

Customer Comforts:
An exploration of the racing
experience

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Executive Summary

Introduction

Customer Comforts is an exploration into the experience of the racing customer. The following report and analysis is based on our Customer Comforts survey. The survey was distributed in a number of ways and resulted in 464 responses.

Distribution Methods:

- Link in Daily Racing Form Online newsletter (Appendix A1)
- Customer information card (Appendix A2)
- Individual track program ads (Appendix A3)
- Link posted on track website

The survey itself consisted of 18 questions and one solicited free response (Appendix A4). There were incentives offered in the form of prizes (Appendix A5).

The survey was intended to cover a broad spectrum of experiences at the track. Parts of this survey could be examined in greater depth and at a later time but this begins the groundwork.

In answer to the question: Are customers comfortable at the racetrack, the answer is yes. Overall, they not only feel comfortable but they equally give positive ratings to the customer service they are receiving. Although respondents had many positive experiences, they had suggestions on improvements and changes that they believe the tracks could work on.

Major Assumptions

The Customer Comforts survey was designed to attempt to identify the comfort level of the racing patron and their preferences. The following report identifies trends according to racing regions. Some assumptions were made in the analysis of this report.

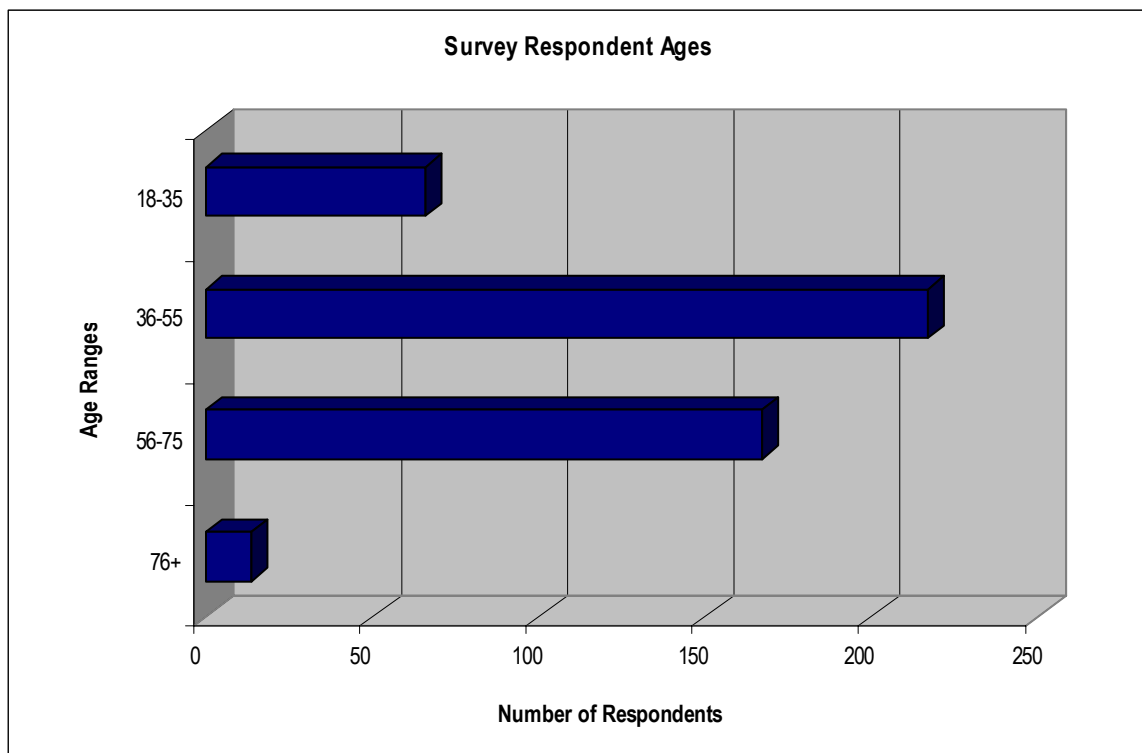
Major Assumptions:

- The majority of survey responses came from DRF Online newsletter link.
- A lesser amount was generated by track program advertisements and hyperlinks on track websites.
- Responding audience was uncontrolled demographically and subject largely to the client base of the Daily Racing Form.

Survey Findings & Analysis

Respondent Ages

Approximately 47% of the survey results were from people who fit into the 36-55 age range. This group can represent a number of people including families, singles, and empty nesters. The large turnout of this group for the survey suggests that the baby boomers are using the internet to access racing information. The 56-75 age range represented the second highest number of respondents with 36%. The youngest age range of 18-35 and the oldest age range of 76+ provided the lowest results with 66 and 14 responses, respectively.

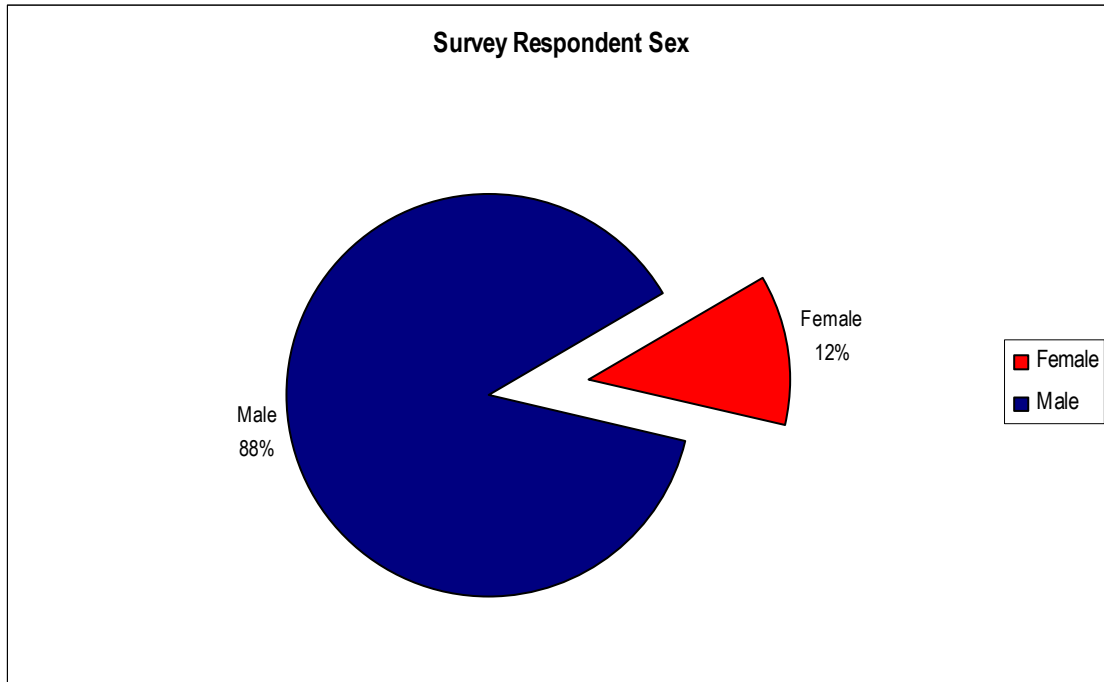


Statistics

Age Range	Number	% of Survey Population
18-35	66	14.3%
36-55	217	46.9%
56-75	167	36.1%
76+	14	3.0%
	464	100%

Respondent's Sex

Of the responses received, 88% were from men and the subsequent 12% from females. Of the 12% female respondents, approximately 25% answered that they were somehow related to the track (either an employee at the track, a family member to someone who works for the track or a licensed horseman). The graph below shows the related percentages and statistics. According to DRF user demographics, 93% are men. This shows a close relationship to the respondents of our survey.



Statistics		
Sex	Number of Respondents	% of Population
Female	56	12.1%
Male	408	87.9%
	464	

Tracks Most Visited

Because of the distribution of the survey, there was a wide range of tracks represented in the data. There were responses from Canada to Puerto Rico and from California to New York. As the pie chart below shows, the bulk of the answers come from the many tracks grouped together, but NYRA, Emerald Downs and Bay Meadows are also sufficiently represented. Bay Meadows is not included in the California tracks data due to its large response rate.



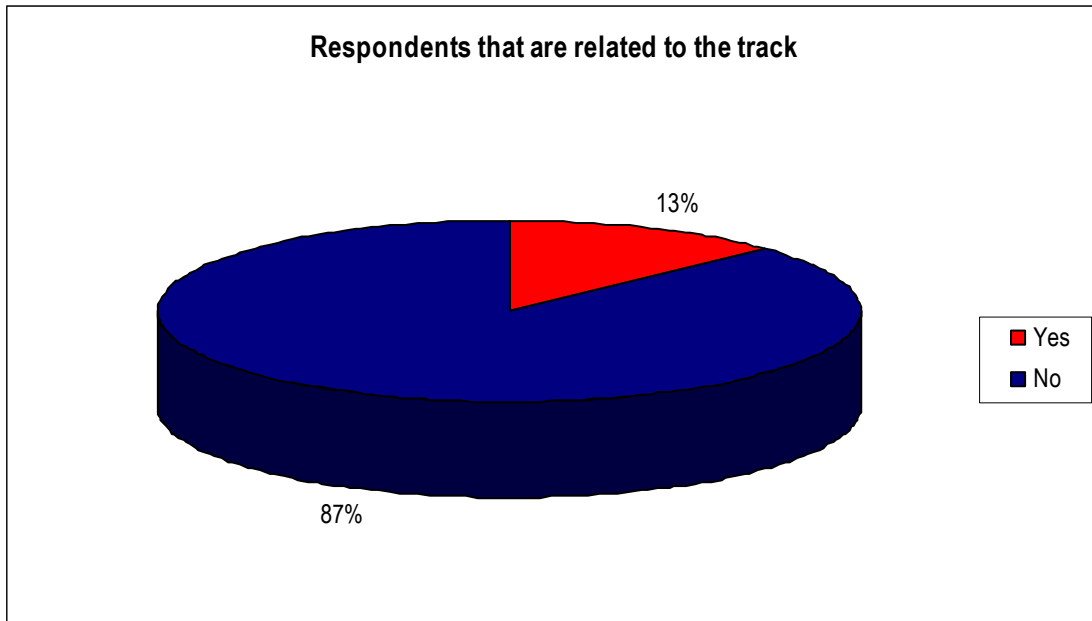
* Note: California track numbers do not include Bay Meadows

Statistics

Tracks	Number of Respondents
Pennsylvania Tracks	10
Remington	12
Texas Tracks	14
Kentucky Tracks	16
New Jersey Tracks	17
Florida Tracks	21
Arlington Park	30
California Tracks*	38
Hawthorne	39
Bay Meadows	45
Emerald Downs	50
NYRA	65
All other Mentions	107
	464

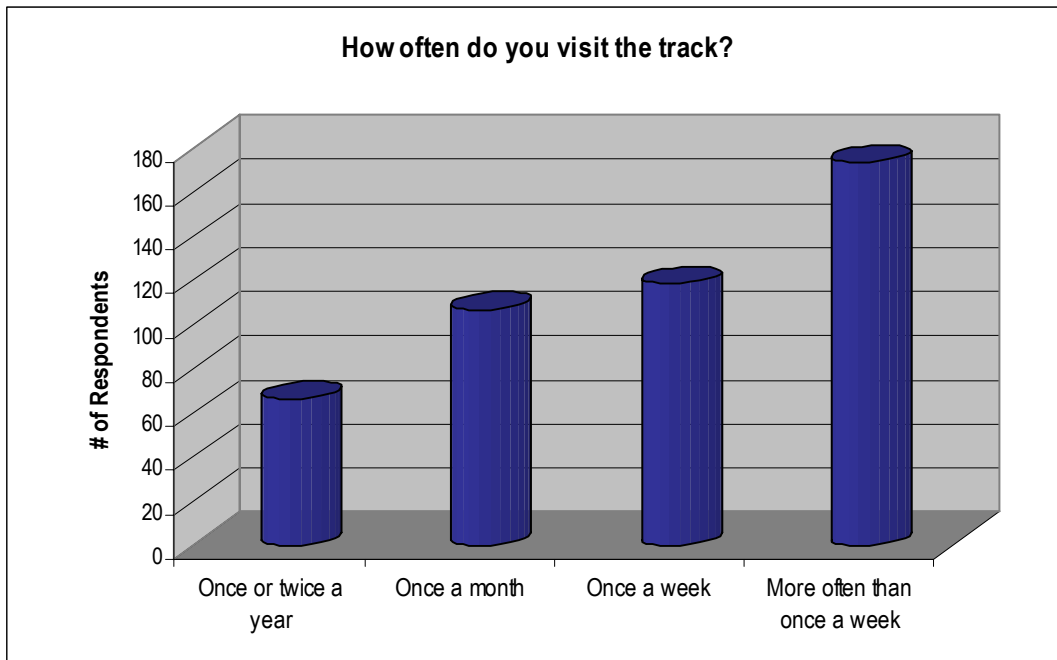
Relationships to the Track

It was determined that a question needed to be asked regarding the relationship that someone may have with the track. The question was asked as follows: Are you an employee at the track, related to an employee that works for the track or a licensed horseman? The survey provided people with the opportunity to share their opinions on wagering, spending, and track improvements. It is positive thinking to hope that people will be genuine and truthful about their answers, however a disgruntled employee or spouse could gather up followers and answer the questions intentionally and noticeably negative. Generally the answers that were received by those who answered “yes” to this question were in-line with those who answered “no”. In some cases, those who answered “yes” provided more detailed feedback to the improvements they would like to see at the track.



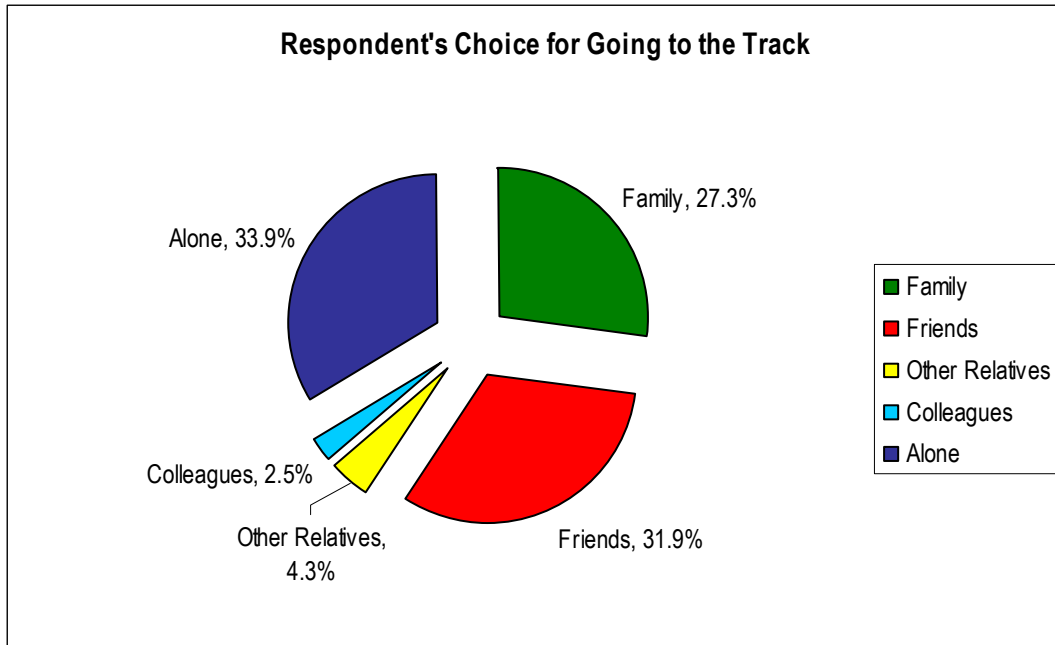
Track Visitor Frequency

How often are patrons visiting the track? Statistically there was a good representation of all categories. This is somewhat important to the basis of the survey questions. Had the information been heavily weighted in any range, we could deduct that their answers may skew other questions as well. The responses show a good mixture of track attendees. Those who are attending the track more than once a week make up the largest percentage of responses with 37%. The patrons who are attending once a week or once a month are 25% and 23% respectively. The smallest group was those only attending once or twice a year at 14%.



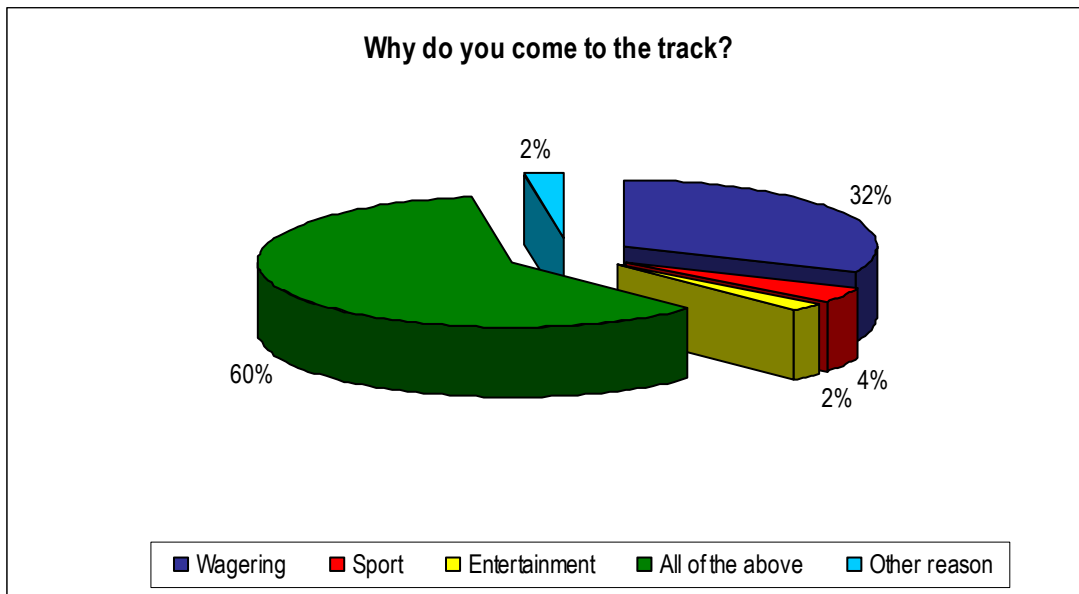
Who is going to the Track?

Patrons were asked who they usually go to the track with. Are they leaving work with colleagues to go to the track, or are they stopping at home to pick up their families? Others may be enjoying the track by themselves. Overwhelmingly, patrons responded that they are going to the track alone, with friends, or with family. Surprisingly, those who are going to the track with colleagues are exceptionally low with only 2.5%. It is encouraging that since 88% of the respondents were male that over 50% of them are going to the track with either friends or family.



Primary Feature for Attending

“The slot machine has saved horse racing in Ontario. It has also changed horse racing, bringing it more into the sphere of entertainment than sport,” says David Willmot, president of Woodbine.¹ “Horse racing was covered in the media as a major sport on a daily basis. It enjoyed a reputation as the nation's No. 1 spectator sport for decades,” says John Brokopp, a gaming guru with the Casino City Times.² Almost 60% of the patrons surveyed are being lured to the track because of the wagering, sport and entertainment features. The second most popular reason for going to the track is wagering which accounted for nearly 32% of the responses. A small percentage of respondents are going to the track for only sport, entertainment, or other reasons.



Statistics

Favorite Feature	Number of Respondents	% of Respondents
Wagering	147	31.7%
Sport	17	3.7%
Entertainment	11	2.4%
All of the above	278	59.9%
Other reason	11	2.4%
	464	100.0%

¹ Lankhof, Bill. Toronto Sun. 4/17/2004. <http://slam.canoe.ca/Slam/HorseRacing/2004/04/17/426680.html>

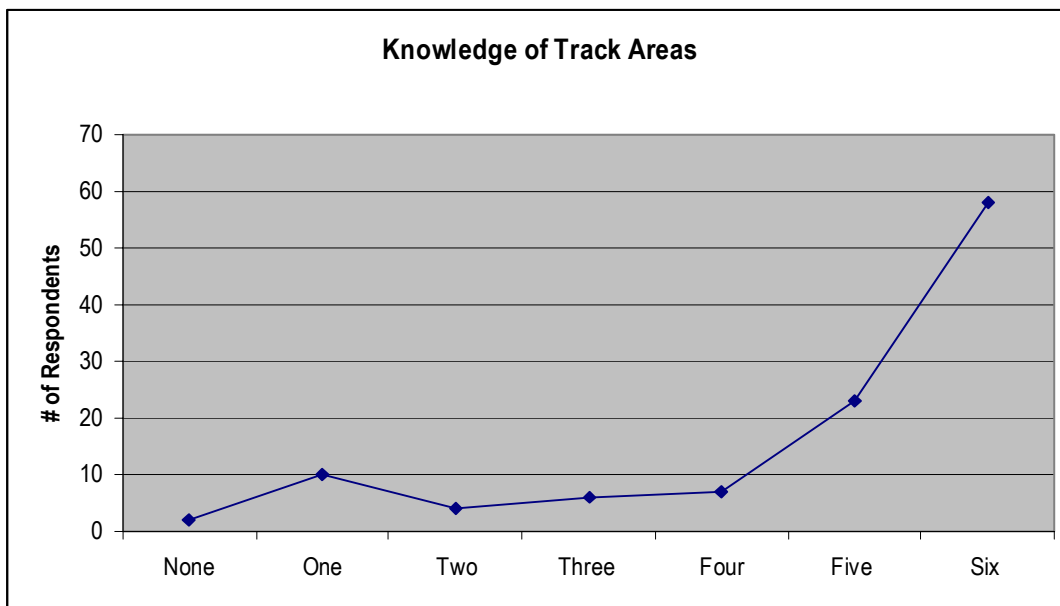
² Brokopp, John. 5/4/2005. <http://brokopp.casinocitytimes.com/articles/18858.html>

Locations of Track Areas

Initially, it was thought that track patrons were unaware of where certain areas were at the track. Respondents were asked if they knew where the following track areas were located at the track they most frequently visited. These areas included:

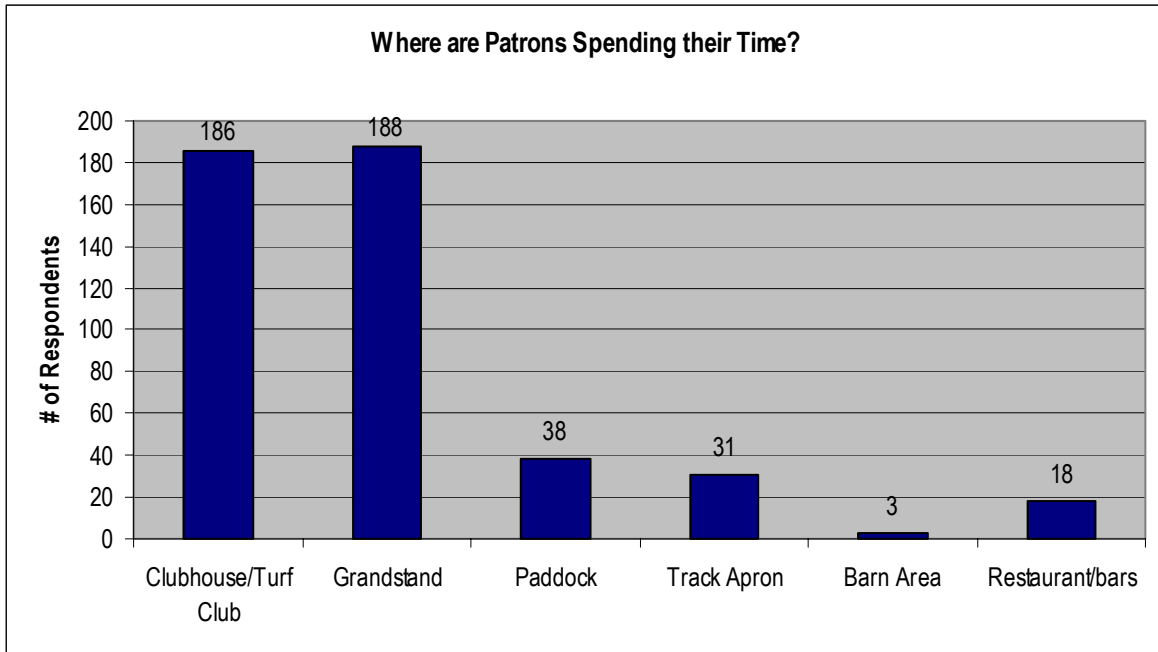
- Clubhouse/Turf Club
- Grandstand
- Paddock
- Track Apron
- Barn Area
- Restaurants
- Winner's Circle

Over 76% of the track patrons could identify with all areas of the track and most patrons could identify six out of the seven locations. The chart below shows the number of respondents who could identify only one (or two, or three, etc) area(s) of the track. Since the number of responses was so high for those knowing where all seven of the areas are located, it was left off of the chart.



Where are patrons spending the most time?

While customers know all of the areas of the track, they are predominantly spending time in the grandstand or the clubhouse. These two answers represented over 80% of the responses. The response to those spending time in restaurants was particularly low with only 18 responses. The paddock and track apron received 8.2% and 6.7% of the responses, respectively. There were no responses that patrons spent most of their time in the winner’s circle and is therefore not included in the chart.

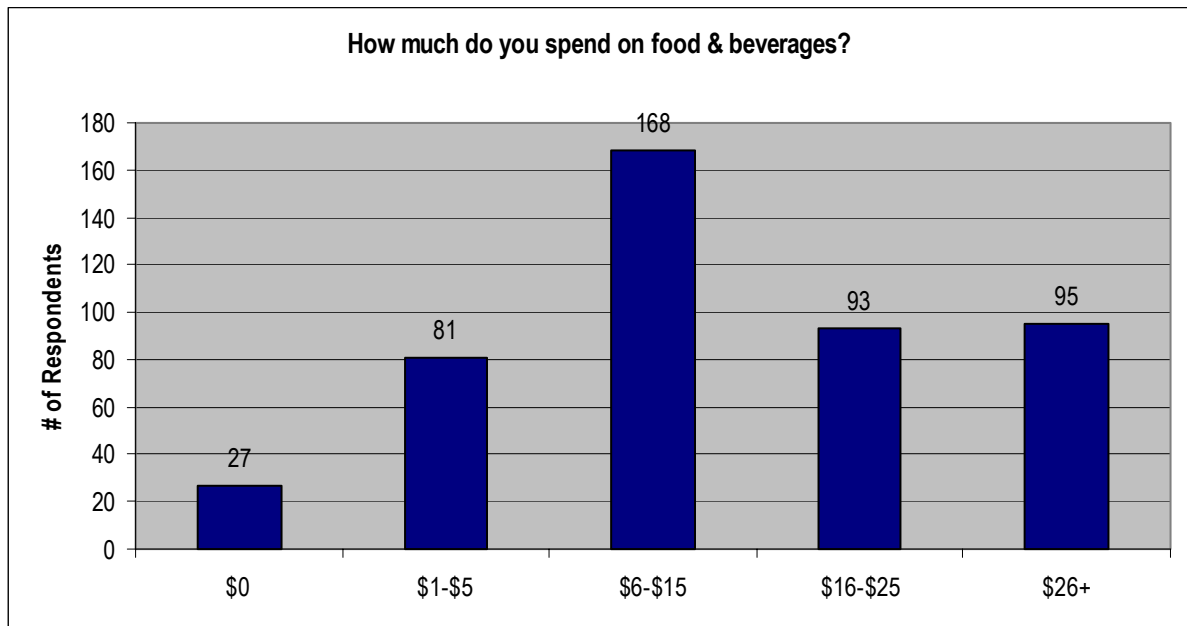


Statistics

Track Locations	Number of Respondents	% of Respondents
Clubhouse/Turf Club	186	40.1%
Grandstand	188	40.5%
Paddock	38	8.2%
Track Apron	31	6.7%
Barn Area	3	0.6%
Restaurant/bars	18	3.9%
	464	100.0%

Food & Beverage Expenditures

Food and beverage selections can affect how much or how little a patron will spend at the track. Respondents (36%) indicated they are spending between \$6-\$15 on food and beverages while at the track. Approximately 20% (each) of patrons are spending \$16-\$25 and \$26+. Most attendees are spending some amount of money on food and/or beverages, however 5.8% of the track patrons reported to not be spending any money on food and beverages.



Food & Beverage Expenditures: Further Analysis

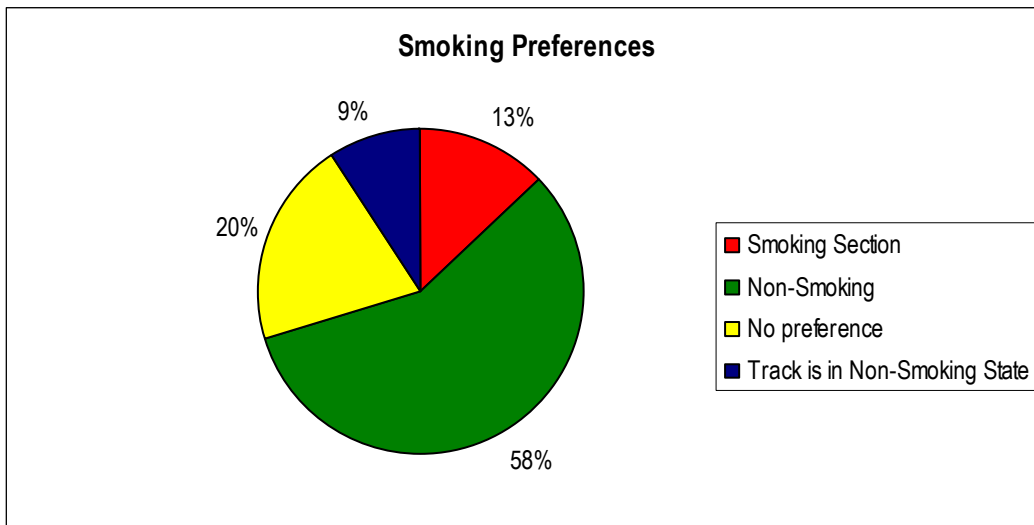
Further analysis was completed to determine if age affected the amount of money spent on food and beverages. Those in the older age groups are more likely to spend more than those who are younger, however none of the age groups presented a dramatic deviation from the full analysis above.

Age Group	Spending	# of Respondents	% of Respondents
18-35	\$0	7	10.6%
	\$1-\$5	10	15.2%
	\$6-\$15	29	43.9%
	\$16-\$25	12	18.2%
	\$26+	8	12.1%
			<hr/> 66
36-55	\$0	10	4.6%
	\$1-\$5	40	18.4%
	\$6-\$15	83	38.2%
	\$16-\$25	43	19.8%
	\$26+	41	18.9%
			<hr/> 217
56-75	\$0	10	6.0%
	\$1-\$5	27	16.2%
	\$6-\$15	53	31.7%
	\$16-\$25	34	20.4%
	\$26+	43	25.7%
			<hr/> 167
76+	\$0	0	0.0%
	\$1-\$5	4	28.6%
	\$6-\$15	3	21.4%
	\$16-\$25	4	28.6%
	\$26+	3	21.4%
			<hr/> 14

An analysis was also completed to determine if frequency of a customer's visit was a determinant in how much money they may spend on food and beverages. Those who are attending only once or twice a year are more likely to spend more money on food and beverages while at the track. Not surprisingly, those who visit the track more than once a week are not spending much (if any) money on food or beverages.

Smoking or Non-smoking?

The non-smoking section received the highest number of responses with 58%. Only 9% of patron's noted that their track falls in a state that has gone completely non-smoking. There is a great deal of confusion on the part of customers with this issue. Within the same track, there were times all four answers appeared in the data set. Some of the improvements that were suggested by the respondents included having a more defined smoking area or enforcing the non-smoking areas better. Only 61 people (or 13%) are sitting in the smoking sections.

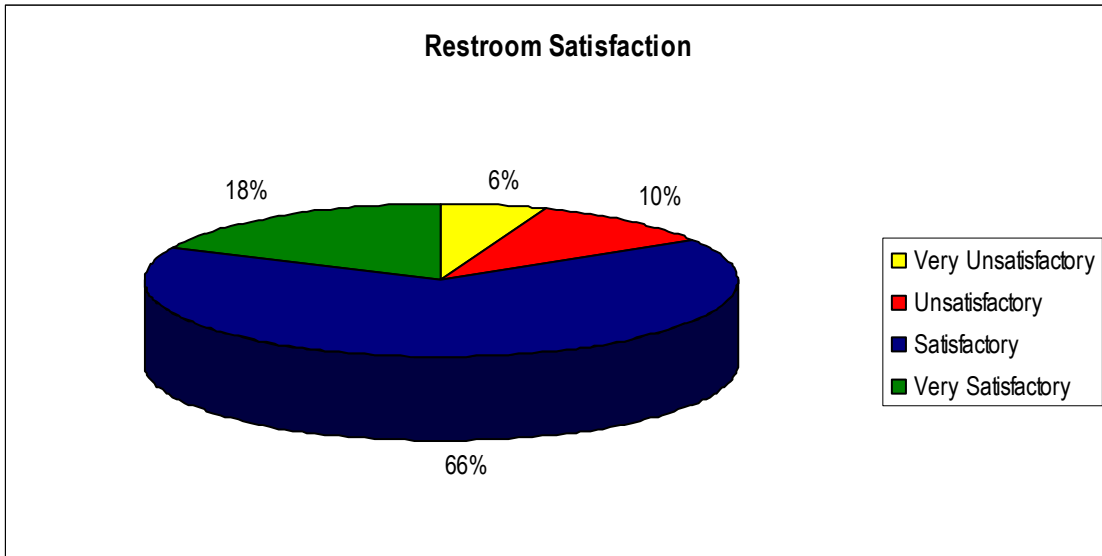


Statistics

Smoking Preference	Number of Respondents
Smoking Section	61
Non-Smoking	265
No preference	95
Track is in Non-Smoking State	43
	464

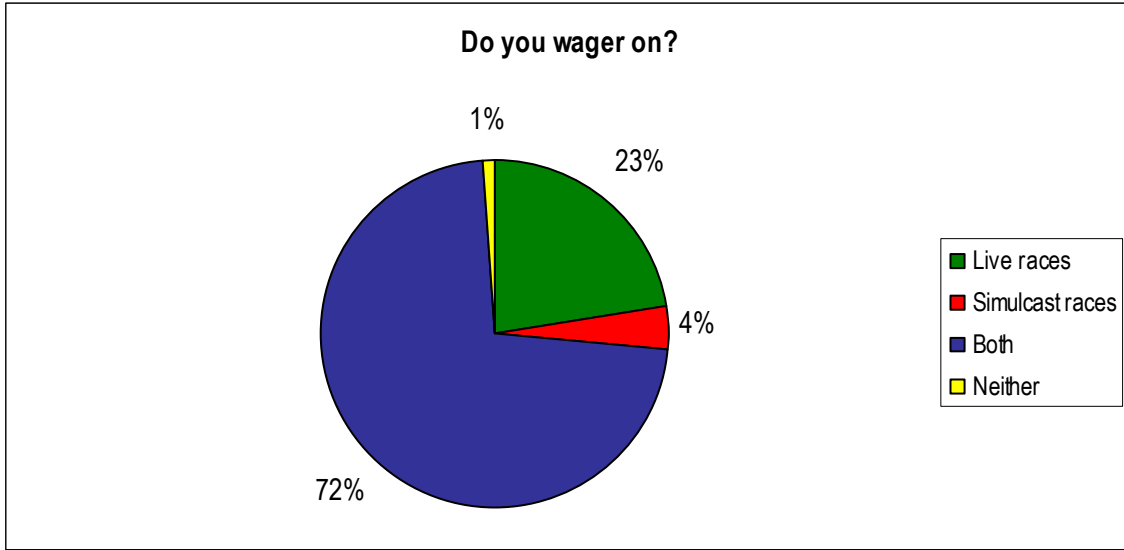
Restroom Satisfaction

Tracks are doing a good job in keeping the restrooms clean and tidy. Over 80% of patrons thought that their track did an adequate or good job in keeping the restrooms in good condition. Only 10% and 6% felt that the bathrooms were unsatisfactory and very unsatisfactory, respectively.



Live & Simulcast Racing Wagering

Nearly 3 out of 4 of customers are wagering on both live and simulcast racing. This fact enforces the importance of a good simulcast line-up as well as quality live racing. Surprisingly, 23% of the participants said that they only wagered on live racing. A much smaller percentage (4%) is coming to the track to wager on simulcasting only.

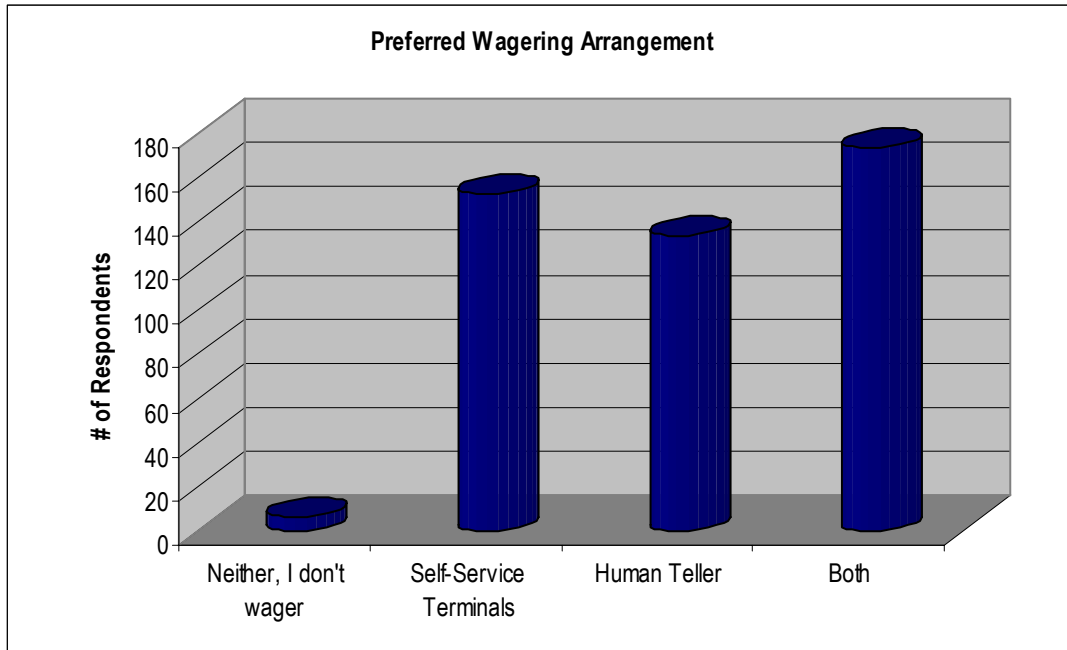


Statistics

Wagering	Number of Respondents
Live races	105
Simulcast races	18
Both	336
Neither	5
	464

Human Tellers vs. Self-Serve Machines

Where customers are placing wagers is important for tracks to know. The answers to which system patrons are using to place wagers resulted with evenly spread data. Approximately 20 votes separated each of the choices as shown below in the chart. The largest percentage is those who use both the self-serve and the human tellers.

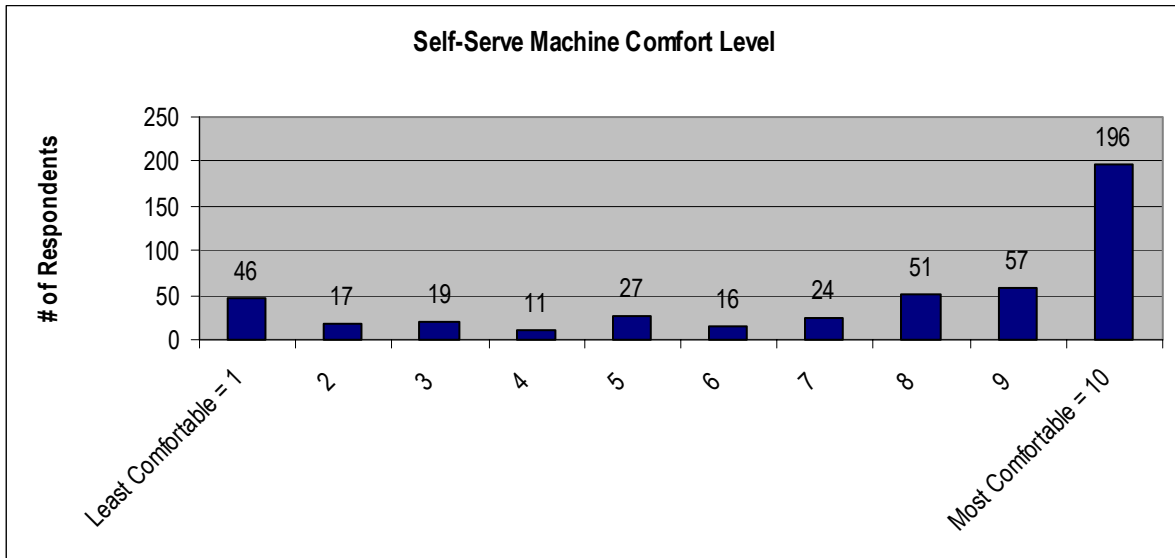


Statistics

Preferred Wagering Arrangement	Number of Respondents	% of Respondents
Neither, I don't wager	6	1.3%
Self-Service Terminals	152	32.8%
Human Teller	133	28.7%
Both	173	37.3%
	464	100.0%

Comfort Level using Self-Serve Machines

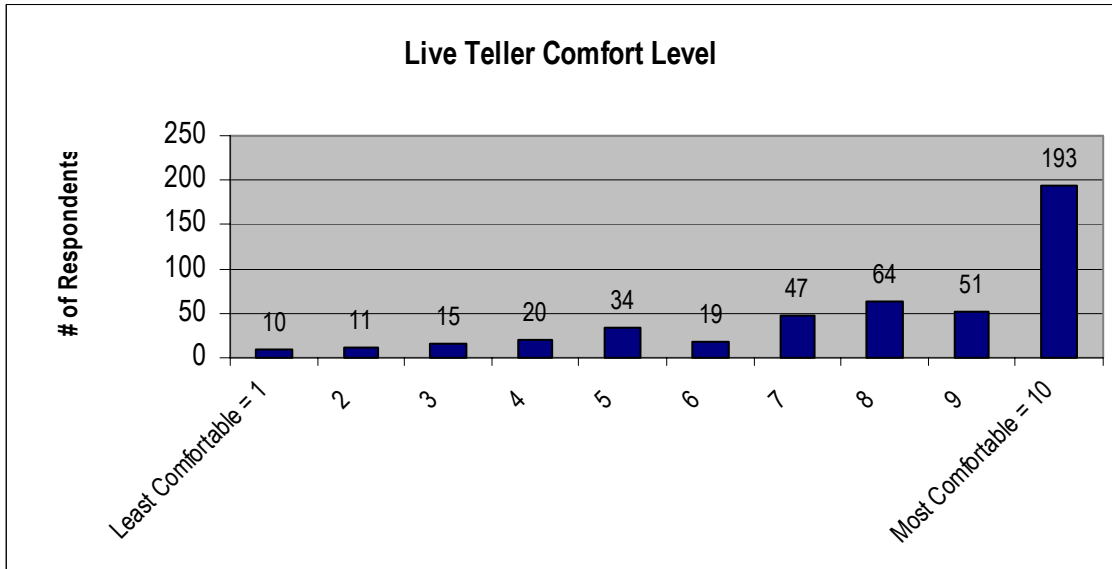
More than 300 respondents said that they are either using self-serve machines for their wagering or using a combination of machines and human tellers. As these numbers are high, so are the comfort levels in which respondents had with the self-serve machines. Over 74% indicated a score of 6 or above on a 1 to 10 scoring system with 1 being not comfortable at all and 10 feeling very comfortable using the self-serve machines. The mean score was 7.47.



Statistics		
Comfort Level Using Self-Serve Machines	Number of Respondents	% of Respondents
Least Comfortable = 1	46	9.9%
2	17	3.7%
3	19	4.1%
4	11	2.4%
5	27	5.8%
6	16	3.4%
7	24	5.2%
8	51	11.0%
9	57	12.3%
Most Comfortable = 10	196	42.2%
	464	100.0%

Comfort Level using Human Tellers

Respondents felt more comfortable using a human teller for their wagering as opposed to the self-serve machine. Over 80% indicated a score of 6 or above on a 1 to 10 scoring system with 1 being not comfortable at all using human tellers and 10 feeling very comfortable. Not surprisingly, the mean score of 7.91 is slightly higher than 7.47, which is the comfort level of the self-serve machines.



Statistics

Comfort Level Using Human Tellers	Number of Respondents	% of Respondents
Least Comfortable = 1	10	2.2%
2	11	2.4%
3	15	3.2%
4	20	4.3%
5	34	7.3%
6	19	4.1%
7	47	10.1%
8	64	13.8%
9	51	11.0%
Most Comfortable = 10	193	41.6%
	464	100%

Self-Serve Machines vs. Tellers: Further Analysis

A further analysis was completed to determine if age had an influence over which wager placing system each age group was more likely to use and their corresponding comfort levels using it. Those in the 18-35 age range who chose that they primarily use the self-serve terminals to make wagers resulted in a mean comfort level score of 8.05. Peculiarly, this group had a greater comfort with using human tellers. In fact, those that use human tellers or both options had a greater comfort level with the tellers.

Surprisingly, those in the 36-55 age group who primarily use the self-serve machines has the lowest comfort level of all (self-serve) groups in using the machines. This group was nearly a point below that of their younger peers registering a mean comfort level of 7.09.

The 56-75 age group had the highest comfort level of using the self-serve machines than all of the other (self-serve) groups. Those who answered that they use both the machines and the tellers equally had a higher comfort level with the machines over the tellers, which is not the case with the two younger groups.

The oldest age group, despite the smaller number of respondents, had high comfort levels using both self-serve machines and tellers.

In conclusion, it appears that those who prefer self-serve machines over using a human teller, are not more comfortable with the machines.

Age Groups	Wager Placing	# of Respondents	% of Respondents	Mean Comfort - Self-Serve	Mean Comfort - Tellers
18-35	Self-Service Terminals	21	31.8%	8.05	8.62
	Human Teller	17	25.8%	7.65	8.88
	Both	27	40.9%	6.85	8.26
	Neither, I don't wager	1	1.5%		
	Total	66	100.0%		
36-55	Self-Service Terminals	79	36.4%	7.09	8.13
	Human Teller	54	24.9%	7.50	7.78
	Both	80	36.9%	7.59	7.76
	Neither, I don't wager	4	1.8%		
	Total	217	100.0%		
56-75	Self-Service Terminals	49	29.3%	8.38	7.29
	Human Teller	58	34.7%	6.76	8.28
	Both	59	35.3%	7.66	7.22
	Neither, I don't wager	1	0.6%		
	Total	167	100.0%		
76+	Self-Service Terminals	3	21.4%	7.67	8.00
	Human Teller	4	28.6%	6.75	9.00
	Both	7	50.0%	9.29	9.00
	Neither, I don't wager	0	0.0%		
	Total	14	100.0%		

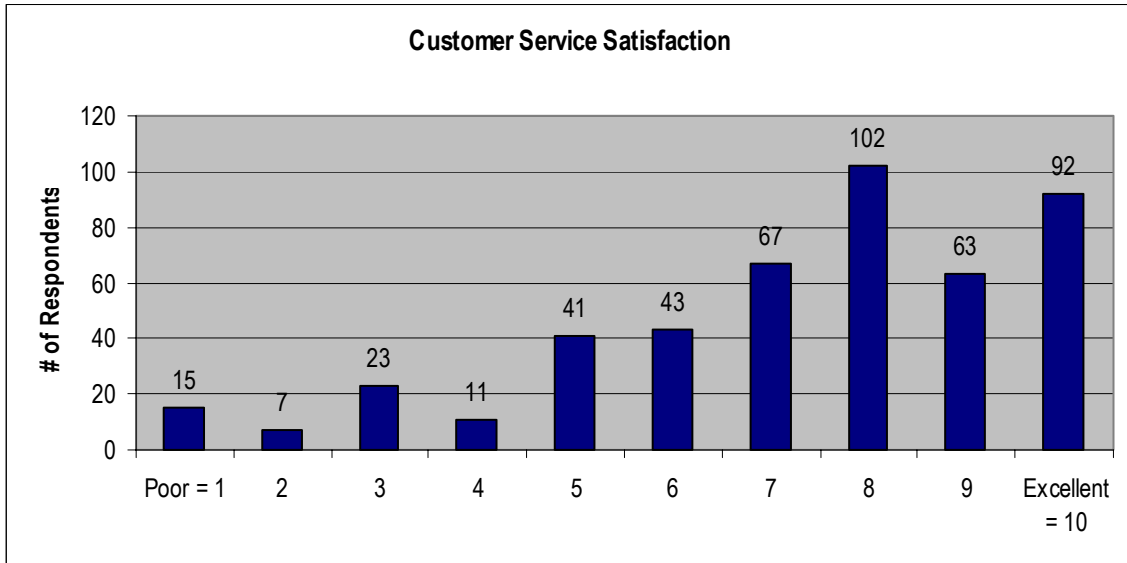
An analysis was completed examining how often customers are going to the track and their preferred method of placing wagers. Not surprisingly those who are attending the track only once or twice a year or once a month are more likely to choose a human teller

for their betting needs. Those who are attending more frequently are choosing either the self-service machines or both machines and tellers for their wagering.

Frequency to the Track	Wagering Preference	Number of Respondents	% of Respondents
Once or twice a year	Neither, I don't wager	0	0.0%
	Self-Service Terminals	16	24.2%
	Human Teller	26	39.4%
	Both	24	36.4%
		<hr/> 66	100.0%
Once a month	Neither, I don't wager	1	0.9%
	Self-Service Terminals	26	24.5%
	Human Teller	42	39.6%
	Both	37	34.9%
		<hr/> 106	100.0%
Once a week	Neither, I don't wager	1	0.8%
	Self-Service Terminals	52	44.1%
	Human Teller	25	21.2%
	Both	40	33.9%
		<hr/> 118	100.0%
More often than once a week	Neither, I don't wager	4	2.3%
	Self-Service Terminals	58	33.5%
	Human Teller	39	22.5%
	Both	72	41.6%
		<hr/> 173	100.0%

Comfort Level with Customer Service

Customer service is a vital piece for tracks. If there is poor customer service, tracks go through the risk of losing more customers to other entertainment options. Slightly over 79% indicated a score of 6 or above on a 1 to 10 scoring system with 1 being poor and 10 being excellent. The mean score was 7.27, which although a good score, was the lowest of the rating questions.

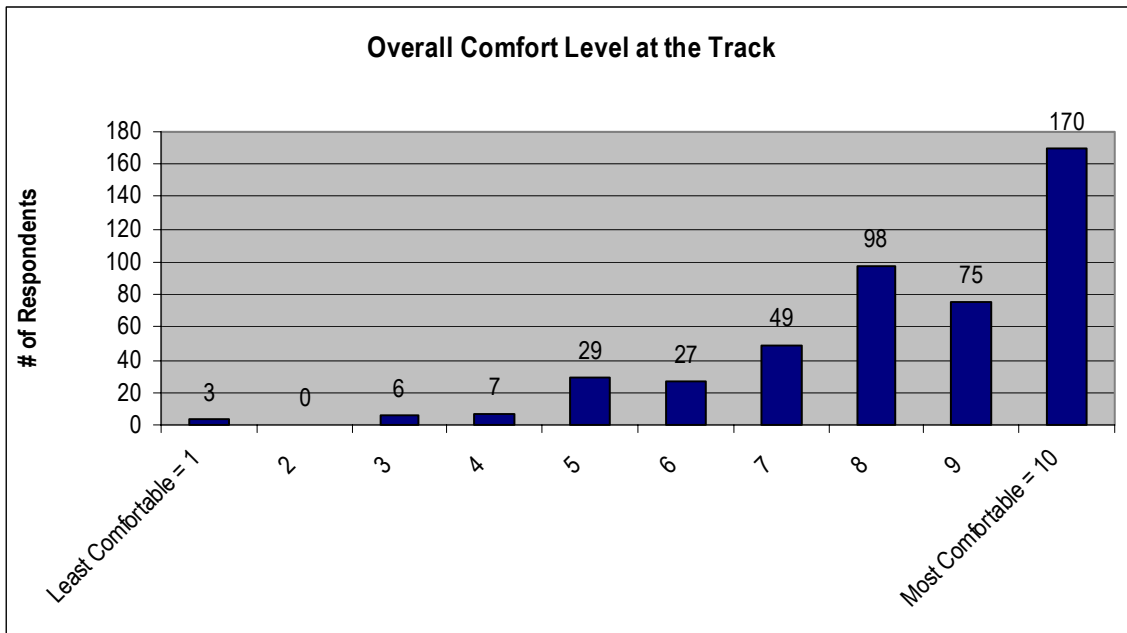


Statistics

Customer Service Comfort Level	Number of Respondents	% of Respondents
Poor = 1	15	3.2%
2	7	1.5%
3	23	5.0%
4	11	2.4%
5	41	8.8%
6	43	9.3%
7	67	14.4%
8	102	22.0%
9	63	13.6%
Excellent = 10	92	19.8%
	464	100%

Overall Comfort Level

Tracks are doing a good job in making sure customers know where various locations are at the track, making them feel comfortable placing wagers, and overall making them as comfortable as possible. Over 90% indicated a score of 6 or above on a 1 to 10 scoring system with 1 being not comfortable and 10 feeling very comfortable. The mean score is very high at 8.31.



Statistics

Overall Track Comfort Level	Number of Respondents	% of Respondents
Least Comfortable = 1	3	0.6%
2	0	0.0%
3	6	1.3%
4	7	1.5%
5	29	6.3%
6	27	5.8%
7	49	10.6%
8	98	21.1%
9	75	16.2%
Most Comfortable = 10	170	36.6%
	464	100.0%

Overall Comfort Level: Further Analysis

A further analysis was completed to determine if those that are attending the track more frequently are more comfortable. Examining the table from above, 73.9% reported a score of 8-10. As shown below, those who are attending the track more than once a week scored slightly below the overall average. This group also scored below all of the other groups. Those who are attending more than once a week reported the lowest scores. Almost 14% recorded a score of 5 or less.

Frequency to the Track	Overall Comfort Level	Number of Respondents	% of Respondents
Once or twice a year	1-3	1	1.5%
	4-5	3	4.5%
	6-7	13	19.7%
	8-10	49	74.2%
		<hr/>	66
Once a month	1-3	1	0.9%
	4-5	5	4.7%
	6-7	21	19.8%
	8-10	79	74.5%
		<hr/>	106
Once a week	1-3	0	0.0%
	4-5	10	8.5%
	6-7	17	14.5%
	8-10	90	76.9%
		<hr/>	117
More often than once a week	1-3	7	4.0%
	4-5	17	9.8%
	6-7	25	14.5%
	8-10	124	71.7%
		<hr/>	173

Changes & Improvements

This section deals with the suggested improvements patrons included with their survey for question 19. The improvements were categorized into six categories:

- Racing
- Wagering
- Facilities
- Food and Beverage
- Other
- None

Due to the unlimited nature of suggestions, percentages are slightly deflated. There are a significant number of suggestions if the percentage is in the neighborhood of 10%.

Racing

In the area of racing related improvements 25% suggested increasing racing dates. This area garnered the most comments and suggestions. However, although this is what the customer appears to want, it is directly opposite the trend in racing over the last fifteen years. According to the Jockey Club Fact Book, the number of races peaked in 1990 with 79,971 and has declined to 58,858 in 2004, a decrease of approximately 17% in the amount of races. This reflects a cut in race days over the past fifteen years resulting in fewer races.

The second highest suggested improvements dealt with the dissemination of racing information. Of racing related suggestions, 11% wanted more racing information including current scratches and wagering information. The third most common request was larger field sizes at 9%. The customer's desire for larger field size also parallels the desire of track management to increase the field sizes to increase handle.

Wagering

In the area of wagering, 39% of wagering related comments requested more human tellers although the use of self-serve terminals exceeded human tellers by 4.1%. According to our data, those that use human tellers or both want more human tellers. While those that utilize the self-serve machines want higher quality and quantity of self-serve machines. Slightly fewer suggestions at 29% were comments dealing with self-service terminals. Of the 29%, about half wanted higher quality self-serve machines and the other half wanted more.

In the area of wagering, 16% of the wagering comments specifically asked for lower takeout. This confirms the theory in the industry that the racing patrons are aware of takeout and want a lower percentage.

Facilities

From the data, facility improvements accounted for the highest percentage of comments at 40.3%. As can be expected, free parking was one of the top suggestions for improvement at 12%. Also there were a surprisingly high number of respondents

suggesting more or improved grandstand seating at 11%. Third in comment numbers was the request for higher quality and quantity of televisions at 9%.

Food and Beverage

Another prospect tracks may consider is taking advantage of “food opportunities.” 76% of racing patrons spend over \$6 on food and beverage and 40% of the customers are spending over \$16 each trip. There is potential for expansion in this area because another complaint of customers is the poor food. According to improvement comments in the area of food and beverage, 43% were not satisfied with the quality of food. In a 2005 Restaurant Report article, “Elements of Successful Restaurant Interior Design” by Ron Gorodesky and Eileen Madigan it is reported that there are four successful trends in restaurant design including:

Entertainment-themed restaurants - Planet Hollywood and Hard Rock Cafe are excellent examples of this trend. Also, we are currently designing a prototype restaurant for Philadelphia Park, a thoroughbred racetrack and The Turf Clubs, off-track wagering facilities. We are creating a sports entertainment venue that serves food and beverages. Activities in this venue will not be limited to horse racing - the venue will have the capability to simulcast all forms of entertainment including concerts and sporting events.

In addition to wanting quality food and beverages, 37% of customers were also looking for lower food and beverage prices.

Other

Slots and alternative forms of gambling were lumped into Other and accounted for 25% of comments. Most of the suggestions for slots also made the connection that the slots would increase the purses. The second highest amount of comments dealt with player compensation and player rewards at 16%.

None

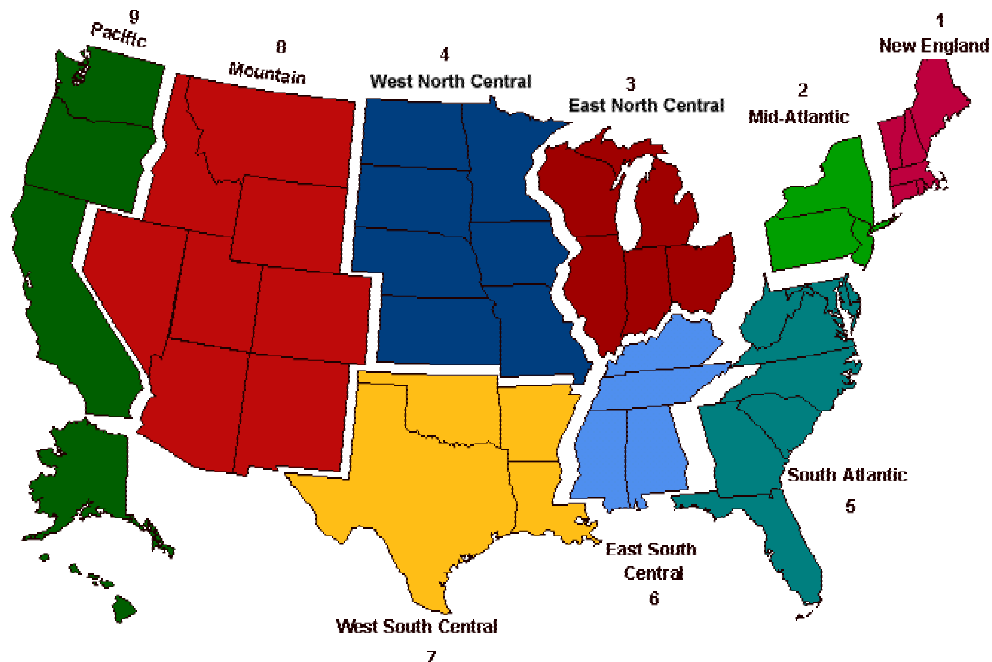
This was an encouraging area of improvement. Of the 464 respondents, 45 felt there was no need for improvement. However, they only account for 9% of all respondents.

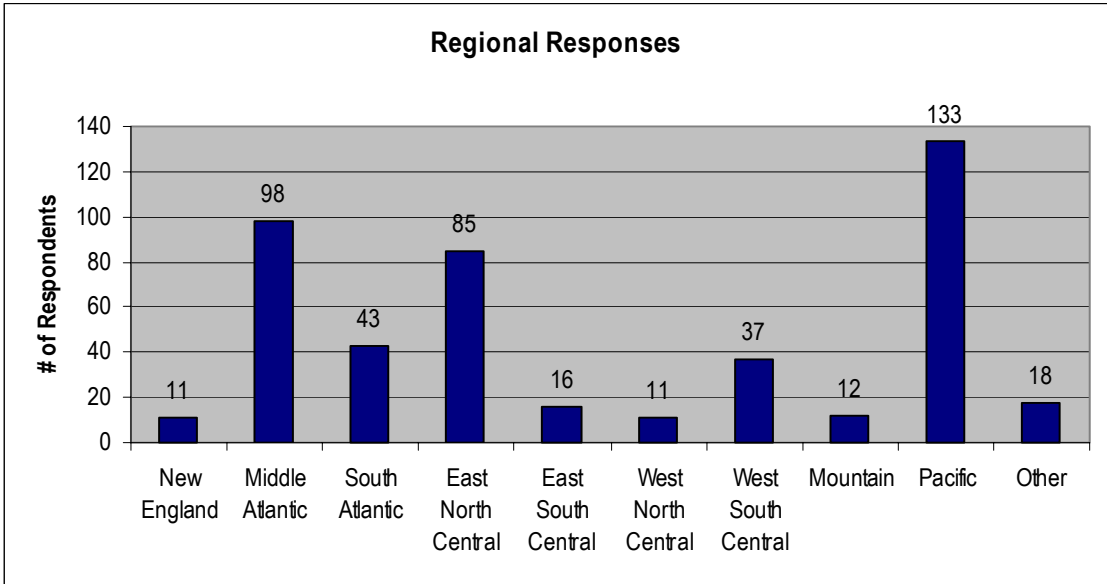
Regional Analysis

The full report provided an overview of how customers feel about their track experiences. An examination into some of the categories on a regional level is now provided. Please note that some of the regions only generated a few responses and that if there were more surveyed that some of the data may shift closer to the normal population.

The data has been split regionally plus one extra category which includes the few responses from Canada and Puerto Rico, and those undistinguishable from the survey. The nine regions that divide the United States are:

- New England (Maine, New Hampshire, Vermont, Massachusetts, Connecticut, Rhode Island)
- Middle Atlantic (New York, Pennsylvania, New Jersey)
- East North Central (Michigan, Wisconsin, Illinois, Indiana, Ohio)
- West North Central (Minnesota, North Dakota, South Dakota, Iowa, Nebraska, Missouri, Kansas)
- South Atlantic (Maryland, Delaware, West Virginia, Virginia, North Carolina, South Carolina, Georgia, Florida)
- East South Central (Kentucky, Tennessee, Alabama, Mississippi)
- West South Central (Arkansas, Oklahoma, Texas, Louisiana)
- Mountain (Montana, Idaho, Wyoming, Colorado, Utah, Nevada, Arizona, New Mexico)
- Pacific (Alaska, Washington, Oregon, California, Hawaii)



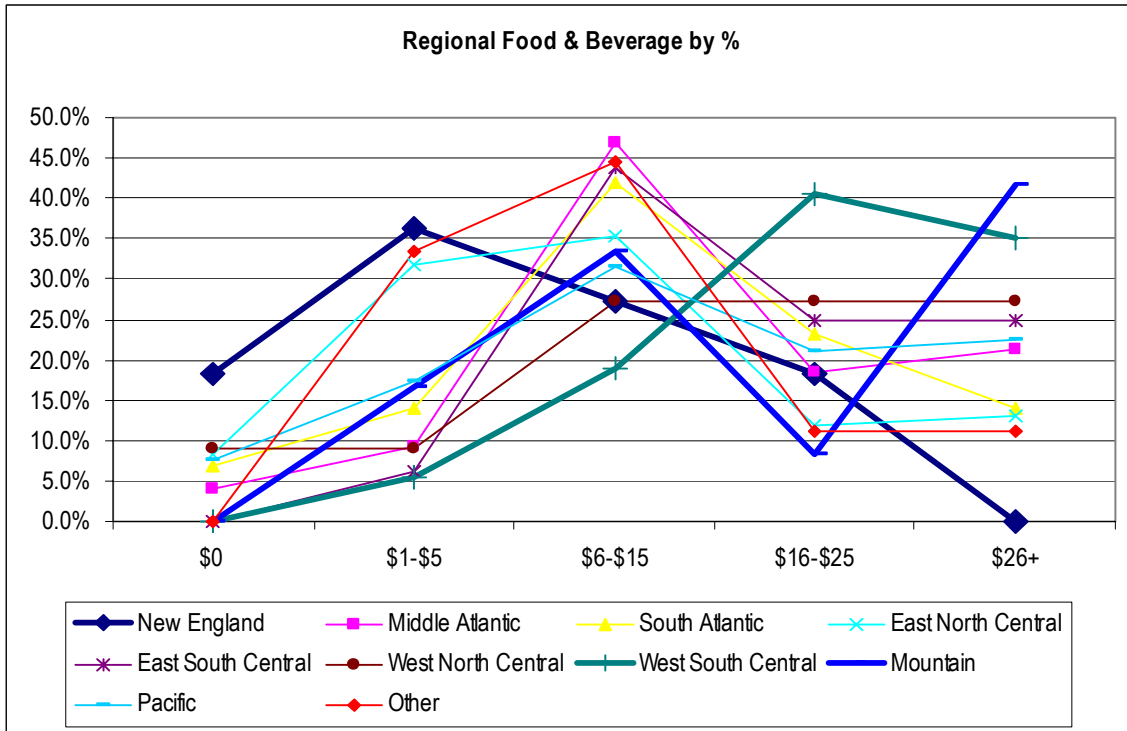


Statistics

Region	Number of Respondents	% of Respondents
New England	11	2.4%
Middle Atlantic	98	21.1%
South Atlantic	43	9.3%
East North Central	85	18.3%
East South Central	16	3.4%
West North Central	11	2.4%
West South Central	37	8.0%
Mountain	12	2.6%
Pacific	133	28.7%
Other	18	3.9%
	464	100.0%

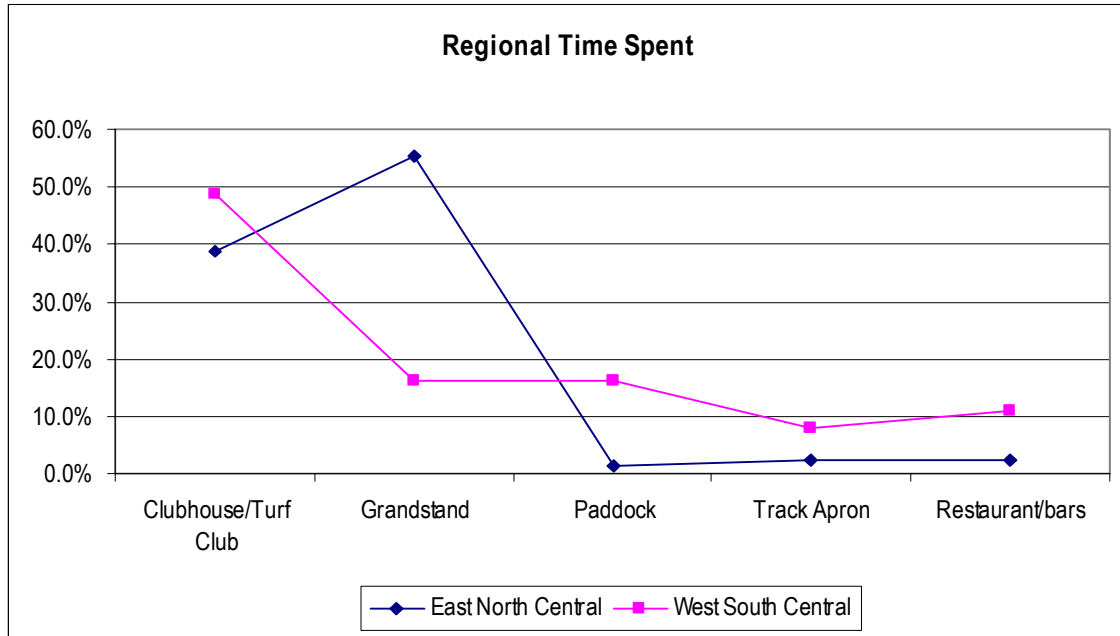
Regional Food & Beverage

The graph below shows how all of the regions are spending on food and beverages. Most regions follow the same pattern as the full report however three of the regions were quite different. Those in the New England area are less likely to spend money on food and beverages. Over 50% of patrons will spend zero or between \$1-\$5. The West South Central region is the biggest spender while those in the Mountain region are most likely to spend over \$26 while at the track.



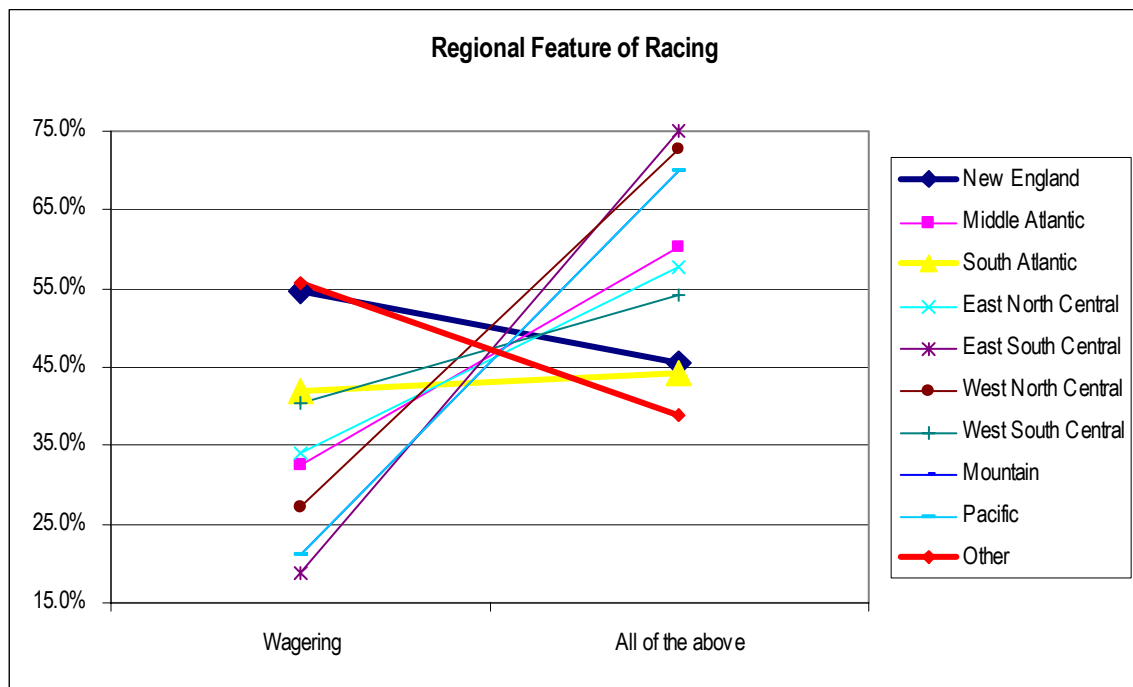
Regional Differences in Where Patrons are Spending Time

Respondents also follow the same pattern as the full group where approximately 40% spend their time in the clubhouse while another 40% spend their time in the grandstand. Those in the West South Central are more likely to be in the clubhouse than the grandstand. These customers are also noted in the previous section for spending more money on food and beverages. The respondents in the East North Central region are more likely to be in the grandstand (55%) than in the clubhouse (39%).



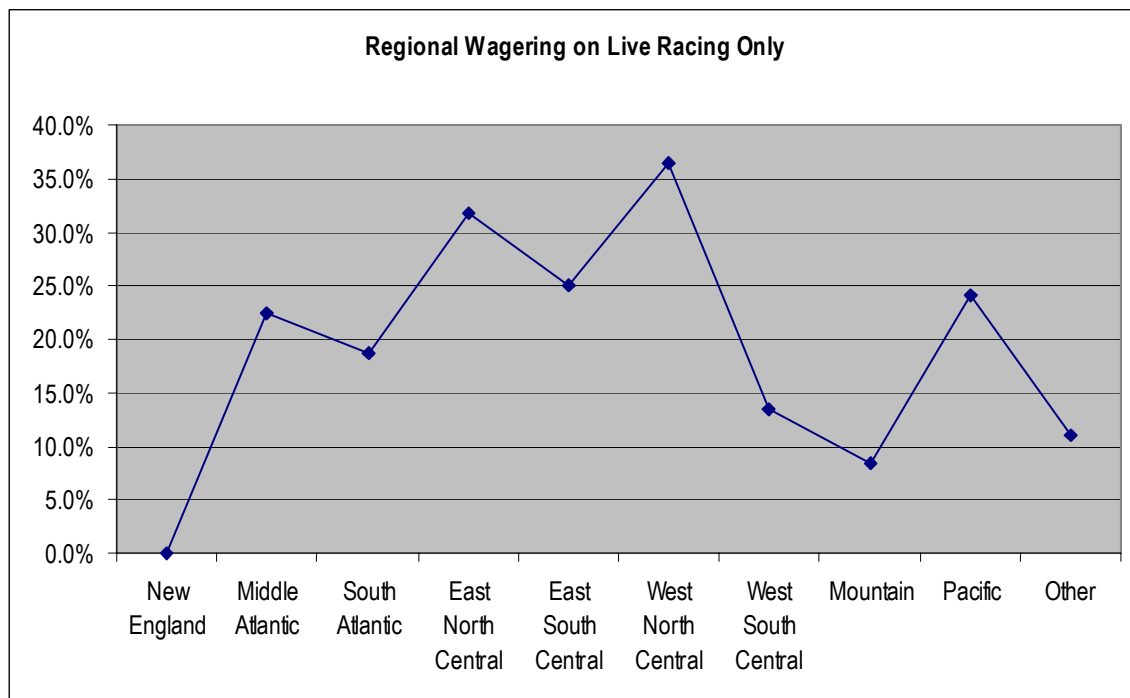
Regional Feature for Attending the Races

The New England and the Other regions are going against the flow for the most important feature to attend the races. These respondents feel that wagering is more important than sport or entertainment factors. The South Atlantic region showed a close proximity of answers between wagering and all choices.



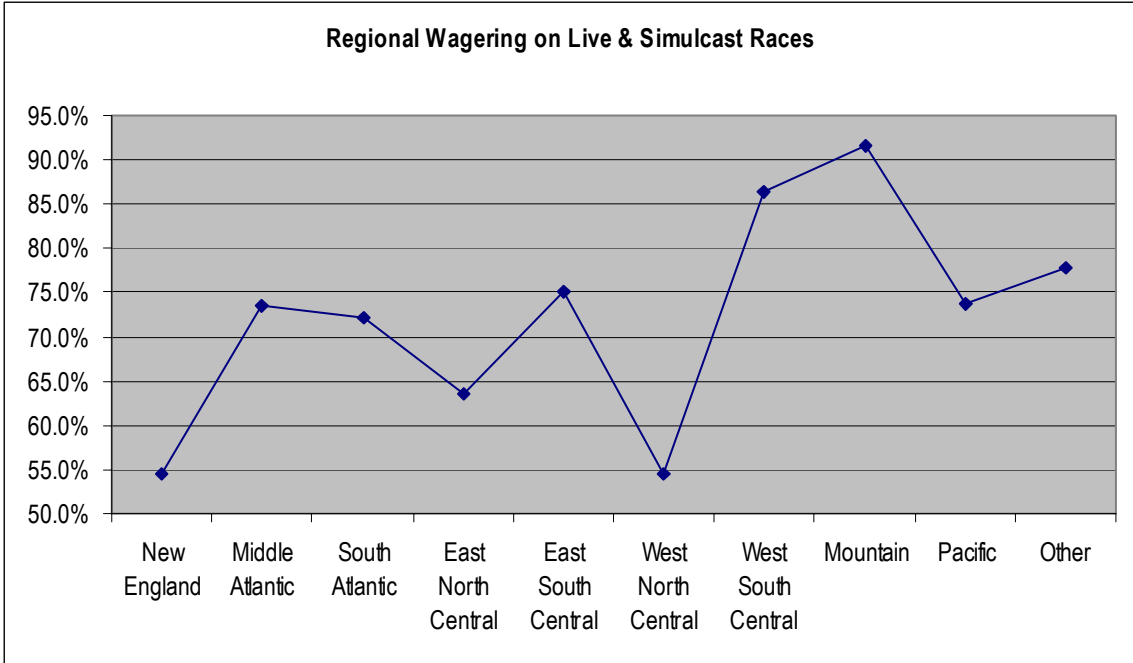
Regional Differences in Wagering on Live or Simulcast Racing

Wagering on live and/or simulcast races on a regional level can show trends if regions are providing a good product. Those in the West North Central region are far more likely to have customers only betting on live racing. Those in the Mountain and West South Central regions have a high percentage of patrons who are wagering on both live and simulcasting. Again those in the West South Central region are spending more time wagering on both types of races, more time in the clubhouse, and more on food and beverages.



Statistics

Region	Live Races
New England	0.0%
Middle Atlantic	22.4%
South Atlantic	18.6%
East North Central	31.8%
East South Central	25.0%
West North Central	36.4%
West South Central	13.5%
Mountain	8.3%
Pacific	24.1%
Other	11.1%

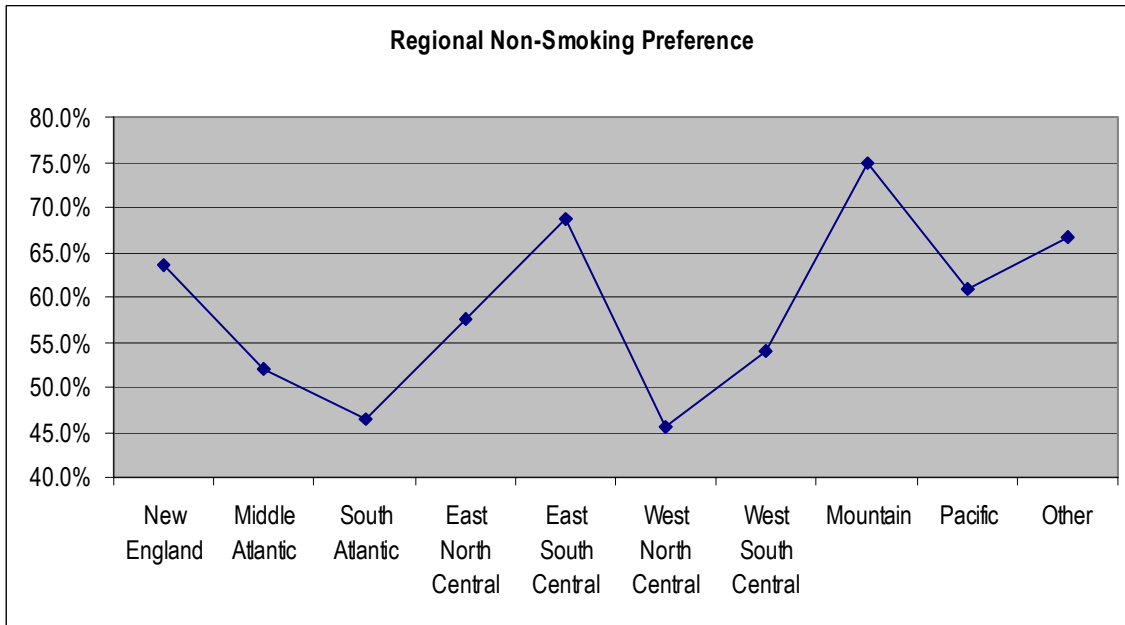
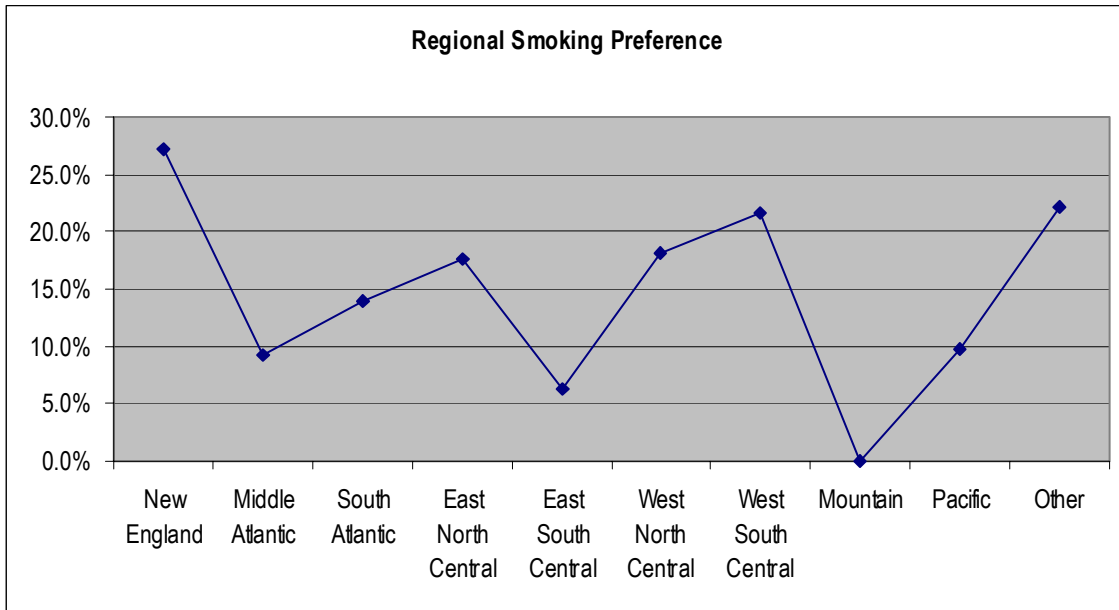


Statistics

Region	Wagering on Both
New England	54.5%
Middle Atlantic	73.5%
South Atlantic	72.1%
East North Central	63.5%
East South Central	75.0%
West North Central	54.5%
West South Central	86.5%
Mountain	91.7%
Pacific	73.7%
Other	77.8%

Regional Smoking Preferences

The full report shows that 13% of patrons prefer the smoking section. Most regions were around this area although the New England region had a mildly higher smoking preference while the Mountain region had a significantly lower amount of patrons that smoked. Subsequently, the Mountain region scored 75% on a preference for the non-smoking section. The South Atlantic (46%) and West North Central (45%) regions were below the full report average of 58% preference of non-smoking sections.



Future Considerations

There are opportunities tracks can extract from the results of this survey. One of these may include additional research into improvement areas or additional research from the full report data. Additional suggestions may include:

- Improved/clearer smoking policies
- Food and beverage selections, variety, and price
 - Consider bringing in well-known restaurants as a partnership
- Marketing opportunities to attract more businesses
 - Use creative techniques to attract those already coming to the track to bring work colleagues
- Study marketing results vs. increase in wagering for offering discounts on parking, etc on certain days
- Consider hiring a host similar to the casinos to make the big players feel welcome and wanted

Study Limitations

While we recognize that our survey had limitations, overall our study achieved its objectives. Customer Comforts was an effort to identify the comfort level of the racing patron and what their perceptions are of individual track facilities and environments.

In retrospect there were some limitations to our survey. The first, and foremost being that our pool of customers came from the Daily Racing Form's online database. At first glance, this would not appear to affect data. However, it can be assumed that the Daily Racing Form customers are already racing fans and wager frequently. They utilize the Form's information for wagering purposes and are more likely to be familiar with horse racing. Based on this assumption, we concluded that the 32% of people that attend races for wagering purposes is inflated. If the survey were to be conducted again, we would distinguish between DRF respondents and track respondents. In this way we could also judge the effectiveness of different channels of communication with customers.

In designing the survey, we had hoped to adequately cover all racing breeds. The final product however ended up with an angle to the thoroughbred tracks. If time and resources were unlimited a different survey for each breed would have presented the most optimal results.

We speculate that another limitation of DRF's database of customers is that our data regarding sex and age more accurately measures the demographics of the Daily Racing Form's customer as opposed to the common racetrack attendees.

The questions asked on the survey also were limiting in themselves. Having an open ended question asking racing patrons to list one improvement garnered 464 different responses that were difficult to categorize. While probably helpful to individual tracks, as a whole, it was difficult to identify specific areas of improvement because the suggestions covered a large range.

While the survey can be counted as a success due to Daily Racing Form's involvement, another limitation to this survey was that as surveyor we had no control over what participating tracks did to solicit responses. We made suggestions for methods to distribute the survey, but we left it to the convenience of the track. Some tracks did a phenomenal job placing advertisements and website announcements while others agreed to participate yet we received few if any responses.

The final limitation was that when split regionally some of the regions had more responses than others. This should be taken into consideration when comparing the regions. Some regions only represent a small number of respondents.

Appendix A

- 1.) Survey link in Daily Racing Form
- 2.) Customer Information Card
- 3.) Individual Track Program Advertisements
- 4.) Online Survey Questions
- 5.) Prize Rules and Regulations
- 6.) Special Thanks

We would like to take this opportunity to thank the following people for all of your assistance in helping us with our senior project. Without you, this report would not exist.

Doug Reed, Adam Michel, Mandy Minger, Joe Scurto, Monique Mahler, Theresa Hume, Tom Manning, Derron Heldt, Chris McErlean, Darlene Jelen, Susie Sourwine, Dale Day, Mike Ziegler, Carrie Everly, Brent Reitz, Dave Johnson, and Nate Newby