



PENN
SCHOEN
BERLAND



Perceptions of Horse Racing Medication Reform

Survey Findings Among Horse Bettors and the General Public

Robert Green, Principal
rgreen@ps-b.com

Sam Hagedorn, Senior Project Manager
shagedorn@ps-b.com

PENN SCHOEN BERLAND
1110 VERMONT AVENUE, NW
SUITE 1200
WASHINGTON, DC 20005

NEW YORK • WASHINGTON • DENVER • SEATTLE • LOS ANGELES • SAN FRANCISCO • LONDON • HONG KONG

Methodology for Public Survey

This report combines findings from a survey of U.S. adults and a survey of Thoroughbred horseracing bettors on behalf of the Coalition for Horse Racing Integrity. The two surveys had different questionnaires, but some items overlapped between the studies.

Penn Schoen Berland (PSB) conducted online interviews among n=1,226 American adults ages 18+ on March 31- April 7, 2015. The margin of error for this study is +/- 2.80 % at the 95% confidence level and larger for subgroups.

PSB also conducted online interviews among n= 396 known bettors or handicappers, contacted from a select industry email list of proven horseplayers on April 27-May 6, 2015. The interviews include n= 59 “big bettors,” who wager more than \$5,000 per month on horseracing. The margin of error for this study is +/- 4.92% at the 95% confidence level for bettors and larger for subgroups.

Some percentages may add to more or less than 100% due to rounding.

Definition of Crosstabs

Bettor Crosstabs	Definition of crosstab	% total
All	Identify themselves as bettors or handicappers, contacted from a select industry email list of proven horseplayers	100
Big Bettors	Bettors who wager \$5,000 or more each month	15

U.S. Adult Crosstabs		Definition of crosstab	% total
% U.S. adults		All adults in United States (18+)	100
Gender	M	Male	49
	F	Female	51
Age	18-39	Age 18-39	36
	40-59	Age 40-59	37
	60+	Age 60 and over	28
Key Audience	Likely Voters	Registered voter and self-identifies as very or somewhat likely to vote in next election for President and Congress	84
	Sports Fans	Considers themselves to be fans of sports	68
	Animal Welfare Supporters	Considers themselves to be very interested in animal welfare issues and has taken some form of action supporting of animals within last year or so	30
	Horse Racing Fans	Identify themselves as fans of horseracing, and either; go to tracks at least once per year, or bet on horseracing at least once per year or so	25

Comparisons with Other Sports (US PUBLIC ONLY)

1. **(ALL SAW THE FOLLOWING QUESTION)** Do you have a very favorable, somewhat favorable, not very favorable, or not at all favorable view of each of the following individuals and organizations?

- 1) Very favorable
- 2) Somewhat favorable
- 3) Somewhat unfavorable
- 4) Very unfavorable
- 5) Don't know / No opinion

(%) U.S. adults	Very Favorable	Somewhat favorable	Somewhat unfavorable	Very unfavorable	Don't know / No opinion
The Olympics	42	40	7	2	8
National Football League (NFL)	29	35	14	11	11
Major League Baseball (MLB)	26	39	13	9	14
US Anti-Doping Agency (USADA)	17	30	9	6	38
NASCAR	15	36	17	16	17
Thoroughbred horseracing	14	33	14	15	24
World Series of Poker	12	27	15	14	33
Professional cycling such as the Tour de France	8	32	21	12	26
Greyhound dog racing	5	20	22	28	25

2. Thoroughbred horseracing (crosstab details)

(% U.S. adults)	Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans	
	M	F	18-39	40-59	60+					
Very favorable	14	18	10	13	13	17	15	18	23	41
Somewhat favorable	33	35	31	28	34	38	36	38	34	48
Somewhat unfavorable	14	14	14	14	16	12	14	13	14	6
Very unfavorable	15	13	18	18	14	14	14	12	15	2
Don't know / No opinion	24	19	28	27	23	20	20	19	14	3

Thoroughbred Horseracing Attributes (Bettors and U.S. Adults)

3. You will now see some questions about Thoroughbred horseracing.

We would like to know if you associate certain words, phrases, or attributes with Thoroughbred horseracing. Using your mouse, please drag the phrase that appears on screen into the “applies” or “does not apply” category. Please do this for each phrase until you have completed the set.

(%)	(%) Among Bettors		(%) Among U.S. Adults	
	Applies	Does Not Apply	Applies	Does Not Apply
Fun to watch	98	2	63	37
Exciting	97	3	72	28
For people like me	92	8	39	61
Drugs	91	9	40	60
Doping / PEDs	90	10	44	56
Good for betting	82	18	80	20
Fair competition	65	35	69	31
Easy to follow	42	58	65	35
Rigged	40	60	33	67
Unsafe	37	63	39	61
Popular	19	81	68	32

Top Issues with the Sport (Bettors Only)

4. In your opinion, how important are the following issues for the Thoroughbred horseracing industry to address?

(%) Among Bettors	Very Important	Somewhat Important	Not very Important	Not at all Important
Takeout rates	80	17	4	0
Drugs	77	17	5	1
Integrity issues / corruption	75	19	5	1
No leadership	65	29	5	1
Image of the sport	63	28	9	1
Tote system integrity	62	27	9	2
Patchwork of rules	60	32	7	1
Injuries	39	41	16	3
Bad or outmoded tracks, racing facilities	30	49	18	3
Lack of exciting races, match-ups	29	47	21	4
Lack of government oversight	25	32	24	18

Factors When Wagering (Bettors Only)

5. Are there racetracks or states that you avoid when betting races?

(% Among Bettors)	Bettors	
	All	Big
Yes	83	86
No	17	14

6. In your handicapping, have you found that trainers show different “form” at different tracks?

(% Among Bettors)	Bettors	
	All	Big
Yes	75	78
No	25	22

7. When handicapping races at certain racetracks or states, how much do you consider the possibility of illegal drug use at that racetrack or state?

(% Among Bettors)	Bettors	
	All	Big
Consider a lot	28	41
Consider some	33	31
Consider a little	16	14
Do not consider	23	15

8. Based on your handicapping experience, do you form an opinion about whether or not trainers are using performance enhancing drugs?

(% Among Bettors)	Bettors	
	All	Big
Yes	72	80
No	28	20

9. **AMONG THOSE WHO SAID YES:** Does that opinion affect how much you bet on that race?

(% Among Bettors)	Bettors	
	All	Big
Yes, I typically bet more	4	4
Yes, I typically bet less	60	55
No, I typically bet the same amount	36	40

Uniform Medication Rules (Bettors and U.S. Adults)

(ALL SAW THE FOLLOWING) Currently each Thoroughbred horseracing state has had its own medication rules. For example, the withdrawal times for the drug clenbuterol ranges from 21 days to 48 hours, depending on which state the horse is racing in. Some horseracing organizations and state regulators have been working to develop uniform medication rules that would apply the same standards and procedures for medication violations across all states.

10. How much have you heard about efforts to have uniform medication rules across all racing states?

(% Among Bettors)	Bettors	
	All	Big
A lot	27	22
Some	50	53
A little	18	22
Nothing at all	5	3

(% U.S. adults)	Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans	
	M	F	18-39	40-59	60+					
A lot	3	4	2	4	3	2	4	5	6	11
Some	14	19	10	22	10	11	15	19	19	36
A little	14	16	13	16	15	12	14	17	23	24
Nothing at all	68	61	75	58	72	76	67	60	52	30

11. Do you support or oppose efforts to have uniform medication rules across all racing states?

(% Among Bettors)	Bettors	
	All	Big
Strongly support	86	85
Somewhat support	12	10
Somewhat oppose	2	3
Strongly oppose	1	2

(% U.S. adults)	Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans	
	M	F	18-39	40-59	60+					
Strongly support	41	43	39	32	41	52	44	44	58	55
Somewhat support	49	48	50	54	48	43	47	47	33	41
Somewhat oppose	7	7	7	10	6	4	6	6	6	4
Strongly oppose	3	2	5	4	5	2	3	3	4	0

12. Which of the following comes closest to your views:

I want to see changes to horseracing's medications policies to happen...

(%) Among Bettors	Bettors	
	All	Big
Faster than they are happening now	92	92
Slower than they are happening now	1	2
At the same pace they are happening now	7	7

(%) U.S. adults		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Faster than they are happening now	58	57	59	54	57	66	60	60	76	68
Slower than they are happening now	8	8	7	11	9	3	7	8	6	10
At the same pace they are happening now	34	34	33	36	35	30	33	32	17	22

USADA to Implement National Medication Standards (Bettors and U.S. Adults)

(ALL SAW THE FOLLOWING) Some people say the industry is moving too slowly and won't ever address its drug and integrity problems on its own. They say a third party organization such as the US Anti-Doping Agency (USADA) should create national medication standards for rulemaking, accreditation, testing, penalties, and enforcement in Thoroughbred horseracing. This change would require Federal legislation.

13. Would you say you strongly support, somewhat support, somewhat oppose, or strongly oppose legislation to create an oversight role for the United States Anti-Doping Agency (USADA) across all U.S. Thoroughbred racing jurisdictions regarding medications and performance enhancing drugs?

(% Among Bettors)	Bettors	
	All	Big
Strongly support	43	39
Somewhat support	29	27
Somewhat oppose	14	15
Strongly oppose	14	19

(% U.S. adults)	Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
	M	F	18-39	40-59	60+				
Strongly support	35	35	35	34	37	37	37	55	49
Somewhat support	48	48	49	48	47	48	48	36	42
Somewhat oppose	11	11	12	11	11	10	9	6	6
Strongly oppose	6	6	4	7	5	5	5	3	3

Demographics

(ALL SAW THE FOLLOWING) You are almost done. The following questions are for statistical purposes only. All information will be kept completely confidential.

14. In the last year or so, have you watched any of the following horse races? Please select all that apply. **(MULTIPLE RESPONSES PERMITTED)**

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
WATCHED ANY RACE	45	53	38	41	44	53	50	57	60	88
DID NOT WATCH	55	47	62	59	56	47	50	43	40	12
Kentucky Derby	41	49	34	34	42	51	45	52	54	78
Belmont Stakes	25	34	16	16	25	37	28	33	32	55
Preakness Stakes	23	31	15	14	23	35	25	30	28	48
Breeders Cup	13	17	9	11	13	15	14	18	19	38
Other Thoroughbred horse race	2	3	1	0	1	5	2	2	3	6
None of the above (EXCLUSIVE)	55	47	62	59	56	47	50	43	40	12

**Note: Survey taken prior to American Pharoah's Triple Crown wins in May-June 2015.*

15. Into which of the following categories does your age fall?

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans	Bettors	
		M	F	18-39	40-59	60+					All	Big
Under 18	*	*	*	*	*	*	*	*	*	*	0	0
18-24	13	11	15	36	-	-	11	12	12	13	1	0
25-29	8	7	9	22	-	-	7	9	12	10	3	2
30-39	15	14	16	42	-	-	13	15	13	18	6	10
40-49	18	19	17	-	49	-	18	18	19	17	14	15
50-59	19	19	18	-	51	-	20	18	19	15	30	36
60-65	8	9	8	-	-	30	9	8	9	8	16	17
65+	20	22	18	-	-	70	22	20	17	19	27	20
Prefer not to say	*	*	*	*	*	*	*	*	*	*	2	0

** not eligible for survey.*

16. Please indicate your gender.

(% U.S. adults		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans	Bettors	
		M	F	18-39	40-59	60+					All	Big
Male	49	100	-	44	51	53	51	58	37	63	93	98
Female	51	-	100	56	49	47	49	42	63	37	7	2

17. Are you registered to vote?

(% U.S. adults		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Yes	90	94	86	84	90	95	100	92	94	97
No	10	6	14	16	10	5	-	8	6	3

18. How likely are you to vote in the next federal election for President and Congress?

(% U.S. adults		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Very likely	76	78	74	65	76	89	89	79	85	83
Somewhat likely	11	11	10	15	11	4	11	11	8	11
Might or might not	6	5	7	11	5	2	-	5	3	3
Somewhat unlikely	2	3	2	2	3	1	-	2	2	2
Very unlikely	5	3	7	6	5	4	-	3	2	2

19. Regardless of how you are registered to vote, do you consider yourself a Democrat, Republican, Independent, or something else?

(% U.S. adults		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Democrat	31	30	33	33	32	29	34	32	38	35
Republican	27	28	26	22	25	35	29	28	23	26
Independent	39	39	38	42	40	33	34	38	36	38
Other	3	3	3	3	3	3	2	2	3	2

20. Do you agree or disagree with the following statement:

I consider myself to be a fan of sports.

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Strongly agree	36	52	21	39	35	35	39	53	46	62
Somewhat agree	32	30	35	30	33	34	33	47	30	30
Somewhat disagree	13	9	17	16	11	12	12	-	13	4
Strongly disagree	18	10	27	14	22	19	16	-	12	4

21. How interested are you in animal welfare issues?

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Very interested	40	33	46	43	40	34	42	43	100	61
Somewhat interested	44	47	41	43	41	48	44	42	-	32
Not very interested	12	15	9	10	13	13	11	12	-	5
Not at all interested	5	5	4	4	6	4	4	3	-	1

22. In the last year or so, have you done any of the following activities? Please select all that apply. **(MULTIPLE RESPONSES PERMITTED)**

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Donated to an animal welfare organization	25	24	26	19	27	29	28	28	56	42
Posted on social media in support of animal welfare	17	11	22	22	15	11	18	17	40	24
Signed a petition or sent an email on behalf of animal rights	16	12	21	22	14	13	17	16	40	22
Adopted a rescue pet	14	11	17	14	18	9	15	15	28	20
Rode a horse	11	10	12	13	11	7	11	13	23	24
Volunteered at an animal shelter	8	6	9	10	9	4	8	10	20	19
Other animal-related activity	4	3	5	2	3	7	4	3	8	3
None of the above (EXCLUSIVE)	51	57	45	51	49	55	48	49	-	30

23. In the last year or so, which of the following gambling activities have you done? Please select all that apply. **(MULTIPLE RESPONSE PERMITTED)**

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Purchased a state lottery ticket	47	50	45	46	48	48	51	55	60	69
Bet at a casino	32	37	27	29	33	33	35	38	43	62
Bet socially with friends	22	29	16	30	19	17	24	29	31	48
Bet at a slot machine facility	22	25	18	24	19	23	23	26	32	48
Bet in an office pool	14	18	9	14	13	13	15	18	19	31
Bet on horseracing	11	14	9	8	11	16	13	15	17	38
Placed a bet online	9	13	5	14	7	4	9	11	14	25
Other betting	1	1	1	1	2	1	1	1	2	2

24. **(AMONG THE 11% OF US ADULTS WHO HAVE BET ON HORSERACING)**
How frequently do you bet on horse racing?

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
4 or more times per week	5	8	0	8	5	2	5	5	7	6
2-3 times per week	7	9	5	7	12	3	7	7	10	9
About once a week	12	13	10	18	10	8	12	12	12	14
1-3 times a month	14	15	12	22	8	12	13	14	16	16
Once every few months	30	29	31	20	26	43	31	31	34	35
About once a year	21	18	24	10	20	30	21	20	17	20
Only once every few years	12	7	18	14	19	3	11	11	4	0

25. Do you agree or disagree with the following statement:

I consider myself to be a fan of horseracing.

(% U.S. adults)		Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans
		M	F	18-39	40-59	60+				
Strongly agree	9	11	8	11	8	9	10	12	18	32
Somewhat agree	27	32	22	26	26	30	29	35	37	68
Somewhat disagree	19	18	20	19	21	17	19	19	17	-
Strongly disagree	40	36	44	38	41	41	38	29	23	-
Strongly agree	5	3	6	6	5	2	4	4	5	-

26. How frequently do you visit a horseracing track?

(% U.S. adults)	Gender		Age			Likely Voters	Sports Fans	Animal Welfare Supporters	Horse Racing Fans	
	M	F	18-39	40-59	60+					
Daily	1	1	0	2	1	0	1	1	1	3
About once a week	4	5	2	6	3	0	4	5	8	14
1-3 times a month	5	7	3	9	3	3	6	7	7	19
Once every few months	8	10	6	8	7	10	10	11	14	30
About once a year	11	11	10	11	9	12	11	13	16	31
Only every few years	14	16	13	10	17	17	15	15	15	1
Never	57	49	65	54	60	57	53	48	39	2

27. For how many years have you been involved with horseracing?

(% Among Bettors)	Bettors	
	All	Big
Less than 1 year	0	0
2-3 years	1	0
4-6 years	3	2
7-9 years	4	2
10-14 years	7	5
15-19 years	7	2
More than 20 years	79	90

28. How frequently do you bet on horse racing?

(% Among Bettors)	Bettors	
	All	Big
4 or more times per week	41	78
2-3 times per week	28	19
About once a week	14	2
1-3 times a month	12	0
Once every few months	4	2
About once a year	1	0
Only every few years	0	0
Never	0	0