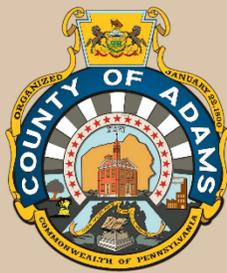




ECONOMIC
IMPACT
ASSESSMENT
of the
EQUINE INDUSTRY

ADAMS COUNTY,
Pennsylvania



Impact of the Equine Industry on the Economy of Adams County

Developed by the:

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Advisory Committee

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Introduction

Beginning in 2014, the Adams County Commissioners and the Adams County Office of Planning and Development (ACOPD) embarked on an effort to determine the economic impact of important Adams County agricultural industries. The first study was completed in 2017. It determined the economic impact of the historic South Mountain Fruit Belt in Adams County contributed \$580 million annually to the local economy. Moving forward, in 2019 ACOPD began working to study the next agricultural industry's economic impact in the county: the equine industry.

A study of the County's equine industry was chosen for several reasons. The last statewide study of the equine industry was conducted and published by Penn State University in 2003, but there has never been a study focused exclusively on Adams County. According to the 2017 Census of Agriculture, the equine industry's market value in Adams County currently ranks fourth out of 63 counties in Pennsylvania. This indicates that this industry would likely be an important sector within the local economy, and information that demonstrates this overall impact would prove important information for local government and businesses. Adams County was not included in the 2017 *Impact of the Equine Industry on the Economy of Southeastern Pennsylvania* study conducted by Delaware Valley University. Additionally, the 2003 Pennsylvania's Equine Industry Inventory, Basic Economic and Demographic Characteristics report conducted by Penn State University is outdated and only provided basic information at a regional scale. Recently, there have also been proposed budget cuts by the Governor's office to the Pennsylvania Race Horse Development Trust Fund potentially threatening the survival of Standardbred racing industry in Pennsylvania. When considering possible budget concerns that may impact an important local industry, it became a high priority to complete a study that could demonstrate this industry's great importance.

The Economic Impact Assessment of the Equine Industry in Adams County has been completed by ACOPD and The Chesapeake Group. The purpose of this study is to determine the various economic impacts of this specific industry within the county, while considering a full range of equine-related activities. Doing so has demonstrated areas within the industry that would benefit from further growth. Several suggestions directed towards a variety of groups will be offered that will help in maintaining and enhancing the industry, as well as assist in possible expansion of its potential. This information will be provided to policymakers in government, those who work within the equine industry, and the public to demonstrate the importance of the industry to Adams County.

A summary of findings can be found on the next page.



Economic Impact of the Equine Industry in Adams County

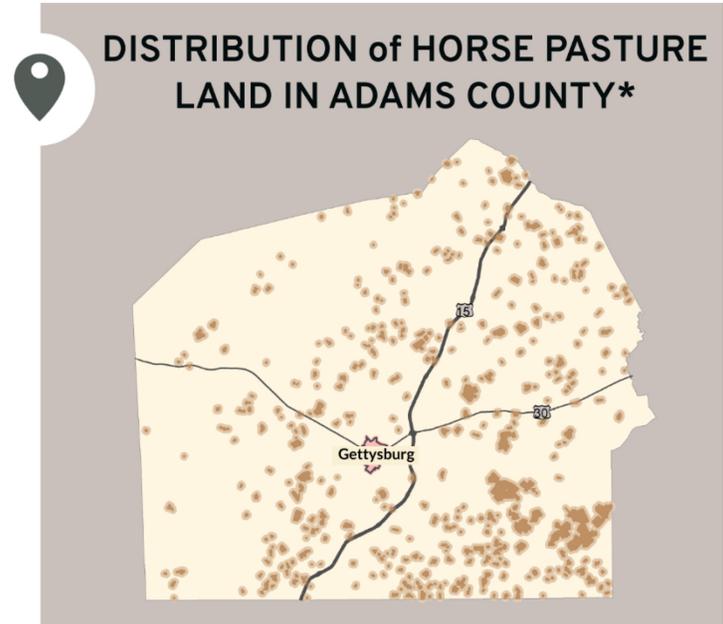
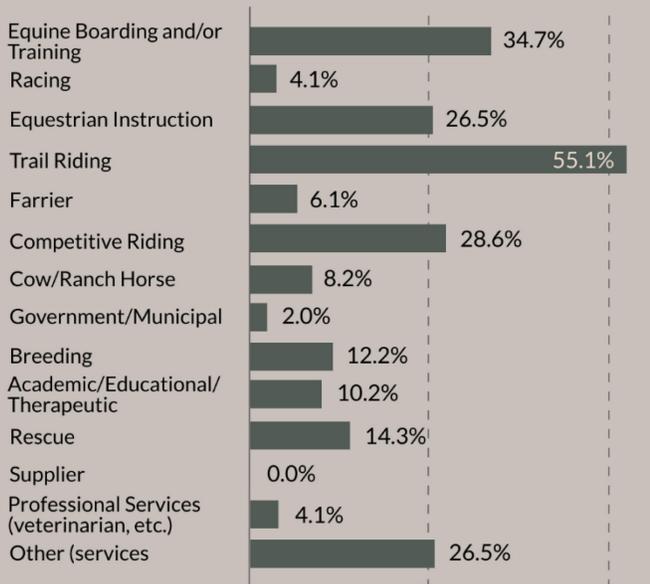
Total Annual Economic Impact
\$49,023,000

5,700
Horses

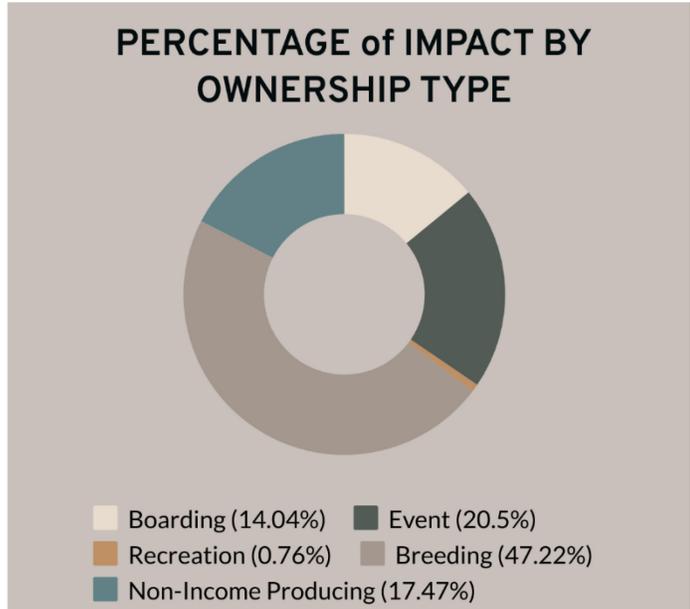
8,489
Acres in Pasture Land

USES of HORSES in ADAMS COUNTY

Survey respondents were asked to select what types of activities they used their horses for. Respondents were allowed to select more than one option.



ACRES in PASTURE in BREEDER OPERATIONS	2,550 ACRES
ACRES in PASTURE in BOARDER, EVENT, and RECREATION OPERATIONS	5,939 ACRES
HORSES in BREEDER OPERATIONS	2,060 HORSES
HORSES in BOARDER, EVENT, and RECREATION OPERATIONS	3,640 HORSES
ACRES PER HORSE AVERAGE in BREEDER OPERATIONS	1.24 ACRES
ACRES PER HORSE AVERAGE in BOARDER, EVENT, and RECREATION OPERATIONS	1.63 ACRES



*This map is for illustration purposes only and may not contain all horse pasture land

Methodology

It is critically important to the Equine Impact Assessment to generate an accurate count of the number of horses in Adams County. Once the baseline number is established, it is used in every future aspect of the assessment. Our initial methodology included utilizing customer data provided by various local large-animal veterinarians, which could be cross validated to establish a final number. The study team found that there was apprehensiveness in sharing this information and quickly looked for an alternative methodology. A shift was made to a GIS-based approach utilizing aerial photography of Adams County and Geographic Information Systems (GIS) technology. While this methodology was more time-consuming, it allowed us to get an accurate picture of where horses are being housed in Adams County. It also minimized our reliance on outside data sources. This methodology can be broken down into the following three major components:

1. Acreage Estimation
2. Area-Density Estimation
3. Projection and Modeling

A detailed explanation of each of these three components that provide the basis for the extrapolated numbers presented at the end of this report. Please note that this methodology was deemed appropriate in response to the lack of existing comprehensive information available for this industry sector. Accompanying this 3-step process, a public survey was released online via SurveyMonkey. This survey, geared towards all types of equine owners, was also available in several locations including the Adams County Courthouse, ACOPD's office and the Adams Economic Alliance office. This survey is included as **Appendix B**. ACOPD and TCG received 57 responses to the survey. This data was compiled and used throughout the study.

1. Acreage Estimation

To accurately account for the total number of horses in Adams County, the study first conducted both in-person and remote surveys. ACOPD and TCG received 57 survey responses and conducted in-person interviews with a broad range of equine operations in Adams County. Amongst more general questions, detailed questions were asked about the number of acres within the operation and the number and types of horses within the operation. Horse owners were able to list the total number of acres dedicated to pastureland. A layer file was created (using ESRI's ArcGIS) from the County's parcel layer of all surveyed horse operation's pasture acres. Additional horse pasture acreage in the county was then added to the layer by using remote sensing of both 2016 and 2018 aerials available to view in ArcGIS. The horse pasture acre layer includes horse pasture, pasture barns, and paddocks.

Impact of the Equine Industry on the Economy of Adams County

In most cases, unless otherwise determined through ground-truthing, woodlands are excluded from the horse pasture acre layer. Google Earth/Google Earth Street View and aerial imagery the County purchases from Eagle View were used to accompany the remote sensing. Google Earth Street View was used to verify pastureland that was not readily discernible in the aerals. In most cases, Google Earth Street View was able to accurately identify the horse pasture as a horse was seen in the photo, the name of the equine operation was seen on a sign, an equine liability



Examples of a wire fence with tape (left) and a heavy board fence commonly used to contain horse pastureland. Fence types like these were used as distinguishing features when searching for horse pastureland.



A side-by-side comparison of horse farms (left) and other agricultural farms commonly located in Adams County. Distinguishing features like numerous fenced paddocks and worn trails from high animal traffic allowed staff to mark potential lots for confirmation on whether it was used for horse pastureland or not.

sign was seen on the fence, and the type of fence used. (Two Penn State documents were used to help define horse fencing: *Fence Planning for Horses, 2016* and *Common-Sense Fencing for Horses, 2017*.)



An example of oblique aerial imagery of a horse farm made possible by EagleView

After the entire county was scanned using the remote sensing technique listed above, large aerial maps were printed. To verify the GIS work and capture missing data, the next step in the process was to ground-truth portions of the county. Four large-sized aerial maps were printed separating the county into four quadrants with the horse pasture acres outlined using the created layer. Each quadrant then underwent a ground truthing process using a county vehicle and two members of the Planning Office staff. Captured data was verified, and newly found horse pasture acres were added and drawn to the quadrant map. Once the ground-truthing was completed, the new horse pasture acres were added to the horse pasture acre layer in GIS.

One final review of the layer was made before it was made available to staff members of the Conservation District, a division of ACOPD, who work daily and directly with the agricultural

community. They reviewed the layer with landowner names to exclude any erroneous additions to the layer that may have been dairy, beef, or other known pasturelands other than horse pasture.

After all logical measures were taken to accurately calculate the total acres in horse pasture using the resources listed, the layer file was used in conjunction with the collected survey information to calculate the total number of acres. It was determined that a total of 8,489 acres is dedicated to equine pastureland in Adams County. This is a substantial amount of land comprising 2.5% of the total land area in Adams County, and roughly 4.9% of all farmland. The 8,489 acres dedicated to equine pastureland, if consolidated, would encompass an area larger than all the County's Boroughs and five of the Townships. 88% of the equine pastureland in Adams County is enrolled in the Clean and Green program. These parcels average a size of 16 acres. Of the remaining 12% not enrolled in the Clean and Green program, the parcels average 6.3 acres.

2. Area-Density Estimation

Once the acreage of land dedicated to equine activities was estimated, careful consideration was given to estimate the number of horses contained within this acreage. The strategy chosen was to determine an area-density ratio (ADR) to apply to the total acreage number generating a final horse count estimate.

A challenge of using an area-density ratio in a projection in this circumstance is the prevalence of multiple unique types of equine operations. Based upon feedback from our Steering Committee we found in Adams County equine operations commonly fall within four distinct categories: Breeders Operations, Boarding Operations, Event Operations, and Pet/Recreation Owners.

- Breeder Operations – The raising and selling of horses for racing, performance, and recreational use. Breeders select and breed horses based on desirable characteristics and sell them horses in local, regional, and international markets.
- Boarding Operations – The operation of a facility used to temporarily or permanently house horses for separate owners.
- Event Operations - Operations such as tours, shows, or transportation that rely on horses as a core component of the business or service.
- Pet/Recreation Operations - Horses used for private recreational purposes and boarded on-site.

Each operation type was examined to determine if they had unique average ADR. The ADR can simply be calculated by dividing the number of horses on a plot of land by the acreage utilized for horse pasture or other horse-related activities.

$$ADR = \frac{\text{Number of Horses}}{\text{Number of Acres}}$$

For example, a breeder with 100 horses on 100 acres would have a much higher ADR (1.0) than an event facility that only houses three horses on 40 acres (.075). It was important to identify if these operations consistently average statistically different ADRs. Because the ADR's will later be used to project the number of horses, the survey results and information gathered during in-person interviews were analyzed to determine this. It was crucial to the accuracy of the projection to determine these ADRs from data received from accurate sources such as the surveys or in-person interviews.

The survey entries were sorted into the four operation types, Breeders Operations, Boarding Operations, Event Operations, and Pet/Recreation Owners based on each survey entry. Ratios between the number of horses and the total acres in horse pasture or dedicated to equine activities in each entry were then compared. It was evident that there was no substantial difference between these ratios for three of the four operation types, those being Boarding Operations, Event Operations, and Pet/Recreation Owners. These three operation types consistently averaged an ADR of 0.566, or 56 horses for every 100-acres. We found the ADR of Breeder Operations to be much higher at 0.808, or 80 horses for every 100-acres.

Some operations can fall within multiple categories. In these circumstances, we chose what was determined to be the most intensive use. For example, a farm with both breeding and boarding was considered a "Breeder" if it could be determined that most of the horses were used for that purpose. Also, farms which both board horses and have horses used for private recreation were considered to be boarding operations.

3. Projection and Modeling

Once both area-density ratios were established, they were applied to the estimated acreage and used to project the number of horses that exist in Adams County.

Only those horse operations that could be confirmed as breeders were considered as Breeder Operations. It was confirmed that 2,549.80-acres, or 30% of the total land area dedicated to equine pastureland, were Breeder Operations. This was again confirmed from in-person interviews and survey data. The remaining 5,939.48-acres were considered either a Boarding Operation, Event Operation or Pet/Recreation Operation and were therefore assigned the more conservative ADR of 0.566. We expect that we were unable to confirm a portion of Breeder Operations existing in Adams County. This causes our projection numbers to be a conservative estimate based upon what we were able to confirm. The projection is outlined in **Table 1**:

TABLE 1: PROJECTION CALCULATION		
1A	Acres in Breeder Operations	2549.799 Acres
	Confirmed via interviews and surveys	
1B	Acres in Boarder, Event, Recreation Operations	5,939.477 Acres
	Estimated via aerial analysis	
1C	Total Acres	8,489.277 Acres
	Calculated by adding rows 1A and 1B	
2	ADR of Boarder, Event, Recreation Operations	0.565923
	Determined via interviews and surveys	
3A	Horses in Breeder Operations	2,060 Horses
	Confirmed via interviews and surveys	
3B	Horses in Boarder, Event, Recreation Operations	279 Horses
	Confirmed via interviews and surveys	
3C	Projected Horses in Boarder, Event, Recreation Operations	3361.2863 Horses
	Projected by multiplying rows 1B and 2	
3D	Total Horses	5700.2863 Horses
	Determined by adding rows 3A, 3B and 3C	

Having established the size of the industry by determining the total number of acres dedicated to equine pastureland and the total number of horses in Adams County, we were able to perform an economic impact analysis. Economic assumptions necessary to estimate total impact were determined through market research, survey data and data collected during in-person interviews. The assumptions, which are listed below, describe the broad range of spending characteristics within the equine industry:

- There are 20,000 or more attendees at equine events held in the county.
- The average dollars per attendee received or spent in Adams County is \$230.
- Full time cost of employees average \$45,000 per year
- Part time cost of employees average \$3,333 per year

The following are other sources of revenue or income defined through the survey. Unless otherwise noted, the large breeders and equine stockholders have been eliminated from these figures. Cells are blank where information was either unavailable or was not applicable.

Impact of the Equine Industry on the Economy of Adams County

TABLE 2: DOLLARS RECEIVED				
	IN ADAMS COUNTY	IN PA (OUTSIDE ADAMS CO)	IN U.S. (OUTSIDE PA)	OUTSIDE OF U.S.
BOARDING STABLE FEES*				
Avg. per	\$10,967			
TRAINING*				
Avg. per	\$333	\$500	\$500	\$455
Percent	20%	40%	40%	100%
INSTRUCTIONAL TRAINING*				
Avg. per	\$13,525			
RECREATIONAL TRAINING*				
Avg. per	\$500	\$1,000		\$750
Percent	33.30%	66.70%		100.00%
RENTAL*				
Avg. per	\$2,000			
INCOME FROM OTHER GOODS AND SERVICES (NOT LISTED)*				
Avg. per	\$7,667	\$7,000	\$500	\$4,818
Percent	43.40%	52.80%	3.80%	100.00%

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning and Development, 2020.

TABLE 3: TOTAL DOLLARS SPENT ON EQUINE PURCHASES (EXCLUDES LARGE ENTITIES)*					
	IN ADAMS COUNTY	IN PA (OUTSIDE ADAMS CO)	IN U.S. (OUTSIDE PA)	OUTSIDE OF U.S.	TOTAL
Avg. per	\$11,000	\$90,000	\$4,500	\$15,000	\$105,500 (total)
Percent	10.40%	85.30%	4.30%	85.30%	

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning and Development, 2020.

Impact of the Equine Industry on the Economy of Adams County

TABLE 4: DOLLARS SPENT ON GOODS AND SERVICES FOR THE HORSES

	IN ADAMS COUNTY	IN PA (OUTSIDE ADAMS CO)	IN U.S. (OUTSIDE PA)	OUTSIDE OF U.S.	TOTAL
TACK / BRIDLES / SADDLES*					
Avg.		\$581	\$322	\$43	\$315
Percent		61.30%	34.00%	4.70%	100.00%
CLOTHING FOR EQUINE-RELATED ACTIVITIES*					
Avg. Per	\$145	\$154	\$237		\$179
Percent of total	27.10%	28.60%	44.20%		100.00%
STABLE SUPPLIES*					
Avg. per	\$734	\$252	\$238		\$408
Percent	59.60%	21.20%	19.30%		100.00%
VETERINARY/ANIMAL HEALTH SERVICES*					
Avg. per	\$829	\$610	\$315		\$585
Percent	46.70%	34.40%	18.90%		100.00%
FARRIER SERVICES*					
Avg. per	\$362	\$1,093	\$410		\$616
Percent	20%	58%	22%		100.00%
LESSONS AND TRAINING*					
Avg. per	\$707	\$458	\$169	\$5	\$332
Percent	51.80%	35.40%	12.40%	0.40%	100.00%

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning and Development, 2020.

TABLE 5: DOLLARS SPENT ON FEES AND INSURANCE

	IN ADAMS COUNTY	IN PA (OUTSIDE ADAMS CO)	IN U.S. (OUTSIDE PA)	OUTSIDE OF U.S.	TOTAL
ACCOUNTING AND LEGAL FEES*					
Avg. per	\$389	\$441	\$18		\$275
Percent	45.80%	51.90%	2.30%		100.00%
ADVERTISING AND MARKETING*					
Avg. per	\$225				
EQUINE INSURANCE*					
Avg. per	\$258	\$627	\$19		\$303
Percent	27.00%	70.90%	2.20%		100.00%
PROPERTY INSURANCE*					
Avg. per	\$1,650	\$262	\$57		\$64
Percent	83.10%	13.90%	3.00%		100.00%
BREEDING EXPENSES*					
Avg. per	\$143	\$329			\$236

Impact of the Equine Industry on the Economy of Adams County

	IN ADAMS COUNTY	IN PA (OUTSIDE ADAMS CO)	IN U.S. (OUTSIDE PA)	OUTSIDE OF U.S.	TOTAL
BREEDING EXPENSES CONTINUED *					
Percent	30.30%	69.70%			100.00%
COMPETITION / SHOW EXPENSES / ENTRY FEES, TRANSPORT, LODGING *					
Avg. per	\$854	\$867	\$1,033		\$919
Percent	29.50%	32.10%	38.30%		100.00%

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning and Development, 2020.

TABLE 6: DOLLARS SPENT ON PROPERTY, EQUIPMENT, IMPROVEMENTS, & VEHICLES

	IN ADAMS COUNTY	IN PA (OUTSIDE ADAMS CO)	IN U.S. (OUTSIDE PA)	OUTSIDE OF U.S.	TOTAL
FUEL AND UTILITIES*					
Avg. per	\$1,426	\$415	\$133		\$636
Percent	70.50%	22.40%	7.20%		100.00%
TAXES (PROPERTY TAX ON EQUINE-RELATED LAND AND BUILDINGS ONLY)*					
Avg. per	\$1,464	\$719			\$1,067
Percent	64.10%	35.90%			100.00%
CAPITAL IMPROVEMENTS*					
Avg. per	\$9,817	\$1,417	\$667		\$3,967
Percent	82.50%	11.90%	5.60%		100.00%
REPAIR AND MAINTENANCE COSTS*					
Avg. per	\$2,471	\$806			\$1,614
Percent	74.30%	25.70%			100.00%
RENT/LEASE (RENTAL OF LAND, BUILDINGS, EQUINE, VEHICLES, EQUIPMENT)*					
Avg. per	\$11,600				
PURCHASE OF VEHICLES (INCLUDING TRAILERS)*					
Avg. per	\$7,257	\$10,357	\$4,643		\$7,419
Percent	32.60%	46.50%	20.90%		100.00%
FARM EQUIPMENT (DEDICATED TO EQUINE ACTIVITIES)*					
Avg. per	\$1,775	\$683	\$731		\$1,054
Percent	54.60%	21.00%	24.40%		100.00%
FENCING*					
Avg. per	\$1,247	\$440	\$47		\$566
Percent	71.80%	25.30%	2.90%		100.00%
OTHER EQUINE-RELATED GOODS AND SERVICES (NOT LISTED)*					
Avg. per	\$1,056	\$156	\$500		\$570
Percent	61.70%	9.10%	29.20%		100.00%

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning and Development, 2020.

Economic Impact

The economic impact is based on the number of equines, spending on upkeep and care of the animals, use of the equine, and recirculation or multiplier of the dollars spent in the local economy attributed to the animals.

Having defined the number of equines to a statistically significant certainty as well as the upkeep and care figures developed through in person interviews and surveys, it is also essential to determine the use associated with the animals. As previously noted, most people think of horses being used as farm animals or for racing and breeding purposes. The preponderance is used for other purposes, most notably for pleasure riding, support for humans, and others.

If given appropriate support, the equine industry's impact on Adams County is likely to grow. Indications of this include the following:

- Both the 2018 and 2019 Standardbred Horse Sale, held in Harrisburg, broke records. The 2018 sales totaled \$53.7 million. According to published statements by Pennsylvania's Agriculture Secretary Russell Redding in 2018, "Standardbred horse sales reflect the strength and promising future of the harness racing industry in Pennsylvania."
- The Amish population in Pennsylvania is focused in Lancaster County, but rising land costs, conflicts with infringing townships, and suburbanizing communities have increased the cost of farming there. As a result (and as recorded by WITF in August of 2019), the Amish are relocating to other more hospitable or accepting communities in Pennsylvania. While the impact is small to date in Adams County, there is significant potential for this trend to grow, which would further expand Adams County's equine population.
- Before the advent of Covid-19, one of the fastest-growing sectors of the non-home-based entertainment industry was agritourism. Since Covid-19, location-based entertainment (LBE) and agritourism in particular, has continued to grow with the need for social distancing and desire for outdoor activity expands. The equine industry has a role when coupled with other Adams County agriculture and historical activity.
- In the short term, at least, there is a growing movement from urban areas to rural areas. While one of the driving forces recently is the Covid-19 virus, other factors were likely to see and afford greater numbers to seek rural settings than in recent years. The growth in the ability to work from home, enhanced telecommunications, and perceived simplicity of lifestyle are two others that will increase demand for rural activity.

Certain assumptions are necessary to define the economic impact of the equine population and industry on Adams County. Salient assumptions follow:

- About 36 percent of the horses are utilized for breeding purposes, and 64 percent are involved with recreation, boarding, events, and other purposes.

TABLE 7: EQUINE INDUSTRY TOTALS IN ADAMS COUNTY*

EQUINE PURPOSE	NUMBER	PERCENT
Breeding horses	2,060	36.14%
Horses in Boarding/Event/Recreation Operations	3,640	63.86%
Total Horse, including temporary boarders	5,700	100%

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning & Development, 2020.

- The proportion of dollars associated with an equine that stays in Adams County varies by the use of the animals.
- In most cases, particularly with animals used for recreational purposes, the "paid" labor is minimal. This latter fact, along with the proportion of dollars that are spent beyond Adams County borders, impacts the number of times the initial dollars recycle through the County's economy or the multiplier.

TABLE 8: PROPORTION OF SPENDING IN ADAMS COUNTY*

EQUINE PURPOSE	% STAY IN ADAMS CO
Boarding Income	45%
Events/Visitations/Shows/Training	2%
Recreation	70%
Breeding	25%

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning & Development, 2020.

- Paid services are often obtained from outside of the county. For example, medical or veterinary services for recreational animals are often obtained from veterinarians outside of Adams County. These dollars are mostly lost to Adams County's economy.
- With limited paid labor, the multiplier is not as substantial as in other agriculture industry segments, particularly when compared to the fruit industry. In general, the dollars diminish locally with each dollar spent. Within five spending cycles, the dollars held locally are generally at a two percent or lower level.

Based on our assumptions, it is estimated that the measurable equine industry's economic impact on Adams County is roughly \$49 million annually.

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This figure includes both horses that produce income and those that do not directly produce income. Non-income producing horses are those not being used as part of a revenue generating venture. Horse owners of non-income producing horses incur costs spent on sustaining the animal, which does impact the local economy, but to a lesser extent than income producing ventures. The breakdown of the impact follows.

- Breeding operations contribute more than \$23 million.
- Boarding operations contribute more than \$6.8 million.
- Recreation operations contribute around \$400 thousand.
- Event Operations contribute more than \$10 million.
- Non-income producing animals contribute more than \$8.5 million.

TABLE 9: EVALUATED ANNUAL ECONOMIC IMPACT*

	% STAYING IN ADAMS CO.	TOTAL INDIRECT	TOTAL
Impact of Income Producing Animals			
Boarding Income	45%	\$2,530,000	\$6,884,000
Event/Visitations/Shows/Training Income	2%	\$209,000	\$10,050,000
Recreation Income	70%	\$177,000	\$373,000
Breeding Income	25%	\$5,650,000	\$23,150,000
Subtotal WITHOUT Breeding			\$17,307,000
Subtotal WITH Breeding			\$40,457,000
Impact of Non-Income Producing Animals			
Cost - Revenue	45%	\$8,566,000	\$8,566,000
TOTAL			\$49,023,000

*Developed by The Chesapeake Group, Inc. and Adams County Office of Planning & Development, 2020.

These estimates are conservative, based on the presented data and assumptions. They indicate the importance of horse breeding operations to Adams County’s agricultural economy. On average, a horse in a breeding operation produced 136% more towards the total economic impact than a horse not in a breeding operation. This substantial increase coupled with the large number of horses and acres dedicated to these operations make the success of breeding operations in Adams County crucial to the long term viability of equine locally.

Critically, the impact does not consider the contribution of animal husbandry to the maintenance of the character of the County and its local jurisdictions. Because of the acreage needs associated with raising, maintaining, and breeding equines, the industry contributes substantially to the rural image and character of the County and its maintenance as a desirable place to live.

The total economic impact of the equine industry makes it likely to grow and thrive within the county well into the future. Outside factors such as successful horse sales, and continuing development of the rural economy validate this possibility. However, other factors such as

migration to the county's rural areas could either positively or negatively influence the continuing growth of this industry.

One indication that the local equine industry will continue to grow is both the 2018 and 2019 Standardbred Horse Sale, held in Harrisburg, broke records. The 2019 sales totaled \$40.7 million, 15 percent higher than the previous record. According to published statements by Pennsylvania's Agriculture Secretary Russell Redding in 2018, "Standardbred horse sales reflect the strength and promising future of the harness racing industry in Pennsylvania." Also, Standardbred Horse Sale President and CEO Pete Spears said "It was a great sale, I think the sale was strong throughout, all the way to the end. There was a great reception for the top sires and many, many top-selling horses. We're very happy." The continuing success of these types of events may not only demonstrate the success of this industry within the entire state, but also within the county.

Another unique indication that the local equine industry should continue to thrive is the migration of Amish to the county. Since the 1720s, the nation's largest settlement of this group has resided in Lancaster County, Pennsylvania. However, within the last decade, the Amish have begun moving out of Lancaster into new locations. Various sources have named rising land costs, lack of land, conflicts with township regulations, suburbanizing communities, and a limiting agricultural economy as motivation for this group to settle elsewhere. As a result, the Amish are relocating to more inviting communities in Pennsylvania as recorded by WITF in August of 2019. One of these locations appears to be Adams County. While the impact so far has been small, there have been more land sales in Adams County to the Amish within the last year than possibly in the last couple decades combined. Since many Amish operations maintain ownership of several horses, this movement of people and horses into the county will allow rural landscapes to be maintained and additional dollars to circulate through equine-related businesses.

An additional factor that has the potential to affect the equine industry both positively and negatively is the spread of COVID-19. In the short-term, and possibly expanding into the long-term, there is a growing movement in which people are moving from urban areas to more rural settings. The demand for housing based in rural areas has been influenced by the increased ability to work from home, enhanced telecommunications, and perceived simplicity of lifestyle. The movement of people to rural areas may negatively impact the rural landscapes that are characteristic of Adams County and eliminate areas that could instead be used for various forms of agriculture and livestock. However, this migration could also impact the equine industry in a positive manner. Before the spread of COVID-19, one of the fastest-growing sectors of the non-home-based entertainment industry was agritourism. Agritourism is a term that refers to a variety of types of businesses such as wineries, corn mazes, and fruit stands that are usually housed on working farms. With both the increased demand for activities for which social-distancing can be easily accommodated and the movement of people to the rural areas within close proximity to these activities, there may be an increase in equine-related and other forms of agritourism enterprises.

Business Profile 1: Hanover Shoe Farms



Hanover Shoe Farms is an internationally known business focused on breeding horses to compete in races. Russell Williams, the current President of the Hanover Shoe Farms, is of the fourth generation to play a role in the business. He is most passionate about experiencing the continued success of the business that has seen multiple generations of employees and horses throughout its history.

Over time, Hanover Shoe Farms have seen a great deal of success. In 2019, horses bred at the Shoe Farms won a total of \$35 million in

various races for their owners, more than any horse farm in the world. The business has bred horses that have been leaders in race winnings each year since records have been kept, which contributes to the pride of those working for the farm.

In terms of the contribution to the county and the local economy, Williams feels that one of the greatest contributions the Shoe Farms provides is stewardship of the 3,000 acres of grazing land owned by the farm. This land directly provides open, green spaces and a recognizable, agricultural



landscape that has been a staple in, and a backdrop for, southeast Adams County. In addition, an average of 900 horses reside on the properties at any time. The purchase of straw and feed for the large number of animals provides a significant amount of funds directly back into the county's vibrant agricultural industry.

Williams hopes that county residents and government will recognize the equine industry as being equally important as the industries associated with the local orchards and other forms of agriculture. Virtually all of the Shoe Farms' customer base resides outside of the county, so its revenue comes from outside but gets spent here. Williams feels evaluating the economic impact of the industry will not only bring more local attention, but also position the county in the Commonwealth as a major player in a significant industry.

Historical Origins

In an effort to accurately portray a more holistic view of the importance of the equine industry, ACOPD also researched the historical origins of the equine industry as well as its modern day implications. While conducting in-person interviews, ACOPD staff also learned of unique challenges facing this industry. These findings, along with suggestions on how Adams County, Pennsylvania and other local and regional partners can help to ensure the viability of this industry, are described within the narrative portion of this report.

Evolution of the Equine Industry in Adams County

The use of horses and the resulting industry have a rich history locally, and throughout the world. According to archaeological evidence, people began to domesticate horses around 4000 B.C.E., and their use became widespread around 3000 B.C.E. Not only have horses been steady and loyal companions to humans throughout time, but they have also played major roles in increasing the efficiency of human activities such as transportation, farming, communication, and even warfare. Recreation and entertainment activities frequently included horses as well.

The buying and selling of horses, related equipment, and recreation involving the animals are also deeply rooted traditions in Adams County. In the early 1900s, sales of horses and related implements came from businesses such as the Gettysburg Livery, the Gettysburg German Coach Horse Company, or Hanover Shoe Farms, a business which still exists today. Horses sold through these businesses were bred to assist with farming activities and travel. Horses were a valuable tool for farmers and travelers until the 20th century when the automobile and mechanized farm equipment were introduced throughout the United States. An article originally printed by the Associated Press, then later printed in the Gettysburg Times in 1941 notes the decline in work horse sales corresponding with an increase of purchases of new farm equipment. This, however, did not stop the industry in Adams County from thriving.



Despite the decline in the use of horses for work purposes and travel, Adams County residents continued to interact with the animals in other ways. Horses bred and sold through various companies throughout the county were also fit for racing, shows, and other related activities. There are records indicating that there was at least one track for horse racing in the county in Hunterstown during the early 1900s, and some residents would even race in unauthorized locations. For example, some residents even recall that groups of teenagers would gather in downtown Gettysburg with horse drawn sleighs and race from Chambersburg Street to Hanover Street, and quickly disperse afterwards to avoid law enforcement. Other events such as horse shows were held throughout the county in the 1970s. Adams County residents frequented shows

Impact of the Equine Industry on the Economy of Adams County

in the Hanover area, and even won some distinguished awards. Groups like the Gettysburg Riding Club formed in the 1950s to maintain interest in riding in the area. The Gettysburg Riding Club even hosted their own horse shows at the South Mountain Fairgrounds just for Adams County residents and offered riding lessons. The past and present efforts of groups, individuals, and equine focused businesses throughout the county have allowed the equine industry to continue to flourish.

In the present day, people often have the misconception that the primary uses for horses are still either farm work or racing. While these two uses of horses are in fact the most common, many other uses can be found throughout the county's equine industry, including event competition, transportation and trade, therapy, entertainment, and recreation. Our economic impact survey captured respondent's use of horses. This data can be viewed in **Appendix A** and can be considered reasonably representative of the range of uses for horses in Adams County.



Hanover Shoe Farms

Industry Enhancement Suggestions

While the equine industry's measurable economic impact is substantial, so is the non-measurable impact. Adams County's image is typically based on three primary characteristics. These are its preserved historical assets, role in this country's history, and its rural character. This county's rural character contributes to the quality of life and the desirable nature as a place to live.



Perhaps the most fundamental factor in preserving the character and related quality of life is the equine component of the agricultural activity. While Adams County is best known for its abundant fruit orchards, that segment of agriculture is focused in a specific geographic area of the county that provides the ideal land and soil conditions. As depicted on Map 1, most of the equine industry is densely populated in a few areas, but also shown is its amazing dispersal throughout the county. The only limiting factors for having a horse with pastureland in Adams County seem to be a potential lack of land and inflexible zoning regulations.

To date, the equine industry has survived primarily without outside monetary support. While supplemental money from the Pennsylvania Race Horse Development Trust Fund helps to support the local standardbred horse breeding operations the remaining industry sectors are mostly independent of financial assistance at this time. Owning, raising, and buying horses can be an expensive endeavor. John Volk, whose company surveyed 1,000 horse owners for The East Coast Equestrian Equine Megamarket Study, “found that horse owners are more involved in their vocation than just about any other group. They spend an average of 22 hours a week on their horses.” The industry, as a single unit, provides tangible and intangible benefits to the local community, and the following suggestions are intended to ensure this trend continues.

Differentiate Working Horses and Livestock from Recreational Use Equine

There continues to be a question as to whether horses are classified as pets like dogs and cats or as livestock like swine, cattle, etc. There is a fundamental difference in treatment and regulations between the two. If not classified as livestock, there are differences in fiscal or tax credits, funding and financing, and physical requirements like fencing, all which may cause significant issues for the farmers or landowners.

At present, both recreational animals and those used for other purposes are treated the same in the eyes of the law. This places revenue-generating equine activity at a disadvantage nationally and puts the survival of those activities in jeopardy. The United States Congress passed the Agricultural Improvement Act in June of 2020, which classified horses more clearly.

Business Profile 2: Pembroke Pointe Show Stables

Pembroke Pointe, under the ownership of Kelsey Bernini Lawrence, is a business focused on working with clients and horses for the purpose of participating in shows in a variety of locations. Lawrence's inspiration for creating the business is a result of participating in local shows while growing up. Throughout the years, she has competed in shows nationally and around the world, but desired to bring her skills and knowledge to Adams County. Lawrence feeds her passion for the industry by working to meet a common goal as a duo with these animals that she says, "have a mind of their own" and are athletes in their own right. Over time, the business



has faced a few challenges, and many successes. Starting a new business can always hold challenges, however the positive feedback from clients, continuous growth, and upgrades to the property have made the challenges well worth facing. While many of the horses that are trained and sold through this business go to clients from

outside of the County and state, Pembroke Pointe has been able to make connections with other equine-focused businesses within Adams County, including Swan Lake Stables. In terms of the future of Pembroke Pointe, Lawrence hopes to uphold the current level of success, while continuing to expand and have the ability to obtain even more horses. She also hopes that her land can contribute to the well-known agricultural landscapes of the County. Lawrence hopes that the equine industry continues to grow in the future (for the future of the industry is that it continues to grow,) so consumers have a variety of options when choosing a business that will meet their needs.



While not the focus of the Act, the agricultural act classified horses as "livestock." Therefore, horses and related farms used for revenue generation purposes should be treated the same as another livestock activity. Furthermore, the "Pets and Women Safety" section revised the statutory definition, removing horses from the blanket of "pets." The new definition helps to clarify the rights of the farmer, and obtain more favorable regulatory treatment from the USDA.

Adams County should convene a task force, composed of state and local entities to define and facilitate the adoption of appropriate definitions for equine activity that conforms to the new federal regulations for both the County and local jurisdictions. Select members of the local equine industry should also be included in the task force to provide a different perspective.

Changes to Ensure Future Horse Ownership

Changes in land use are inevitable. In 2010 Adams County was the 10th fastest growing county in Pennsylvania. Since then, the county's population growth has slowed, and from 2010 through 2019 grew by only 1.58 percent. Although the percent of population increase has dropped, 12,000 acres were proposed for conversion to new development during that time. The conversion of farmland to residential development can lead to land use conflicts. There will be pressure to not allow livestock facilities, including facilities housing horses, as this type of development encroaches on rural activity. Conflicts could occur because of those who relocate to the county from other areas with different environments. Wind direction and airflow that spread odors related to farming in general and breeding specifically can be viewed as a nuisance by neighboring residential developments. The Pennsylvania Act 43 Agricultural Security Area Law does give some protection for landowners from local ordinances or nuisance lawsuits affecting normal farming practices. County and local jurisdictions should examine the unity of horse farms in and around rural residential settings to ensure that horse ownership is facilitated to maintain the character of Adams County.

Land Preservation

Horse ownership comes with a long list of responsibilities. Maybe the most important responsibility related to owning a horse is having access to the proper amount of pastureland on which the horse will reside. Competition for land and the conversion of agricultural land to residential and commercial development will be a major factor in the frequency of horse ownership now and in the future.

Despite responsibility at the local level, factors beyond the control of governments can create budgetary difficulties. In order to direct needed funds elsewhere, one often-sacrificed effort is continued investments in land preservation, conservation, and easements to preserve agriculture. This study calculated that just under 8,500 acres in Adams County are in horse pastureland and only 540 acres of those acres are permanently preserved both through the county's Agricultural Land Preservation Program and other preservation programs. The numbers

Business Profile 3: National Riding Stables

The National Riding Stables, under the ownership of John and Terry Latschar, is a 501(c)(3) non-profit organization that rescues and rehabilitates abused and neglected horses, gives horse-back tours of the Gettysburg Battlefield, and provides a “retirement” home for older horses. The Latschars purchased the property in 2015 and began as a for-profit organization. In 2018, they became a non-profit organization to have the ability to provide a home to older horses.

The organization’s owners are extremely passionate about the animals they work with. They find great joy in seeing abused and neglected horses once again become healthy and comfortable with human interaction. Great passion is also derived through educating visitors on the behavior of the animals and viewing the joy that animals can provide. The Latschars stress the importance of treating horses, and all animals, with respect and kindness. This organization has seen a variety of successes throughout their years of operation.



For two years, they have been able to maintain the viability of the organization after becoming a non-profit and secure funding sources. Currently, ten retired horses call the National Riding Stables their home. The Latschars are grateful for the area’s vibrant agricultural industry and related services, which make getting the necessary supplies to take care of their animals a fairly simple task. The challenges this organization faces are similar to those of other non-profits, which include the constant search for funding sources to ensure the organization can function. In terms of the future of their

organization, they hope to be able to maintain their current holdings and continue to rescue and rehabilitate the animals they are so passionate about. For the future of the equine industry in the County, they would advocate for legislation that will better protect animals from abuse and neglect and hope for a balance between agriculture and residential development. For other non-profits like themselves, the hope is that they may continue to expand and receive the necessary donations to stay afloat into the future.

suggest that both the local and state level preservation efforts should continue funding farmland preservation to maintain and attract the equine industry. A steady allocation of funding is cost-effective during difficult economic periods, affording purchases at levels not achievable once economic conditions improve. Maintaining funding levels for this purpose is very important.

Promotion of County Equine Activity and Agritourism Opportunities

Continuous development within South Central Pennsylvania counties east of Adams County provides an opportunity to attract equine activity to this area and expand upon what is already in place. The relocation of Amish is only one example. Adams County attracts horse owners because of the rural landscapes surrounding the historic communities. Open space and pastureland are commonly available in the real-estate market. In cooperation with active realtors in the area, Adams County should develop a targeted marketing effort geared toward attracting residents that want to or do own businesses that serve the equine industry. This can be done at minimal out-of-pocket costs by employing social media, among other things.

There is also an opportunity to expand equine-related agritourism activities including events, training, boarding, and others. Adams County should market this activity cooperatively with other historical and agricultural events marketing. Townships should also be encouraged to develop flexibility in their ordinances to allow for these types of activities. This will not only allow for an expansion of the industry itself, but on a smaller scale could allow farmers to maintain their land for longer periods of time by having the ability to generate additional revenue.

Business Profile 4: Land of Little Horses

The Land of Little Horses is a business with a rich history. In 1970, while travelling to Argentina, the original owners met a family who learned to breed miniature horses. Upon their return to the United States, they imported 25 miniature horses, known as Falabella horses. They opened the Gettysburg Miniature Horse Farm on the current property in 1971. Over time, the 100-acre property has transitioned through different owners. The current owners, Bill and Maggie Baldwin, purchased the property in 2017. The Baldwins have a passion for animals and were inspired to take on the business. This allowed them to work with a variety of animals, while expanding on the ideas they had for potential events and activities to host at the farm. Like any business, throughout its time in operation the Land of Little Horses has faced challenges and enjoyed successes. One of the biggest challenges from the onset was the weather-dependent nature of the

business. The Baldwin's have achieved the ability to hold events rain or shine and limit the effects of potential cancellations due to weather.



Over time, this business has managed to maintain a consistent level of success, resulting from the variety of activities in which visitors can partake. Currently, the park holds in-season events daily, providing educational, entertaining, and the always popular, hands-on activities.



In terms of the business's success, positive feedback is consistently provided by visitors who genuinely enjoy the variety of activities and the overall experience. The County's agricultural-related industries and services, as well as other local businesses, have also assisted the Baldwins in their success. Aspirations for the future include the continuation of this strong, family-based entertainment attraction and potentially expand on the entertaining, educational, and family-friendly experiences at the park. For the equine industry as a whole, the hope is that it continues to grow and draw visitors to the County.



Appendix A – Additional Survey Findings

An important component of the economic impact assessment was an online and physical survey advertised to horse owners in Adams County. We received 57 responses and utilized this data heavily in shaping our impact assessment methodology. Included in this appendix are several findings from the survey that influenced this report. **Appendix B** includes the physical version of the survey that was shared with respondents.

Business Structures for Respondents

Table 10 shows survey results for what type of business structure respondents with businesses selected. There is a full range of business structures associated with the responding entities, with the preponderance being either individual horse owners or family farms.

TABLE 10: BUSINESS STRUCTURES for RESPONDENTS

Entity	Percent
Family Farm	38%
Corporation / LLC	13%
Sole Proprietorship	9%
Individual Horse Owner	38%
Partnership	2%

Horse Breeds

Table 11 shows survey results for what types of horse breeds are owned by Adams County residents. There is a full range of horses in Adams County from thoroughbreds and standardbreds to draft and gaited horses.

TABLE 11: HORSE BREEDS

Breeds:	
Thoroughbred	Quarter Horses
Standardbred	Draft Horses
Ponies	Warm Bloods
Miniature Horses	Mules / Burros
Arabians	Gaited Horses
Sport Horses	Painted

Segment Involvement

Table 12 shows survey results for what type of activity respondents with horses participate in. There is substantial segmentation on the use of horses, however over half of respondents selected Trail Riding as an activity they engage in.

TABLE 12: SEGMENT INVOLVEMENT

Use	Percent
Equine Boarding and/or Training	34.7%
Racing	4.1%
Equestrian Instruction	26.5%
Trail Riding	55.1%
Farrier	6.1%
Competitive Riding	28.6%
Cow / Ranch Horse	8.2%
Government / Municipal	2.0%
Breeding	12.2%
Academic / Educational / Therapeutic	10.2%
Rescue	14.3%
Supplier	0.0%
Professional Services (veterinarian, etc.)	4.1%
Other (services, local horse clubs, etc.)	26.5%

Equine Discipline in which Entity Participates

Table 13 shows survey results for equine disciplines respondents participate in. While the preponderance of entities responding use horses for "Pleasure," these results indicate it is common for horses to serve more than one purpose. A common scenario in which a respondent may select more than one discipline would be a horse used for jumping that is also regarded by the owner as a "Pleasure" horse.

TABLE 13: EQUINE DISCIPLINE in which ENTITY PARTICIPATES

Use	Percent
Dressage	22%
Pleasure	55%
Driving	10%
Eventing	8%
Endurance	4%
Racing	10%
Hunter / Jumper	27%
Western	39%
Agriculture / Transportation	4%
Other	14%

Appendix B – Survey



Adams County Office of
Planning and Development

Economic Impact Assessment of the Equine
Industry in Adams County

PUBLIC SURVEY FOR AN ECONOMIC IMPACT ASSESSMENT OF THE EQUINE INDUSTRY IN ADAMS COUNTY

The Adams County Office of Planning and Development, in partnership with The Chesapeake Group, Penn State Extension and the Adams Economic Alliance, is excited to present a survey for the Economic Impact Assessment of Equine on Adams County. Building on the success of The Economic Impact of the Historic South Mountain Fruit Belt on Adams County, ACOPD is excited to begin a new assessment of quantifying another industry's impact on Adams County's economy, the equine industry. The purpose of the study will be to determine the current total direct, indirect and induced economic impacts of the equine industry in Adams County, inclusive of the full range of equine-related activities contained within the county. This information will be provided to policy makers in legislature, local government officials, equine industry participants, and the general public to demonstrate the importance and contribution of the equine industry in Adams County.

Physical copies of the survey will be available at the Adams County Office of Planning and Development's office located at 670 Old Harrisburg Road, Gettysburg, PA 17325 and the Adams Economic Alliance's office located at 1300 ProLine Place, Gettysburg, PA 17325. Physical copies should be returned to the Adams Economic Alliance office. An online version of the survey is also available at <https://www.surveymonkey.com/r/adamsequine>. Physical surveys will be mailed to various equine-related mailing lists, and ACOPD staff will be attending as many equine-related events as possible to disseminate surveys. ACOPD staff will also be requesting in-person interviews with a number of equine businesses.

Your responses to this survey are vital for the Economic Impact Assessment of the Equine Industry in Adams County, as it's success will be determined by the number of equine industry participants who contribute their comments during the data collection period. Each question is optional and all information will be tallied and combined for the sole purpose of generating the study's final report. Each response, whether physical or received through the online survey, will be treated as confidential information and will not be shared outside of ACOPD and The Chesapeake Group.

We thank you for your cooperation! Any questions may be directed to the project representative below:

Harlan Lawson, Comprehensive Planner – Community/Economic Development

Adams County Office of Planning & Development

670 Old Harrisburg Road, Suite 100

Gettysburg, PA 17325

helawson@adamscounty.us

717-337-9824 x3011

Adams County, Pennsylvania Equine Industry Survey

Adams County Office of Planning & Development
670 Old Harrisburg Rd, Gettysburg, PA 17325
Ph: 717-337-9824 / Fax: 717-334-0786



Please return form by: **March 1st, 2019**

All survey responses are confidential and will be tallied for the sole purpose of generating an Economic Impact Assessment and guiding policy decisions. Individual survey responses will be held at the Adams Economic Alliance and will not be shared.

1. Name and Location

1A. Name and/or Name of Business? (optional)

1B. In what County, Township/Town or Borough/City is your place of residence? (optional)

State:	County:	Township/Borough:
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1C. In what County, Township/Town or Borough/City are your equine activities located? *If you participate in equine activities in more than one location, please indicate the primary location of your equine activities.*

State:	County:	Township/Borough:
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2. Involvement in the Equine Industry

2A. Which of the following best describes your equine involvement? (check all that apply)

<input type="checkbox"/> Equine Boarding and/or Training	<input type="checkbox"/> Racing
<input type="checkbox"/> Equestrian Instruction	<input type="checkbox"/> Trail Riding
<input type="checkbox"/> Farrier	<input type="checkbox"/> Competitive Riding
<input type="checkbox"/> Cow / Ranch Horse	<input type="checkbox"/> Government / Municipal
<input type="checkbox"/> Breeding	<input type="checkbox"/> Academic / Educational / Therapeutic
<input type="checkbox"/> Rescue	<input type="checkbox"/> Supplier
<input type="checkbox"/> Professional Services (veterinarian, etc.) Please specify:	<input type="checkbox"/> Other (services, local horse clubs, etc.) Please specify:

3. Discipline

3A. What equine disciplines do you participate in? (check all that apply)

<input type="checkbox"/> Dressage	<input type="checkbox"/> Pleasure	<input type="checkbox"/> Driving
<input type="checkbox"/> Eventing	<input type="checkbox"/> Endurance	<input type="checkbox"/> Racing
<input type="checkbox"/> Hunter / Jumper	<input type="checkbox"/> Western	<input type="checkbox"/> Agriculture / Transportation
<input type="checkbox"/> Other (therapeutic, etc.) Please specify:		

4. Relocated Equine Activities

4A. For how many months (if any) in any given year do you typically relocate your equine activities out of state?

4B. If any equine activities are relocated, how many horses / equine are relocated for that time/activity?

5. Equine Inventory

5A. Number of equine owned / managed as of January 2nd, 2019

	# Owned	# Managed		# Owned	# Managed
Thoroughbred			Ponies		
Standardbred			Miniature Horses		
Arabians			Sport Horses		
Quarter Horses			Draft Horses		
Warm Bloods			Mules / Burros		

Impact of the Equine Industry on the Economy of Adams County

5A. (continued) Number of equine owned / managed as of January 2nd, 2019					
	# Owned	# Managed		# Owned	# Managed
Gaited Horses			Other (not listed)		
Please specify 'Other' breed(s):					
6. Acreage					
6A. If you are the proprietor, how many acres do you dedicate to equine? <i>Please round to the nearest whole number</i>					
	# of Acres		# of Acres		# of Acres
Pasture		Indoor / outdoor ring		Crops	
Forage		Track		Boarding	
Other, please specify:					
6B. How many acres (if any) have you enrolled in the following programs? <i>Please round to the nearest whole number</i>					
	# of Acres		# of Acres		# of Acres
Agricultural Preservation/Conservation Easements		Clean & Green			
7. Equine Business Type					
7A. Which of the following best describes the business structure or entity of your equine concern?					
<input type="radio"/>	Family Farm	<input type="radio"/>	Corporation / LLC		
<input type="radio"/>	Sole Proprietorship	<input type="radio"/>	Individual Horse Owner		
<input type="radio"/>	Partnership	<input type="radio"/>	Other, <i>please specify:</i>		
8. Equine Events					
8A. If you are the proprietor of (a) recreational trail riding event(s), where is/are the event(s) located :		<input type="radio"/>	Federal lands	<input type="radio"/>	In Adams County
		<input type="radio"/>	State lands	<input type="radio"/>	In PA
		<input type="radio"/>		<input type="radio"/>	Outside PA
Please fill as many entries below as necessary to capture a full year's worth of events:					
8B. Event Name:			8C. Event Location:		
8D. Average # of employees per event:		8G. Number of times this event occurs per year:			
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):			
8F. Average # of volunteers per event:					
8B. Event Name:			8C. Event Location:		
8D. Average # of employees per event:		8G. Number of times this event occurs per year:			
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):			
8F. Average # of volunteers per event:					
8B. Event Name:			8C. Event Location:		
8D. Average # of employees per event:		8G. Number of times this event occurs per year:			
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):			
8F. Average # of volunteers per event:					
8B. Event Name:			8C. Event Location:		
8D. Average # of employees per event:		8G. Number of times this event occurs per year:			
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):			
8F. Average # of volunteers per event:					

Please attach additional pages if needed

Impact of the Equine Industry on the Economy of Adams County

8B. Event Name:		8C. Event Location:	
8D. Average # of employees per event:		8G. Number of times this event occurs per year:	
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):	
8F. Average # of volunteers per event:			
8B. Event Name:		8C. Event Location:	
8D. Average # of employees per event:		8G. Number of times this event occurs per year:	
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):	
8F. Average # of volunteers per event:			
8B. Event Name:		8C. Event Location:	
8D. Average # of employees per event:		8G. Number of times this event occurs per year:	
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):	
8F. Average # of volunteers per event:			
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8F. Average # of volunteers per event:			
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8D. Average # of employees per event:		8G. Number of times this event occurs per year:	
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):	
8F. Average # of volunteers per event:			
8B. Event Name:		8C. Event Location:	
8D. Average # of employees per event:		8G. Number of times this event occurs per year:	
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):	
8F. Average # of volunteers per event:			
8B. Event Name:		8C. Event Location:	
8D. Average # of employees per event:		8G. Number of times this event occurs per year:	
8E. Average # of attendees per event:		8H. Furthest travel distance of attendees (location or miles):	
8F. Average # of volunteers per event:			

Impact of the Equine Industry on the Economy of Adams County

9. Employees				
9A. If you have employees, please list the total number of employees (full time, part time, and working students):	# Full-time	# Part-time	# Students	
9B. Total annual wages and benefits paid for full and part time employees:	\$ _____			
9C. Estimated annual value of volunteer or "work for service" (payment-in-kind) exchange. (such as bartering or non-cash payment of goods or services):	\$ _____			
10. Spending on Equine-related Goods and Services				
10A. Dollars spent annually for equine & stable supplies:				
	In Adams County	In PA (outside of Adams County)	In U.S. (outside of Pennsylvania)	Outside of U.S.
Purchase of Equine	\$ _____	\$ _____	\$ _____	\$ _____
Tack / Bridle / Saddles	\$ _____	\$ _____	\$ _____	\$ _____
Clothing for Equine-related Activities	\$ _____	\$ _____	\$ _____	\$ _____
Stable Supplies	\$ _____	\$ _____	\$ _____	\$ _____
10B. Dollars spent annually for goods and services for daily care:				
Equine Boarding Expenses	\$ _____	\$ _____	\$ _____	\$ _____
Feed	\$ _____	\$ _____	\$ _____	\$ _____
Hay	\$ _____	\$ _____	\$ _____	\$ _____
Bedding	\$ _____	\$ _____	\$ _____	\$ _____
10C. Dollars spent annually for services:				
	In Adams County	In PA (outside of Adams County)	In U.S. (outside of Pennsylvania)	Outside of U.S.
Veterinary / Health	\$ _____	\$ _____	\$ _____	\$ _____
Farrier	\$ _____	\$ _____	\$ _____	\$ _____
Lessons and Training	\$ _____	\$ _____	\$ _____	\$ _____
Accounting and Legal Fees	\$ _____	\$ _____	\$ _____	\$ _____
Advertising and Marketing	\$ _____	\$ _____	\$ _____	\$ _____
Equine Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Property Insurance	\$ _____	\$ _____	\$ _____	\$ _____
10D. Dollars spent annually for competition or breeding costs:				
	In Adams County	In PA (outside of Adams County)	In U.S. (outside of Pennsylvania)	Outside of U.S.
Breeding Expenses	\$ _____	\$ _____	\$ _____	\$ _____
Competition / Show Expenses / (entry fees, transport, lodging)	\$ _____	\$ _____	\$ _____	\$ _____
10E. Dollars spent annually for goods and services for capital / property costs:				
Fuel and Utilities	\$ _____	\$ _____	\$ _____	\$ _____
Taxes (property tax on equine-related land and buildings only)	\$ _____	\$ _____	\$ _____	\$ _____
Capital Improvements	\$ _____	\$ _____	\$ _____	\$ _____
Repair and Maintenance Costs	\$ _____	\$ _____	\$ _____	\$ _____
Rent/Lease (rental of land, buildings, equine, vehicles, equipment)	\$ _____	\$ _____	\$ _____	\$ _____
Vehicles (including trailers)	\$ _____	\$ _____	\$ _____	\$ _____
Farm Equipment (dedicated to equine activities)	\$ _____	\$ _____	\$ _____	\$ _____

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10E. (continued) Dollars spent annually for goods and services for capital / property costs:				
Fencing	\$ _____	\$ _____	\$ _____	\$ _____
Dollars spent annually for other goods and services (not listed)	\$ _____	\$ _____	\$ _____	\$ _____
<i>Please describe 'other' goods and services:</i>				

11. Income on Equine-related Goods and Services

11A. Dollars received from equine-related goods and services:				
	In Adams County	In PA (outside of Adams County)	In U.S. (outside of Pennsylvania)	Outside of U.S.
Horse Sales	\$ _____	\$ _____	\$ _____	\$ _____
Events	\$ _____	\$ _____	\$ _____	\$ _____
Boarding Stable Fees	\$ _____	\$ _____	\$ _____	\$ _____
Training	\$ _____	\$ _____	\$ _____	\$ _____
Breeding	\$ _____	\$ _____	\$ _____	\$ _____
Instructional Training	\$ _____	\$ _____	\$ _____	\$ _____
Recreational Riding	\$ _____	\$ _____	\$ _____	\$ _____
Rental	\$ _____	\$ _____	\$ _____	\$ _____
Income from other goods and services (not listed)	\$ _____	\$ _____	\$ _____	\$ _____
<i>Please describe 'other' goods and services:</i>				

12. Future Investment

12A. Anticipated investment over the next two years, if any (estimated \$ amount):				
	In Adams County	In PA (outside of Adams County)	In U.S. (outside of Pennsylvania)	Outside of U.S.
Property	\$ _____	\$ _____	\$ _____	\$ _____
Structures	\$ _____	\$ _____	\$ _____	\$ _____
Equine	\$ _____	\$ _____	\$ _____	\$ _____
Farms and Tack	\$ _____	\$ _____	\$ _____	\$ _____
Vehicles (including trailers)	\$ _____	\$ _____	\$ _____	\$ _____
Farm Equipment (dedicated to equine activities)	\$ _____	\$ _____	\$ _____	\$ _____
Operations (employees, consultants)	\$ _____	\$ _____	\$ _____	\$ _____
Other (not listed)	\$ _____	\$ _____	\$ _____	\$ _____

13. Conclusion and Comments

13A. What can local, state and federal decision-makers do to improve the Equine industry in Adams County? (feel free to attach additional paper if more space is required)

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13A. (continued) What can local, state and federal decision-makers do to improve the Equine industry in Adams County? (feel free to attach additional paper if more space is required)

13B. Additional comments on issues affecting your equine operation (feel free to attach additional paper if more space is required):