

RESULTS — TRAINER EXPERIENCE

NATIONAL RACEHORSE OWNERS SURVEY

2016



Part of ESP Properties
A WPP Company





RESULTS — TRAINER EXPERIENCE

1) The most influential steps to ownership are speaking to a trainer or other owners.

2) Owners want more information on costs and trainers.

3) Trainers are approachable, but could communicate more information more regularly.

4) Costs and prize money are primary lapse reasons; racecourse and trainer experience crucial.

MOST INFLUENTIAL STEP IN OWNERSHIP DECISION?

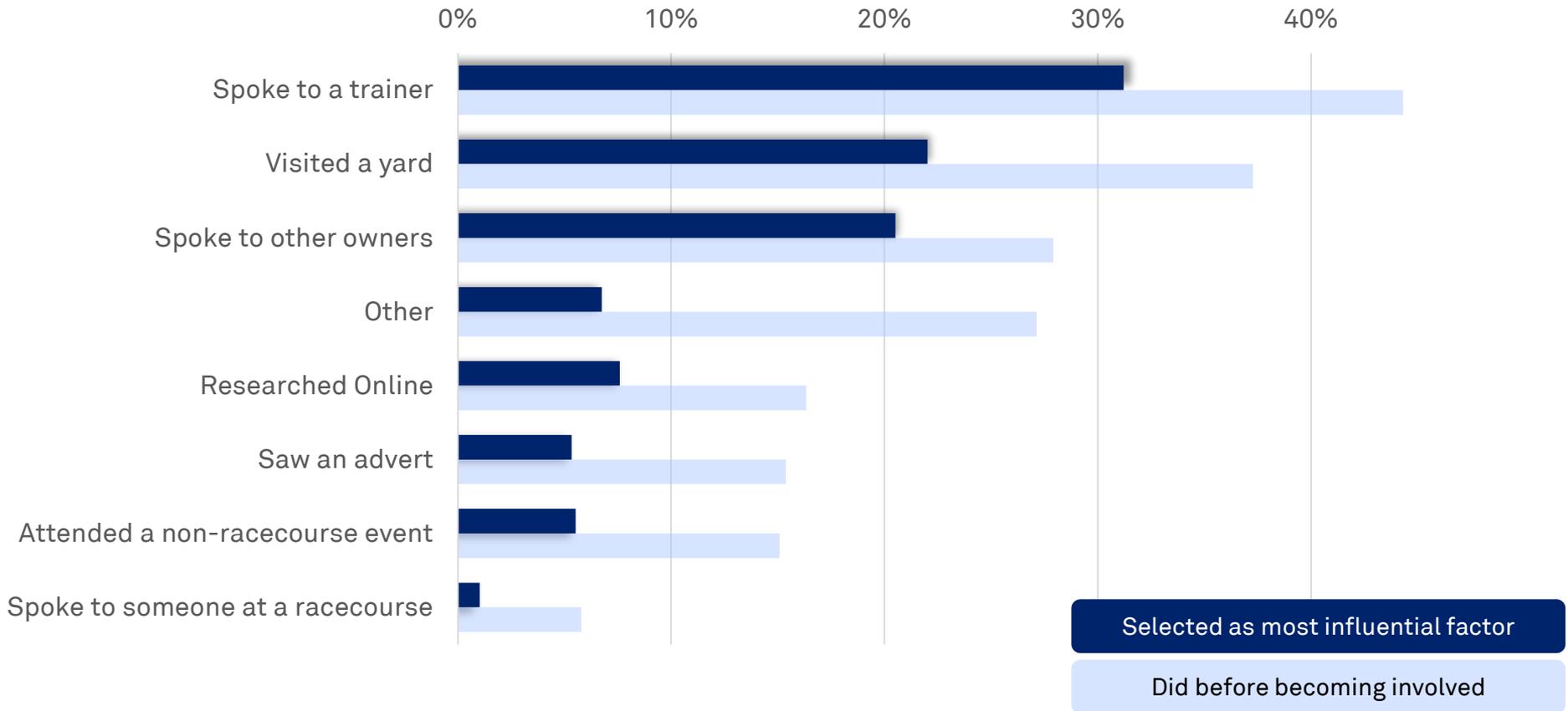
53%

of Racehorse owners say **speaking to a trainer, or visiting a yard,** was the most influential step in their decision



OWNERSHIP DECISION STEPS

The most influential steps to ownership are speaking to a trainer or to other owners.



All Owners

Q. Did you do any of the following before deciding to become involved in owning a racehorse?

2,203 responses

All Owners

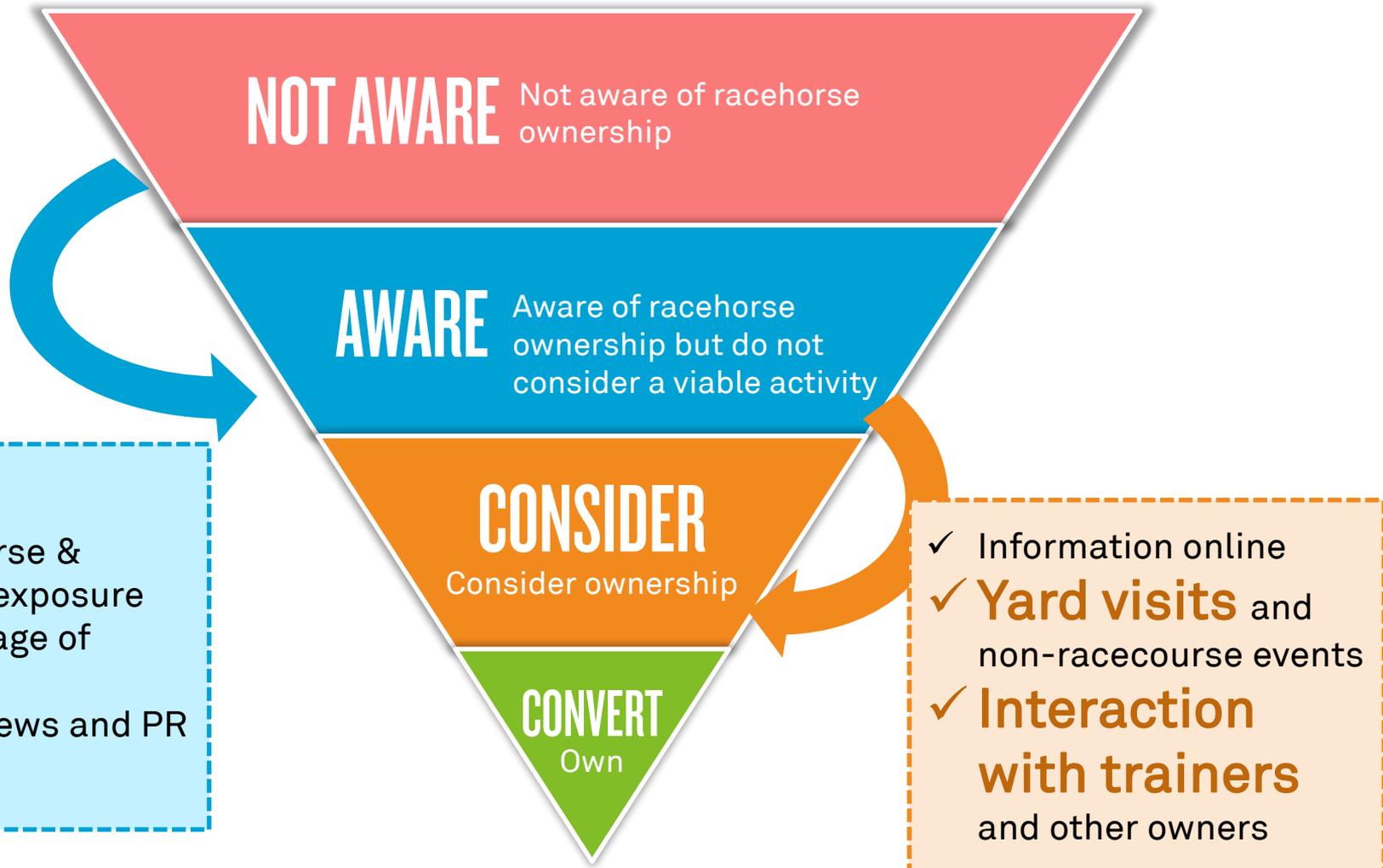
Q. Which was the most influential in your decision to become involved in owning a racehorse?

2,203 responses



THE CONVERSION FUNNEL FOR RACEHORSE OWNERSHIP

Trainers are the “salesforce” for racehorse ownership – how can we better support them?



WHAT ELSE WOULD HAVE HELPED?

44% of owners say there isn't enough information available to make a decision – they want more information on costs and trainers.



TRAINERS

85%

Of owners deal directly
with their trainer

MANAGERS

15%

of owners deal
with someone else

75%
syndicate
manager

15% racing
manager

5% another
member of
training team

5% unsure

Trainers and managers were scored on these criteria...

Approachable

They are friendly and easy to talk to if you have questions

Communicative

They stay in touch regularly and are proactive, flexible and accommodating offering updates that include photos and videos

Informative

They give you accurate and detailed information on your horse including day to day training and race plans

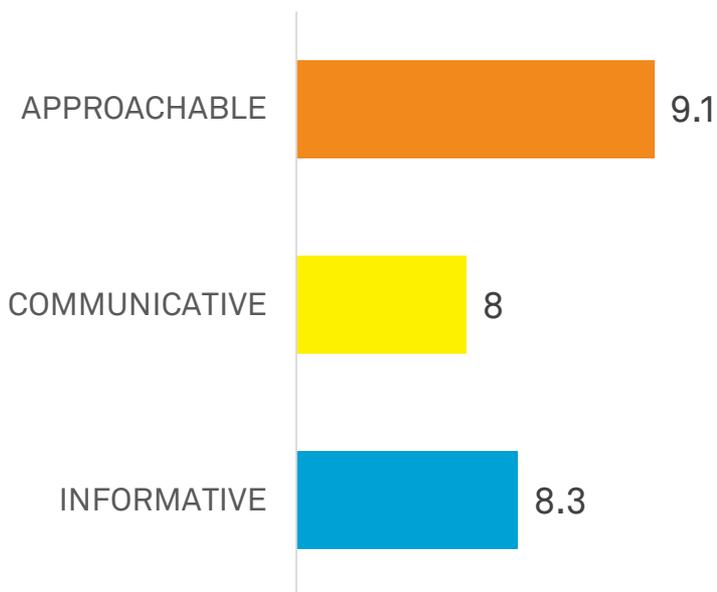


TRAINER AND MANAGER RATINGS — RESULTS

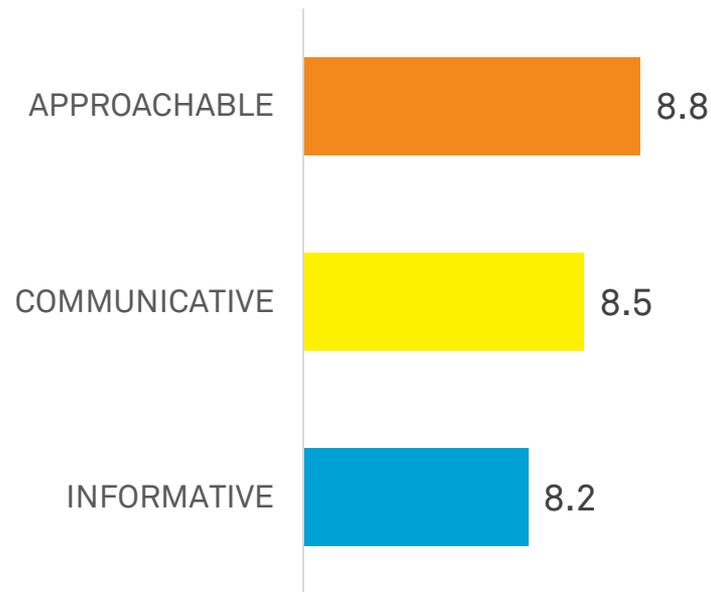
Trainers are approachable, but could communicate more information more regularly.

Managers are more communicative, but could also provide more information regularly.

TRAINERS



MANAGERS



Approachable

Communicative

Informative

WHAT ASPECTS OF OWNERSHIP ARE MOST ENJOYABLE? TRAINER RELATIONS

Trainers are crucial to the enjoyment of owners and have a material impact on experience.

Seeing my colours and being proud of the condition of my horse due to excellent trainer and staff.

Male, 55-64

The planning with the trainer and then that plan coming together and resulting in that all important winner

Male, 45-54

Discussing riding tactics with my trainer and jockey pre race then watching them being followed during the race.

Male, 65-74

Visiting the yard to be able to spend time with my horse, the trainer and stable staff

Male, 55-64

We are lucky in that we have a trainer who shares in our pleasure in planning a race or a campaign.

Female, 45-54

Close relationship with trainer and horse. Watching that horse grow and mature.

Female, 55-64



WHAT WOULD ENHANCE THE OWNERSHIP EXPERIENCE? TRAINER RELATIONS

There is a feeling that trainers could enhance and update their communication methods and be more transparent.

With the advent of advanced media it is now possible for trainers to give you a glimpse of your horse working without you having to be there at the crack of sparrow. Those trainers that embrace the new methods will involve their clients more and improve relationships.

Male, 55-64

More transparency in the sport and trainers who don't lie to line their own pockets.

Male, 45-54

Make me feel comfortable asking Rookie questions. Make me feel like they want me at the yard



Trainers being more informative and upfront when problems arise.

Male, 55-64

Some provide videos and pictures through their website...that's a great benefit and one we should see more

Owning a horse is one thing. Having a good / sociable / honest / approachable / listening trainer is another.

Male, 55-64



WHY DID OWNERS LAPSE?

Costs and prize money are most cited lapse reasons, but racecourse (44%) and trainer (29%) experience are crucial.





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