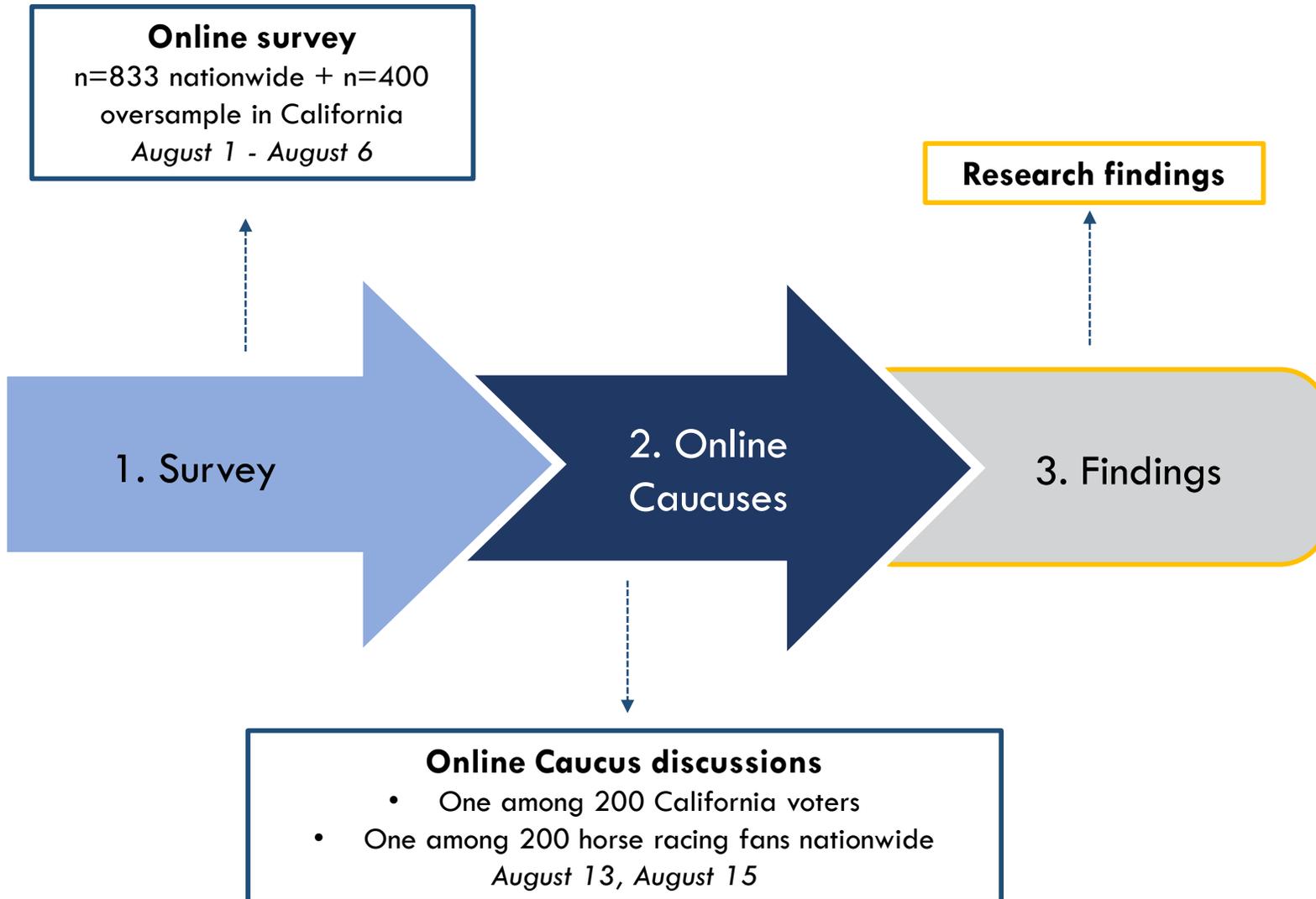




Creating & Communicating a Culture of Safety

December 2019

We conducted two rounds of research in early August



Online nationwide survey

- ✓ Gain a baseline measure on recall and impact of news coverage
- ✓ Measure biggest vulnerabilities
- ✓ Measure response to preliminary industry commitments

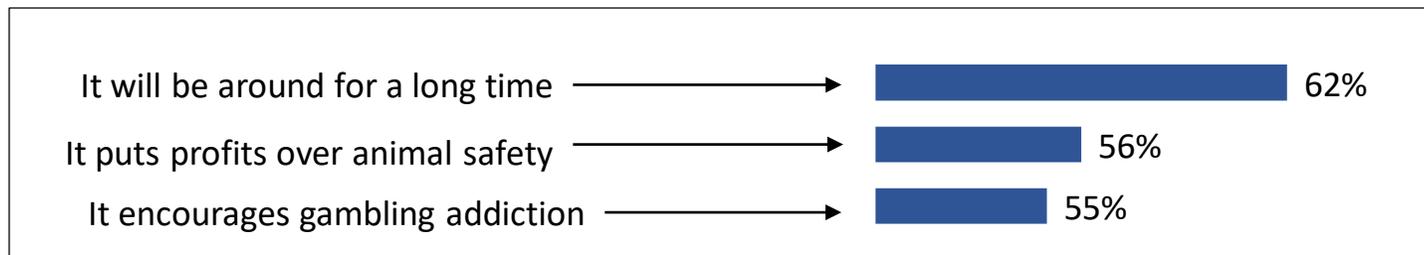
Online qualitative research

- ✓ Test potential messaging angles and proof-points
- ✓ Place the issue in context and understand the language people use
- ✓ Understand future public and fan expectations of the industry

Horse racing evokes strong emotions – both positive and negative

- **Fans are driven by the excitement, beauty, and thrill of racing:** This resonates with non-fans as well, who talk about big hats, fun times, and competition.
- **The industry is associated with negative attributes:** 41% don't think the industry does enough to protect horses' safety and another 35% aren't sure.

Top 3 attributes of the Horse Racing Industry



- **But, views are yet not entrenched:** Views toward the horse racing industry are split

37% positive / 35% negative / 27% unformed

Recent news hasn't fully penetrated, but there are latent concerns

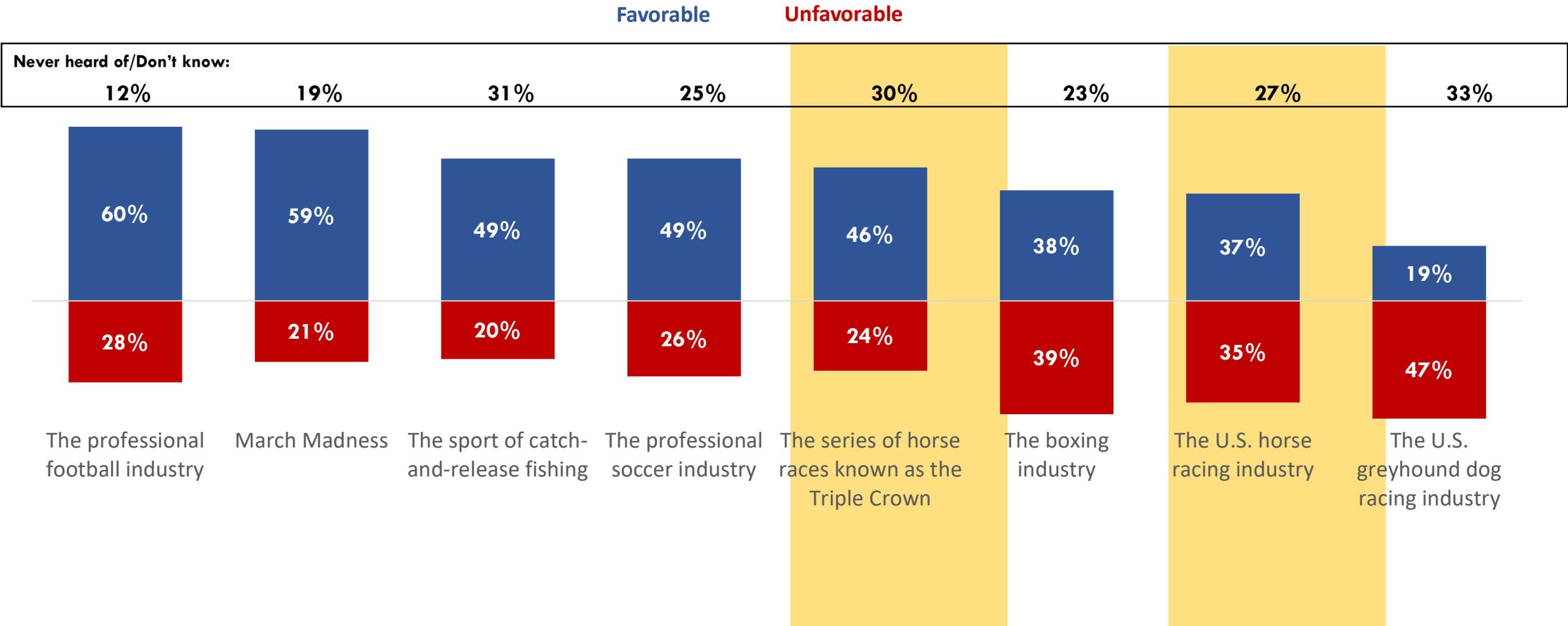
- **Most people are mostly unaware of increased deaths:** 43% nationwide aren't sure if horse deaths have increased or decreased in recent years.
- **But safety dominates the topic:** Those who have heard something recently about racing cite injuries or deaths.

What have you seen or heard? <i>(Open-end)</i>	National (23%)
Horse deaths/injuries/euthanization (not Santa Anita specific)	33%
Horse deaths/injuries/euthanization (Santa Anita specific)	9%

"I'm surprised it took seven months and 30 deaths for anyone to take notice."

—Horse Racing Fan

Views of the industry are split. But there's room to improve.



Eagerness for reform, and an opening for the industry

- **Little appetite for a ban on horse racing:** Only **16%** of Americans, before reading about Santa Anita – and **19%** after reading about it – want to see horse racing banned.
- **Strong support for more regulation:** **69%** want the industry more regulated, and **59%** would be open to seeing the federal government create and enforce the rules.
- **Preference for the industry to take the lead:** But, if given a choice, key groups would prefer the industry to take the lead, not the government.

An industry-led coalition of horse racing groups, including horse owners, track owners, trainers, and jockeys		A government-led coalition of regulators, independent monitors, and representatives from horse racing groups	
Nationwide	53%	41%	
Democrats	52%	46%	
Republicans	56%	37%	

Visible action is necessary

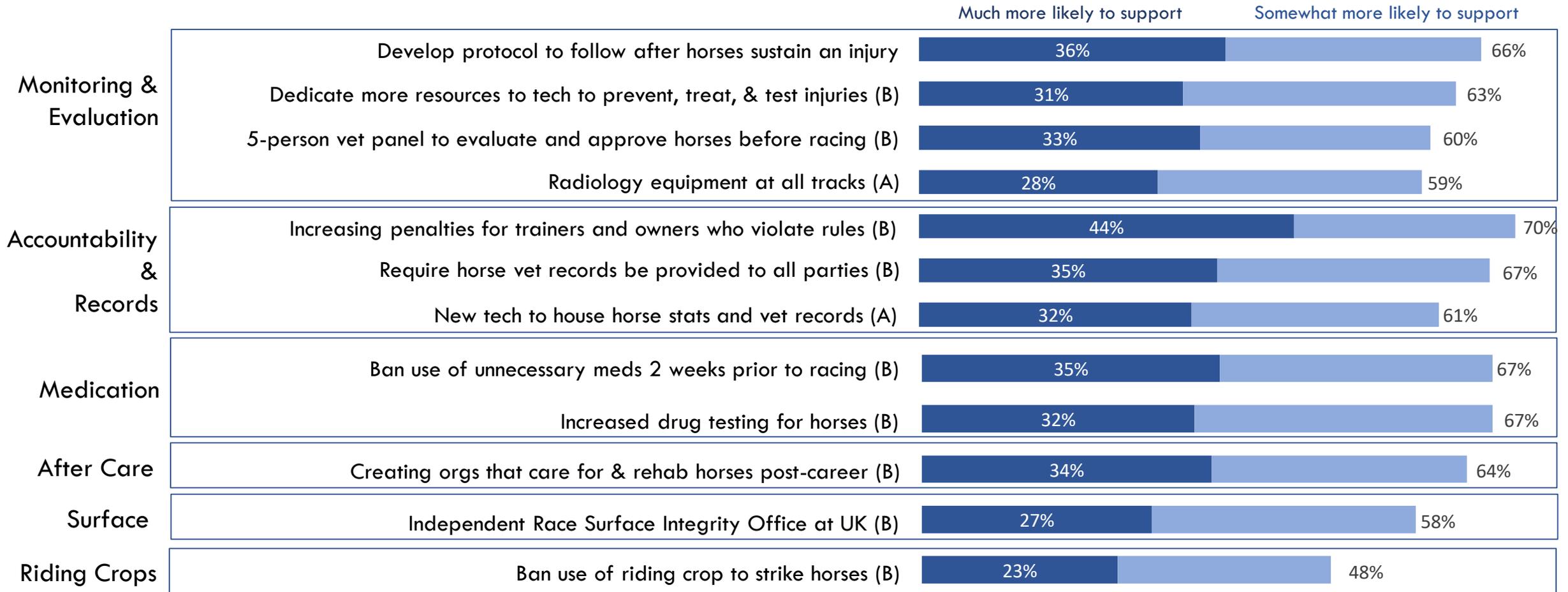


Table shows only select results; A random half sample was shown (A) items, and the other half was shown (B) items

Messaging guidance

- **Talking about your values and ethos is vital:** Language around the passion that the trainers, owners, and riders have for the horses the care for is powerful.
- **Lean into the meaning of the sport, especially the “tradition”:** The tradition of horse racing – a family event, the happy memories, the pomp and circumstance – was mentioned by many as a reason to keep the sport alive. Its should not be a stand-alone message but is a key emotion to tap into.
- **Accountability should be at the center of messaging:** Regulations must enforce some level of accountability – mostly in the form of penalties – to monitor and moderate that drive for profit. **46%** voted holding rule-breakers accountable as a top priority for the horse racing industry — second only to protecting the well-being of the horses.
- **Avoid, or be careful when:**
 - 1.) Making the economic argument
 - 2.) Mentioning the comparison to Europe
 - 3.) Claiming that horses are born to run

Implications

1 The industry needs to act while audiences are open to an industry-led effort

2 Biggest areas to address are medication & accountability

3 Emphasize the industry's values and ethos, which drives commitment to reform & accountability

4 Lean into tradition and meaning

5 Don't reject the idea of greater oversight

6 Don't make it about economics with general audiences; though that may work with lawmakers & business interests in key states

7 Recruit veterinarians, but also work to develop trust in more surrogates

THOROUGHbred SAFETY COALITION

Thoroughbred Safety Coalition



We are pushing for a new, comprehensive, and centralized set of standards. Addressing our industry's safety challenges requires concrete action ... with medical, operational, and organizational reforms, including enhanced transparency and improved information sharing. More must be done—and will be.

This is just a start.

thoroughbredsafetycoalition.com

