



Strategic review of the fixture list

Project Scope

September 2007

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Introduction

Purpose

The British Horseracing Authority (“BHA”) distributed an “Issues Paper” in May 2007 inviting comments from Racing’s stakeholders on the issues that should be covered in the Strategic Review of the Fixture List (“the Review”).

The Issues Paper set out that the Review would seek to:-

“Undertake a root-and-branch review of the fixture list, identifying the optimal fixture list for British Horseracing and, subsequently, how it can be delivered.”

This Project Scope document is the next stage in the Review, and contains:

- Confirms the Issues to be addressed in the Review – based on the submissions from stakeholders.
- Set out in overview the Review’s methodology notably:
 - The focus on basing recommendations on evidence/information;
 - The data collection tools to be employed during the Review;
 - The Review’s timetable; and
 - The Role of Deloitte.
- Stage Two Issues – in order to meet the timetable a number of issues either originally set out in the Issues Paper or proposed by stakeholders, will not be considered at this stage in the Review(while acknowledged as still being important to address at a later stage).

Submissions

In excess of 40 submissions were received in response to the BHA Issues Paper circulated in May 2007.

Following the circulation of the Draft Project Scope in August, additional comments were submitted by representatives of all major stakeholders.

The BHA wishes to thank all those stakeholders who contributed to such a comprehensive, constructive and robust set of submissions.

Clarifications

The UK has the most competitive and diverse betting market in the world, which the Review will reflect where appropriate. Notably when “betting” is referred to in the Scope it should be interpreted as including both traditional bookmakers and betting exchanges.

It should be reiterated that maintaining the highest possible levels of integrity is at the heart of British Horseracing and, therefore, underpins all considerations relating to the fixture list. This obviously has financial implications in terms of the cost of providing the whole gamut of regulatory services at every fixture.

The Review will develop recommendations on the assumption that fixtures will continue to be covered in Licensed Betting Offices at comparable levels to 2007. It is acknowledged that should the dispute between Turf TV and SIS fail to be resolved then this may present significant practical issues to some of the recommendations.

Implementation of Recommendations

The Review will develop recommendations capable of being implemented for the 2009 fixture list. However given the complexity of some issues, practical considerations and the Review timetable it is recognised that it may not be feasible to implement all of the recommendations in full for 2009.

Review Team

The BHA recognises that a Review of this breadth and importance requires significant resources to be allocated if it is to be successful, hence the BHA board will ensure appropriate resources are made available. The support of other stakeholders may also be necessary during periods of the Review.

Deloitte Support

The BHA have engaged the Sports Business Group at Deloitte to provide support to the BHA on the Review. Deloitte prepared the Economic Impact of British Racing for the BHB in June 2006, and will ensure this Review enjoys the maximum benefit from relevant information collected for that report. The Sports Business Group have extensive experience of the Racing industry and have worked with many sports governing bodies on complex issues such as the possible reform of the fixture list/competition structures etc.

Issues – results of submissions

Tables 1 to 3 indicate the issues that are considered by the BHA, based on submissions, to be the priority items for the Review. These issues will form the focus of the Review going forward. Those items from the Issue Paper which have been excluded from the following tables have been set out on page 6 along with an explanation as to why their consideration will occur at a later stage.

It should be noted that the classification of an issue as ‘no/minimal comment’ does not necessarily mean the issue is not important and not worthy of consideration. It merely implies that stakeholders chose neither to disagree nor provide further comments on the issue. A significant number of submissions applauded the comprehensive nature of the issues set out in the Issues Paper. This by implication suggested all issues should be addressed at some stage if possible.

In the interest of brevity only a summary description of the issues has been included. Full descriptions are set out in Appendix One.

Table 1: Sporting issues

Ref	Issue (1)	Race-courses	Horsemen	Bookmakers	Media
1.6 & 2.6	Greater clarity and narrative to racing product	HIGH	HIGH	-	HIGH
1.9	Maximising promotion through TV	HIGH	-	-	HIGH
1.2	Opportunities to be provided for whole horse population?	HIGH	HIGH	-	-
1.3	Impact of low grade fixtures on the reputation of British Horseracing	HIGH	HIGH	-	-
1.8	Separate consideration of Jump racing (2)	HIGH	HIGH	-	-
1.1	Demands of horse population for opportunities	HIGH	HIGH	-	-
1.4	Impact on welfare from fixture expansion	-	HIGH	-	-
(1) See Appendix 1 for detailed description of issues via references given. (2) The differences in Jump and Flat racing will be picked up via consideration of the relevant issues set out in tables 1-3, rather than requiring a distinct work stream of the Review.					

Key:

KEY – Critical to Review.

HIGH – High degree of stated agreement with inclusion.

MOD – Some confirmation that issue should be included.

- No/minimal comment on issue.

Table 2: Leisure issues

Ref	Issue (1)	Race-courses	Horsemen	Bookmakers	Media
2.4	Quality racing at best times on best days	HIGH	HIGH	-	HIGH
2.1	Sufficient commercially attractive fixture slots?	HIGH	-	-	HIGH
2.3	Consideration of geographical location	HIGH	HIGH	-	-
2.5	Measures to increase sponsorship	-	-	-	MOD
(1) See Appendix 1 for detailed description of issues via references given.					

Table 3: Betting issues

Ref	Issue (1)	Race-courses	Horsemen	Bookmakers	Media
3.1	How racing has fared in betting markets	KEY	-	-	-
3.8	Alternative suggested criteria model focused on races not fixtures(2)	-	-	KEY	-
3.2	Marginal contribution of additional fixtures	HIGH	-	HIGH	-
3.5	Factors that are significant for betting customers	HIGH	-	MOD	-
3.3	Bookmakers experience of opportunities for fixture list	-	-	HIGH	-
3.7	Promote betting and increase accessibility to newcomers to betting	-	-	MOD	-
(1) See Appendix 1 for detailed description of issues via references given. (2) Suggested by Association of British Bookmakers' submission.					

Project methodology

Tables 4, 5 and 6 show how it is proposed each of the prioritised issues will be addressed. It is vital that the Review is both robust and focused on facts and information. As such, wherever possible the Review will draw on at least two alternative sources of information and/or analysis tools.

Details of the existing Market Research are set out on page 4, as is the process for data collection via Request for Information (“RFIs”).

BHA considers the following analysis will be central to the Review:

1. Financial analysis of the value to British Horseracing of different types of fixtures (including Jump, Flat Turf and All Weather Track; geographical aspects) to incorporate:-
 - a. Racecourse revenues and costs (including integrity related costs)
 - b. Average levy generated by fixture type
2. Financial analysis of incremental revenue and costs of additional fixtures staged between 2003 and 2006.
3. Analysis of the needs of the horse population for opportunities across the year taking account of actual runs and the estimated level of ‘real’ eliminations. Analysis to separately consider Jump and Flat seasons.
4. Assessment of the proposed alternative fixture criteria (i.e. focus on races staged rather than fixtures).

Table 4: Sport issues

Issue	Data analysis	Market research	Industry consultations
Greater clarity and narrative to racing product			
Maximising promotion through TV			
Opportunities to be provided for whole horse population?			
Impact of low grade fixtures on British Horseracing reputation			
Separate consideration of Jump racing			
Demands of horse population for opportunities			
Impact on welfare from fixture expansion			

Table 5: Leisure issues

Issue	Data analysis	Market research	Industry consultations
Quality racing at best times on best days			
Sufficient commercially attractive fixture slots?			
Consideration of geographical location			
Measures to increase sponsorship			

Table 6: Betting issues

Issue	Data analysis	Market research	Industry consultations
How racing has fared in betting markets			
Alternative criteria model focused on races not fixtures(2)			
Marginal contribution of additional fixtures			
Factors that are significant for betting customers			
Bookmakers experience of opportunities for fixture list			
Promote betting and increase accessibility to newcomers to betting			

 Key source of information

Information tools

Request for information (RFI)

Information tools

The provision of high quality information from Racing's stakeholders, on a timely basis, will be central to the ability of the Review to properly address the issues identified. In order to capture this information, Requests for Information ("RFIs") will be circulated to stakeholders during September. The RFIs will have two distinct elements:

- Specific tailored requests for each stakeholder group – in most cases the requested information will be financially focused.
- Issues responses – the views of all stakeholders on any of the issues the Review will examine are clearly welcome. As such stakeholders will be invited to submit comments on any issues. In some cases it is recognised these will by necessity initially be largely subjective in nature, however wherever possible supporting evidence and information should also be submitted for consideration by the Review. Furthermore, following initial data submission and analysis, it is anticipated summarised financial information will be circulated to stakeholders, at which point there will be the opportunity for further comment. As such, stakeholders may consider it appropriate to defer comments on some issues until further information is made available.

Submission mechanism

A central BHA Fixture Review e-mail address has been set up for all submissions.

Alternatively stakeholders may wish to submit their responses (or certain commercially sensitive elements) to the confidential Deloitte address.

The same contact mechanisms can be used if there are questions/clarifications/needs arising from the RFIs.

Timing

The RFIs will be circulated in September, with a final submission date of mid October. Given the challenging timetable for the Review, stakeholders will be encouraged to send through responses as soon as possible. Multi-stage responses are acceptable if they can be used to accelerate information provision.

Market research

The Review will draw upon existing relevant market research information.

In addition, new primary market research will be performed to address certain key issues – particularly in relation to betting aspects.

Existing Research

The following research will form part of the Review:

- Lapsed Racehorse Ownership study (May 2007) - Findings based on the opinions of 219 lapsed racehorse owners drawn from the Weatherby's database.
- ROA Members' survey (2006)
- Taylor Nelson Sofres (TNS) 2006 Racetrack report - TNS conduct four waves of research each year, interviewing a nationally representative sample of 2,000 Great British residents per wave. Interviews are conducted in April, June, September and December.
- BHB Racing Review (2003) – the extensive research performed for the Racing Product and Racing Experience reports will be drawn upon as appropriate.

It is anticipated that other relevant research will have been performed by stakeholders, who will be encourage to share the results with the Review.

Project plan – timetable

The table below sets out the envisaged timetable for the Review. It is acknowledged the timetable is challenging. The BHA are therefore, to a large extent, reliant on the support and co-operation of Racing's stakeholders in order to deliver to this timetable.

Date	Key activities
June	<ul style="list-style-type: none"> Stakeholder submissions to Issues Paper
July	<ul style="list-style-type: none"> Review of stakeholder submissions
August	<ul style="list-style-type: none"> Project Scope circulated and agreed Market research surveys agreed RFIs circulated to stakeholders
September	<ul style="list-style-type: none"> Stakeholder data collection Ongoing discussions with stakeholders to clarify information requests
October	<ul style="list-style-type: none"> Stakeholder submissions to be finalised Stakeholder consultations Financial analysis performed (sport, leisure and betting)
November	<ul style="list-style-type: none"> Stakeholder workshops/consultations (maximum value to be ensured by advanced circulation of preliminary data analysis)
December	<ul style="list-style-type: none"> Initial Findings Report prepared BHA Board consider Initial Findings Report, and circulate it for comment by stakeholders
January	<ul style="list-style-type: none"> Responses to Initial Findings Report (by end of month)
February	<ul style="list-style-type: none"> Refinement and finalisation of recommendations in consultation with stakeholders
March	<ul style="list-style-type: none"> Final recommendation incorporated into 2009 fixture list policy
April	<ul style="list-style-type: none"> Beginning of the 2009 fixture allocation process
May	
June	<ul style="list-style-type: none"> 2009 fixture bidding
July	<ul style="list-style-type: none"> 2009 fixture list published

Stage Two issues

A number of issues either originally set out in the Issues Paper or proposed by stakeholders, will not be considered at this stage of the Review but are important to be addressed as part of a later stage or via a different forum. The most significant of such issues have been set out in the table below, together with the logic for their deferral/exclusion. A number of other issues were also suggested by stakeholders and have been noted by the BHA, but given the scope and timetable of the Review have not been included at this stage.

Ref	Deferred Issue	Explanation for deferral (or exclusion as indicated)
N/a	Implications of ongoing dispute between Turf TV and SIS (including any impact on the Levy).	Excluded It is not appropriate for the BHA to become involved in the commercial dispute between the two parties and their respective shareholders.
1.5	Horsemen's costs from fixture expansion.	The impact on horsemen's costs from the existing and further fixture list expansion is acknowledged as being important and, accordingly, the direct costs of running horses at additional fixtures will be estimated and considered as part of the examination of the marginal contribution of these additional fixtures. However, broader considerations of the horsemen's costs associated with an increased horse population cannot be wholly attributed to changes in the fixture list and will not be considered as part of this review.
1.7	AWT positioning.	Differences between AWT and Flat Turf fixtures - financial contribution to British Horseracing will be examined in the review. The objective remains of improving the quality of AWT fixtures outside the Flat Season. However, this inevitably has major funding implications (in terms of both investing in facilities and the provision of prize money). As such it is not considered feasible for practical recommendations to be developed in time for the 2009 fixture allocation process and therefore further consideration of this issue will take place outside of this review.
2.2	Promotion of fixtures in commercially favourable slots.	This issue is closely bound in with the examination of whether there are sufficient commercially attractive slots (2.1), hence will be partially addressed for this Review. Furthermore the development of a financial mechanism, discussed across, links to this issue. The Review will not however prioritise the development of the actual measures to promote these fixtures by individual racecourses.

Ref	Deferred Issue	Explanation for deferral (or exclusion as indicated)
3.4 N/a	Internationalisation of betting & the related issue of 48 hour declarations.	Several key stakeholder submissions stated that the internationalisation of betting should not form part of this Review given its current limited contribution to British Horseracing. The merits, or otherwise, of 48 hour declarations apply regardless of the shape of the fixture list hence it is not considered appropriate to investigate for the purpose of the Review. The BHA will continue to be involved in future discussions on the topics of internationalisation of betting & 48 hour declarations.
3.6	Gambling Act/ regulatory reform implications for Racing's fixture list.	Based on the submissions to the Issues Paper, particularly those from the betting industry, namely that it is highly unlikely that the Gambling Act will have any significant implications for the fixture list, it is not proposed to investigate this issue further for the purposes of the Review.
3.7	Promote betting and increase accessibility to newcomers to betting.	While Racing would almost certainly benefit from measures to increase the accessibility of the sport to newcomers, this is likely to be true regardless of the shape of the fixture list (within reason). The issue has therefore been deferred.

Financial Mechanism

The Issues Paper set out that once an optimal fixture list has been established a financial mechanism (which will likely include consideration of a fixture incentive mechanism) will be required to deliver this list. The development of any such mechanism therefore by definition lags somewhat behind the establishment of the fixture list.

The BHA acknowledge that the development of a robust financial mechanism will require the full involvement of all stakeholders affected, which is likely to have timing implications. Equally the BHA are mindful of the desirability of agreeing the maximum number of fixture list recommendations that are capable of being implemented for the 2009 fixture list, some of which may require a financial mechanism to be in place, or, as a minimum, elements of such a mechanism.

It is therefore proposed that the financial mechanism will be examined as part of the Review to the extent possible in the time given. While the aspiration of the BHA is to have a financial mechanism agreed for March 2008 it is acknowledged this may not be feasible. However the Review will seek as a minimum to have a set of agreed principles which the financial mechanism must address, and would then aim to develop the mechanism further in time for application for the 2010 fixture list.

Appendix 1: Detailed issue descriptions

The issues, and numbering, set out below reflect those set out in the Issues Paper (May 2007). *Issues in italics will be deferred to Stage Two – see page 6 for further details.*

1 ISSUES RELATING TO THE SPORTING OBJECTIVES

1.1 **What are the demands of the horse population for opportunities/fixtures?**

- The requirements of the horse population are paramount when attempting to assess the optimal size of the fixture list and, to that end, the review will attempt to quantify the total number of opportunities required by the existing horse population and how these are allocated between codes and across the year.
- It will also be necessary to consider recent trends in the size of the horse population to project how the current demand for opportunities may alter in the foreseeable future.

1.2 **Should opportunities be provided for all horses across the horse population and, if not, how would this impact upon the number of fixtures and races required?**

- A fundamental tenet of the Racing Review was that as long as criteria gaps exist and racecourses are able to stage additional fixtures, the race programme should provide opportunities for all sections of the horse population, albeit with the prize money offered commensurate with the ability of the competing horses.
- Certain sections of the industry have raised concerns regarding the impact of this policy on the reputation of British Horseracing and/or the future of the breed (by allowing very moderate horses to become winners). Is it in the interests of the industry to provide opportunities at this low level? If so, can such races be staged without damaging the allure and reputation of British Horseracing?
- In the event of restricting the fixture list and race programme in some way, it would be necessary to estimate the impact on the demand for fixtures and races.

1.3 **Has British Horseracing's reputation, and in particular its landmark fixtures, been damaged by the proliferation of low-grade fixtures in recent years?**

- The declining levy yield has inevitably impacted upon the Levy Board's contribution to the main prize fund, which has declined from £62.5m in 2006 to £55m in 2007 and again to £49.5m in 2008. This reduction in financial support has coincided with a continued expansion of the fixture list, thereby resulting in a significant reduction in the average level of support allocated to each fixture. For example, in 2006 the main prize fund was allocated across 1,392 fixtures with an average contribution of £44,900 per fixture. In 2007, its allocation across 1,415 fixtures reduced the average contribution per fixture to £38,869. Against this backdrop, the review will consider whether the industry's main prize fund is being spread too thinly across too many fixtures, thereby damaging its flagship events. Furthermore, does the prize money for Britain's premier events remain competitive from an international perspective?
- Has the media's coverage of the sport's quality events suffered because of the increasing mass of fixtures? Do newspapers have less space available to promote the major fixtures and races?

1.4 **Has the welfare of the sport's participants been affected as a direct consequence of the expansion in the number of fixtures in recent years?**

- Is there any evidence of the quality of the racing surface deteriorating at particular racecourses in recent years as a consequence of over-racing?
- Has the workloads of those directly involved in producing the racing product increased to levels at which the welfare of participants has been compromised in any way?

1.5 What are the marginal costs incurred by the horsemen associated with facilitating the expanded fixture list?

- The incremental income generated from any additional fixtures should be assessed net of any such extra costs.
- Have additional costs been incurred in relation to the recruitment and retention of staff as a direct consequence of the increased workloads associated with the growth in the number of fixtures.

1.6 How should the fixture list be composed to facilitate a greater clarity and narrative to the product based around its quality events?

- Is there a need to revisit the presentation and promotion of landmark events in order to create shop windows with long-lasting and significant impact for racing's customers?
- Are the landmark events sufficiently well-defined and linked into an on-going narrative based around racing's seasons and championships?
- Could Premier Racing, or some version of it, provide an appropriate framework for a narrative of such feature events?

1.7 How should AWT fixtures be positioned within British Horseracing?

- *Should there be greater differentiation between Flat turf fixtures and AWT fixtures with separate fixture matrices established to maintain an optimal balance between these alternative products?*
- *As the number of AWT fixtures has expanded, the industry has commenced implementation of a strategy that, over the next few years, will lead to the creation of a series of black-type events during the five months from November to March, recognising that such a Pattern would have much to offer in terms of keeping horses in training and, more specifically, in training in this country. Should additional steps be taken to improve the quality of AWT racing in Britain, particularly outside the winter months? How could any such initiatives be delivered without damaging turf racing's quality events?*

1.8 Does Jump racing, for which the fixture list has remained relatively stable throughout recent years, require its own separate consideration as part of the wider review?

- Are there any fixture-related issues specific to Jumping that respondents would wish to incorporate within the review?

1.9 How would the fixture list best meet the needs of television, thereby maximising the promotion of racing through such exposure?

- In the light of comments made by the BBC following the 2007 Grand National (i.e. supporting a 5:00 p.m. start), what similar measures could maximise the exposure of racing's feature events to television audiences?

2 ISSUES CONCERNING RACECOURSE AND LEISURE
INDUSTRY-RELATED OBJECTIVES

2.1 **Does the existing fixture list provide sufficient fixtures in commercially attractive slots?**

- Does the existing fixture allocation process facilitate the trading of fixtures in such slots to maximise their value to the industry as a whole?

2.2 ***What measures can the industry at large and individual racecourses adopt to promote fixtures in these slots?***

- *What motivates different customer groups to attend race meetings? How important, for example, is the quality of racing for attendees?*

2.3 **Is it desirable or (in the light of the agreement with the Office of Fair Trading) feasible for geographical location to be considered as part of the fixture allocation process?**

2.4 **Is British Horseracing making best use of the opportunities provided by the calendar, e.g. Bank Holidays, to attract new racegoers?**

- With Bank Holiday fixtures relatively unattractive from the perspective of the corporate customer and sponsor, does the current funding mechanism provide sufficient incentive for racecourses to make best use of such days when potential (new) racegoers are available en masse?
- Should the fixture list be better able to take account of local opportunities, and respond to local competitive threats?

2.5 **What measures can be adopted to attract increased corporate sponsorship at fixtures?**

- Is a stronger narrative required to promote British Horseracing to potential sponsors?
- What long-term measures can be taken to break down entrenched negative attitudes to the sponsorship of British Horseracing?
- Is there a need, as recommended in 'The Racing Experience', for the promotion for racing-related sponsorship opportunities that are featured on terrestrial television to be co-ordinated by

a single, industry-wide sponsorship unit that has the relevant sponsorship skill, knowledge and expertise?

2.6 **What is the role for quality racing in promoting the sport generally?**

- How can quality racing be harnessed to help create an overall narrative for the sport which will benefit everyday racing?
- How can the collective story of British Horseracing be used to drive interest and attendance from the bottom-up?

3 ISSUES RELATING TO THE BETTING-RELATED OBJECTIVES

3.1 **Confirmation is sought in respect of how racing has fared in the various betting markets during recent years.**

- What have been the recent trends in racing's:
 - Market share
 - Betting turnover – in total and on a like-for-like basis, particularly in respect of racing's quality events
 - Gross win – in total and as a percentage of the betting industry's total gross win
- From a betting perspective, has the relative performance of the two codes of racing deviated during this period? If so, what factors have contributed to such diverging performances?

3.2 **In the light of the expansion of the fixture list in recent years, what has been the marginal contribution of the additional fixtures?**

- What has been the impact on the levy yield of the expansion of the fixture list since 2003?
- How significant are the substitution effects arising from the creation of additional fixtures? How much of any additional levy generated is considered to be incremental?
- At what stage does the incremental levy generated fail to cover the costs associated with staging additional fixtures?
- From a betting perspective, how has the performance of the newly created fixtures varied by time of year, day of week and time of day?

3.3 **Where does bookmakers' trading experience indicate that the real opportunities exist for racing and its fixture list?**

- How many fixtures does the betting industry desire?
- When does it want them staged (i.e. by day of week, time of the day)?

3.4 ***With the increasing internationalisation of gambling markets, and the development of the co-mingling of pool bets, are fixtures currently scheduled at the appropriate times of day to exploit such markets?***

- *Would British Horseracing's attractiveness to the international markets increase if fixtures were staged at different times of the day? If so, would these fixtures generate sufficient income to support their scheduling?*

3.5 **What factors are significant in determining the attractiveness of particular fixtures and races to the betting industry's existing customers?**

- How are betting turnover indices affected by factors such as:
 - Month of year
 - Day of week
 - Code of fixture
 - Class of fixture and/or race
 - Race type
 - Field sizes
 - Television coverage
 - Number of fixtures in the session and the relative strength of each particular fixture (i.e. 1st, 2nd, 3rd, 4th)
- Is there a robust commercial case for imposing field size restrictions to facilitate additional fixtures?

3.6 ***Will the new regulatory regime for betting that the Gambling Commission will create from September 2007 impact upon the betting industry's attitude towards racing as a betting product, thereby affecting its requirement for fixtures?***

3.7 **Is racing readily accessible to newcomers to the gambling market?**

- Do barriers exist leading to the betting industry's new/younger customers tending to favour products other than racing?
- If so, what are these barriers and what steps can racing take to break them down?

3.8 Revised criteria based on races rather than fixtures

The betting industry, through the ABB, has suggested that levy would be maximised by adopting a new approach based on the provision of a certain number of races per day rather than fixtures.

This would be based on a racing programme that provides continuous coverage during core afternoon trading periods, which it envisages being between 1:00pm and 6:00pm adjusted, as appropriate, in the winter period to 12:30 to 5:00pm.

Furthermore, it is suggested that the ideal evening provision would be four races per hour from 6:00pm to a suitable time depending on season – 8:20pm in early/late season; 9:20pm in mid summer; 8:20pm Autumn and Winter. (In all cases Sundays are excluded from evening coverage).

The number of races required can be summarised as follows:

Early/Late Summer

1:00pm – 6:00pm	30 races	(40 on Saturdays)
6:00pm – 8:20pm	10 races	

Mid Summer

1:00pm – 6:00pm	30 races	(40 on Saturdays)
6:00pm – 9:20pm	14 races	

Autumn

1:00pm – 6:00pm	30 races	(40 on Saturdays)
6:00pm – 8:20pm	10 races	

Winter

12:30pm – 5:00pm	27 races	(36 on Saturdays)
5:00pm – 8:20pm	14 races	

ABB appreciates that the current limited availability of floodlit tracks effectively prohibits four races per hour at times of the year with restricted daylight and would support two races per hour until additional floodlit facilities were in place.

Impact on horse population and tracks

Implementing such a radical overhaul of the fixture criteria would have significant implications for the horse population and racecourses providing the service, and the proposal accepts that its implementation would be an evolutionary rather than revolutionary process.

Changes to the number of races that tracks are permitted to stage per meeting may be required.

In addition, an increase in the number of tracks with the ability to provide floodlit racing and an expansion in stabling capacity would be needed to enable the additional races at extended meetings to be staged. Each of these has funding implications but, it is suggested by the betting industry that, moving to these criteria is expected to result in the required increase in levy generation.