



Ontario Horse Racing Industry Performance Results [Fiscal Year 2019-20 Q1]

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PERFORMANCE MANAGEMENT EXCELLENCE GROUP (PMEG)

BACKGROUND

The Performance Management Excellence Group or “PMEG” is a horse racing industry working group, established and led by the Ontario Lottery and Gaming Corporation (OLG) with representation from government agencies, that is committed to building a sustainable horse racing industry by providing up-to-date facts and information related to the horse racing sector in Ontario.

OVERARCHING GOAL

Contributing to the efficient and effective management of funding through a systematic and integrated approach to performance management.

Members:

Ontario Lottery & Gaming Corporation (OLG)

Ministry of Finance (MOF)

Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA)

Alcohol and Gaming Commission of Ontario (AGCO)

KEY PERFORMANCE INDICATORS DEFINED

#	Name	Definition	Unit of Measure	Data Source
1	Gross Bet on Ontario Races	<ul style="list-style-type: none"> Total gross wagering on Ontario races 	M\$	Canadian Pari-Mutuel Agency
2	Total Count of Tickets Sold at Racetracks	<ul style="list-style-type: none"> Total number of wagering tickets sold live at all racetracks across Ontario 	Count	Racetracks
3	Average Ontario Yearling Sales Price	<ul style="list-style-type: none"> Average sales price of Ontario yearlings sold at all Thoroughbred and Standardbred yearling sales (Ontario and abroad) <p><i>Note: Quarter horse yearling sales are conducted privately and, therefore, excluded from this metric.</i></p>	\$/yearling	Canadian Thoroughbred Horse Society; Standardbred Canada; Ontario Racing
4	Average Field Size	<ul style="list-style-type: none"> Average number of starters (not unique) per race in Ontario 	Starters/Race	Equibase Company LLC; Standardbred Canada; Ontario Racing
5	Total # of Unique Starters	<ul style="list-style-type: none"> Total # of unique horses starting a race in Ontario 	Count	Equibase Company LLC; Standardbred Canada; Ontario Racing

EXECUTIVE SUMMARY [FISCAL YEAR 2019-20 Q1]

- In the first three months of Fiscal Year 2019-20 (April 1 – June 30, 2019), gross wagering on Ontario races increased by 11.9% relative to the same period the prior year, driven by double-digit growth in both Thoroughbred and Standardbred handle.
- The volume of betting tickets sold live, at racetracks across Ontario, saw a decline compared to the previous year (-2.5%), mostly driven by Standardbred (-6.9%). When normalizing for the number of races, the count of tickets sold live per race decreased by 5.0%.
- The Ontario horse racing industry experienced a horse supply setback this quarter, with 4.4% lower unique starters year over year and declines across all breeds (Thoroughbred, Standardbred and Quarter Horse).

PERFORMANCE DASHBOARD [INDUSTRY]

Ontario Horse Racing Industry Performance Dashboard – Fiscal Year 2019-20 Year to Date (Apr 1, 2019 - Jun 30, 2019)

VISION
To enable and grow a prosperous, dynamic horse racing sector positioned for long-term viability and success in Ontario
MISSION
Building a sustainable horse racing industry in Ontario through fact-based decision-making
VALUES
Accountability • Integrity • Respect • Transparency



	Year to Date		
	Actual	Prior Year	Change (%) ²

More self-sufficient sector that sustains jobs

Gross Bet on Ontario Races (M\$)	281.6	251.6	11.9%
Total Count of Tickets Sold at Racetracks (Count)	2,083,986	2,138,350	-2.5%
Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.		
Average Field Size (# of Starters per Race)	7.6	7.8	-1.9%
Total # of Unique Starters (Count)	4,059	4,248	-4.4%

¹ Average Ontario Yearling Sales Price is for Thoroughbred and Standardbred only. Quarter horse yearling sales are conducted privately and, therefore, excluded from this metric.

² The change vs. previous year colour status compares the performance results to the previous year's results using threshold ranges to allocate colours. Please refer to the colour status legend below.

Change vs. Previous Year Colour Status Legend					
Gross Bet	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Total Count of Tickets Sold	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Avg Ontario Yearling Price	<-10%	≥-10% up to <0%	≥0% up to <+10%	≥+10%	Not Applicable
Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
Average Field Size	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable

PERFORMANCE DASHBOARD [THOROUGHBRED]

Ontario Horse Racing Industry Performance Dashboard – Fiscal Year 2019-20 Year to Date (Apr 1, 2019 - Jun 30, 2019)

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	Year to Date		
	Actual	Prior Year	Change (%) ²

More self-sufficient sector that sustains jobs

Gross Bet on Ontario Races (M\$)	160.4	143.7	11.6%
Total Count of Tickets Sold at Racetracks (Count)	1,206,447	1,199,122	0.6%
Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.		
Average Field Size (# of Starters per Race)	7.4	7.8	-4.3%
Total # of Unique Starters (Count)	1,399	1,459	-4.1%

¹ Average Ontario Yearling Sales Price is for Thoroughbred and Standardbred only. Quarter horse yearling sales are conducted privately and, therefore, excluded from this metric.

² The change vs. previous year colour status compares the performance results to the previous year's results using threshold ranges to allocate colours. Please refer to the colour status legend below.

Change vs. Previous Year Colour Status Legend					
	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Gross Bet	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Total Count of Tickets Sold	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Avg Ontario Yearling Price	<-10%	≥-10% up to <0%	≥0% up to <+10%	≥+10%	Not Applicable
Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable
Average Field Size	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable

PERFORMANCE DASHBOARD [STANDARDBRED]

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	Year to Date		
	Actual	Prior Year	Change (%) ²

More self-sufficient sector that sustains jobs			
Gross Bet on Ontario Races (M\$)	120.8	107.3	12.6%
Total Count of Tickets Sold at Racetracks (Count)	849,288	911,773	-6.9%
Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.		
Average Field Size (# of Starters per Race)	7.7	7.8	-1.1%
Total # of Unique Starters (Count)	2,518	2,575	-2.2%

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Change vs. Previous Year Colour Status Legend					
	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Gross Bet	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Total Count of Tickets Sold	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Avg Ontario Yearling Price	<-10%	≥-10% up to <0%	≥0% up to <+10%	≥+10%	Not Applicable
Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable
Average Field Size	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable

PERFORMANCE DASHBOARD [QUARTER HORSE]

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	Year to Date		
	Actual	Prior Year	Change (%) ²

More self-sufficient sector that sustains jobs			
Gross Bet on Ontario Races (M\$)	0.4	0.6	-31.3%
Total Count of Tickets Sold at Racetracks (Count)	28,251	27,455	2.9%
Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.		
Average Field Size (# of Starters per Race)	6.4	7.5	-14.9%
Total # of Unique Starters (Count)	142	214	-33.6%

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Change vs. Previous Year Colour Status Legend					
Gross Bet	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Total Count of Tickets Sold	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Avg Ontario Yearling Price	<-10%	≥-10% up to <0%	≥0% up to <+10%	≥+10%	Not Applicable
Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
Average Field Size	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable

PERFORMANCE TREND DASHBOARD [INDUSTRY]

Ontario Horse Racing Industry Performance Trend Dashboard – Fiscal Year 2019-20 Year to Date (Apr 1, 2019 - Jun 30, 2019)

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	Q1	Q2	Q3	Q4	YTD
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More self-sufficient sector that sustains jobs

Gross Bet on Ontario Races (M\$)	281.6				281.6
Total Count of Tickets Sold at Racetracks (Count)	2,083,986				2,083,986
Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.				
Average Field Size (# of Starters per Race)	7.6				7.6
Total # of Unique Starters (Count)	4,059				4,059

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² Year over year change colour status compares the performance results for each quarter to the same quarter the previous year using threshold ranges to allocate colours.

Year Over Year Change Colour Status Legend ²					
	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Gross Bet	<-5%	≥-5% up to <+1.2%	≥+1.2% up to <+5%	≥+5%	Not Applicable
Total Count of Tickets Sold	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Avg Ontario Yearling Price	<-10%	≥-10% up to <0%	≥0% up to <+10%	≥+10%	Not Applicable
Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable
Average Field Size	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable

PERFORMANCE TREND DASHBOARD [THOROUGHBRED]

Ontario Horse Racing Industry Performance Trend Dashboard – Fiscal Year 2019-20 Year to Date (Apr 1, 2019 - Jun 30, 2019)

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	Q1	Q2	Q3	Q4	YTD
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More self-sufficient sector that sustains jobs

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Total Count of Tickets Sold at Racetracks (Count)	1,206,447				1,206,447
Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.				
Average Field Size (# of Starters per Race)	7.4				7.4
Total # of Unique Starters (Count)	1,399				1,399

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Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
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	Q1	Q2	Q3	Q4	YTD
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Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.				
Average Field Size (# of Starters per Race)	7.7				7.7
Total # of Unique Starters (Count)	2,518				2,518

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Total Count of Tickets Sold	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Avg Ontario Yearling Price	<-10%	≥-10% up to <0%	≥0% up to <+10%	≥+10%	Not Applicable
Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
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PERFORMANCE TREND DASHBOARD [QUARTER HORSE]

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	Q1	Q2	Q3	Q4	YTD
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Total Count of Tickets Sold at Racetracks (Count)	28,251				28,251
Average Ontario Yearling Sales Price (\$/Yearling) ¹	Data collected annually.				
Average Field Size (# of Starters per Race)	6.4				6.4
Total # of Unique Starters (Count)	142				142

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Total Count of Tickets Sold	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Avg Ontario Yearling Price	<-10%	≥-10% up to <0%	≥0% up to <+10%	≥+10%	Not Applicable
Unique Starters	<-2.5%	≥-2.5% up to <0%	≥0% up to <+2.5%	≥+2.5%	Not Applicable
Actual Value Colour Status Legend					
	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable
Average Field Size	<7.5	≥7.5 up to <8.0	≥8.0 up to <8.4	≥8.4	Not Applicable

RESTRICTIONS & LIMITATIONS

This report was prepared by a Performance Management Excellence Group (PMEG) led by the Ontario Lottery and Gaming Corporation (OLG), using information collected by and received from third party sources. This information has not been independently verified by OLG or the PMEG. Readers are cautioned that past performance may not be indicative of future results. Any conclusion, forecast, projection or other forward-looking information is inherently subject to change and uncertainty, and actual results may differ materially. None of OLG, any member of the PMEG or any of our third party sources represents or warrants as to the accuracy, interpretation, completeness, sufficiency or reliability of the information contained herein, and all liability arising from the adoption, use or application of such information by any person is hereby expressly disclaimed.