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THE HORSE INDUSTRY IN KING COUNTY

prepared by the King County Office of Business Relations
&
Economic Development

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King County

The Horse Industry in King County

Introduction

This report will describe and assess the role of the horse industry in the King County economy. As such, it will offer a framework for understanding the operation of the sector in general terms, provide the data that is currently available and list the areas of further research necessary to fill in any data gaps.

One means of understanding the horse industry in King County is to establish a framework to describe the cluster in general terms as it exists in any locale. This requires defining the industry, sketching its basic components and highlighting the linkages between the primary sector or activity (characterized by the horses and their uses as well as the direct services provided such as boarding and breeding and horse racing) and linkages to other portion of the industry, both backward (veterinary services for example) and forward (such as horse show associations).

One method to apply the industry framework to King County would be to use existing data to fill in the outline of cluster. However, there were numerous data availability problems. For example, there is little detailed disaggregated data on the King County equestrian sector available. Another important gap in the data picture is the King County horse ownership patterns: the number of horses owned by households as opposed to farms and the characteristics of these owners. However, it was possible to collect data on the number of horses and farms in the County, employment and wages in the sector and horse racing at Emerald Downs. These data will be presented below.

The report will finish with a list of data items to be that need to be collected and suggestions as to data collection methodologies.

Overview: The Nature of the Horse Industry

The delineation or “conceptual map” of the horse of the horse industry is based upon research contained in *A Report of the Research on the Horse Industry in Great Britain* a 2004 publication produced by the Henley Centre consulting firm.

In general, the horse or equestrian industry in any locale can be divided between the primary or core industry and a secondary or supplying industry that supports the core.

The core horse industry is one in which participants, organizations and other units are primarily involved in using horses as “the final consumption type activity”. In this type of activity the horse is generally either: 1) the end use (riding for income or leisure) or 2) being bred, raced or otherwise directly used in an income producing capacity. The involvement and use by riders and other participants runs the spectrum from professional participation (horse racing, breeding for income, horse and rider training, etc.) to leisure and recreation activities. Obviously, those participants, organizations, etc. that rely on horses for their main source of income can be characterized as being on the professional

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end of the spectrum, as opposed to those who are involved with horses on a strictly no-profit leisure or recreational basis. Figure 1 provides the conceptual map of the generalized core horse industry.

Of course, there may be many instances where this distinction is blurred, with horse owners for example dividing their time between some income generating activities, while also riding for pleasure in their free time.

Based on the typology of the primary horse industry delineated above, the sub-sectors of the professional and leisure ends of the spectrum can be arranged in the following fashion:

Leisure Horse and Riders

- Horseownership for leisure riding
- Breeding as a hobby
- Unaffiliated leisure sports (e.g., informal polo games or rodeos)
- Casual riding lessons
- Riding and trekking centers
- Voluntary horse rescue centers

Professional Horse and Riders

- Professional horse ownership
- Breeding
- Affiliated professional sports (e.g., professional rodeos)
- Horse and rider training
- Horse racing
- Horse shows

The secondary industries that supply or support the core horse industry encompass a wide variety of businesses, organizations and participants; their role is to make the core horse industry activities possible. Figure 2 displays the full range of industries supporting the core. In some cases, these units provide specialized goods and services that are specific to the horse industry, such as the production and/or sales of saddles or rider clothing, while other units serve the equestrian industry but also offer products to industries outside the sector, such as insurance agencies that provide equine insurance as well as non-horse products. Support industries may include professionals service providers veterinarians, blacksmiths, etc.), media (horse-related magazines and books, etc.) retail trade outlet (selling equipment, horse feed, riding clothes, etc.), associations, and event organizers.

The Horse Industry in Washington State and King County

Description of the horse industry in King County must begin with an estimate of the number of horses in the County. However, there are severe data limitations and conflicting estimates of horse ownership in both the County and Washington State.

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Horse Estimates: Washington State

There is no definitive estimate of the total number of horses in King County. The National Agricultural Statistical Service of the U.S. Department of Agriculture produces a Census of Agriculture every five years, including a count of horses on the state and county level. However, this count only covers horses on farms and does not include horse owned by households not in involved in agriculture. The Census has a point system which defines a farm, taking into account the proportion of time spent by the owner in farming, the size of the farm and the dollar amount of horse sales. In addition to this ownership limitation, the last two Censuses (1997 and 2002) used a slightly different methodology from previous surveys, making it impossible to compare these surveys to previous Census. Thus, only two data points are available for farm owned horses by state and county.

However, by using the Agricultural Census in concert with two surveys that produced Washington State-level horse inventories, it is possible to make an “educated guesstimate” of the number of horses owned in King County.

Variable	1997	1999	2002	2003
<i>US Census of Agriculture [1]</i>				
Farms with Horses	12,859		11,218	
Number of Horses	85,790		75,951	
Number of Horses Sold	10,796		10,813	
Value of Sales (1,000)	N/A		\$18,599	
<i>NASS [2]</i>				
Number of Horses		155,000		
<i>Deloitte [3]</i>				
Number of Horses				249,964

Sources/Notes:

[1] US Department of Agriculture, 1997 and 2002
[2] US National Agricultural Statistical Service, "U.S. Equine Inventory", March, 1999
[3] "The Economic Impact of the Horse Industry on the United States", July, 2005, for the American Horse Council Foundation

The National Agricultural Statistical Services (NASS) a division of the US Department of Agriculture produced an inventory of horses in the United States based upon the Census of Agriculture and two additional sample survey for the years 1998 and 1999. This inventory was intended to capture more than merely horses on farms. As seen in Table 1 above, the Inventory report 155,000 horses in Washington in 1999. The inventory estimated the same number of horses in Washington State in 1998 as well. This is a little

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more than double the estimated farm-owned horses reported by the Census of Agriculture for in 1997.

The 2003 U.S. horse inventory provided by the American Horse Council Foundation placed Washington State as having the 11th highest total of horses in the nation with almost 250,000 head about 100,000 above the NASS inventory. The Foundation's estimate was based on surveys of four types of participants in the horse industry conducted by the Deloitte consulting firm: horse owner/industry suppliers, racetracks, off-track betting organizations, and horseshow managers/organizers.

The Census of Agriculture reported a decline of the number of farms with horses and the farm-owned horse inventory between 1997 and 2002; in 2002, the Census estimated that there were 75,951 horses in Washington State on 11,218 farms. The number of farms with horses declined by 12.8%, while the number of horses fell by a smaller 11.6%. At the same time, there was a very small increase in the number of horses sold.

Horse Estimates: King County

Estimates of the number of horses in King County can be obtained through use of the three different sources estimating the Washington State horse inventory coupled with the Census estimate of the King County farm-owned horse inventory.

Table 2 displays data for 1997 and 2002 covering King County farm-owned horses. It is interesting to note that all measures of King County farm-owned horse activity increased over the five years reported by the Census.

Table 2					
King County Selected Farm-Owned Horse Data					
1997 and 2002					
Variable	1997	2002	Change: 1997-2002		
			Number	%	
Farms with Horses	430	692	262	60.9%	
Number of Horses	4,376	5,227	851	19.4%	
Number of Horses Sold	523	583	60	11.5%	
Value of Sales (1,000)	\$1,748	N/A			
N/A = Not reported					
Source: US Department of Agriculture, Census of Agriculture, various years					

The County's proportion of State horses increased in 2002 over 1997 (see Table 3). In 2002, King County had 6.2% of the state's farms with horses, almost 7% of the horses in Washington and 5.4% of the horses sold that year. As a means of comparison, the County had 28.8% of the State's 2006 population and 44% of the State's jobs in year 2000.

Based upon relative rankings, both the County and the State are considered horse-intensive areas. For example, in 2002, the State's horse sales by farms (totaling \$18,599,000) ranked 15th overall in United States. The 1997 King County inventory

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placed the County in the top third of the 100 leading farm horse counties in the nation – King County was ranked 30th. Only two counties in Washington – Yakima and Okanogan – had more farm horses than King County in 1997. According to the NASS, Washington State has the 8th highest number of horses in the United States in 1999, tied with four other States for this honor. The Deloitte study placed Washington State’s horse population 11th in the country.

Table 3 King County Farm-Owned Horses as a Percent of Washington State 1997 and 2002		
Variable	1997	2002
Farms with Horses	3.3%	6.2%
Number of Horses	5.1%	6.9%
Number of Horses Sold	4.8%	5.4%
Source: Census of Agriculture		

One of the main drawbacks to the Census data is the lack of data on households that own horses and use them for leisure activities. The Census collects data only for farms, which are units where “the operator spends 50-percent or more of his/her working time in 2002

Table 4 Estimate of King County Horse Inventory 1997, 2000, and 2002			
Year	2002/2003	1997/1999	2001
	Deloitte	NASS	Average
Washington State			
Farm-Owned Horses [1]	75,951	85,790	80,871
All Other [2]	174,013	69,210	121,612
Total Horses	249,964	155,000	202,482
Farm-Owned to Nonfarm-Owned Multiplier	2.29	0.81	1.50
Year	2002	1997	2000
			Average
King County [1]			
Farmed-Owned Horses	5,227	4,367	4,797
All Other [2]	11,976	3,523	7,214
Total	17,203	7,890	12,011
Notes :			
[1] US Census Of Agriculture 1997 and 2002			
[2] Horses owned by breeders, competitors (races and shows), stables, households, etc.			
Sources: Census of Agriculture, National Agricultural Statistical Service, the American Horse Council Foundation and King County BRED			

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at farming or ranching”. Thus, while the number of King County horses in the Professional Horse and Rider portion of the spectrum is reported, there is no Census data identifying the number of King County horses owned by households for leisure activities, and by households and commercial operators for purposes of racing, showing or boarding, breeding, backcountry riding, etc.

However, Table 4 above outlines a method to estimate the total King County horse population. By using the 2003 estimate of total horse inventory in Washington States produced by Deloitte for the American Horse Council Foundation (249,064) and subtracting the 2002 Census of Agriculture count of farm-owned horses (75,951), a estimated on nonfarm-owned horses can be produced – 174,013. A similar procedure using the NASS 1999 State estimate (155,000) and subtracting the 1997 Census count (85,790) can provide an estimate of non-farm horses – 69,210. Obtaining averages of these numbers can produce yet another estimate.

By deriving a farm-owned to nonfarm-owned multiplier, the total of nonfarm-owned can be estimated. This procedure produces a range of from about 8,000 to 17,200 total horses in King County.

King County Horse Associations Organizations and Supporting Industries

Table 5		
Horse-Related Organizations and Stables in King County		
Organization/Business	Location	Activities
Clubs		
Snoqualmie Valley Riding Club	Snoqualmie	Trail Riding, Barrel Racing
Green River Saddle Club	Auburn	Trail Riding, Western Pleasure, Barrel Racing, Eventing, Driving
South Seattle Saddle Club	Maple Valley	
Raging River Riders	Fall City	
Cherry Valley Riders	Duvall	
Lake Washington Saddle Club	Bellevue	Hunter and Jumper Shows, Dressage Schooling Shows, Maintaining Bridle Trails State Park
King County Executive Horse Council	Woodinville	
Sammamish Saddle Club	Sammamish	
Washington State Horsemen Center (Cascade Zone)	Maple Valley	
Stables		
Mt. Si Stables	North Bend	
Homestead Horse Boarding	Renton	
Source: King County BRED		

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A list of King County horse associations and stables are displayed in Table 5 above.

King County is home to nine horse associations, which is proof of a vibrant horse activities and ownership in the area. More research is necessary to determine the associations' membership and range of activities. Additional data is also required to identify other businesses aside from stables that are located in the County.

King County: Employment and Wage Impacts

Estimates of the King County horse industry firm, employment and wage impacts for 1990 and the years 2000 to 2005 are contained in Table 6 below.

Table 6				
Equestrian and Related Industries in King County[1]				
Firms, Average Covered Employment, Total Wages and Average Wages				
1990, 2000-2005				
YEAR	FIRMS	AVG MONTHLY EMPLOYMENT	TOTAL WAGES	AVG ANNUAL WAGES
1990	219	2,309	\$35,022,505	\$15,170
2000	285	2,694	\$55,519,134	\$20,611
2001	289	2,765	\$69,778,680	\$25,238
2002	306	3,208	\$59,296,816	\$18,485
2003	284	3,347	\$63,695,531	\$19,030
2004	282	3,098	\$60,198,940	\$19,429
2005	289	3,205	\$60,867,346	\$18,993
Avg. 2000-5	289	3,053	\$61,559,408	\$20,164
Chg.1990-2005	70	896	\$25,844,841	\$3,823
%Change	31.5%	38.8%	73.8%	25.2%
[1] Industrial sectors included in the Equestrian and Related industries estimates are Horse & Other Equine Production, Support Activities for Animal Production, Horses Wholesaling, Racetracks, Other Spectator Sports, Promoters of Performing Arts, Sports and Similar Events with Facilities; Promoters of Performing Arts, Sports and Similar Events without Facilities; and All other Amusement and Recreation Industries.				
Source: Washington State Employment Security Department				

The sectors included in the Employment Security data presented in Table 6 and their North American Industrial Classification System (NAICS) numbers are contained in Appendix A. NAICS details all economic activity in the United States down to the six-digit level. All NAICS sectors were reviewed to determine if any equine-related activity was included. Eight six-digit codes were judged to contain horse-related activity and data for these sectors were obtained from the Washington State Employment Security Department. Note this is "covered" employment, that is, employment in firms that are mandated to cover workers with unemployment insurance. Typically, this account for close to 90% of all employment.

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It should be pointed out that these data must be used with some caution. Many of these sectors identified as containing some equestrian-related employment, also include firms that are not involved in the horse industry at all. For example, such sectors as Support Activities for Animal Production; Other Spectator Sports; Promoters of Performing Arts Sports and Similar Events with Facilities; and All Other Amusement and Recreation Industries include an unidentified portion of firms and employees with no connection to the horse industry. In spite of these limitations, these data do provide a good approximation of employment and wages in the King County horse industry.

There was an average of 289 firms in the King County horse cluster between 2000 and 2005, the same number of firms in the County in 2005. These firms were responsible generating an average of \$61.6 million in wages per year and 3,053 jobs over this same period of time. The 1990's saw substantial growth of the County's horse industry, with employment increasing by 39% and total annual wages by 74% between 1990 and 2000. However, the expansion in the horse industry appears to have moderated since 2000. While employment has increased by 19%, the number of firms in the King County horse industry expanded by just 4. Total annual wages reached a peak of \$69.8 million in 2001 and have not been at that level since. Year 2005 annual wages are 13% below the peak, while average annual wages per employee have decline by 7.9% from 2000 and 24.7% from 2001.

Table 7 Detailed King County Equestrian Employment and Wages 2005				
SECTOR	FIRMS	EMPLOYMENT	TOTAL WAGES	AVERAGE WAGES
Horses and other equine production	16	48	\$1,574,060	\$32,567
Support activities for animal production	52	158	\$3,106,700	\$19,621
Racetracks/Horse wholesaling [1]	4	518	\$9,584,165	\$18,517
Other spectator sports	28	95	\$2,040,110	\$21,550
Promoters with facilities	25	971	\$13,228,744	\$13,624
Promoters without facilities	41	262	\$11,355,483	\$43,411
All other amusement and recreation industries	123	1,153	\$19,978,084	\$17,323
TOTALS	289	3,205	60,867,346	\$18,993
Source: Washington State Employment Security Department personal communication, 4/25/07				
[1] These sectors were combined by the Washington State Employment Security Department to avoid disclosing data on individual firms.				

Table 7 provides a detailed picture of the King County horse industry for the year 2005 using the six-digit NAICS numbers. Consult Appendix A for the NAICS numbers and the corresponding sector description. Note that the racetracks and horse wholesaling

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sectors were combined by the State Employment Security Department to maintain of confidentiality and not disclose information about individual firms.

Of the 289 firms identified as having some or all horse-industry employment, 123 or 43% are included in the sector classified as “All other amusement and recreation industries” (NAICS 713990). This sector also contained the largest number employees – 1,153 or 36% of the total and 33% (\$19.98 million) of the \$60.9 million in wages in the horse-related industries. Equine activities found in this sector include recreational horseback riding, horse rental services and stables.

The next largest number of employees (971) and total wages (\$13.2 million) were found in promoters with facilities sector. Horse show organizers and promoters are found in this sector.

It should be pointed out and emphasized again that these employment and wage estimates include non horse-related activities and thus the data significantly overstates the equine activity in the County. For example, NAICS 713990 (All other amusement and recreation industries) also covers miniature golf facilities, pool halls, recreational day camps, youth sports teams and leagues and archery and shooting ranges. The distribution between horse and non-horse activities in these data cannot be estimated. As such the data contained in Tables 6, 7 and 8 somewhat overstate the size of the equine sector. Nothing short of a survey of the King County equine industry can provide a true and reliable account of the industry’s numbers and impact.

Relationship of Direct Employment in the King County Horse Industry to Rural King County Employment

The horse industry represents a small, but nonetheless significant portion of employment in the County’s rural area. Employment in rural King County is estimated to be 29,457 in 2005 (see Table 8); the lion’s share of this employment (62.8%) is located in rural unincorporated King County, while a smaller portion – 37.2% - was located in rural cities. The equine industry total of 3,205 represented 10.9% of total rural employment. However, if it is assumed that all the King County horse-related the employment is located in the unincorporated rural portion of the County, then equine employment accounted for 17.3% of employment in the rural unincorporated area.

Interestingly, equine industry direct employment is concentrated in services – with the exception of horse production and support for this production, all the industries identified as having horse-related employment are classified as services. A little over 93% of King County horse industry employment is in services.

Note that total 2005 King County employment was estimated to be 1,116, 600.

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Secondary Employment and Output Impacts of the King County Horse Industry and a Comparison to Total King County Activity

In order to estimate the secondary employment and output (the value of final demand of final use) the King County horse industry, the IMPLAN input-output model was used. The model has developed a series of input-output tables for regional through the country. These tables estimate the transactions (sales of purchases) among 508 industrial sectors

Table 8									
Employment by Sector and Jurisdiction/Area									
Rural King County									
2005									
Jurisdiction	Mfg.	WTU [1]	Services	Retail	FIRE [2]	Education	Govt	Construction & Resources	Total
Unincorp. County	681	1,578	6,034	1,036	256	2,185	1,764	4,955	18,489
Rural Cities									
Black Diamond	*	31	144	33	*	86	34	96	450
Carnation	176	17	154	46	11	213	40	54	716
Duvall	*	*	368	119	95	173	35	121	973
Enumclaw	314	108	1,738	700	624	473	237	152	4,346
North Bend	17	97	840	896	78	137	105	204	2,374
Skykomish	0	0	*	*	0	31	10	0	57
Snoqualmie	*	145	880	44	70	415	156	328	2,057
Rural City Total	507	398	4,124	1,794	878	1,528	617	955	10,968
Total Rural King County	1,188	1,976	10,158	2,830	1,134	3,713	2,381	5,910	29,457

Source: Puget Sound Council of Governments from Washington State Employment Security Department and King County BRED

[1] Wholesale, Transportation & Utilities

[2] Finance, Insurance & Real Estate

* Suppressed to avoid disclosure.

Note: In the three rows where data is suppressed, the sum of the rows will not equal the jurisdiction/area employment totals. The same is true for the four columns where data is suppressed. In those sectors, total employment is greater than indicated. In all cases, employment totals by jurisdiction in the last column are correct.

and through these transactions are also able to generate employment and output multipliers. These multipliers are then in turn used to estimate induced and indirect impacts. For example, induced impacts result from purchases made by direct employees in a sector. Indirect impacts result from sales from support industries to horse industry firms.

Tables 9 and 10 display the 2005 direct and secondary employment and output impacts of the King County equine industry. Output represents the dollar value of sales by firms. Direct employment in the sector resulted in 945 secondary jobs. The location of these secondary jobs is not known, although many would be assumed to be in rural King County.

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Sector	Direct	Indirect	Induced	Total Secondary	Total Employment
Horse and other equine production	48	2	2	4	52
Support activities for animal production	158	2	17	19	177
Racetracks/Horse Wholesaling	518	72	112	184	702
Other spectator sports	95	13	20	33	128
Promoters with facilities	971	203	48	251	1222
Promoters without facilities	262	55	13	68	330
All other amusement&recreation industries	1153	205	181	386	1539
TOTAL	3,205	552	393	945	4,150

Source: IMPLAN Model run by enterpriseSeattle, May 4, 2007

Sector	Direct	Indirect	Induced	Total Secondary	Total Output
Horses and other equine production	\$1,440,817	\$337,882	\$219,226	\$557,108	\$1,997,925
Support activities for animal production	\$3,042,362	\$227,110	\$1,911,135	\$2,138,245	\$5,180,607
Racetracks/Horse Wholesaling	\$26,653,708	\$4,030,933	\$12,279,325	\$16,310,258	\$42,963,966
Other spectator sports	\$4,888,228	\$739,264	\$252,000	\$991,264	\$5,879,492
Promoters with facilities	\$22,799,500	\$9,648,231	\$5,273,496	\$14,921,727	\$37,721,227
Promoters without facilities	\$6,151,874	\$2,603,333	\$1,422,921	\$4,026,254	\$10,178,128
All other amusement&recreation industries	\$80,720,296	\$22,539,188	\$19,840,424	\$42,379,612	\$123,099,908
TOTAL	\$145,696,785	\$40,125,941	\$41,198,527	\$81,324,468	\$227,021,253

Source: IMPLAN Model run by enterpriseSeattle, May 4, 2007

Table 10 displays direct and secondary King County horse industry output impacts. The horse industry's direct output of \$145.7 million ultimately results in a total impact of \$227.0 million. Output data for rural King County is not available, but as a means to measure orders of magnitude, 2005 taxable retail sales (including sales subject to the use tax) in King County totaled \$41.8 billion in 2005. Unincorporated King County retail sales were \$1.5 billion during this same time period.

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Horse Racing

Emerald Downs Racetrack, located in Auburn, is the largest thoroughbred racetrack in the State of Washington. There were 101 racing days in 2005 (the latest year when data were available), featuring 925 races and 7,237 participating horses. A total of \$154.2 million in wages were placed at the Racetrack, \$122.9 million or 80% were returned to the betting public.

Table 11
Emerald Downs Data
2003-2005

Variable	2003	2004	2005
Wagers Placed	\$138,593,283	\$136,467,998	\$154,172,316
Returned to Public	\$109,287,145	\$108,910,146	\$122,938,669
Retention	\$29,306,138	\$27,557,852	\$31,233,647
Number of Race Days	92	90	101
Number of Races	N/A	813	925
Number of Horses Starting	N/A	5,894	7,237
Average Horses per Race	7.31	7.25	7.80

N/A = Not Reported
Source: Washington Horse Racing Commission, Annual Reports

Data Needs and Adjustments

Ideally, a survey of horse owners would produce more accurate data concerning the nature and economic impact of the King County leisure horse industry. Additional information concerning ownership patterns such as the location of the leisure horses (backyard or boarded, number of horses) is necessary as is the end-uses to which the horses are put: pleasure riding, showing, breeding, etc. Additional information concerning the characteristics of horse owners is also necessary to fully understand the impact of the equine industry in the County.

In addition, more detailed data on core horse industry: breeders, horse shows, riding schools, etc are required as is data on the support industry. Ideally, these data could be collected in a survey of horse owners and professionals.

Suggested King County Strategy to Enhance and Encourage the Horse Industry

Based on the above analysis and The Henley Centre report, the following suggested actions are put forward as a means of strengthening the horse industry in King County

1. Improve Communications between the industry and King County and among the horse industry participants.

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- a. Contact representatives of the King County horse industry, including those listed in Table 5, to develop goals, objectives and implementation actions.
- b. Support existing horse industry communications networks.
2. Improve performance of King County horse industry businesses.
 - a. Supply assistance to horse industry business through outreach and counseling by the Rural Business Circuit Rider so as to enhance the profit of equine businesses.
 - b. Bring business together in seminars or workshops to share business performance ideas and suggest ways to work together
 - c. Coordinate interaction and exchange of ideas and perspectives between the horse industry and DDES
3. Investigate ways to promote equestrian tourism.
4. Review trail situation and investigate ways to keep trails maintained in the County and ways to increase the trail mileage (e.g., opportunities in the County obtaining the Burlington Northern right-of-way)
5. Improve land management – coordinate with WSU Agents to work on pasture management, control of manure, etc.
6. Development more data on the King County Horse industry.
 - a. Produce a survey on horse owners in the County.

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APPENDIX A

Industrial Sectors Included in Washington Employment Security Department Data

<u>NAICS</u>	<u>Sector</u>
112920	Horse & Other Equine Production
115210	Support Activities for Animal Production
422590	Horses Wholesaling
711212	Racetracks
711219	Other Spectator Sports
711310	Promoters of Performing Arts, Sports and Similar Events with Facilities
711320	Promoters of Performing Arts, Sports and Similar Events without Facilities
713990	All Other Amusement and Recreation Industries