

Perception Study Results on California Racing

What do top owners and trainers think?

In the January issue of *Owners' Circle*, we reported the results of our membership survey, conducted by Issues Management Network (IMN). In addition to surveying our members, TOC also commissioned IMN to conduct personal interviews with a selected group of owners and trainers, both in and out-of-state, to gain further insights into how California racing is perceived.

Here's what we learned from their report:

CALIFORNIA OWNER/ TRAINER'S THOUGHTS ON:

Marketing

The California owners and trainers interviewed agreed that marketing is the most important challenge for Thoroughbred racing in the state, with the need to attract more fans at the top of the agenda:

"Fan support at the tracks, that's what makes the game."

About half of those interviewed believed that California racing doesn't always treat its fans very well, most often citing cost, but also the environment:

"We make it way too hard for people to come to the tracks and they don't have anything to help you once you're here."

Tax Relief

Tax relief also ranked very high on the list of priorities. We heard:

"The most urgent issue is some form of tax benefits and other forms of incentives; the legislature takes, takes, takes; instead of encouraging ownership, they're discouraging it."

To the "what do we do about it?" question, one owner responded:

"It's our responsibility to properly educate (the Legislature) on the contributions racing brings to the state, not just in terms of the pari-mutuel but other kinds of revenues including taxes and employment."

Quality Horses

About half of those interviewed in California believed that a shortage of quality horses is one of the most serious issues facing Thoroughbred racing here today:

"California quality is super, but not day in and day out."

"We have the best purse structure of any racing Mecca in the world; we should have all the quality horses we could say grace over."

Asked why this is, interviewees most often cited the following reasons; injuries caused by track surfaces, continuous training with too few opportunities to race, too many race days with no time off; an outflow of better horses to points east; and the reluctance of eastern owners to come west.

Race Days

A very high number of both owners and trainers thought there were too many race days in California, with most believing that too much racing was negatively impacting horses, horsemen and fans.

"We need to cut back on racing days, it hurts the quality of the product and contributes to short fields; we need to recognize what's best for all of us."

"People only have so much money to spend; it becomes boring, no longer something to look forward to."

A significant number of both owners and trainers also expressed dissatisfaction with the racing schedules in California. They believed there are not enough appropriate racing opportunities for their horses.

Track Surfaces

By a very large majority, owners and trainers said they believed track surfaces are a serious problem for California, either in fact, or at least in perception. A large number felt strongly that surfaces here, as compared to elsewhere in the country, are injuring too many horses:

"Horses are getting hurt too often, it's really risky."

"The cost to horse racing in California is huge."

Even among those who said they didn't believe California surfaces were actually creating more injuries than elsewhere, there was unanimous concern for California's reputation in the rest of the country.

"It's one of the biggest deterrents to racing people in the east bringing their stock to California."

Interviews with horsemen from out-of-state seemed to validate that this concern is real.

Other Topics

Among the other topics discussed with the California study group were the Cal-bred incentive program (which enjoys broad support), attracting more "easterners" to race in California, (viewed as a difficult task and not desirable by some), and how to attract new owners to the sport. Taxes and operating costs were seen, hands down, as the most important areas to address to achieve that goal.

OUT-OF-STATE OWNER/TRAINER'S VIEWS ON CALIFORNIA RACING

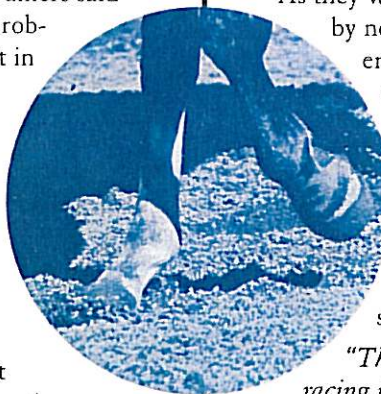
Location, Location, Location

Among the horsemen we interviewed from outside of California, the overriding reason not to race in California is geography. People want to race where they live and believe there are ample opportunities.

"Getting there is the reason we don't go."

Wear and tear on both humans and horses are a concern, and more than one trainer viewed the Florida winter season as a good opportunity to "freshen up" their horses rather than send them on a long trip west.

Florida meets also have strong loyalty among many eastern owners who have long traditions of wintering there, and higher purses generally aren't enough of a lure. However, most owners and trainers agreed that "the right horse for the right race and the right purse" would move them to come west. As one owner put it, "the reason you race is you'd like to win."



Track Surfaces

As they were by Californians, track surfaces were seen by nearly all of the out-of-state owners and trainers to be a detriment to California racing, either in fact or due to the perception that they are "unkind to horses." Only one owner listed this as their top reason for not racing in California, but a significant number of others counted it among their reasons. One trainer, who thought injuries can and do happen anywhere, nevertheless said:

"They need to repair the image of California racing in the eyes of owners."

Lifestyle & Hospitality

While a number of California owners expressed the view that we don't treat out-of-state owners very well when they come here, for the most part our out-of-state interviewees didn't agree. In fact, "nice people, good hospitality, excellent hotels and great amenities" were most often cited by owners as reason to come to California. Trainers, though, were inclined to feel less welcomed.

We thank California Thoroughbred Trainers, Del Mar Thoroughbred Club, Hollywood Park, Santa Anita, and Oak Tree Racing Association for their aid in sponsoring this study.

OUR THANKS TO THE OWNERS AND TRAINERS WHO CONTRIBUTED THEIR TIME AND THOUGHTS TO THIS STUDY:

CALIFORNIA

OWNERS

Betty Mabee
Mace Siegel
Sidney Craig
Bob Lewis
Richard Stacey
Mike Pegram
Michael Lima
Bart Heller
Jerry Moss
Ronald Anson
Henry Pabst
Robert & Barbara Walter
Thomas & Marguerite Cavanaugh
For Thoroughbred Corp.
Richard Mullhall

TRAINERS

Richard Mandella
Craig Lewis
Bob Baffert
Ron McAnally
Jack Carava
D. Wayne Lukas
Robert Frankel
Jerry Hollendorfer
Edward Gregson
Ceasar Dominguez
Neil Drysdale

OUT-OF-STATE

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William T. Young
Robert Clay
Alexander Campbell
Helen Alexander
Cot Campbell
Ogden Mills Phipps
Arthur Appleton

TRAINERS

Mark Hennig
Claude McCaughey
John Kimmel
Howard Teshler
Nick Zito
Carl Nafzger
Neil Howard