners take their equines to public lands for trail riding and other uses.

An effort was made in this analysis to document the growing number of horses within Maine. In speaking with members and participants of the equine industry the general consensus was the number of horses has been increasing. However, there is little documentation of the number of horses in Maine in the past. A potential future study could involve the estimation of the growth of the Maine equine industry.

Pasture



In the survey used for this study (please see *Section IX. Survey Results*) the total amount of acreage used for horses was 7,696.9 acres, with 1,591 horses tallied. On average, each horse requires 4.84 acres of open space. Extrapolating this number to the rest of Maine's horse population, it is estimated that the equine industry uses 169,322 acres, or about 265 square miles, of open space for pasture.

Hay

For the 974 horses kept at survey respondents' residences, \$354,710 was spent in Maine on hay in 2006⁷. This represents \$364 spent per horse per year. Again extrapolating this number to the rest of Maine's horse population, it is estimated that, in total, \$12.74 million dollars were spent on hay for horses.

⁶ Brookings Institution Metropolitan Policy Program. "Charting Maine's Future: An Action Plan for Promoting Sustainable Prosperity and Quality Places". 2006.

⁷ Boarders were not included in this portion of the analysis because for some the cost for hay is included in boarding fees and is impossible to separate out. Included in this average, however, are people who grow their own hay.

According to the 2004 New England Agricultural Statistics⁸, 155,000 acres of hay fields (both alfalfa and other hay) was harvested. The total value of production was estimated to be \$34.9 million, meaning each acre produced \$224.9 worth of hay that year. Dividing this number into the estimated amount spent per horse for hay in Maine (above) equals 1.62 acres. On average, each horse in the State of Maine requires 1.62 acres of hay field. In total, the equine industry keeps 56,700 acres of land in Maine in active hay fields to feed and care for their horses.

Together, for open pasture and hay production, it is estimated that the horse industry directly uses 226,022 acres of agricultural land in Maine.

Public Lands

Survey respondents indicated that they used public lands (for example, national and state parks, land under conservation easements) for equine use an average of twelve and a half times per owner over the past year. Based on the results of this study, there is 1 horse participant in the state for every 5 horses; this equals about 7,000 horse participants in the state. It is estimated that these participants take approximately 87,500 trips to Maine's public lands for trail riding and other uses per year.

Previous Use

Survey respondents were also asked how their equine-related land had been used before they moved to/started using the property. About 30% said the land was an agricultural use other than horses, 30% said it was woodland or unused open space and about 15% said it was used for horses. More often than not, when property is purchased for equine use it's previous use was not for equines.

In summary, the impact of the equine industry in the State of Maine goes far beyond just economics. This study found that equine industry contributes significantly to the preservation and use of open space and agricultural land.

⁸ United States Department of Agriculture: New England Agricultural Statistics Service. "New England Agricultural Statistics". 2004.

VII. Expenditures Made on Maine Horses

This section outlines the direct expenditures made by all owners and participants in the horse industry in 2006, as well as the estimated values of all owned equine related assets.

Maine Equine Participants Expenditures

The numbers presented below in Tables 7 & 8 are based on the results of Questions 9 and 10⁹ in the survey. 305 surveys were used for the analysis of this section, which represents 1,492 horses; 593 harness racing horses and 899 pleasure horses.

Table 7
Horse Participants Expenditures on Operational Inputs

	Per Horse Avg		Maine Total Value		
	Pleasure	Racing	Pleasure	Racing	Total
Employee Compensation	\$73.09	\$1,124.19	\$2,324,230	\$3,597,415	\$5,921,645
Hay	\$393.33	\$215.73	\$12,507,817	\$690,331	\$13,198,148
Grain	\$222.46	\$306.28	\$7,074,138	\$980,085	\$8,054,223
Mixed/Formula Feed	\$39.61	\$58.81	\$1,259,549	\$188,194	\$1,447,743
Supplements	\$70.56	\$77.58	\$2,243,651	\$248,265	\$2,491,916
Entry Fees	\$69.09	\$68.97	\$2,197,171	\$220,713	\$2,417,884
Stud/Breeding Fees	\$24.75	\$318.36	\$787,041	\$1,018,760	\$1,805,801
Training	\$57.64	\$860.12	\$1,832,904	\$2,752,378	\$4,585,282
Health Costs (Vet, Meds, etc.)	\$243.36	\$495.83	\$7,738,755	\$1,586,655	\$9,325,409
Farrier Services	\$226.78	\$193.80	\$7,211,455	\$620,162	\$7,831,617
Tack and other Equipment	\$187.82	\$150.96	\$5,972,670	\$483,058	\$6,455,727
Grooming and other supplies	\$66.32	\$52.78	\$2,108,917	\$168,901	\$2,277,818
Bedding/Sawdust	\$100.00	\$100.00	\$3,180,000	\$320,000	\$3,500,000
Maintenance Equine Buildings	\$215.47	\$211.91	\$6,851,963	\$678,119	\$7,530,082
Utilities - for Equine Needs	\$63.58	\$61.57	\$2,021,971	\$197,015	\$2,218,986
Taxes for Equine Property	\$112.74	\$131.61	\$3,585,283	\$421,139	\$4,006,421
Fuel (heating)	\$112.39	\$144.01	\$3,574,087	\$460,824	\$4,034,911
Rent/Lease of Land/Buildings	\$36.43	\$47.78	\$1,158,454	\$152,893	\$1,311,347
Equine Registration	\$11.32	\$18.68	\$360,093	\$59,764	\$419,857
Club/Association Membership	\$15.49	\$17.94	\$492,635	\$57,400	\$550,035
Riding Lessons	\$74.24	\$2.94	\$2,360,770	\$9,395	\$2,370,165
Equine-Oriented Camp	\$8.30	\$0.34	\$263,880	\$1,079	\$264,959
Equine-Oriented School	\$9.69	-	\$308,273	-	\$308,273
Trail License/Permits	\$0.76	\$3.05	\$24,230	\$9,767	\$33,998
Travel & Shipping	\$81.82	\$215.52	\$2,602,011	\$689,673	\$3,291,684
Equine Books Purchased	\$10.59	\$3.93	\$336,783	\$12,568	\$349,351
Maine Equine Journals & Magazines Subscription(s)	\$4.97	\$1.15	\$158,080	\$3,686	\$161,766
Clinics	\$26.64	\$1.22	\$847,033	\$3,912	\$850,945
Other Expenses	\$42.94	\$26.62	\$1,365,419	\$85,180	\$1,450,600
Total			\$82,749,260	\$15,717,333	\$98,466,593

⁹ "Bedding/Sawdust" was erroneously omitted from the original survey. These per horse averages are based on estimates of weekly needs for horse bedding.

Table 7 displays the per horse average (for both pleasure and racing horses) for each operational expense. The totals for Maine are these per horse averages multiplied by the applicable number of estimated horses in Maine (3,200 Racing Horses and 31,800 Pleasure Horses).

Employee compensation and training costs are much higher for harness racing horses than pleasure horses. Travel and shipping is also higher, with harness racing horses getting shipped from racetrack to racetrack. The maintenance of equine buildings is relatively equal between the two. Real estate purchases for pleasure horses is higher per horse than racing horses. This can best be explained by the fact that a greater percentage of harness racing horses are boarded elsewhere as compared to pleasure horses.

It is estimated that in 2006 horse owners in Maine purchased almost \$100 million worth of operational equine related goods and services from businesses/individuals located in the State of Maine. Pleasure horse participants spent over \$80 million and harness racing participants spent over \$15 million.

Table 8
Horse Participants Expenditures on Capital Inputs

	Per Horse Avg		Maine Total Value		
	Pleasure	Racing	Pleasure	Racing	Total
Purchase of Equines	\$454.33	\$1,574.11	\$14,447,776	\$5,037,167	\$19,484,943
Real Estate Purchases	\$1,042.69	\$864.17	\$33,157,673	\$2,765,340	\$35,923,012
Equipment Purchases	\$494.71	\$540.38	\$15,731,697	\$1,729,209	\$17,460,906
Total			\$63,337,146	\$9,531,715	\$72,868,861

Table 8 displays the estimated equine related capital expenses for 2006. While operational expenses are expenses that should be expected to remain constant from year to year, capital expenses are usually one time large expenses. It is difficult to assess whether these capital expenditures could be expected from year to year, with the variability inherent in the nature of the purchases.

The largest equine related capital expense in 2006 was the purchase of equine related real estate, which was estimated to be above \$35 million. The next highest was the purchase of equines; almost \$20 million in 2006.

Current Value of Equine Related Assets

In the survey conducted for this survey, horse owners were asked to estimate what they felt their equine assets are worth. The numbers presented in Table 9 are the estimated value of equine related assets owned in Maine based on their responses. The Maine total values are again based on the estimate that there are 3,200 racing horses and 31,800 pleasure horses in Maine.

Table 9
Value of All Equine Related Assets

	Per Horse Avg		Maine Total Value		
	Pleasure	Racing	Pleasure	Racing	Total
Equines	\$3,340.38	\$7,246.44	\$106,223,956	\$23,188,609	\$129,412,565
Equine Related Land, Fencing and Buildings	\$21,951.13	\$16,758.83	\$698,046,009	\$53,628,248	\$751,674,258
Feed & Stable Supplies	\$350.69	\$388.57	\$11,151,966	\$1,243,424	\$12,395,390
All Tack	\$1,111.98	\$574.77	\$35,360,857	\$1,839,268	\$37,200,125
Tractors	\$1,844.41	\$1,015.50	\$58,652,217	\$3,249,605	\$61,901,823
Equine Trailers	\$1,349.62	\$600.72	\$42,918,044	\$1,922,304	\$44,840,348
Vehicles used for Towing	\$2,906.32	\$1,700.06	\$92,420,881	\$5,440,191	\$97,861,072
Hay Making Equipment	\$502.24	\$175.77	\$15,971,170	\$562,457	\$16,533,627
Other	\$53.87	\$88.23	\$1,712,991	\$282,326	\$1,995,317
Total			\$1,062,458,092	\$91,356,434	\$1,153,814,526

The average value per horse is almost double for a racing horse than a pleasure horse. The per horse value of equine related land, fencing and buildings for a pleasure horse is more than that for a racing horse. This means that for each pleasure horse owned in Maine a owner has over \$20,000 worth of land, buildings and fencing for that horse. It is not surprising that the per horse average is higher for pleasure horses than racing horses, because many racing horses are not stabled at the owners property, but off site somewhere.

The total estimated value of all equine related assets owned in Maine is estimated to be over \$1.1 billion dollars. Over a billion of this is owned by people in the pleasure horse industry. Almost \$100 million is owned by participants in the harness racing industry.

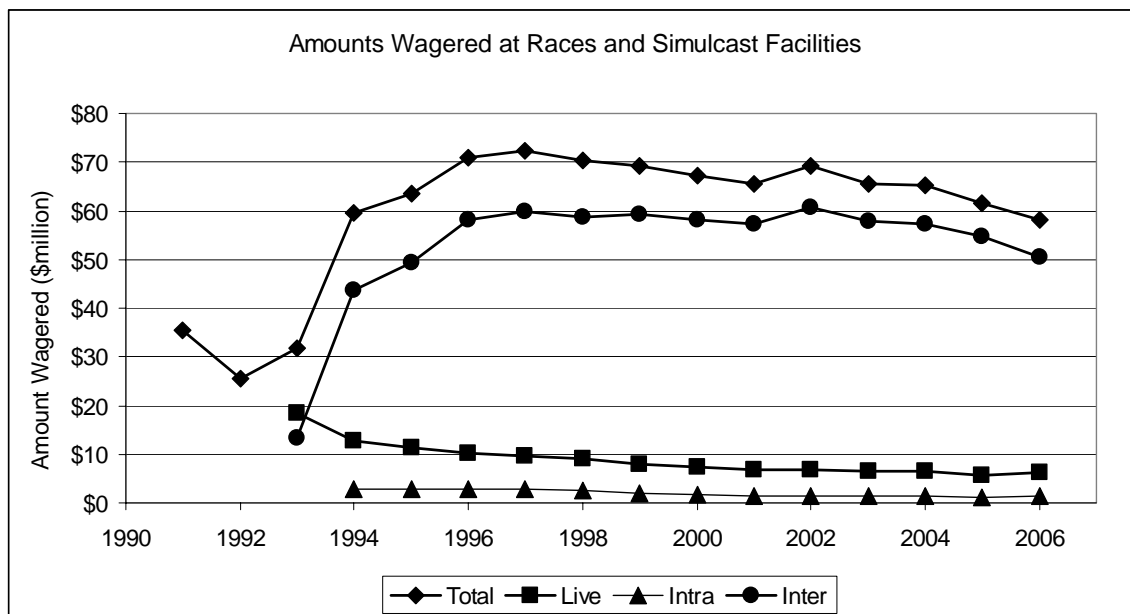


VIII. Harness Racing Data

This section outlines the various harness racing data not included in the earlier computation of the industry's economic impact. The data displayed here is useful in demonstrating the total impact of the harness racing industry, and to another degree the horse industry as a whole.

Harness Racing Wagering Data

Figure 1
Historical Wagering at Maine's Raceways
& Off-Track Betting Facilities



Source: Harness Racing Commission, Various Dates

The amount wagered at the State's racetracks and simulcast facilities has remained relatively stable since the creation of off-track betting in 1993. Figure 1 demonstrates the total amount of money wagered on in Maine horse races, both in-state (Intra) and out-of-state (Inter - that is, the money that is wagered on the races comes from Maine, while the races themselves do not take place in the state).

The majority of wagering that takes place in Maine is on races that take place out of state, at Maine's simulcast betting facilities. In 2006 this amount was over \$50 million. The amount wagered at live races, at either one of the two racetracks in Maine or at a state fair, is the second highest amount, with over \$6 million wagered in 2006. Although the amount wagered in total has declined since the early 1990's, the amount wagered on live races has remained relatively stable over the past few years.

Table 10
Wagering at Live Maine Raceways, 2006

Track	Total Wagering	Exotic	Straight
Scarborough Downs	\$2,357,396	\$1,630,442	\$726,954
Bangor Raceway	\$986,967	\$683,140	\$303,827
Northern Maine Fair	\$117,872	\$68,694	\$49,178
Topsham Fair	\$119,776	\$75,596	\$44,180
Skowhegan Fair	\$256,583	\$169,336	\$87,247
Union Fair	\$169,884	\$114,736	\$55,148
Windsor Fair	\$668,497	\$463,716	\$204,781
Oxford County Fair	\$121,549	\$79,341	\$42,208
Farmington Fair	\$204,201	\$142,707	\$61,494
Cumberland Ext.	\$24,366	\$18,243	\$6,123
Cumberland Fair	\$218,442	\$148,938	\$69,504
Fryeburg Fair	\$854,970	\$534,997	\$319,973
Totals	\$6,100,503	\$4,129,886	\$1,970,617

Table 10 presents a breakdown of the wagering that took place in 2006 at live racing events throughout the State. Almost 39% of the wagering that went on was at Scarborough Downs; out of the 227 days raced in 2006, 125 were held at this raceway.

Table 11
Wagering at Maine Off-Track Betting Facilities, 2006

	Total Wagering	Exotic	Straight
Winners Circle	\$8,942,686	\$6,444,342	\$2,498,344
Martin's Manor Rest.	\$5,392,384	\$3,697,454	\$1,694,930
Winners-OTB	\$6,804,998	\$4,354,913	\$2,450,085
OTB Facilitators	\$4,865,109	\$3,266,562	\$1,598,547
Scarborough Downs	\$20,434,197	\$13,773,679	\$6,660,518
Bangor Raceway	\$5,492,794	\$3,611,001	\$1,881,793
Totals	\$51,932,168	\$35,147,951	\$16,784,217

As was shown earlier, the bulk of 2006 wagering in Maine was on Inter-State races. Such wagers are made at off-track betting facilities. In 2006, the largest amount of such wagering happened at Scarborough Downs, where over \$20 million was wagered on races not held at the track (Table 11).

Distribution of Wagers to Various State Funds

In 2006 the State of Maine collected over \$4 million to be put in the State's various funds from wagering on both in-state and out-of-state horse races. The largest of this was used to supplement purses paid to horse owners at in-state harness races. This is presented in Table 12.

Table 12
Amount Collected from Wagering to State Funds

State Fund	Amount Collected (\$ million)
General Fund	\$0.90
Agricultural Fair Stipend	\$0.62
Fair Stipend Fund	\$0.05
Sire Stakes Fund	\$0.56
Promotional Board Fund	\$0.13
Purse Supplement	\$1.05
Off Track Betting Simulcast	\$0.75
Total	\$4.06

Source: Maine State Harness Racing Commission, 2006.

Purses Paid By Tracks

The average daily purse in Maine in 2006 was about \$10,000 more than the 2005 average. This has mostly to do with the passage of the 2003 state referendum, which allowed the use of slot machines at Bangor Raceway and Scarborough Downs (as of now, only Bangor has received the required local approval). Part of the proceeds from the slots is used to improve the purses in local races.

Table 13
Purses Paid By Tracks

Track	Average Daily Purse		
	2004	2005	2006
Bangor	\$15,485	\$18,577	\$28,775
Cumberland	\$15,559	\$16,317	\$22,263
Farmington	\$15,879	\$14,510	\$20,957
Fryeburg	\$26,953	\$19,877	\$35,202
Oxford	\$14,525	\$20,199	\$29,733
Presque Isle	\$18,256	\$18,622	\$27,787
Scarborough	\$19,036	\$19,156	\$28,604
Skowhegan	\$20,169	\$20,007	\$45,918
Topsham	\$16,082	\$12,468	\$17,213
Union	\$20,647	\$13,940	\$17,213
Windsor	\$21,408	\$19,784	\$28,990
Total Average	\$18,542	\$18,458	\$28,436

Source: Maine State Harness Racing Commission, 2004-06.

This increase in purses is a reason to be optimistic about the future of harness racing in Maine. In the Down East¹⁰ magazine article, "A Day at the Races" (August 2007) Don Marean, owner of Lindon Horse Farm in Hollis, states that

¹⁰ Peavey, Elizabeth. "A Day at the Races". Down East: The Magazine of Maine. August 2007. Pages 86-89; 119-123.

before the slots purses were so low that racing horse owners found it "*...almost impossible to break even. Now you can even make some money.*"

With increased economic benefits to owners, this should translate to increases in the quality of the final product for spectators and increased wagering and involvement from the public.

This is good news for the harness racing industry in Maine. With increased purses horse owners will have increased opportunities to make a living from this activity, a traditional Maine agricultural industry. It allows agricultural land to remain undeveloped and Maine to retain a sense of place.

IX. Survey Results

This section contains a listing of each question asked in the equine survey, a tabulation of responses and comments about the various responses.

1. How are you associated with the equine industry? (Circle all that Apply)

a) Pleasure horse owner	253
b) Racing horse owner	83
c) Work Horse owner	25
d) Vet	4
e) Farrier	9
f) Boarding	58
g) Farm -producing grain/feed/hay	28
h) Equine related shop/store	11
i) Non-owner participant	<u>10</u>
Total Responses	481
Total Respondents	325

The first question in the survey was a multiple answer question, in which respondents answered how they were involved in the horse industry (pleasure horse owner, racing horse owner, boarder, vet, etc.). Some people indicated they were both racing and pleasure horse owners. When this occurred the horses were treated as racing horses in the analysis, as many of the expenditures made on the horses (such as training) are for racing.

2. In what town or city do you currently reside?

Table 14
Respondents Place of Residence

County	Respondents	Percent
Androscoggin	16	4.92%
Aroostook	19	5.85%
Cumberland	40	12.31%
Franklin	11	3.38%
Hancock	15	4.62%
Kennebec	40	12.31%
Knox	9	2.77%
Lincoln	12	3.69%
Oxford	23	7.08%
Penobscot	60	18.46%
Piscataquis	0	0.00%
Sagadahoc	5	1.54%
Somerset	19	5.85%
Waldo	16	4.92%
Washington	8	2.46%
York	32	9.85%
Total	325	100.00%

The cities/towns given by participants were grouped into applicable Maine counties after all the surveys were received. Out of 333 usable surveys that were received, 325 of the respondents answered this question.

3. Are your horse(s) boarded in the same community where you reside? If not, please specify.

Yes = 194

No = 84

Unfortunately, where respondent's horses are boarded cannot be released in list form in this report due to privacy issues. Also, there was no way to group their responses as many of them vary and respondents did not indicate which community the horse was boarded in, only the name of the stable. However, the cost of going to the stables and transporting their horses is included in the owner's expenses in Question 9.

4. If you keep your horses at home, how many?

It was determined after receiving the surveys it would be better to know the number of horses owned, and not necessarily kept at respondent's properties. The number of horses owned was calculated using the responses in this question and Question 5.

Total horses owned: 1,591

5. Please list the total number of horses by breed that you own:

Table 15
Breed of Horses

	Number	Percent
American Saddlebred	14	0.91%
Appaloosa	120	7.82%
Arabian	51	3.32%
Belgian	18	1.17%
Draft	26	1.69%
Grade	6	0.39%
Haflinger	11	0.72%
Icelandic	6	0.39%
Mini	20	1.30%
Mixed	84	5.48%
Morgan	60	3.91%
Other	50	3.26%
Paint	74	4.82%
Percheron	57	3.72%
Pinto	6	0.39%
Pony	33	2.15%
QH	204	13.30%
Shetland	8	0.52%
Shire	14	0.91%
Standardbred	586	38.20%
Tennessee Walking Horse	9	0.59%
Thoroughbred	51	3.32%
Warmblood	20	1.30%
Welch Cobb	6	0.39%
	1534	100.00%

There is quite a variety of horses owned in the State. The largest share of horse breeds in this survey were Standardbred horses, although this should not extrapolated out to the entire Maine horse population because there was a higher percentage rate of return from racing horse owners.

6. If you ride on trails, how many times in the past year did you ride on public lands?

Average = 12.5 times a year

The average horse industry participant, not horse, uses public lands about twelve and half times a year.

7. How had your equine related land been used before you got involved with equines?

Table 16
Previous Land Use

Previous Use	Responses
Agricultural Use (other than horses)	78
Woodland/Open Space	77
Horses	38
Not Applicable	30
Residential	28
Other/Don't Know	18
Total	269

Question 7 was an open ended question. In order to tabulate the responses they were put into six general categories, and can be seen in Table 16.

In Question 4, 194 respondents indicated that they kept the horses at home. Yet in Table 16 there are 269 total responses. The reason for this larger total number of respondents is due to two factors; 1) respondents in some cases answered "Not Applicable", or 2) answered for their boarders. There were, however, no multiple answers to the question.

8. How many acres of land, owned or leased, do you use for keeping equines in Maine?

The total amount of acres that survey respondents (305) use for their horses is 7,696.9 acres.

9. In this section please list the expenses/purchases you made for your equines in Maine for 2006.

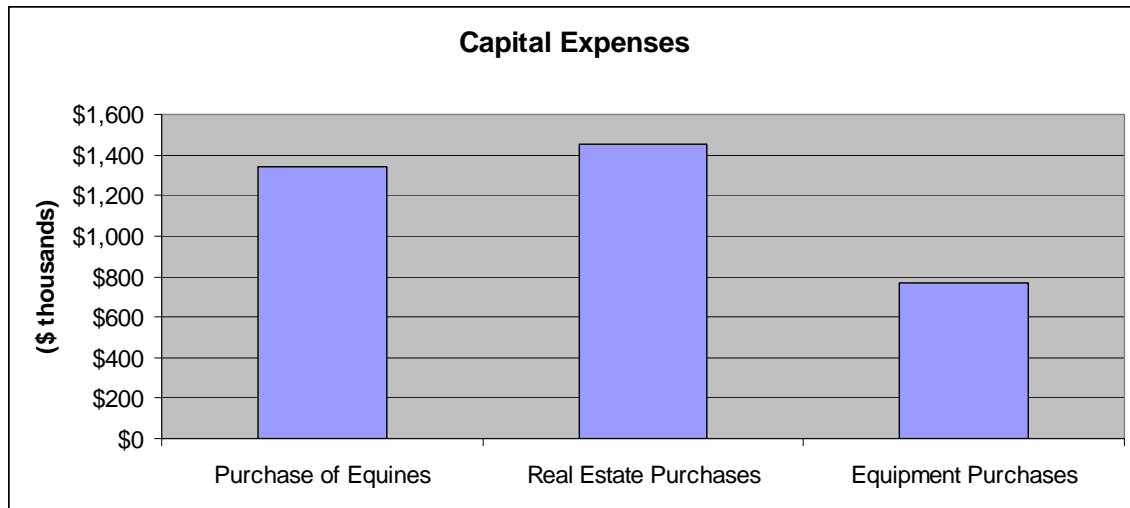
Table 17
Equine Related Expenditures for 2006

Expenses	Total
Employee	\$732,353
Hay	\$481,529
Grain	\$381,611
Formula Feed	\$70,483
Supplements	\$109,436
Entry Fees	\$103,016
Breeding Fees	\$211,039
Training	\$561,867
Health Costs	\$512,805
Farrier Services	\$318,795
Tack Equipment	\$258,367
Grooming Supplies	\$90,920
Maintenance Buildings	\$319,372
Utilities	\$93,671
Taxes	\$179,400
Fuel	\$186,438
Rent/Lease Property	\$61,083
Equine Registration	\$21,255
Club Membership	\$24,564
Riding Lessons	\$68,481
Equine Camp	\$7,660
Equine School	\$8,715
Trail Permits	\$2,495
Travel & Shipping	\$201,365
Equine Books	\$11,850
Maine Equine Journals	\$5,152
Clinics	\$24,671
Other	\$54,386

305 survey respondents indicated they spent over \$5 million on equine related expenses (non-capital expenses) in 2006. Some of the larger expenses were "Employee Compensation", "Training", "Health Costs", "Hay" and "Grain" needs.

10. Please list capital expenses made during 2006

Figure 2
Capital Expenses on Equines for 2006



305 survey respondents spent over \$3.5 million on equines, equine-related real estate and buildings and equine-related equipment purchases. This, along with the expenses made in Question 9, means respondents spent \$8.5 million for equines and related activities.

11. Please estimate the value of your different equine related assets, as displayed below.

Table 18
Value of Equine Related Assets

Assets	Total
Equines	\$7,678,204
Equine Related Land, Fencing and Buildings	\$30,579,351
Feed & Stable Supplies	\$566,373
All Tack	\$1,350,865
Tractors	\$2,283,184
Equine Trailers	\$1,570,324
Vehicles used for Towing	\$3,634,944
Hay Making Equipment	\$555,312
Other	\$100,188

The purpose of Question 11 was not to have respondents estimate purchases in the past year, but instead estimate what their equine-related assets are worth. 305 respondents to the survey estimated their assets are worth nearly \$50

million dollars, with the largest amount (\$30.5 million) in "Equine Related Land, Buildings and Fencing". The next highest was the value of the horses themselves, estimated by respondents to be worth over \$7.5 million.

12. Did you sell any horses this past year? If so, how many and for how much?

200 horses were sold for \$1,598,225. The average sale price for a horse in this study was \$7,991.13.

Appendix A. Equine Survey

1. How are you associated with the equine industry? (*Circle all that apply*)
 - a) Pleasure horse owner
 - b) Racing horse owner
 - c) Work Horse owner
 - d) Vet
 - e) Farrier
 - f) Boarding
 - g) Farm –producing grain/feed/hay
 - h) Equine related shop/store
 - i) Non-owner participant

2. In what town or city do you currently reside?

3. Are your horse(s) boarded in the same community where you reside? If not, please specify.

4. If you keep your horses at home, how many?

5. Please list the total number of horses by breed that you own:

6. If you ride on trails, how many times in the past year did you ride on public lands?

7. How had your equine related land been used before you got involved with equines?

8. How many acres of land, owned or leased, do you use for keeping equines in Maine?

9. In this section please list the expenses/purchases you made for your equines in Maine for 2006.

- a) Employee Compensation (including salaries, wages and benefits paid to anyone employed for horse care/training) _____
- b) Hay _____
- c) Grain _____
- d) Mixed or Formula Feed _____
- e) Supplements _____
- f) Entry Fees _____

Please indicate what the horse(s) was entered into:

- g) Stud/Breeding Fees _____
- h) Training (if hired out) _____
- i) Health Costs (including veterinarian fees, medicines, lab work, etc.) _____
- j) Farrier Services _____
- k) Tack and other personal equipment _____
- l) Grooming and other horse supplies _____
- m) Breeding Fees _____
- n) Maintenance and Repair of equine related buildings, facilities, fencing, equipment, etc. _____
- o) Utilities – estimated total for equine related needs _____
- p) Taxes _____
- q) Fuel _____
- r) Rent/Lease for land, building(s), if applicable _____
- s) Fees and Payments
 - i. Equine Registration _____
 - ii. Club/Association membership _____
 - iii. Riding lessons _____
 - iv. Equine-oriented camp _____
 - v. Equine-oriented school _____
 - vi. Trail licenses/permits _____
- t) Travel and shipping _____
- u) Equine Education Materials
 - vii. Equine Books purchased in Maine _____
 - viii. Maine Equine Magazine(s)/Journal(s) _____
- v) Clinics _____
- w) Other (*please specify in the space below*) _____

10. Please list capital expenses made during 2006

- a) Purchases of equine(s) _____
- b) Real Estate purchases and improvements _____
- c) Equipment purchases _____

11. Please estimate the value of your different equine related assets, as displayed below.

- a) Estimated current value of all equines you own _____
- b) Estimated current value of all equine related land, fencing and buildings you own _____
- c) Estimated current value of all equine feed and stable supplies on hand you own _____
- d) Estimated current value of all tack including horse drawn equipment you own _____
- e) List current value of vehicles and related equipment to maintain your equines
 - i. Tractors _____
 - ii. Manure spreaders _____
 - iii. Starting gates _____
 - iv. Hot walkers _____
 - v. Treadmills _____
 - vi. Equine trailers/vans _____
 - vii. Vehicles for towing trailers/vans _____
 - viii. Hay making equipment _____

12. Did you sell any horses this past year? If so, how many and for how much?

Thank you very much for taking the time to fill out this survey!!

Appendix B. Postcard Notice

The Maine Horse Survey

**Attention - Anyone Involved in the Horse Industry in Maine
Your Help is Needed!!**

The Maine Horse Survey is sponsored by the Maine Farm Bureau with funding from the Maine Department of Agriculture. The purpose of this survey is to collect data that will be used to estimate the full economic impact of the horse industry in the State of Maine. All data and results are confidential and the survey can be filled out anonymously.

The Maine Farm Bureau hired Planning Decisions, a 25 year-old research and planning firm located in South Portland, ME, to conduct the survey and resulting Report.

The online survey can be accessed on Planning Decisions' website at:

<http://www.planningdecisions.com/>

For any questions, or if you would like a paper based survey, please contact Kevin Scribner at Planning Decisions by e-mail at kscribner@maine.rr.com or by phone at 207-799-2226.



Thank you from the Maine Farm Bureau and Planning Decisions!