



AUSTIN
Dan Houston
4302 Avenue D, 78751
512.853.9044
dhouston@CivicEconomics.com

CHICAGO
Matt Cunningham
1425 W. Summerdale, #3A, 60640
773.251.5926
mattc@CivicEconomics.com

MEMORANDUM

TO: FLORIDA HORSE RACING OWNERS, BREEDERS, AND TRAINERS

DATE: SEPTEMBER 2013

IN RE: FLORIDA HORSE RACING IMPACT STUDY – SURVEY

If you have received this survey as a printed copy or as a PDF, please note that there are three ways participants may complete the survey:

1. **ONLINE:** The survey is available at the following link:

<https://www.surveymonkey.com/s/FLRacingImpact>

2. **PDF:** If you prefer, you may use the PDF format of this document to enter your responses in the blanks provided. If you do so, please save your completed survey under a new name of your choosing and e-mail it to:

Matt Cunningham at mattc@CivicEconomics.com

3. **IN PRINT:** Finally, you may simply hand write your answers onto the printed copy of the survey at mail it back to:

**Matt Cunningham
Civic Economics
1425 W. Summerdale, #3A
Chicago, IL 60640**

Please submit completed surveys before September 20, 2013.

Thank you for your participation.



Florida Racing Impact Study 2013

ABOUT THIS STUDY AND SURVEY

Thank you for participating in this important study of the economic impact of horse racing in the State of Florida.

Cummings Associates and Civic Economics have been retained by the Florida Horsemen's Benevolent and Protective Association, the Florida Thoroughbred Breeders and Owners Association, and the Florida Quarter Horse Racing Association to measure the impact of horse racing to the Florida Economy.

This survey is an essential component of that study. The survey is aimed at owners, breeders, and trainers of Thoroughbred, Quarter Horse, and Standardbred race horses active in the state of Florida in 2012.

This survey asks for financial information of a sensitive nature, so we want to assure you that your confidentiality will be protected assiduously. Only personnel associated with Cummings and Civic Economics will have access to your responses, which will be maintained in a secure environment. Results will be presented in the aggregate, averaging responses in two ways: sets of questions will be totaled, then those totals will be averaged. The reporting of the study will provide no opportunity for anyone to identify your business information.

All questions refer to 2012. You may use the calendar year or, if you prefer, your fiscal year 2012.

IF YOU HAVE YOUR 2012 (CALENDAR OR FISCAL) FINANCIAL RECORDS AT HAND, THIS SURVEY SHOULD TAKE ROUGHLY 30 MINUTES TO COMPLETE.

Florida Racing Impact Study 2013

SECTION I: RESPONDENT INFORMATION

Please note that we do ask that respondents provide an e-mail address; it will be used only to identify updated or duplicated surveys and addresses will be separated from responses at the earliest possible time.

If you leave the survey before completing it, you should return to it using the same computer and browser with which you began. If you do, you may continue working with your previous answers. If you do not, or if your computer is unrecognized, you will need to begin again and we will use your e-mail address to identify and match the responses.

***1. Please provide an e-mail address for our internal use:**

***2. Are you presently an active participant in the Florida horse racing industry as an owner, breeder, or trainer of horses that compete in pari-mutuel horse races in Florida, that are bred or trained in part in Florida, or that spent some portion of 2012 (or your fiscal year 2012) in Florida?**

- Yes
- No
- Other (please specify)

***3. Do you or your racing related business primarily reside or operate in Florida?**

- Yes
- No (please specify state)

***4. During how many months of 2012 was your horse racing related activity primarily in Florida?**

- | | | |
|-------------------------|-------------------------|--------------------------|
| <input type="radio"/> 1 | <input type="radio"/> 5 | <input type="radio"/> 9 |
| <input type="radio"/> 2 | <input type="radio"/> 6 | <input type="radio"/> 10 |
| <input type="radio"/> 3 | <input type="radio"/> 7 | <input type="radio"/> 11 |
| <input type="radio"/> 4 | <input type="radio"/> 8 | <input type="radio"/> 12 |

5. Please use the space below if you think there is something else we should understand about your responses to the questions in this section.

SECTION II: YOUR HORSE RACING ACTIVITIES

*6. What is your PRIMARY activity relative to Florida horse racing?

- Horse owner or lessee
- Horse breeder
- Horse trainer
- Other (please specify)

7. What OTHER activities apply to you (if any, check all that apply)?

- No other activities
- Horse owner or lessee
- Horse breeder
- Horse trainer
- Other (please specify)

8. What percentage of your racing and/or breeding operations relate to:

Thoroughbreds

Standardbreds

Quarter Horses

9. Please indicate the number of horses you owned or leased for racing purposes in 2012:

In Florida

In total

10. Please indicate the number of horses you trained for racing purposes in 2012:

In Florida

In total

11. Please indicate the number of horses you bred or used as breeding stock for racing purposes in 2012:

In Florida

In total

Florida Racing Impact Study 2013

12. If you were engaged in breeding operations in 2012, please indicate the number of horses of each age class that were stabled in Florida at any point in 2012:

Stallions

Broodmares

Foals

Yearlings

Other racing age

13. Please use the space below if you think there is something else we should understand about your responses to the questions in this section.

Florida Racing Impact Study 2013

SECTION III: FINANCIAL INFORMATION

Again, Cummings Associates and Civic Economics offer the strongest assurance of confidentiality.

*** 14. Please estimate your gross income in US dollars earned from these horses in 2012 in each of the following activities in 2012 IN FLORIDA:
(Please enter whole numbers and do not use a dollar sign)**

Purses, fees, and commissions	<input type="text"/>
Stud fees	<input type="text"/>
Horse sales	<input type="text"/>
Boarding	<input type="text"/>
Training	<input type="text"/>
Veterinary services	<input type="text"/>
All other revenue	<input type="text"/>

**15. Please estimate your gross income in US dollars earned from these horses in 2012 in each of the following activities in 2012 OUTSIDE OF FLORIDA:
(Please enter whole numbers and do not use a dollar sign)**

Purses, fees, and commissions	<input type="text"/>
Stud fees	<input type="text"/>
Horse sales	<input type="text"/>
Boarding	<input type="text"/>
Training	<input type="text"/>
Veterinary services	<input type="text"/>
All other revenue	<input type="text"/>

Florida Racing Impact Study 2013

16. Please estimate the expenditures associated with these horses that you made in Florida in 2012 in the following categories:

(Please enter whole numbers and do not use a dollar sign)

Feed, Bedding and Grooming Supplies	<input type="text"/>
Medicine and Vitamins	<input type="text"/>
Tack, Equipment, and All Other Supplies	<input type="text"/>
Boarding	<input type="text"/>
Training	<input type="text"/>
Rider Education / Lessons	<input type="text"/>
Stud Fees	<input type="text"/>
Shoeing / Farrier	<input type="text"/>
Veterinary Services	<input type="text"/>
All Other Horse Services	<input type="text"/>
Trailer and Horse Transport	<input type="text"/>
Travel and Transportation	<input type="text"/>
Entry Fees	<input type="text"/>
Jockey/Driver Fees	<input type="text"/>
Contract Workers (exercise riders and others)	<input type="text"/>
Facilities Maintenance	<input type="text"/>
All Other Business Expenses	<input type="text"/>
Employee Compensation (Wages and Non-Cash)	<input type="text"/>
Federal Taxes	<input type="text"/>
State Taxes	<input type="text"/>
Local Taxes	<input type="text"/>

17. Please use the space below if you think there is something else we should understand about your responses to the questions in this section.

SECTION IV: RACING RELATED EMPLOYMENT

Whole numbers only. If the appropriate answer to any question is zero, please enter it in the applicable box.

*** 18. Please indicate the number of FULL-TIME, YEAR-ROUND, FLORIDA-BASED employees (including yourself) that were on your payroll and associated with these horses in 2012:**

*** 19. Please indicate the number of FULL-TIME, SEASONAL, FLORIDA-BASED employees (including yourself) that were on your payroll and associated with these horses in 2012:**

Number of employees:

Average number of months per year:

*** 20. Please indicate the number of PART-TIME, FLORIDA-BASED employees (including yourself) that were on your payroll and associated with these horses in 2012:**

Employees:

Average number of weeks worked per year:

Average number of hours worked per week:

*** 21. Please indicate the total number of family members, friends, and volunteers involved with these horses and NOT receiving wages:**

Volunteer friends and family:

22. Please use the space below if you think there is something else we should understand about your responses to the questions in this section.

THANK YOU FOR YOUR PARTICIPATION

On behalf of the FHBPA, FTBOA, and FQHRA, we thank you for your willingness to complete this survey. Your honest answers will allow Cummings Associates and Civic Economics to provide the most informed estimates of the impact of horse racing on the Florida economy.

Final study findings and reports will be made available by the sponsoring organizations in the Fall of 2013.

23. Please use the space below if you wish to provide us with any other information or insight about your horse racing business activities or the economic impact of horse racing in Florida.