

Delaware Equine Industry

2004



STATE OF DELAWARE
 DEPARTMENT OF AGRICULTURE
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 SECRETARY

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Dear Friend of Delaware Agriculture:

I am very pleased and proud to present the results of the 2004 Delaware Equine Study, the first ever comprehensive study of this important segment of our agricultural industry. I want to thank Governor Ruth Ann Minner, the Delaware General Assembly, the racing commissions, and the Delaware Standardbred Breeders' Fund for providing the funding for this project. I also want to thank the Delaware Equine Council for their help and each and every person who voluntarily participated in this very important study.

As clearly shown by the numbers contained within this report, the equine industry's importance to Delaware's economy is significant and growing. In addition to the expenditures Delaware equine owners and operations make into the state economy, our racetracks, equine show and competition facilities, breeding, training, and boarding operations attract thousands from outside of Delaware who also expend significantly into our state economy. Not only does the industry directly provide jobs for thousands of Delawareans, but also indirectly through expenditures made for feed and bedding, veterinarian services, equipment, grooming and tack supplies, maintenance and repair and other sectors of the industry's infrastructure.

Equine and equine operations make significant contributions to the quality of life in Delaware by keeping land in open space, and providing a wide diversity of recreational activities available to the general public. As spectators or participants, countless Delawareans enjoy equine racing, shows and competitions, pony rides, trail and pleasure riding, and much more. For many, the view of Delaware from atop a horse is the best one. I know firsthand how important equines are and have been socially and recreationally to my family and to the quality of life of many others in Delaware.

We have accomplished our goal of quantifying the total number of equine in Delaware and the economic impact of the equine industry on the state economy. The number of equine operations in Delaware is increasing each year. It is important we continue to be an "Equine Friendly State" in order to keep the growth of the industry moving forward by attracting new equine operations and businesses to Delaware.

Special thanks go to Chris Cadwallader, Director of the Delaware Agricultural Statistics Service, for his hard work in designing, implementing, evaluating this study and preparing it for publication. Also, to Titus Awokuse, professor in the University of Delaware's Department of Food and Resource Economics for his important efforts in conducting the economic impact analysis of Delaware's equine industry which is also contained in this bulletin.

Sincerely,

Michael T. Scuse
 Secretary of Agriculture



A.M. Ambrose, Jr.



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Kelly Mills

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THE EQUINE OPERATIONS, OWNERS, TRAINERS, AND RACETRACKS WHO VOLUNTARILY PROVIDED THE BASIC DATA FOR THE 2004 DELAWARE EQUINE SURVEY.

SPECIAL RECOGNITION:

Alexandra Riley, Mathematical Statistician, USDA-NASS, Washington, DC. - For providing outstanding technical expertise in edit, analysis and summarization of the Delaware Equine Survey data.

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Kelly Mills, Delaware Department of Agriculture - For providing outstanding technical and creative expertise in the preparation of this bulletin.

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John F. Wayne, and Winbak Farms



Kelly Mills

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DELAWARE EQUINE COUNCIL



The mission of the Delaware Equine Council is to promote, protect and enhance the keeping of equines in Delaware. We are a nonprofit organization representing all breeds, public stables, weekend trail riders, mule owners, driving enthusiasts, show circuit participants and any equine professionals. With the memberships and organizations involved, we now represent over 4,600 equine owners!

We provide equestrians with contacts, education, information, and updates on equine health and political issues. To promote our industry, we publish a newsletter and maintain a website to inform the public. This year finds us involved in the Delaware Department of Agriculture's Equine Survey in addition to partnering with the Delaware SPCA to provide a program called "Helping Horses." This new program targets neglected and abused equine in the First State. We continue to participate in the Department of Agriculture activities, including mentoring programs in Delaware schools and numerous equine-related events throughout the state.

The equine industry impacts many Delaware jobs (vets, farriers, equine dentists, etc.), agriculture, (grain, hay, bedding, etc.), breeding farms, insurance and farmland preservation. We are not in competition with other equine groups, stables or businesses. The purpose of the Delaware Equine Council is to support ALL equine endeavors in the First State. We continue to practice this while addressing issues such as the equine liability law, equine farm insurance knowledge, nutrient management and trail access and use. We are a member of the American Horse Council.

For more information, please visit our website at:

www.delawareequinecouncil.org



Pete Clark

DELAWARE CERTIFIED THOROUGHBRED PROGRAM



The Delaware Certified Thoroughbred Program began with the 2003 meet, and is sponsored by the Delaware Thoroughbred Horsemen's Association. By providing a purse enhancement incentive for horsemen, the DCTP seeks to enhance the racing conditions and long-time economic prosperity of Delaware agriculture, and to stimulate the preservation of Delaware farmland.

In order to be certified, a Thoroughbred must spend a minimum of 90 consecutive days (subject to verification) on a Delaware farm or training facility prior to March 31 of its two-year-old year, and it must race at Delaware Park. The certifier must submit a Delaware Certified Thoroughbred application form within ten days of the thoroughbred's arrival at an approved DCTP farm or training facility. Days will not count until all paperwork has been received by DCTP. The one-time registration fee is \$50 for weanlings and \$100 for yearlings. Upon validation, the thoroughbred is certified for life, even with changes in ownership.

The certifier of the thoroughbred will receive an additional fifteen percent of the purse share if the Delaware Certified Thoroughbred finishes first, second, or third in any race, including stake races at Delaware Park. The owner will receive fifteen percent of the purse share for first, second, or third place finishes in any race, including Delaware Park stake races. Owner bonuses are included in purse distributions, and certifier bonuses are paid at the end of the meet. Delaware Certified Thoroughbred horses will also receive preference when entering races at Delaware Park, and will be identified as such in Delaware Park's racing programs.



Kelly Mills

Delaware Certified Thoroughbred Program
777 Delaware Park Blvd.
Wilmington, DE 19804
(302) 994-2398 or (302) 994-2521 ext. 7289
(302) 994-3392 fax
dctprogram@aol.com
www.dtha.com

DELAWARE STANDARDBRED BREEDERS' FUND



The Delaware Standardbred Breeders' Fund is a state agency that is a rebirth of the "Delaware Development Fund" of the late Sixties. The "Fund" evolved as a result of the VLT legislation which placed slot machines at the state's three racetracks. Pursuant to SS 4815 (b) (3) of Title 29 of the Delaware Code, the Fund started accruing money in 1999 but did not become active until September of 2001.

The Fund encourages and supports the breeding of Standardbred horses via the program, which regulates specific purse money and administers all registrations of participating stallions and racehorses (i.e., two- and three-year-old trotters and pacers). The Fund oversees 16 stake races a year, which culminate with \$100,000 finals for each gait and sex at the two harness tracks. Bonus payments are awarded for progeny of registered stallions and broodmares who meet the requirements of the program. A record number of 512 mares were bred to Delaware stallions in 2004.

Standardbred Breeders' Fund

2320 S. DuPont Highway

Dover, DE 19901

(302) 698-4610

(302) 233-3047

Judy.Davis-Wilson@state.de.us



Vickie Duke

DELAWARE STANDARDBRED OWNERS' ASSOCIATION



The Delaware Standardbred Owners' Association, Inc., is a 1,150 member trade association that represents the harness horsemen and horsewomen who compete at Dover Downs and Harrington Raceway.

The D.S.O.A is governed by a 12-member Board of Directors who are elected by and from the membership. The D.S.O.A. promotes harness racing and advocates on behalf of horsemen's issues in Delaware. Additionally, for its members, the D.S.O.A. serves as a voice on governmental issues at both the local and national level. The D.S.O.A. is a member of Harness Horsemen International, an international trade association comprised of local horsemen's associations throughout the United States and Canada. Anyone interested in becoming a member of D.S.O.A. may contact our Dover office at (888) 227-0658.

DELAWARE PARK



Rich in history and tradition, Delaware Park Racetrack and Slots has the reputation of being the most beautiful and friendly racetrack in the country. While Delaware Park is open year round (with the exception of Easter and Christmas) for simulcasting and slots, the track hosts a six-month Thoroughbred and Arabian meet beginning in the spring. The track, which is situated in the middle of key racing points throughout the Mid-Atlantic region, is located 30 miles south of Philadelphia and 50 miles north of Baltimore.

The track opened in 1937, and many of racing's greatest champions have raced at Delaware Park over the decades. Some of these include Stymie from the 1940s, Flower Bowl and Cavan from the 1950s, Kelso, Damascus, and Buckpasser from the 1960s, Spectacular Bid and Relaxing from the 1980s, and Captain Bodgit and Xtra Heat from the 1990s. Delaware Park will distribute approximately \$35 million in total purses this year. This figure includes overnight, overnight stake, stake and incentive purses for Thoroughbreds and Arabians. The \$4.6 million stakes schedule is highlighted by the Grade II Delaware Handicap for fillies and mares and the Grade II Delaware Oaks for fillies. Both of these races carry on the tradition of providing championship racing to the local area and nationally as part of the Racing to the World Thoroughbred Championships Series which is televised annually on ESPN.

Location: Route 7 and Route 4, Exit 4B I-95, New Castle County

Delaware Park Racetrack and Slots

777 Delaware Park Blvd.

Wilmington, DE 19702

(302) 994-2521

www.delawarepark.com



Delaware Park Racetrack and Slots

DOVER DOWNS



It took Dover Downs a quarter century to reach its current position in horseracing. The racetrack opened with its first season in 1969 and enjoyed moderate success, but since the mid-1990s, Dover Downs has advanced to the highest echelon in harness racing. Today, Dover Downs is the only racetrack to campaign a six-month long season, six days a week offering 15 races daily.

Starting each November and continuing into December, the capital city raceway boasts the top horses and horsemen in the Standardbred sport racing for purses of nearly \$4 million in major stakes events.

The raceway's signature event is the \$425,000 Progress Pace. Over the meet's opening two Sundays, the top three-year-olds battle it out in \$25,000 eliminations followed by a \$325,000 final. In addition, the track presents eight divisions of the prestigious Matron Series, one of the sports oldest stakes, for two and three-year-old trotters and pacers.

The finest young horses bred in the First State also vie in four Delaware Standardbred Breeders Fund (DSBF) events for two-year-olds. Each of four divisions culminate with a \$100,000 final, then three-year-old finals are held in April. Every third year, Dover Downs presents all four Classic Series finals for older horses, each with a \$250,000 purse. Annually during the latter part of each meet, the Classic Series leads off a new season with \$85,000 elimination divisions of the Classic Pace, Classic Trot, Distaff Pace and Distaff Oaks.

Since 1996 at Dover Downs, a keen level of competitive quality racing has resulted in Riyadh setting a world record by pacing a 1:49.1 mile, only matched by Cam Knows Best four years later. A number of other world records have also been set over the lightning fast five-eighths mile oval.

Location: 1131 N. DuPont Highway, Dover

Dover Downs Harness Racing

P.O. Box 1412

Dover, DE 19903

(302) 674-4600

www.doverdowns.com



Vickie Duke of Photo Won

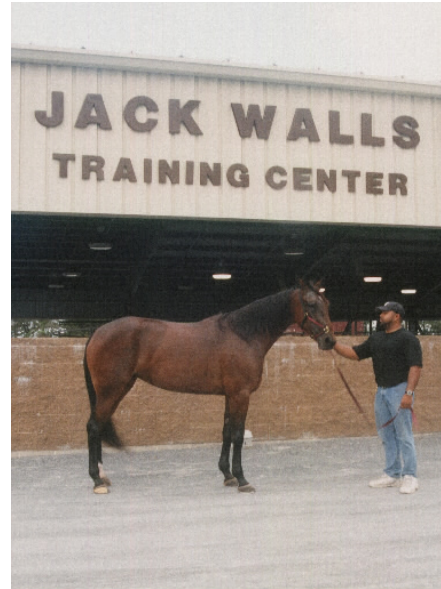
HARRINGTON RACEWAY



Located in the hub of Delaware, Harrington Raceway is known for having a rich history and humble roots. The track is in its 59th year of operation and was formerly known as the Kent and Sussex Raceway. The pre-slots era boasted minimal race days and purses did not exceed \$5,000 in a night. Since the inception of slot machines at the racetrack in 1996 however, Harrington Raceway's schedule has ballooned to 104 racing days with approximately \$14 million in purses annually.

Some of the sport's finest horses have raced on Delaware's half-mile track, including the legendary trotter Magician, who began his stakes career at Harrington in 1998. In 2004, the track hosted two races of national significance, the \$350,000 Messenger Stakes, the sport's second leg of pacing's Triple Crown, as well as the \$135,000 War on the Shore Invitational, in which Royal Mattjesty paced the fastest mile in track history (1:51). In 2002, harness racing's all-time leading driver and winner of more than 15,000 races, Herve Fillion, made his return to the racetrack at Harrington, winning three races.

Live racing is conducted on a Sunday through Thursday schedule with a 5:30 p.m. post time.



Kelly Mills

Location: Route 13, Harrington, DE

Harrington Raceway

15 West Rider Road

Harrington, DE 19952

(302) 398-7223

www.harringtonraceway.com



Kelly Mills

2004 DELAWARE EQUINE SURVEY DESIGN AND METHODOLOGY



Introduction

The 2004 Delaware Equine Survey was conducted by the Delaware Agricultural Statistics Service (DASS) in cooperation with the Delaware Department of Agriculture. DASS is one of 45 state statistical offices of the USDA's National Agricultural Statistics Service (NASS). NASS is the USDA's statistical agency which has for the past 141 years been responsible for producing accurate, unbiased official statistics on United States agriculture.

Survey Objectives

The Delaware equine industry is a complex, dynamic part of the state's economy. The size and importance of the entire industry has never been statistically measured. While it has been commonly believed the equine industry has been rapidly expanding in recent years, the extent of growth was unknown.

The Delaware Department of Agriculture, representatives from both the racing and non-racing sectors of the equine industry, and the Delaware General Assembly wisely recognized the need for accurate statistics on Delaware's equine community.

The objective of Delaware Equine Survey was to measure the number of equine operations by type, acreage used for equine, the number of equine by bred and use, equine-related expenditures, equine-related assets and income, and the number of people employed directly by equine operations.

Population of Interest

Only operations, owners and trainers of equine who had equine-related expenditures in Delaware during 2003 and operations having equine on Delaware acreage as on May 1, 2004, were included in the target population for this survey. Also, the three racetracks in Delaware were included in the survey. The equine community includes many segments which were NOT included in the population of interest for this survey. For example, veterinarians, farriers, drivers, jockeys, grooms, tack businesses, feed and bedding suppliers, equipment dealers, and other enterprises within the infrastructure of the equine industry are excluded from the economic totals from this study.

Survey Methodology

A list was built for the target population of equine operations, owners, and trainers. Some of the sources of names included equine breed associations, Coggins test documents, NASS's census of agriculture list, racing owner and trainer licensing lists and others. The list was built with control indicators for each record to designate whether they were a racehorse operation/owner/trainer or a non-racehorse operation/owner. In addition, a control indicator also specified residential status as Delaware or out-of-state.

It is cost-prohibitive to build a state-level equine operation/owner/trainer list which is 100 percent complete. Therefore, an area sampling frame was utilized to measure the incompleteness of the survey list. A probability sample of 50 segments of land approximately one square mile in size was selected and canvassed by National Association of Departments of Agriculture (N.A.S.D.A.) field enumerators to identify equine operations/owners/trainers who were not on the survey list. Information collected by those not on the survey list was expanded to represent all others in the state who did not make it onto the 2004 Delaware Equine Survey List.

After a first and second request mailing of the questionnaire to all operations/owners/trainers on the survey list, telephone data collection was attempted for all who did not respond by mail.

After telephone data collection was completed, there were operations/owners/trainers for which reports had not been received. Therefore, a representative probability sample of racehorse and non-racehorse operation/owner/trainer records was selected for personal interviews. The data collected from this sample was expanded to account for the other operations/owners/trainers who did not report. There were 3,528 completed reports used to summarize the 2004 Delaware Equine Survey. The Delaware response rate was 62 percent while the out-of-state response rate was 49 percent.

Survey Summary Notes

Equine operations are diverse in terms of size, type of equine, and activities engaged in. For this publication, if an operation reported they had one or more racehorses, their economic data was summarized under racing even if they had more non-racehorses than racehorses. Any operation reporting racehorses was summarized as a commercial racing operation.

Trainers who board horses at Delaware Park Racetrack and Harrington Raceway may be there for the entire six-month meet or only for a few days. Some of the trainers surveyed had mailing addresses at the racetrack and they were summarized as in-state reports whereas some trainers who were at the track for the entire meet had an out-of-state mailing address and their data was summarized as coming from out-of-state.

In the racing industry, the “boarding fee” or “training fee” charged to racehorse owners by trainers is often an all-inclusive fee. The trainer’s fee portion and the boarding cost frequently could not be broken out by horse owners and was therefore included in the expenditure category reported; either “boarding of equine” or “training fees.”

The number of equine workers cited in this study excludes owners of equine operations, equine trainers, veterinarians, grooms, jockeys, farriers, drivers, and many others in the industry who are hired for services but are not employees of a particular equine trainer or operation.



Winbak Farms

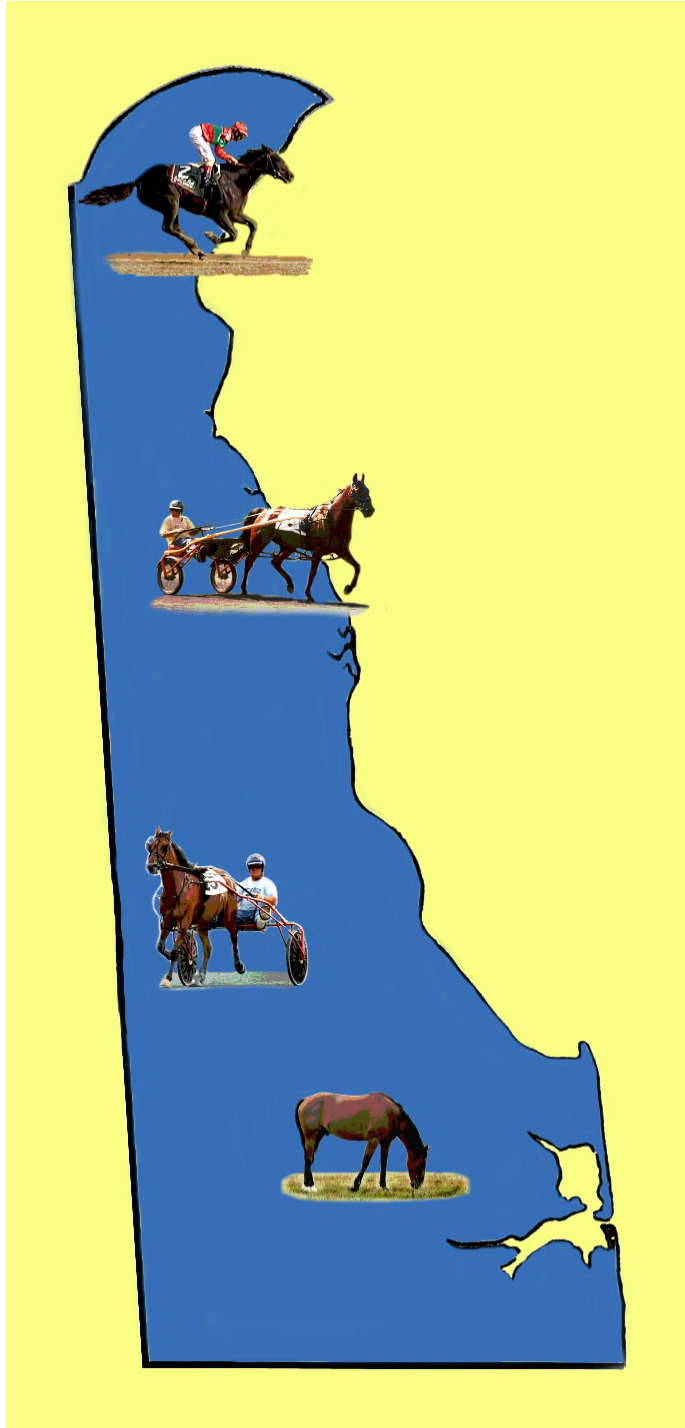
Statistical Reliability

Statistically, the survey was designed to estimate at the state level. The reliability of survey results is affected by sampling variability and non-sampling errors. Sampling variability is a measure of how the estimates would differ if other samples had been drawn. The sampling variability expressed as a percent of the estimate is called the coefficient of variation (cv). For major data items, the cv at the state level was: Number of Equine Operations – 3%, Acreage used for Equine – 8%, Number of Equine – 4%, Equine Expenditures – 3%, Assets – 5%, and Income – 14%.

At the county level, the cv’s ranged as follows; Number of Equine Operations – 9% -13%, Acreage used for Equine – 14%-19%, and Number of Equine – 9%-11%.

Non-sampling errors occur during a survey process but, unlike sampling variability, are difficult to measure. They may be caused by respondents or interviewers failing to follow instructions, misunderstanding of survey questions by respondents, non-response, or data handling mistakes between collection and publication. In this survey, all survey procedures and analyses were carried out in a consistent and orderly manner to minimize the occurrence of these types of errors.

2004 DELAWARE EQUINE SURVEY RESPONDENT COMMENTS



Kelly Mills

“My horses race at Delaware Park but winter in Maryland. I love Delaware Park and all of Delaware, I think it is great horse country!”

-James Acker, Manchester, NY

“The equine industry in the state of Delaware provides more financial exchange than the population realizes. It is an expensive hobby!”

-Madeline Moses, Georgetown, DE

“Horse racing and breeding are very valuable to the economic well-being of the state of Delaware. The industry creates many jobs and increases farm values.”

-The Paul Family, Wilmington, DE

“We were glad to participate in this survey and hope it will show how much money equines bring to Delaware’s economy. We need to open more riding areas on public lands.”

-Mark Rogers, Millsboro, DE

“The state has really done a lot to make Delaware one of the elite places to show horses. Harrington is *the* best place to show, facility-wise, in the Mid-Atlantic.”

-Heather Hevlow-Miller, Earleville, MD

“I hope and believe you will find that the equine contribution to the Delaware economy, whether pleasure or business, is quite substantial.”

-Don Poore, Jr, Smyrna, DE

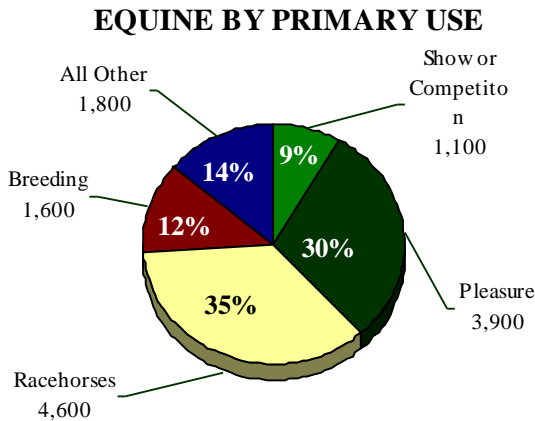


EQUINE INVENTORY

There were a total of 13,000 equine in Delaware as of May 1, 2004. Of the total inventory, racing-related horses (racehorses plus Arabian, Standardbred, and Thoroughbred racing-related breeding stock) accounted for 41 percent (5,350), non-racing-related horses 50 percent (6,500), ponies 7 percent (900), and donkeys, burros and mules 2 percent (250).

Standardbreds lead all breeds of equine with 4,300 of which 70 percent were racehorses. Thoroughbreds had the second largest total with 1,800 of which 72 percent were racehorses. Quarter Horses at 1,300 came in third, followed by Arabians with 700 (43 percent were racehorses), and Paints with 600.

EQUINE INVENTORY AND AVERAGE VALUE BY BREED, MAY 1, 2004*



EQUINE INVENTORY AND VALUE BY COUNTY, MAY 1, 2004*

County	Number	Average Value Per Head	Total Value
		Dollars	
New Castle	3,600	15,718	56,585,000
Kent	6,000	9,100	54,600,000
Sussex	3,400	7,229	24,580,000
Total	13,000	10,443	135,765,000

*Includes horses at racetracks

Breed	Number	Percent of Total	Average Value Per Head (Dollars)
Light Horse Breeds			
Appaloosa	250	2	3,100
Arabian	700	5	15,300
Half Arabian	150	1	4,300
Miniature Horses	450	4	1,400
Paint	600	5	4,100
Quarter Horse	1,300	10	4,000
Other Light Horse Breeds	700	5	4,000
Crossbred/Grade Horses	350	3	2,200
Warmbloods			
Haflingers	350	3	2,200
Other Warmbloods	300	2	14,700
Race Horse Breeds			
Standardbred	4,300	33	16,000
Thoroughbred	1,800	14	19,000
Draft Horses			
Belgian	300	2	2,000
Percheron	250	2	2,900
Other Draft Horses	50		4,600
Ponies			
Shetland	150	1	1,100
Welsh	200	2	4,200
Other Ponies	550	4	1,500
Other			
Donkeys and Burros	150	1	600
Mules	100	1	1,200
Total	13,000	100	10,443

*Includes horses at racetracks

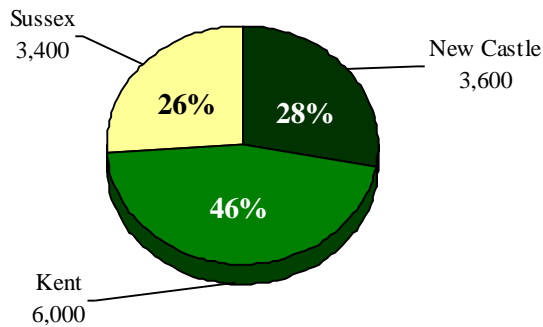
EQUINE INVENTORY, TOTAL VALUE, AND PRIMARY USE BY BREED, MAY 1, 2004*

Primary Use of Equine

Breed	Number	Total Value	Breeding		Show or Competition	Trail Riding/ Pleasure Riding/ Sports	Racing	Other (Work, Retired, etc.)
			Brood Mares	Stallions				
		Dollars	Number					
Light Horse Breeds								
Appaloosa	250	775,000	20	10	30	160		30
Arabian	700	10,710,000	60	15	100	190	300	35
Half Arabian	150	645,000	5	-	35	80		30
Miniature Horses	450	630,000	155	20	50	210		15
Paint	600	2,460,000	70	15	110	360		45
Quarter Horse	1,300	5,200,000	100	20	250	830		100
Other Light Horse Breeds	700	2,800,000	55	5	90	500		50
Crossbred/ Grade Horses	350	770,000	10	-	35	260		45
Warmbloods								
Hafingers	350	770,000	60	10	30	150		100
Other Warmbloods	300	4,410,000	35	5	100	140		20
Race Horse Breeds								
Standardbred	4,300	68,800,000	500	45	25	130	3,000	600
Thoroughbred	1,800	34,200,000	150	10	75	200	1,300	65
Draft Horse Breeds								
Belgian	300	600,000	45	10	-	30		215
Percheron	250	725,000	35	5	5	30		175
Other Draft Horses	50	230,000	-	-	-	30		20
Ponies								
Shetland	150	165,000	10	5	35	70		30
Welsh	200	840,000	20	5	50	90		35
Other Ponies	550	825,000	55	10	80	330		75
Other								
Donkeys and Burros	150	90,000	15	10	-	50		75
Mules	100	120,000	-	-	-	60		40
Total	13,000	135,765,000	1,400	200	1,100	3,900	4,600	1,800

*Includes horses at racetracks

EQUINE INVENTORY BY COUNTY



Kelly Mills

NUMBER OF EQUINE OPERATIONS



Of the total 2,000 operations in Delaware with equine as of May 1, 2004, noncommercial equine operations accounted for 65 percent of the total while commercial racing operations accounted for 25 percent and commercial non-racing operations accounted for 10 percent.

Kent county had the largest number of operations with equine at 1,000 or 50 percent of the total, followed by Sussex with 700 or 35 percent, and New Castle with 300 or 15 percent. In addition, Delaware Park Racetrack is located in New Castle County while Dover Downs and Harrington Raceway are in Kent County.

Of the 2,000 equine operations, 23 percent have had equine on their current operation for less than 4 years, 20 percent for 5-8 years, and 57 percent for 9 or more years.

At the county level, the percent of operations having equine on their current operation for less than 4 years was New Castle—20 percent, Kent—24 percent, and Sussex—22 percent. The percent of operations having equine for 5-8 years was New Castle—20 percent, Kent—22 percent, and Sussex—17 percent. The percent of operations having equine 9 or more years was New Castle—60 percent, Kent—54 percent, and Sussex—61 percent.

EQUINE OPERATIONS BY TYPE OF OPERATION AND COUNTY, MAY 1, 2004*

Type of Operation	New Castle	Kent	Sussex	Delaware
Commercial Racing Operations	60	250	190	500
Commercial Non-racing Operations	40	80	80	200
Noncommercial Operations	200	670	430	1,300
Total	300	1,000	700	2,000

*Excludes racetracks

LAND USED FOR EQUINE



Excluding racetracks, the 2,000 places with equine as of May 1, 2004, operated a total of 120,000 acres of which 27,000 were used for equine-related purposes. Of the 27,000 acres, noncommercial equine operations had 52 percent of the total, commercial racing operations had 37 percent, and commercial non-racing operations had 11 percent.

Kent county had 12,000 acres used for equine-related purposes, (45 percent of the total), while Sussex county had 9,000 acres (33 percent), and New Castle county had 6,000 acres (22 percent).

Racetracks had an additional 415 acres used for equine.

Over 5,700 acres have been converted to equine-related use within the past 4 years, and an additional 4,800+ acres were converted to equine-related use 5-8 years ago.



Kelly Mills

EQUINE ACREAGE AND VALUE BY COUNTY AND RACETRACKS, MAY 1, 2004

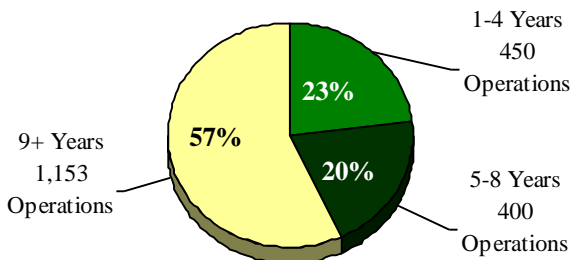
Within the past 4 years, Kent and Sussex counties both had over 2,500 acres converted to equine-related use and New Castle had over 600 acres.

Of the 5,700+ acres converted to equine use within the past 4 years, 81 percent was previously used for crop farming, 12 percent was previously used for livestock farming, and 7 percent was not used for agricultural purposes.

	Acres	Total Value*	Average Value per Acre*
		Dollars	
New Castle	6,000	130,000,000	21,667
Kent	12,000	160,000,000	13,333
Sussex	9,000	129,000,000	14,333
Racetracks	415	141,000,000	339,759
Total	27,415	560,000,000	20,427

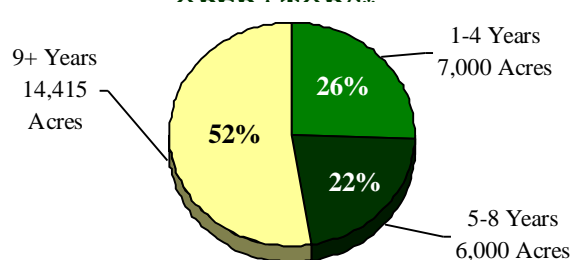
*Includes value of equine buildings and fencing

LENGTH OF TIME HAVING HAD EQUINE ON CURRENT OPERATION*



*Includes racetracks

LENGTH OF TIME LAND HAS BEEN USED FOR EQUINE BY CURRENT OPERATION*



*Includes racetracks

EQUINE ACREAGE AND VALUE BY TYPE OF OPERATION

Operation Type	Acres	Total Value*	Average Value per
			Acres*
			Dollars
Commercial Racing Operations	10,000	177,000,000	17,700
Commercial Non-racing Operations	3,000	70,000,000	23,333
Noncommercial Operations	14,000	172,000,000	12,286
Racetracks	415	141,000,000	339,759
Total	27,415	560,000,000	20,427

*Includes value of equine buildings and fencing.

EQUINE OPERATIONS AND ACREAGE BY LENGTH OF TIME BY COUNTY, MAY 1, 2004*

County	Number of Operations	Total Acres Operated	Acres Used for Equine	Less Than 4 Years		5-8 Years		9+ Years	
				Number	Acres	Number	Acres	Number	Acres
				New Castle	300	16,600	6,000	60	1,000
Kent	1,000	37,600	12,000	240	3,000	220	3,000	540	6,000
Sussex	700	65,800	9,000	150	3,000	120	2,000	430	4,000
Total	2,000	120,000	27,000	450	7,000	400	6,000	1,150	14,000

*Excludes racetracks

DELAWARE EQUINE ACREAGE BY LENGTH OF TIME AND PREVIOUS USE*

Time Frame the Current Operator has had Equine on Acreage	Previous Use of Land					Total
	Crop Farming	Livestock/Poultry Farming (Excludes Equine)	Horse Farm**	Land was not Used For Agricultural Purposes	Previous Use Not Known	
						Acres
2001-2004 (1-4 Years)	4,600	700	800	400	500	7,000
1993-2000 (5-8 Years)	3,600	500	600	700	600	6,000
1992 and earlier (9+ Years)	7,000	1,800	2,600	800	1,800	14,000

*Excludes racetracks

**Previous owner used acreage for equine-related purposes.

NEW CASTLE COUNTY EQUINE ACREAGE BY LENGTH OF TIME AND PREVIOUS USE*

Time Frame the Current Operator has had Equine on Acreage	Previous Use of Land					Total
	Crop Farming	Livestock/Poultry Farming (Excludes Equine)	Horse Farm**	Land was not Used for Agricultural Purposes	Previous Use Not Known	
Acres						
2001-2004 (1-4 Years)	400	100	300	100	100	1,000
1993-2000 (5-8 Years)	400	100	100	100	300	1,000
1992 and earlier (9+ Years)	1,400	800	1,000	300	500	4,000

*Excludes racetracks

**Previous owner used acreage for equine-related purposes

KENT COUNTY EQUINE ACREAGE BY LENGTH OF TIME AND PREVIOUS USE*

Time Frame the Current Operator has had Equine on Acreage	Previous Use of Land					Total
	Crop Farming	Livestock/Poultry Farming (Excludes Equine)	Horse Farm**	Land was not Used for Agricultural Purposes	Previous Use Not Known	
Acres						
2001-2004 (1-4 Years)	2,100	300	300	100	200	3,000
1993-2000 (5-8 Years)	2,000	200	300	300	200	3,000
1992 and earlier (9+ Years)	3,400	500	1,000	200	900	6,000

*Excludes racetracks

**Previous owner used acreage for equine-related purposes

SUSSEX COUNTY EQUINE ACREAGE BY LENGTH OF TIME AND PREVIOUS USE

Time Frame the Current Operator has had Equine on Acreage	Previous Use of Land					Total
	Crop Farming	Livestock/Poultry Farming (Excludes Equine)	Horse Farm**	Land was not Used for Agricultural Purposes	Previous Use Not Known	
Acres						
2001-2004 (1-4 Years)	2,100	300	200	200	200	3,000
1993-2000 (5-8 Years)	1,200	200	200	300	100	2,000
1992 and earlier (9+ Years)	2,200	500	600	300	400	4,000

**Previous owner used acreage for equine-related purposes.

EQUINE-RELATED EXPENDITURES



A total of \$279.7 million in expenditures was made in Delaware for equine-related purposes during 2003. Of the total, racetracks expended \$119.3 million (43 percent of the total) which included \$72.6 million in purse and stake payments. Delaware residents expended \$107.1 million (38 percent of the total), and out-of-state residents expended \$53.3 million (19 percent of the total).

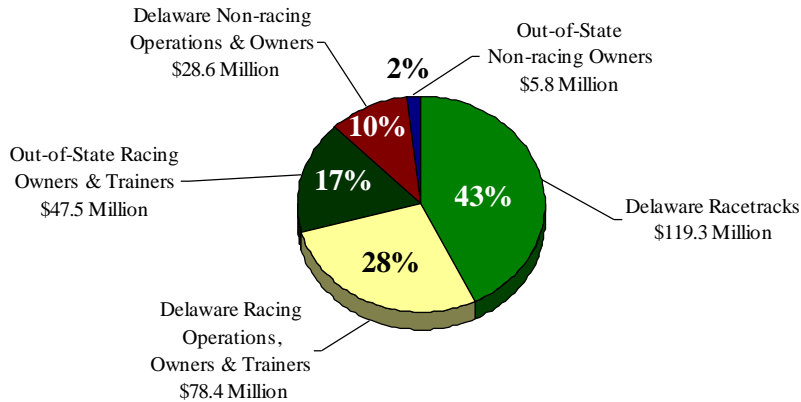
Racing operations, owners, and trainers had a total of \$125.9 million in expenditures accounting for 45 percent of the total while non-racing operations and owners had \$34.5 million or 12 percent of the total. The racetracks accounted for the remaining 43 percent.

Excluding purse and stake payments, purchases of equine accounted for the largest expenditure amount at \$36.2 million followed by labor expenses at \$35.8 million, training fees at \$19.0 million and equipment purchases at \$15.5 million.

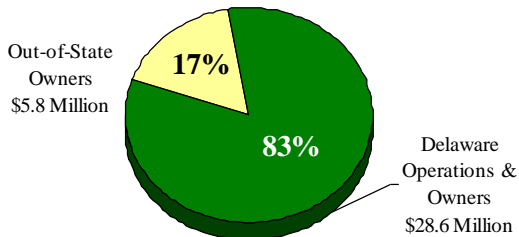


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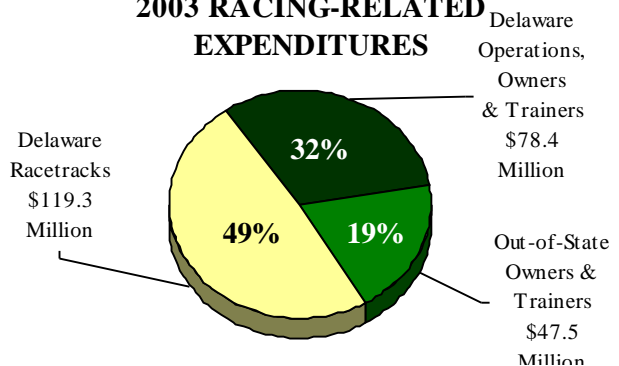
2003 EQUINE-RELATED EXPENDITURES



2003 NON-RACING-RELATED EXPENDITURES



2003 RACING-RELATED EXPENDITURES



**EQUINE-RELATED EXPENDITURES MADE IN DELAWARE IN 2003:
RACETRACKS, DELAWARE RESIDENTS, OUT-OF-STATE RESIDENTS AND TOTAL**

Expenditure Category	Racetracks	Delaware Residents	Out-of-State Residents	Total
			Dollars	
Purchases of Equine	-	20,750,000	15,430,000	36,180,000
Boarding of Equine	-	3,890,000	6,700,000	10,590,000
Veterinarian and Health	830,000	6,370,000	3,540,000	10,740,000
Feed and Bedding	30,000	9,760,000	2,780,000	12,570,000
Grooming Supplies and Tack	420,000	3,710,000	1,530,000	5,660,000
Insurance Premiums	1,710,000	1,870,000	520,000	4,100,000
Fuels and Utilities	1,450,000	2,350,000	520,000	4,320,000
Maintenance and Repair	1,880,000	2,650,000	250,000	4,780,000
Farrier	-	3,330,000	1,280,000	4,610,000
Breeding Fees	-	3,750,000	660,000	4,410,000
Rent and Lease	690,000	1,360,000	130,000	2,180,000
Land Taxes	160,000	1,600,000	-	1,760,000
Equipment Purchases	420,000	12,240,000	2,810,000	15,470,000
Training Fees	-	7,570,000	11,460,000	19,030,000
Travel and Lodging	50,000	830,000	1,760,000	2,640,000
Advertisement and Marketing	1,100,000	280,000	90,000	1,470,000
Professional Fees	540,000	550,000	100,000	1,190,000
Sales Fees and Commissions	-	260,000	130,000	390,000
Interest Paid	-	1,070,000	50,000	1,120,000
Entry and Nomination Fees, Licenses, Registrations, and Memberships	230,000	2,030,000	2,350,000	4,610,000
Contract Services	3,910,000	490,000	170,000	4,570,000
Capital Improvements	3,360,000	4,620,000	-	7,980,000
Real Estate Purchases	-	4,720,000	-	4,720,000
Labor Expenses	24,220,000	10,660,000	870,000	35,750,000
Other Contracted Labor	110,000	280,000	150,000	540,000
Other Expenditures	5,580,000	80,000	10,000	5,670,000
Purses and Stakes	72,600,000	-	-	72,600,000
Total	119,290,000	107,070,000	53,290,000	279,650,000

**EQUINE-RELATED EXPENDITURES MADE IN DELAWARE IN 2003:
RACETRACKS, RACING, NON-RACING AND TOTAL**

Expenditure Category	Racetracks	Racing Operations, Owners and Trainers	Non-racing Operations and Owners	Total
	Dollars			
Purchases of Equine	-	33,350,000	2,830,000	36,180,000
Boarding of Equine	-	8,860,000	1,730,000	10,590,000
Veterinarian and Health	830,000	8,040,000	1,870,000	10,740,000
Feed and Bedding	30,000	7,770,000	4,770,000	12,570,000
Grooming Supplies and Tack	420,000	3,610,000	1,630,000	5,660,000
Insurance Premiums	1,710,000	1,990,000	400,000	4,100,000
Fuels and Utilities	1,450,000	2,180,000	690,000	4,320,000
Maintenance and Repair	1,880,000	1,690,000	1,210,000	4,780,000
Farrier	-	3,280,000	1,330,000	4,610,000
Breeding Fees	-	3,990,000	420,000	4,410,000
Rent and Lease	690,000	1,220,000	270,000	2,180,000
Land Taxes	160,000	580,000	1,020,000	1,760,000
Equipment Purchases	420,000	8,540,000	6,510,000	15,470,000
Training Fees	-	17,590,000	1,440,000	19,030,000
Travel and Lodging	50,000	1,710,000	880,000	2,640,000
Advertisement and Marketing	1,100,000	200,000	170,000	1,470,000
Professional Fees	540,000	540,000	110,000	1,190,000
Sales Fees and Commissions	-	300,000	90,000	390,000
Interest Paid	-	920,000	200,000	1,120,000
Entry and Nomination Fees, Licenses, Registrations, and Memberships	230,000	3,430,000	950,000	4,610,000
Contract Services	3,910,000	520,000	140,000	4,570,000
Capital Improvements	3,360,000	2,650,000	1,970,000	7,980,000
Real Estate Purchases	-	2,220,000	2,500,000	4,720,000
Labor Expenses	24,220,000	10,290,000	1,240,000	35,750,000
Other Contracted Labor	110,000	360,000	70,000	540,000
Other Expenditures	5,580,000	70,000	20,000	5,670,000
Purses and Stakes	72,600,000	-	-	72,600,000
Total	119,290,000	125,900,000	34,460,000	279,650,000

**NON-RACING-RELATED EQUINE EXPENDITURES MADE IN DELAWARE IN 2003:
DELAWARE RESIDENTS, OUT-OF-STATE RESIDENTS AND TOTAL**

Expenditure Category	Delaware Residents	Out-of-State Residents	Total
		Dollars	
Purchases of Equine	2,380,000	450,000	2,830,000
Boarding of Equine	870,000	860,000	1,730,000
Veterinarian and Health	1,590,000	280,000	1,870,000
Feed and Bedding	4,300,000	470,000	4,770,000
Grooming Supplies and Tack	1,200,000	430,000	1,630,000
Insurance Premiums	330,000	70,000	400,000
Fuels and Utilities	620,000	70,000	690,000
Maintenance and Repair	1,100,000	110,000	1,210,000
Farrier	1,120,000	210,000	1,330,000
Breeding Fees	140,000	280,000	420,000
Rent and Lease	270,000	-	270,000
Land Taxes	1,020,000	-	1,020,000
Equipment Purchases	5,340,000	1,170,000	6,510,000
Training Fees	1,050,000	390,000	1,440,000
Travel and Lodging	320,000	560,000	880,000
Advertisement and Marketing	150,000	20,000	170,000
Professional Fees	110,000	-	110,000
Sales Fees and Commissions	80,000	10,000	90,000
Interest Paid	200,000	-	200,000
Entry and Nomination Fees, Licenses, Registrations, and Memberships	500,000	450,000	950,000
Contract Services	140,000	-	140,000
Capital Improvements	1,970,000	-	1,970,000
Real Estate Purchases	2,500,000	-	2,500,000
Labor Expenses	1,240,000	-	1,240,000
Other Contracted Labor	70,000	-	70,000
Other Expenditures	20,000	-	20,000
Total	28,630,000	5,830,000	34,460,000

**RACING-RELATED EQUINE EXPENDITURES MADE IN DELAWARE IN 2003:
RACETRACKS, DELAWARE RESIDENTS, OUT-OF-STATE RESIDENTS AND TOTAL**

Expenditure Category	Racetracks	Delaware Residents	Out-of-State Residents	Total
	Dollars			
Purchases of Equine	-	18,370,000	14,980,000	33,350,000
Boarding of Equine	-	3,020,000	5,840,000	8,860,000
Veterinarian and Health	830,000	4,780,000	3,260,000	8,870,000
Feed and Bedding	30,000	5,460,000	2,310,000	7,800,000
Grooming Supplies and Tack	420,000	2,510,000	1,100,000	4,030,000
Insurance Premiums	1,710,000	1,540,000	450,000	3,700,000
Fuels and Utilities	1,450,000	1,730,000	450,000	3,630,000
Maintenance and Repair	1,880,000	1,550,000	140,000	3,570,000
Farrier	-	2,210,000	1,070,000	3,280,000
Breeding Fees	-	3,610,000	380,000	3,990,000
Rent and Lease	690,000	1,090,000	130,000	1,910,000
Land Taxes	160,000	580,000	-	740,000
Equipment Purchases	420,000	6,900,000	1,640,000	8,960,000
Training Fees	-	6,520,000	11,070,000	17,590,000
Travel and Lodging	50,000	510,000	1,200,000	1,760,000
Advertisement and Marketing	1,100,000	130,000	70,000	1,300,000
Professional Fees	540,000	440,000	100,000	1,080,000
Sales Fees and Commissions	-	180,000	120,000	300,000
Interest Paid	-	870,000	50,000	920,000
Entry and Nomination Fees, Licenses, Registrations, and Memberships	230,000	1,530,000	1,900,000	3,660,000
Contract Services	3,910,000	350,000	170,000	4,430,000
Capital Improvements	3,360,000	2,650,000	-	6,010,000
Real Estate Purchases	-	2,220,000	-	2,220,000
Labor Expenses	24,220,000	9,420,000	870,000	34,510,000
Other Contracted Labor	110,000	210,000	150,000	470,000
Other Expenditures	5,580,000	60,000	10,000	5,650,000
Purses and Stakes	72,600,000	-	-	72,600,000
Total	119,290,000	78,440,000	47,460,000	245,190,000

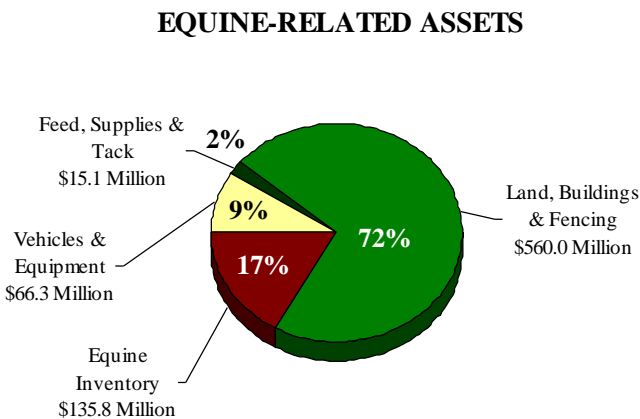
EQUINE-RELATED ASSETS



The value of all equine-related assets held by Delaware equine operations, owners, and trainers as of May 1, 2004, totaled \$777.2 million. Equine-related land, buildings and fencing assets accounted for 72 percent of the total followed by equine inventory at 17 percent, vehicles and equipment at 9 percent, and tack and supplies at 2 percent.

Racing operations, owners, and trainers accounted for 37 percent of the total value of assets while non-racing operations and owners accounted for 41 percent and racetracks accounted for 22 percent.

Excluding racetracks, racing operations, owners and trainers held 74 percent of the total value of equine inventory assets. Non-racing operations and owners held 58 percent of the total asset value of equine-related land, buildings and fencing.



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DELAWARE EQUINE INDUSTRY ASSETS, MAY 1, 2004

Asset Category	Racing Operations, Owners and Trainers	Racetracks	Non-racing Operations and Owners	All Operations, Owners and Trainers
	Dollars			
Equine Inventory	81,130,000	25,785,000	28,850,000	135,765,000
Land, Buildings, and Fencing	177,000,000	141,000,000	242,000,000	560,000,000
Vehicles and Equipment	27,350,000	1,850,000	37,100,000	66,300,000
Feed and Supplies	1,200,000	-	1,900,000	3,100,000
Tack	4,740,000	1,030,000	6,230,000	12,000,000
Total	291,420,000	169,665,000	316,080,000	777,165,000

DELAWARE EQUINE INDUSTRY ASSETS BY TYPE OF OPERATION, MAY 1, 2004*

Asset Category	Racing Operations*	Non-racing Operations		All Operations
		Dollars		
Equine Inventory	81,130,000	28,850,000		109,980,000
Land, Buildings and Fencing	177,000,000	242,000,000		419,000,000

*Excludes racetracks

NEW CASTLE EQUINE INDUSTRY ASSETS BY TYPE OF OPERATION, MAY 1, 2004*

Asset Category	Racing Operations*	Non-racing Operations		All Operations
		Dollars		
Equine Inventory	27,800,000	6,000,000		33,800,000
Land, Buildings and Fencing	52,000,000	78,000,000		130,000,000

*Excludes racetracks

KENT EQUINE INDUSTRY ASSETS BY TYPE OF OPERATION, MAY 1, 2004*

Asset Category	Racing Operations*	Non-racing Operations		All Operations
		Dollars		
Equine Inventory	37,900,000	13,700,000		51,600,000
Land, Buildings and Fencing	70,000,000	90,000,000		160,000,000

*Excludes racetracks

SUSSEX EQUINE INDUSTRY ASSETS BY TYPE OF OPERATION, MAY 1, 2004

Asset Category	Racing Operations	Non-racing Operations		All Operations
		Dollars		
Equine Inventory	15,430,000	9,150,000		24,580,000
Land, Buildings, and Fencing	55,000,000	74,000,000		129,000,000



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EQUINE INDUSTRY INCOME BY TYPE OF OPERATION, 2003*

Racing*	\$60,000,000
Non-racing	\$5,000,000
Total	\$65,000,000

*Excludes racetracks

EQUINE INDUSTRY LABOR BY TYPE OF OPERATION, 2003*

	Racing	Non-racing	Total
Number of Full-time Equine Workers	970	130	1,100
Number of Part-time Equine Workers	950	150	1,100
Total Workers	1920	280	2,200
Cash Expenditures for Labor	\$34,510,000	\$1,240,000	\$35,750,000
Value of Non-cash Items to Workers	\$980,000	\$270,000	\$1,250,000
Cash Expenditures for Contract Labor	\$470,000	\$70,000	\$540,000

*Data represents only workers who were employees of equine operations. Includes racetracks and trainers' employees at racetracks.

Excludes contract workers, veterinarians, farriers, etc.



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OTHER BREEDS OF EQUINE IN DELAWARE

Light Horses

American Saddle Horse
Buckskin
Hackney
Kentucky Mountain
Morgan
Mustang
Palomino
Paso Fino
Peruvian Paso
Pinto
Rocky Mountain
Spotted Saddle Horse
Tennessee Walking Horse



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Warmbloods

Anglo Trakehner
Danish
Dutch
French - Selle Francaise
German Trakehner
Hanovarian
Hessen
Oldenburg
Swedish

Ponies

American Paint
Chincoteague
Connemara
Hackney
Norwegian Fjord
Pony of America
Trottingbred

Draft

American Cream
Clydesdale
North American Spotted

ECONOMIC IMPACT ANALYSIS OF DELAWARE EQUINE INDUSTRY

Titus O. Awokuse and Thomas W. Ilvento
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University of Delaware

INTRODUCTION

The Delaware equine industry study involves two major components: 1) a survey of operations, owners and trainers who had equine-related expenditures in Delaware during 2003, and 2) a corresponding quantitative economic impact analysis of the direct, indirect, and induced contributions of the equine industry to Delaware's economy. The survey results have been covered in the first part of this bulletin. This section focuses on the economic impact analysis. Together, they provide the first comprehensive study of the Delaware equine industry. The results of this work will enhance our ability to understand the diverse nature of the equine industry and provide the public and policymakers with more accurate information on its economic contribution to the state.

An earlier study (1999) measured the economic value of Delaware's equine industry, but was limited to just the racing sector and did not include non-racing equine activities and events. Furthermore, the former study underestimated the importance of the equine industry to Delaware's economy because it only captured direct economic effects, not the indirect and induced effects. Indirect and induced effects show the additional contributions the industry makes from expenditures into the economy, and can only be obtained from an economic model. Given the national growth of the industry in the last few years and the limited scope of the 1999 Delaware equine study, there was a need for a more up-to-date and comprehensive study which captures direct, indirect, and induced effects of equine and equine-related activities on Delaware's economy. The economic impact analysis component of the study shows the complex interconnections between the equine industry and other industries in the state of Delaware and provides quantitative estimates of direct, indirect and induced effects.

In order to accurately capture the economic importance of this industry, it is appropriate to first discuss the components and linkages that define Delaware's equine industry. Subsequent sections discuss the research approach and methodological details, as necessary.

DIRECT ECONOMIC AND SOCIAL CONTRIBUTIONS

The 2004 Delaware Equine Survey gathered equine-related information about the types of operations and land acreage devoted to equine use, the number by breed and use of equine, and economic data from horse operations, owners and trainers. The survey expenditures represent only the direct effects of the equine industry.

The equine industry provides economic value to the state through income and job creation. Equine-related economic activities include services and sales for other businesses, equestrian shows, competitions, and racing events. Equine-related jobs are created for trainers, veterinarians, tack shop employees, farriers, accountants, sales agents, and feed and hay producers, among others.

In addition to its economic impact, the equine industry also has a significant social effect through its contributions to the stability of communities, to the environment, 4-H and other educational programs, and physical and mental health therapy. The Delaware equine industry plays a pivotal role in the preservation of agricultural acreage as open space in the more densely populated regions of the state (for example, New Castle County). Thus, horses add to Delawareans' quality of life by helping to preserve the rural agricultural character and scenic beauty in the state. The equine industry also provides quality entertainment and recreation value.

Recreational activities on horseback have an economic effect by generating employment for some Delaware residents. Furthermore, equine have social value in helping children and adults develop personal responsibility as they provide care to their horses, ponies, mules, burros and donkeys.

Delaware has 2,003 operations having 13,000 equine on 27,415 acres in Delaware's three counties. To put into perspective the size of the equine industry, Delaware ranks third nationally in the number of equine per county behind Arizona and Nevada. Furthermore, Delaware's racing-related equine accounted for 41% of the state's total equine. This is likely the highest percentage of any state. No other state in the country can claim to have a ratio of one commercial racetrack per county.

Economic expenditures at the racetracks, Arabian, Standardbred and Thoroughbred racing, are major sources of economic stimuli to other sectors of the state economy. Delaware's three racetracks inject a total of \$119.3 million in direct spending into the state economy. The detailed breakdown of racetrack expenditures can be found in Table 1. Furthermore, these commercial enterprises also generate significant tax revenues for the state government.

Direct expenditures reported from the 2004 Delaware Equine Survey are impressive in scale. In 2003, the average cost of taking care of an equine in Delaware was \$3,581 for non-racing-related equine and \$10,430 for racing-related equine. Racing and non-racing operations generated \$160.4 million in spending in Delaware in 2003 (see Table 2). This expenditure amount includes horse purchases, upkeep, equine-related activities, labor expenses, capital improvements, etc. Another important area of spending occurs through spectators and participants at horse shows, competitions and racing events. This sector contributed \$16.4 million to Delaware's economy in direct spending (was not included in the NASS survey expenditure total) (see Table 3).

INDIRECT AND INDUCED ECONOMIC CONTRIBUTIONS

In Delaware, the equine industry has a far reaching impact on other industries in the state economy in terms of expenditures on equine and related products made by equine operations, owners, trainers, and racetracks. Non-equine industries benefiting from equine expenditures include real estate, vehicle and equipment sales, services, wholesale, retail, manufacturing, and other related industries. Delaware equine owners and operations support their equine activities with land purchases, capital investments, and equipment purchases. Equine owners utilize a variety of other industry support goods and services, many of which help stimulate the economic well-being of non-equine businesses including farming operations. In addition, horse shows, competitions, and racing events held across the state are an important component of the indirect and induced economic value provided by the equine industry.

Economic impact analysis involves the development of a detailed accounting of inter-industry activities and linkages. Such an economic analytical framework is commonly described as input-output analysis. Wassily Leontief, a Nobel Prize winner in economics, developed this method of analysis. Input-output analysis uses a mathematical modeling approach to model the transactions between various industries in the economy. The input-output model requires the collection of economic data for a specific geographic region (county, state, or nation). The main emphasis is on the economic activity of a group of industries that both produce goods (output) and consume goods from other industries (input) in the process of producing the specific industry's output.

For instance, the equine industry in Delaware demands (consumes) the outputs of other industries such as real estate, feed and bedding, labor, boarding, veterinary and farrier services, equipment purchase and repair, and insurance. The Delaware equine industry then uses these inputs from other Delaware industries to produce outputs captured as horse racing, riding lessons/clinics, breeding services, trail riding, shows and competitions, and more. All of these diverse economic activities in the equine industry have a far-reaching impact on Delaware's economy.

The economic impact analysis of the Delaware equine industry was done to account for the inter-industry activities and linkages and determine how much value the equine industry adds to the rest of the economy of Delaware. This analysis uses the expenditure data from the survey conducted by the National Agricultural Statistics Service (NASS), state level data from non-equine industries, and data from a special survey of participants and spectators at horse shows and racing events. The model estimates an input-output table which shows all the economic transactions generated by impacted industries in the state of Delaware. The analysis builds a set of outputs which identify the purchase and sale transactions between industries within a state system and with neighboring regions (imports and exports).

The analysis generates a set of multipliers which represent a quantitative measure of the extent that change in employment or expenditures is expected to generate in additional effects throughout the economy. Multipliers translate the consequences of change taking into account the complicated linkages in the economy. For example, a state employment multiplier can be estimated which relates a change in a state's equine sector employment to the resulting total employment change in the state. In input-output analysis, there are many different multipliers that can be estimated and reported.

Most studies report the direct, indirect, and induced multiplier effects of a particular industry on the overall economy's output, income, and employment levels. The *direct effect* measures the direct contribution of equine expenditures to Delaware's economy. The *indirect effect* measures effect of equine expenditures on non-equine industries that supply inputs and services used by the equine industry. Finally, the *induced effect* measures the impact of expenditures by households that receive income from the equine industry – in other words, the effect of household spending as a result of income from equine.

The input-output analysis and corresponding multipliers were derived using the nationally accepted software called IMPLAN (Impact Analysis Planning). The IMPLAN model was originally developed at the University of Minnesota for the US Forest Service. Table 4 provides detailed information on the economic impact analysis results and estimates of various multipliers. Multipliers are often called estimators of the “ripple” effect of an industry or a change in the impacted industries. The IMPLAN manual recommends the use of the Type SAM multiplier and it is obtained as follows:

Type SAM multiplier = (direct effect + indirect effect + induced effect) / direct effect.

Additional definitions of the numbers in Table 4 include:

Industry Output Multipliers represent the total dollar value of output generated in the economy by a \$1 change in final demand for the products of a particular sector (e.g., equine).

Value Added Multipliers represent the total effect of a \$1 change in output on employee compensation, plus proprietary income plus other property income plus indirect business tax. This is an alternative income multiplier that accounts for other incomes beyond equine labor income.

Labor Income Multipliers represent the total change in statewide household labor income due to a \$1 change in the labor expenditure of a given sector in response to change in demand for the sector.

Employment Multipliers measure the total employment change in the state resulting from a change in employment of a given sector as a result of a change in final demand.



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TOTAL ECONOMIC CONTRIBUTIONS

Results from the input-output analysis are presented in Table 4. The table shows the total effect broken down into direct, indirect, and induced contributions of the Delaware equine industry. Separate results are provided for racetracks, racing and non-racing operations, and participant and spectator events. The data for the spectator events was collected through a supplemental survey of horse show and racing event participants and spectators conducted by the University of Delaware's Department of Food and Resource Economics.

As shown in Table 4, the total economic contribution of all four categories of equine activity is \$360.3 million in total industry output. A portion of this amount goes to Delaware workers and equine owners in the form of wages, salaries, and profits. The industry contributes \$111.7 million in value added activity, and \$81.6 million in labor income. The total value is the sum of direct, indirect, and induced effects. The estimated total number of jobs supported by the equine industry is 3,062 jobs in 2003. The employment figures include full-time, part-time, and seasonal employment.

The three racetracks in Delaware (Dover Downs, Harrington Raceway, and Delaware Park) make significant contributions to the state's economy. The racetrack operations account for a total industry output of \$137.8 million (38% of total) and a total of 1,094 jobs. These output figures translate to a total effect of \$25.8 million in labor income. The racing operations, owners, and trainers account for the largest portion of the total industry output in the amount of \$159.1 million (44% of the total) and a total of 1,472 jobs. Non-racing operations and owners contribute \$42.4 million in total industry output to Delaware's economy (12% of the total) and 304 jobs.



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Equine participant and spectator events also contribute a non-trivial amount to the state's economy. This equine activity provided a direct impact of \$16.4 million into Delaware's economy. In total, direct, indirect and induced spending for equine events have an annual economic impact of \$21.1 million to Delaware (6% of the total). They support 192 jobs and \$6.3 million in labor income. These jobs and the labor income include employees working at the equine events, but the majority of the impact is felt at local businesses supported by horse show and racing event attendees.

CONCLUSIONS

This study shows that the equine industry makes a major contribution to Delaware's economy. The economic impact analysis of equine data provides businesses, government officials, and community planners with important information necessary for making better decisions about future investment opportunities and economic growth potentials of the equine industry in the state of Delaware. Many Delawareans are directly or indirectly involved in the equine industry. Delaware's equine industry consists of three major activities: private (pleasure, work, etc.), commercial (racing, breeding, boarding, etc.), and participant and spectator events (racing, shows and competitions, etc.). These components of the equine industry make significant contributions to the Delaware economy in terms of output, value added, labor income and employment. The state of Delaware has 13,000 equine of which 41% are used for racing-related purposes and 59% are used for non-racing-related purposes. Direct effect of equine expenditures is estimated at \$296.0 million while the "ripple" effect (indirect and induced effects) of the direct expenditures generated an additional \$64.3 million. Thus, the total economic impact of the equine industry output is estimated at \$360.3 million in 2003. In addition, the equine industry also contributes a total of 3,062 jobs to the state economy.

**TABLE 1.
EQUINE-RELATED EXPENDITURES MADE IN DELAWARE BY RACETRACKS, 2003**

Expenditure Category	Average per Racetrack	Total	Category as Percent of Total
Veterinarian and Health	\$276,667	\$830,000	0.70
Feed and Bedding	\$10,000	\$30,000	0.03
Grooming Supplies and Tack	\$140,000	\$420,000	0.35
Insurance Premiums	\$570,000	\$1,710,000	1.43
Fuels and Utilities	\$483,333	\$1,450,000	1.22
Maintenance and Repair	\$626,667	\$1,880,000	1.58
Rent and Lease	\$230,000	\$690,000	0.58
Land Taxes	\$53,333	\$160,000	0.13
Equipment Purchases	\$140,000	\$420,000	0.35
Travel and Lodging	\$16,667	\$50,000	0.04
Advertisement and Marketing	\$366,667	\$1,100,000	0.92
Professional Fees	\$180,000	\$540,000	0.45
Entry and Nomination Fees, Licenses, Registrations, Memberships, etc.	\$76,667	\$230,000	0.19
Contract Services	\$1,303,333	\$3,910,000	3.28
Capital Improvements	\$1,120,000	\$3,360,000	2.82
Labor Expenses	\$8,073,333	\$24,220,000	20.30
Other Contracted labor	\$36,667	\$110,000	0.09
Other Expenditures	\$1,860,000	\$5,580,000	4.68
Purses and Stakes	\$24,200,000	\$72,600,000	60.86
Total	\$39,763,334	\$119,290,000	100.00

Source: 2004 Delaware Equine Survey, National Agricultural Statistics Service (NASS), USDA.



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TABLE 2.
EQUINE-RELATED EXPENDITURES MADE IN DELAWARE IN 2003:
RACING, NON-RACING AND TOTAL

Expenditure	Racing*	Non-racing	Total	Category as Percent of Total
Purchases of Equine	\$33,350,000	\$2,830,000	\$36,180,000	22.56
Boarding of Equine	\$8,860,000	\$1,730,000	\$10,590,000	6.60
Veterinarian and Health	\$8,040,000	\$1,870,000	\$9,910,000	6.18
Feed & Bedding	\$7,770,000	\$4,770,000	\$12,540,000	7.82
Grooming Supplies and Tack	\$3,610,000	\$1,630,000	\$5,240,000	3.27
Insurance Premiums	\$1,990,000	\$400,000	\$2,390,000	1.49
Fuels and Utilities	\$2,180,000	\$690,000	\$2,870,000	1.79
Maintenance & Repair	\$1,690,000	\$1,210,000	\$2,900,000	1.81
Farrier	\$3,280,000	\$1,330,000	\$4,610,000	2.87
Breeding Fees	\$3,990,000	\$420,000	\$4,410,000	2.75
Rent and Lease	\$1,220,000	\$270,000	\$1,490,000	0.93
Land Taxes	\$580,000	\$1,020,000	\$1,600,000	1.00
Equipment Purchases	\$8,540,000	\$6,510,000	\$15,050,000	9.38
Training Fees	\$17,590,000	\$1,440,000	\$19,030,000	11.87
Travel and Lodging	\$1,710,000	\$880,000	\$2,590,000	1.62
Advertisement and Marketing	\$200,000	\$170,000	\$370,000	0.23
Professional Fees	\$540,000	\$110,000	\$650,000	0.41
Sales Fees and Commissions	\$300,000	\$90,000	\$390,000	0.24
Interest Paid	\$920,000	\$200,000	\$1,120,000	0.70
Entry and Nomination Fees, Licenses, Registrations, Memberships, etc.	\$3,430,000	\$950,000	\$4,380,000	2.73
Contract Services	\$520,000	\$140,000	\$660,000	0.41
Capital Improvements	\$2,650,000	\$1,970,000	\$4,620,000	2.88
Real Estate Purchases	\$2,220,000	\$2,500,000	\$4,720,000	2.94
Labor Expenses	\$10,290,000	\$1,240,000	\$11,530,000	7.19
Other Contracted Labor	\$360,000	\$70,000	\$430,000	0.27
Other Expenses	\$70,000	\$20,000	\$90,000	0.06
Total	\$125,900,000	\$34,460,000	\$160,360,000	100.00

*Excludes Racetracks

Source: 2004 Delaware Equine Survey, National Agricultural Statistics Service (NASS), USDA.

TABLE 3.
EQUINE-RELATED EXPENDITURES MADE IN DELAWARE IN 2003:
HORSE SHOWS/COMPETITIONS AND RACING EVENTS

Expenditure Category	Horse Shows	Racing Events	Total
Feed and Bedding	\$625,000	\$1,200,000	\$1,825,000
Lodging	\$155,000	\$620,000	\$775,000
Transportation	\$110,000	\$1,040,000	\$1,150,000
Food and Drink	\$65,000	\$1,210,000	\$1,275,000
Souvenirs	\$55,000	\$240,000	\$295,000
Recreation	\$145,000	-	\$145,000
Supplies	\$935,000	\$870,000	\$1,805,000
Entry Fees	\$1,520,000	-	\$1,520,000
Stall Fees	\$390,000	-	\$390,000
Miscellaneous	\$30,000	\$260,000	\$290,000
Off-track Betting	-	\$6,930,000	\$6,930,000
Total	\$4,030,000	\$12,370,000	\$16,400,000

Source: Survey of Delaware horse shows and racing events, University of Delaware.



Winbak Farms

**TABLE 4.
IMPACT OF THE EQUINE INDUSTRY ON DELAWARE'S ECONOMY IN 2003:
RACETRACKS, RACING, NON-RACING, EQUINE EVENTS AND TOTAL**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect	Multiplier
Racetracks					
Industry Output	\$119,289,999	\$6,726,549	\$11,771,253	\$137,787,801	1.16
Value Added	\$22,822,830	\$3,567,925	\$7,431,680	\$33,822,435	1.48
Labor Income	\$19,240,519	\$2,164,433	\$4,384,719	\$25,789,671	1.34
Employment (# of Jobs)	927	53	114	1,094	1.18
Racing					
Industry Output	\$125,900,000	\$15,122,691	\$18,043,568	\$159,066,259	1.26
Value Added	\$35,047,771	\$8,847,909	\$11,391,648	\$55,287,328	1.58
Labor Income	\$27,627,605	\$5,456,669	\$6,721,126	\$39,805,400	1.44
Employment (# of Jobs)	1,152	146	174	1,472	1.28
Non-racing					
Industry Output	\$34,460,000	\$3,491,634	\$4,404,364	\$42,355,998	1.23
Value Added	\$9,614,217	\$1,982,608	\$2,780,657	\$14,377,482	1.50
Labor Income	\$6,834,924	\$1,232,110	\$1,640,600	\$9,707,634	1.42
Employment (# of Jobs)	231	30	43	304	1.31
Equine Events					
Industry Output	\$16,399,054	\$1,879,567	\$2,842,611	\$21,121,232	1.29
Value Added	\$5,273,523	\$1,101,313	\$1,794,657	\$8,169,493	1.55
Labor Income	\$4,512,854	\$735,739	\$1,058,857	\$6,307,450	1.40
Employment (# of Jobs)	147	18	27	192	1.31
Total					
Industry Output	\$296,049,053*	\$27,220,441	\$37,061,796	\$360,331,290	1.22
Value Added	\$72,758,341	\$15,499,755	\$23,398,642	\$111,656,738	1.53
Labor Income	\$58,215,902	\$9,588,951	\$13,805,302	\$81,610,155	1.40
Employment (# of Jobs)	2,457	247	358	3,062	1.25

*Total direct effect is the sum of NASS Equine Survey expenditures plus the University of Delaware survey on horse show and racing event expenditures.

Source: IMPLAN-based economic impact analysis model.



Kelly Mills



DELAWARE EQUINE SURVEY



2320 South DuPont Highway
Dover, Delaware 19901
302-698-4537 or 800-282-8685 in state
FAX 302-697-4450



Dear Horse Enthusiast:

This survey is all about getting recognition for the Delaware Equine Industry. Whether you have a single horse or a large commercial equine operation, we need your information. Please respond quickly. Your response is voluntary, but extremely important. The information you provide will be held **STRICTLY CONFIDENTIAL**. Federal law prohibits disclosing individual data.

Sincerely

Chris Cadwallader

Chris Cadwallader
State Director

Please make corrections to name, address and Zip Code, if necessary.

Section 1

INSTRUCTIONS: Combine equine information for all household members and report totals on one survey questionnaire. If multiple survey questionnaires are received by your household members, complete one questionnaire and return all questionnaires together. Please return this questionnaire even if you do not have any equine or equine related expenditures. If you are in partnership with non-household members please coordinate so duplicated data is not reported by partners. If you have any questions, please call 1-800-282-8685 (In State) or 302-698-4537 (Out of State).

- Are you a resident of the State of Delaware?
 NO (Continue) YES (Go to item 3)
 - Do you operate land in Delaware? (Owned and/or rented from others)
 NO (Go to item 5) YES (Continue)
 - Were any equine regardless of ownership located on Delaware land YOU operate (Owned and/or rented from others) as of **May 1, 2004?** (If your horse is boarded by someone else; answer "NO")
 NO (Continue) YES (Go to item 6)
 - Will there be equine on your operation in 2004?
 NO (Continue) YES (Go to item 6)
 - Did you have any equine related expenditures in Delaware during 2003?
 NO (Please return this form in the envelope provided) YES (Go to Section 3)
 - In what county is your operation located: New Castle Kent Sussex
- COMMERCIAL EQUINE OPERATION: (REGARDLESS OF SIZE) THE EQUINE ACTIVITIES CONDUCTED ON THE OPERATION ARE DONE FOR THE PURPOSE OF EARNING CURRENT OR FUTURE INCOME.**
- What do you consider to be the **PRIMARY** function of this operation? (Please check only ONE box).

A commercial horse racing related place (boarding, training, breeding, etc)	104
A commercial non-race horse related place (boarding, training, breeding, riding/lessons, etc)	105
All other places where horses, ponies, or other equine are kept (farms, residences, etc)	106
 - What is the total acreage in your operation? (Include acres owned plus acres rented. Exclude land rented to others. Include the farmstead, pasture, cropland, woodland, wasteland, and government program land)
 - Of the total acres in your operation, how many are used for equine related purposes? (Include, pasture, crops grown for equine feed/bedding, training areas, buildings, etc)
 - How was this Delaware equine acreage used before you became involved with equine?
 Crop farming =1, Livestock/poultry farming =2, Horse farm =3, Not used for Ag purposes =4, Don't know =5 (Enter code)

107	108	109
-----	-----	-----
 - How long have you had equine on the land you operate?

110	1-4 years	111	5-8 years	112	9 or more years
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Section 2

INVENTORY AND TYPE OF USE BY BREED - In the table below, record the total number of equine regardless of ownership located on the land you operate in Delaware as of **May 1, 2004**.
Do Not Report equine owned but located/boarded on land operated by someone else.
Do Not Report equine owned but located outside Delaware.

EQUINE CATEGORY	COLUMN #1	Combined Estimated Value of these Equine. (Both Owned and/or Boarded for Others)	Account for the equine inventory reported in Column 1. Pick the PRIMARY USE based on which use the equine provide the most important service to you. (Report foals in anticipated use category) Do not include the same animal in more than one use category.					
	Number of Equine by Breed on your Operation as of May 1, 2004		Breeding		Show, Competition	Trail Riding/ Pleasure Riding/ Sports	Racing	Other: Farm Work, Therapeutic, Retired, Rescued, etc.
		Number	Dollars	Brood Mares				
LIGHT HORSE BREEDS								
Appaloosa	501	502	503	504	505	506		507
Arabian	508	509	510	511	512	513	514	515
Half Arabian	516	517	518	519	520	521		522
Miniature Horses	523	524	525	526	527	528		529
Paint	530	531	532	533	534	535		536
Quarter Horse	537	538	539	540	541	542		543
Other Light Horse Breeds (Specify)	544	545	546	547	548	549		550
Crossbred/Grade Horses/ Breed Unknown	551	552	553	554	555	556		557
WARMBLOODS								
Hafingers	558	559	560	561	562	563		564
Other Warmblood Breeds (Specify)	565	566	567	568	569	570		571
RACE HORSE BREEDS								
Standardbred	572	573	574	575	576	577	578	579
Thoroughbred	580	581	582	583	584	585	586	587
DRAFT HORSE BREEDS								
Belgian	588	589	590	591	592	593		594
Percheron	595	596	597	598	599	600		601
Other Draft Horse Breeds (Specify)	602	603	604	605	606	607		608
PONIES								
Shetland	609	610	611	612	613	614		615
Welsh	616	617	618	619	620	621		622
Others Pony Breeds (Specify)	623	624	625	626	627	628		629
	630	631	632	633	634	635		636
DONKEYS AND BURROS								
	637	638	639	640	641	642		643
MULES								
TOTAL EQUINE ON YOUR OPERATION MAY 1, 2004	644	645	646	647	648	649	650	651

Section 3 2003 EQUINE RELATED EXPENDITURES

1. Please report your equine related expenditures **made in Delaware** during 2003. (Regardless of equine ownership)
Instructions: If you report "Boarding of Equine" expenses, do not breakdown the total cost of boarding (bedding, feed, grooming, etc.) into other categories. If in partnership with others, please coordinate so reported expenses are not duplicated.

EXPENDITURE CATEGORY	Dollars
PURCHASES OF EQUINE (Private sales, claimers, auctions, etc.)	810
BOARDING OF EQUINE (Include stall fees and expenditures paid for boarding)	811
VETERINARIAN/HEALTH (Include vet fees, medicines, parasite control, lab work, etc)	812
FEED AND BEDDING - Grown (report estimated value) and/or purchased (Include grain, hay, seeds, straw, other bedding, fertilizers, pesticides, vitamins, minerals, mixed formula feeds, etc)	813
GROOMING SUPPLIES (Include grooming fees, clippers, soaps, oils, sprays, brushes, etc)	814
INSURANCE PREMIUMS (Equine related - liability, collision, mortality, etc)	815
FUELS/UTILITIES (Equine related - telephone, water, gasoline (for travel and for pasturing, hay, etc), oil, electricity, internet service, natural gas, diesel/fuel, propane, etc)	816
MAINTENANCE REPAIR (Include contracted labor and materials/parts for maintenance or repair of buildings, vehicles, facilities, fencing, equipment, etc)	817
FARRIER (Include shoeing, etc)	818
BREEDING FEES (Include stud fees, A.I., semen, embryo handling fees, etc)	819
TACK (Include clothing, blankets, boots, hats, saddles, bridles, halters, harnesses, trunks, etc)	820
RENT/LEASE (Include rental of land and buildings, rental of equine, rental of vehicles, equipment, etc)	821
TAXES (Include property tax on equine related land and buildings only)	822
EQUIPMENT PURCHASES (Include autos, trucks, SUV's, airplanes, treadmills, mowers, horse vans, tools, trailers, tractors, hot walkers, starting gates, manure spreaders, portable stalls, sulkies, carts, buggies, etc)	823
TRAINING FEES (Include fees paid for training of equine and/or individuals (riding lessons, etc)).	824
TRAVEL/LODGING (Include shipping of equine, air travel, tolls, motel costs, meals, etc. Exclude gasoline reported under fuels/utilities)	825
ADVERTISEMENT/MARKETING (Include cost of ads, business entertainment, pamphlets, subscriptions, etc)	826
PROFESSIONAL FEES (Include accounting, legal, etc. Exclude veterinarian)	827
SALES FEES AND COMMISSIONS (Include brokerage fees, auction fees, etc)	828
INTEREST PAID (On equine related debt. Exclude principal portion of payments)	829
SHOW/EVENT/RACING ENTRY AND NOMINATION FEES, REGISTRATIONS, LICENSES, MEMBERSHIPS (Include jockey, driver, rider, etc)	830
CONTRACT SERVICES (Specify)	831
CAPITAL IMPROVEMENTS (Include contracted labor and materials for construction or additions to buildings, facilities, fencing, etc)	832
REAL ESTATE PURCHASES (Include only equine related land and building purchases)	833
LABOR EXPENSES (Include cash wages, employer cost for pensions, social security tax, workman's compensation tax, unemployment compensation tax, health insurance, etc)	834
OTHER CONTRACTED LABOR (Include labor expenditures not reported elsewhere)	835
OTHER EXPENDITURES (Specify)	836

DELAWARE RESIDENTS - continue with Section 4 "Equine Related Assets as of May 1, 2004".

OUT-OF-STATE RESIDENTS - If you do not operate land in Delaware where equine are kept, go to Section 7 "Survey Results".

If you operate equine related land in Delaware - continue with Section 4 "Equine Related Assets as of May 1, 2004".

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Section 4 EQUINE RELATED ASSETS AS OF MAY 1, 2004

1. What is your estimate of the value of all equine related land, fencing, and buildings on your operation?
2. What is your estimate of the value of all equine related vehicles and equipment that you own? *(Include tractors, manure spreaders, motor homes, campers, pick-ups, autos, horse vans, trailers, portable stalls, starting gates, hot walkers, treadmills, sulkies, carts, tools, buggies, etc)*
3. What is your estimate of the value of all equine feed and supplies on hand that you own? *(Include grain, hay, straw, other bedding, seeds, fertilizers, feed additives, vitamins, minerals, etc)*
4. What is your estimate of the value of all tack and equestrian clothing that you own? *(Include saddles, bridles, halters, harnesses, riding/driving/racing equipment, grooming equipment, blankets, trunks, etc)*

Dollar Value
701
\$
702
\$
703
\$
704
\$
705

Section 5 EQUINE RELATED LABOR - 2003

1. In 2003, how many *(whether seasonal or year round)* paid workers employed by this operation spent the majority of their time working with equine or performing equine related tasks?
2. In 2003, how many *(whether seasonal or year round)* paid workers employed by this operation spent some of their time working with equine or performing equine related tasks? *(Do not include any workers reported in item 1).*
3. What was the value of all non-cash items *(housing, utilities, meals, clothing, transportation, horse boarding, riding lessons, etc)* provided to all equine workers *(paid and non-paid)* in 2003?

Number
706
707
Dollars
708
\$
709

Section 6 EQUINE RELATED INCOME - 2003

1. In 2003, did you have any income from equine sales and/or equine related activities?
 YES *(Continue)* NO *(go to Section 7)*
2. What was your gross income from equine sales and/or equine related activities in 2003?

Dollars
710
\$
711

Section 7 SURVEY RESULTS

Would you like to receive a free copy of the results of this Equine Survey?
 The survey results will also be available free of charge on the internet at www.nass.usda.gov/de

- YES NO

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