

FTBOA

2017 Industry Promotion Plan

This document memorializes the ongoing activities of the Florida Thoroughbred Breeders' and Owners' Association ("FTBOA") in promoting the Florida Thoroughbred industry.

Mission Statement: It is the Mission of the FTBOA to promote the State of Florida's Thoroughbred industry, educating the public within this state, across the country, and internationally about the benefits of breeding, buying, owning, training, and racing in Florida. These efforts target individuals already active in the world of Thoroughbreds and/or other horse breeds, as well as potential newcomers to the community of horse enthusiasts. The goal is to make Florida the most attractive Thoroughbred environment possible as compared to other locales and their competing incentive and promotional programs, leading to enhanced economic benefits and employment opportunities for the State of Florida and its citizens.

The importance of the industry and these promotional efforts is recognized in Florida law, which created the Florida breeders' awards program "to encourage the agricultural activity of breeding and training racehorses in this state." Fla. Stat. §550.26165(1). This program is "intended to encourage thoroughbred breeding and training operations to locate in this state," and the FTBOA is given considerable flexibility in its design, because this program "must be responsive to rapidly changing incentive programs in other states." Fla. Stat. §550.26165(5)(a). Beyond the FTBOA's operation of the breeders' awards program, the importance of the FTBOA's efforts to promote the state's Thoroughbred industry are underscored by the state's dedication of funds to the FTBOA "for general promotion of the industry." Fla. Stat. §550.2625(3).

Of course, these promotional efforts must be accomplished within existing budget limitations, and they must remain adaptable to a constantly evolving and developing Thoroughbred marketplace in this state, nationally, and internationally.

Promotional Plan for 2017: The FTBOA's investment in promotional activities on behalf of the Florida Thoroughbred industry will continue and expand upon its ongoing initiatives, to include the following:

- 1) Create and support marketing programs to educate the state, national, and international communities about the benefits of breeding, buying, owning, training, and/or racing in Florida. Beyond the FTBOA's website provides a wealth of information on the Florida industry, important events and dates, etc., the FTBOA's marketing and promotional efforts extend to racetrack condition books, thoroughbred sales catalogues, local Central Florida radio stations, YouTube, social media, and the Thoroughbred Week television show, which airs nationally through Mid-Atlantic Sports Network, Fox, and Cox Central Florida. The FTBOA also regularly participates in state, national, and international conferences, in numerous international trade missions sponsored by the Florida Department of Agriculture and Consumer Services, and in Ocala's international "sister cities" programs. More detail on these activities is provided in the "Additional Information" section, which starts on page 6.
- 2) Negotiate Florida-bred purse supplement agreements with the Florida Thoroughbred race tracks, pursuant to ss. 550.26165(1) and 550.2625(3)(c), Florida Statutes. Under these agreements, a

(Draft – 07/25/2016)

FTBOA

2017 Industry Promotion Plan

portion of breeders awards funds are used to create “special racing awards,” enhancing the purses available to Florida-breds competing in stakes races conducted at Florida’s Thoroughbred race tracks (Gulfstream Park, Gulfstream Park West, and Tampa Bay Downs). These purse supplements add to the value of “black-type” stakes races, consisting of graded races, listed races, and restricted races. The winner and the second and third place finishers in black-type races are printed in bold in sales catalogs, increasing the value of the horses and their offspring. Restricted races make up the largest percentage of FTBOA purse supplement races, examples of which include: (a) Tampa Bay Downs’ annual Florida Cup Day in April; (b) Gulfstream Park’s annual Sunshine Millions in January and the Florida Sire Stakes series, which is run in August, September, and October; and (c) Gulfstream Park West’s annual Sunshine Millions Preview in November. By promoting and enhancing the value of these events, the FTBOA increases public awareness of Florida-breds, encourages investment in breeding and racing in the Sunshine State, and contributes to the continued success of our state race tracks.

- 3) Administer and promote the Florida Sire Stakes (“FSS”), which is a special racing program for foals born in Florida and sired by a stallion standing in this state. The FTBOA began administering the program with the foals of 2012, featuring a robust \$3 million racing schedule for FSS horses that includes a \$5,000 bonus in FSS-designated races, a series of stakes races with attractive purses, and the opportunity for horses beyond the age of two to compete in FSS stakes races. The program encourages breeding Florida-breds, standing Florida-based stallions, training and racing in Florida, and the purchase and sale of FSS-eligible horses. More details on this program are provided in the “Additional Information” section, which starts on page 6.
- 4) Support national organizations, such as the Thoroughbred Owners and Breeders Association (“TOBA”), American Horse Council, Permanently Disabled Jockeys Fund, and U.S. Livestock Genetics Export, Inc. Beyond participating in TOBA activities at the national level, the FTBOA supports TOBA seminars in Florida and The Jockey Club/TOBA’s OwnerView National Thoroughbred Owners’ Conference, serving as panelists, acting as a resource for recruiting potential new owners, kicking off programs by introducing the Florida industry to participants, and promoting TOBA’s educational programs. The FTBOA’s participation enhances the Florida thoroughbred climate by showcasing Florida’s thoroughbreds to potential owners and enhancing the experience of existing owners through education. Descriptions of the other national organizations mentioned above and the FTBOA’s related activities appear in the “Additional Information” section, which starts on page 6.
- 5) Sponsor national events, such as the Eclipse Awards and the National Thoroughbred Owners’ Conference. Administered by the National Thoroughbred Racing Association, the Eclipse Awards are the thoroughbred industry’s highest honors, presented annually in a televised event to honor the best thoroughbred horses, industry participants, and media members – an evening frequently called the “Oscars of horse racing.” The FTBOA is a sponsor of the Eclipse Awards week when it is held in Florida. This sponsorship brings key recognition to Florida-breds and Florida’s contributions to the sport at a national and international level, with the FTBOA and Florida-breds prominently featured at event sites, in the awards program, and throughout the awards telecast. The FTBOA also hosts the champions’ breakfast and presents copies of The Florida Horse magazine throughout the week of events. More on the Eclipse Awards and a

FTBOA

2017 Industry Promotion Plan

description of the National Thoroughbred Owners' Conference and the FTBOA's involvement in that event is provided in the "Additional Information" section, which starts on page 6.

- 6) Sponsor annual awards event honoring Florida Horse of the Year and Florida-bred champions, their breeders, owners and trainers. The FTBOA Awards Gala is held annually in March in conjunction with the Ocala Breeders' Sales Company March Sale of Two-Year-Olds in Training. In 2015, the gala was held at the Circle Square Cultural Center in Ocala with more than 400 in attendance, including sponsors, award winners, and members of the public. Awards are presented to divisional champions of all age groups, including two-year-olds, three-year-olds and older horses. The breeder, owner, and trainers receive awards for their accomplishments. The Florida Horse of the Year, Breeder of the Year, and Broodmare of the Year are announced at the Gala. The leading Florida stallions and trainers are also highlighted. The Gala allows the Florida Thoroughbred industry to showcase its best and increase public awareness locally, nationally, and internationally.
- 7) Educate the Florida public on the Thoroughbred industry's significant economic contribution to Marion County and to the State of Florida. In 2013, FTBOA gathered key racing industry stakeholders to commission a study of the economic impact of racing breeds in the state of Florida. The resulting study, "Florida Horse Racing Industry Economic Impact: Racing, Training, Breeding and Racetrack Operations," was presented to the Florida Legislature in early 2014 and has been widely disseminated locally and at the state, national, and international levels. In late 2014, the FTBOA worked with the Ocala/Marion County Chamber & Economic Partnership ("CEP") and other key industry stakeholders to commission a study of the economic impact of equines in the thoroughbred breeding region of Marion County. The results were released to business and community leaders at a CEP breakfast event in March 2015 and have been widely disseminated throughout the county, state, and nation. The FTBOA participates in a wide variety of events and activities in Marion County and in Florida to help spread the word about the value of the state's Thoroughbred industry. More detail on these activities is provided in the "Additional Information" section, which starts on page 6.
- 8) Support local organizations and events, such as the Ocala/Marion County Chamber & Economic Partnership, Marion County Hospitality Council, Farm City Week, Florida Equine Institute & Allied Trade Show, Marion County Days in Tallahassee, University of Florida Large Animal Hospital, College of Central Florida Equine Programs, Future Farmers of America, 4-H Programs, Run for the Ribbons Horse Show, Stirrups and Strides, and the Marion County Therapeutic Riding Association. More detail on the FTBOA's activities with these organizations is provided in the "Additional Information" section, which starts on page 6.
- 9) Provide administrative and fund-raising support for Florida Thoroughbreds retired from racing that are cared for at Second Chance Farm at the state's Lowell Correctional Institution in Marion County. The FTBOA provides administrative and fund-raising support for this thoroughbred retirement program, which gives inmates an opportunity to earn an equine certification degree while caring for retired thoroughbreds in their lifelong, post-racing home. There are ten Second Chance Farms nationwide, with the Florida farm being the only female program. Over 100 women have graduated from the program, with only three returning to the

FTBOA

2017 Industry Promotion Plan

prison system. The farm, founded in 2000, houses over 40 horses. More details on this program are provided in the “Additional Information” section, which starts on page 6.

- 10) Provide administrative and fund-raising support for the scholarship program. The FTBOA provides administrative and fund-raising support for a student scholarship program, which issues approximately 30 scholarships annually to college and university students. The FTBOA also coordinates these scholarships with the University of Florida and College of Central Florida. Fundraising efforts include golf tournaments, silent and live auctions, and other charity events, as well as FTBOA efforts to help secure grants.
- 11) Maintain a library at the FTBOA’s offices available as a research resource. The FTBOA offices house an extensive research library, including more than 50 years of industry periodicals like *The Florida Horse*, *The Blood-Horse*, *The Thoroughbred Record*, *Thoroughbred Times*, and *American Racing Manuals*. Sale catalogs are also available from North America’s leading sales companies, including Barretts, Fasig-Tipton, Keeneland, and Ocala Breeders’ Sales Company, as well as international sales catalogs from Tattersalls and Goffs. Rare Thoroughbred breeding books are also available for review. Individuals use the library to help plan matings for their broodmares and keep up with the latest industry news. Library users can also access the *Daily Racing Form*, allowing them to review past performances for horses they have bred or horses they follow as potential purchases.
- 12) Maintain a museum available for tours in order to educate the public on Florida-bred racing history. The FTBOA museum is a gallery capturing more than 50 years of Florida’s Thoroughbred history, with a collection including Needles’ 1956 Kentucky Derby trophy and memorabilia from prominent Thoroughbred families and farms, such as the Heaths, the Hoopers, the Franks, and Mockingbird and Tartan Farms. The museum is open to the public on weekdays during normal business hours. Tours are provided on almost a daily basis to a wide variety of individuals, ranging from school field trips to retirement community groups to passersby visiting Ocala.
- 13) Recognize Florida-breds winning stakes races across the country with annual awards plaques. Each year the FTBOA honors the breeders of Florida-bred stakes winners with an awards plaque listing the horse’s name, pedigree, stakes race won, and breeder’s name. Breeding a stakes winner is a monumental achievement worthy of recognition from the FTBOA, spreading further goodwill for the Florida breeding industry.
- 14) Inform, educate, assist, and serve FTBOA members and prospective members while promoting the virtues of Florida-breds and Florida breeding, buying, owning, training, and racing as part of daily FTBOA activities. The FTBOA has a membership services department dedicated to providing members with many valuable benefits, including over 40 member discounts from relevant businesses, numerous member services useful to both Thoroughbred breeders and owners, educational programs, member events, and collective representation before legislative and regulatory bodies. More detail on these activities is provided in the “Additional Information” section, which starts on page 6.

FTBOA

2017 Industry Promotion Plan

- 15) Facilitate communications with, between, and among the FTBOA membership, industry stakeholders, community, business, and the media. Examples of these communication efforts and outreach are provided in the “Additional Information” section, which starts on page 6.
- 16) Maintain a consistent and effective legislative presence in Tallahassee in order to communicate the benefits the state enjoys from the Thoroughbred industry, creating a favorable governmental environment in which to advocate for initiatives that would make the Florida industry more competitive nationally and internationally and to oppose initiatives that would work counter to that goal.
- 17) Participate in state regulatory developments surrounding horseracing in Florida, with an aim toward promoting the integrity and safety of Florida racing and creating a Thoroughbred environment with a solid national reputation. For example, the FTBOA was closely involved in legislative and/or agency initiatives in 2015 to move Florida toward adopting standardized rules for the conduct of horseracing and toward adopting more nationally uniform standards on medication use.

FTBOA

2017 Industry Promotion Plan

Additional Information on FTBOA Promotional Activities

Marketing Programs

State, National, and International

- Production of advertising to promote Florida-bred racing programs, incentives, deadline reminders, and important industry events as part of ongoing marketing program.
- Placement of advertisements in print and online, e.g., Florida-bred incentive program ads to thoroughbred sales companies for sales catalogues and to racetracks for condition books.

State

- Promotion on Central Florida radio stations.
- Promotion at state industry conferences and events, e.g., Southern Animal Health Association Conference (Orlando 2015).

National

- Promotion of Florida-bred winners nationally on Thoroughbred Week TV show carried on Mid-Atlantic Sports Network, Fox, and Cox Central Florida, with further promotion on YouTube and social media.
- Promotion at national conferences and events (see below).

International: The FTBOA has been an active member of the international community promoting the Florida thoroughbred worldwide. The FTBOA's participation enhances the Florida Thoroughbred climate by developing international relationships with key personnel in other countries and promoting the Florida-bred internationally.

- Trade missions: Marketing program focused on enhancing inbound and outbound trade for Florida-breds in emerging Thoroughbred markets, which may include in-country visits, periodic follow-up, and reporting of trade missions in industry publications. Examples of emerging markets: South Korea, Japan, China, South America (Argentina, Brazil, Chile), and the Caribbean (Trinidad/Tobago). Specific sales increases are directly correlated to recent trade missions to several countries that in turn increased visitors to the state and increased the number of horses they bought. For example, in 2014, Japanese buyers spent \$3.9 million in March, South Koreans spent \$275,000 that month, and Trinidad buyer spent \$252,000 in April, all of which reflect an increase from previous sales.
- Sister City programs: The FTBOA has played an important role through the years with Ocala's Sister Cities -- Newbridge in Ireland and Pisa in Italy -- attending trade missions to

FTBOA

2017 Industry Promotion Plan

both in the past. In 2015, the FTBOA assisted in the programming and marketing of trips to both countries and supported recent inbound trips. What started out as only an equine focus with Newbridge has grown into a strong inbound/outbound program for city services such as police and fire and a strong collaboration with the Ocala/Marion County Chamber of Commerce and Economic Partnership, creating opportunities for trade, technology, and manufacturing.

The City of Ocala and the FTBOA also partnered with Pisa, Barbaricina, and San Rossore in a Sister City program in 2004, which began a relationship of mutual industry connection. The FTBOA is working with one of its Italian members to arrange a future trade mission.

- Promotion at International conferences and events, e.g., the Pan American Conference administered by The Jockey Club and the Organizacion Latinoamericana de Fomento (“OSAF”). The Jockey Club, the breed registry for thoroughbreds in North America, and OSAF, which promotes Thoroughbred breeding and racing in nine Latin and South American countries (Argentina, Brazil, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay and Venezuela), hosts a bi-annual Pan American Conference. Among the topics are simulcasting, medication, harmonization of rules, international ratings and classifications, marketing, stud book issues, the importing and exporting of bloodstock, and thoroughbred ownership.

Florida Sire Stakes: The Florida Sire Stakes (“FSS”) is a special racing program for foals born in Florida and sired by a stallion standing in this state. The FTBOA began administering the program with the foals of 2012, featuring a robust \$3 million racing schedule for FSS horses that includes a \$5,000 bonus in FSS-designated races, a series of stakes races with attractive purses, and the opportunity for horses beyond the age of two to compete in FSS stakes races. The program encourages breeding Florida-breds, standing Florida-based stallions, training and racing in Florida, and the purchase and sale of FSS-eligible horses.

Since taking over administration of the program in 2012, FTBOA achievements include:

- Creation of a marketing campaign to promote participation in the program nationally.
- Development of an FSS logo to help create a brand identity for the program, which other states have failed to do.
- Encouraged use of the FSS logo in the advertising of farms that breed, own, and/or race FSS-eligible horses, creating increased buy-in from other producers.
- Growing participation rates.
- Partnering with the race track to create three significant FSS racing event dates on the racing calendar in Florida, which builds interest in the general public and draws national attention from industry professionals.
- Creation of FSS social media promotion of the events at the track, featuring interviews with stallion owners, breeders, and owners of the racehorses competing.

FTBOA

2017 Industry Promotion Plan

Support of Other Organizations

- Thoroughbred Owners and Breeders Association: The Thoroughbred Owners and Breeders Association (“TOBA”), based in Lexington, Kentucky, was formed in 1961 and is a national trade organization for Thoroughbred owners and breeders. TOBA's mission is to improve the economics, integrity, and pleasure of the sport on behalf of Thoroughbred owners and breeders. TOBA's commitment to recruiting new owners to the industry, providing education through clinics and seminars, and enhancing owner and breeder experiences through programs such as the Sales Integrity Program, American Graded Stakes Committee and Claiming Crown, make TOBA the voice of Thoroughbred owners and breeders. TOBA co-manages Thoroughbred OwnerView with The Jockey Club. Thoroughbred Charities of America is the charitable arm of TOBA.

The FTBOA supports TOBA seminars in Florida and The Jockey Club/TOBA OwnerView National Thoroughbred Owners’ Conference by serving as panelists, acting as a resource for recruiting potential new owners, by kicking off programs by introducing the Florida industry to the participants, and by promoting TOBA’s educational programs. FTBOA worked closely with TOBA to create a seminar discount for members who attend.

The FTBOA’s participation enhances the Florida thoroughbred climate by showcasing Florida’s thoroughbreds to potential owners, enhancing the experience of existing owners through education, and giving FTBOA members reduced programming fees.

- U.S. Livestock Genetics Export, Inc.: The mission of U.S. Livestock Genetics Export, Inc. (“USLGE”) is to better serve world markets with superior livestock genetics from leading, progressive livestock breeders in the United States. USLGE is a non-profit, nationwide trade association that brings together a broad base of U.S. livestock organizations. USLGE represent the international marketing interests of the dairy, beef, sheep, swine and horse breeding industries. Members also include the embryo and semen industry, livestock export sector, plus federal and state agriculture agencies.

USLGE members match international producers with sources in the United States that offer genetics with superior credentials. The combined resources of USLGE members include most major species and breeds -- resources that are unmatched by any other single organization. This unique broad-based team offers more sources for superior performance-oriented genetics than any other group in the world. USLGE works as a one-stop center to make the genetic selection process easier, more efficient, and more productive.

FTBOA periodically attends USLGE conferences. FTBOA participation in USLGE enhances the ability of the Florida thoroughbred marketplace to serve world markets and allows the FTBOA to interact with other USLGE members and government agencies to develop export opportunities.

- Grayson-Jockey Club Research Foundation: The Grayson-Jockey Club Research Foundation (“GJCRF”) is traditionally the nation's leading source of private funding for equine medical research that benefits all breeds of horses. Since 1983, the Foundation has provided \$22 million to fund more than 322 projects at 41 universities. The Foundation

FTBOA

2017 Industry Promotion Plan

exists to help all horses by funding excellent and significant veterinary research at universities throughout North America and internationally.

The FTBOA is a supporter of the Foundation, having visited its facility in 2015. The Foundation is working with companies in the equine community in Ocala and throughout Florida to raise \$100,000, which it will then use to solicit matching funds from individuals. The funds are earmarked to support equine research at the University of Florida.

The FTBOA's support enhances the Florida thoroughbred climate by signaling a growing interest among area organizations in advancing equine health and welfare through this important initiative. The Ocala Breeders' Sales Company and Ocala Stud, the oldest active thoroughbred farm in the state, have also shown support, and FTBOA will continue to publicize the initiative to industry leaders.

- American Horse Council: The mission of the American Horse Council ("AHC") is to promote and protect the equine industry by representing its interests in Congress and in federal regulatory agencies on national issues of importance; to unify the equine industry by informing industry members of regulations and pending legislation and by serving as a forum for all member organizations and individuals; and to advise and inform government and the industry itself of the equine industry's important role in the United States economy.

The FTBOA is a member of the AHC and periodically attends AHC conferences. The FTBOA partnered with the AHC in the past in one of the most significant economic impact studies regarding equines in the nation. The FTBOA worked to ensure a drill-down report of the study was secured for the state of Florida and at the county level. This led to the identification of Marion County as having the largest horse population of any county in the United States (2005), which in turn led to development of the moniker "The Horse Capital of the World" -- a slogan used worldwide to promote Florida thoroughbreds and the this breeding region.

Participation with AHC enhances the Florida thoroughbred climate by keeping up on national trends affecting the industry, participating in key committees pertinent to the racing breed, and by serving as a national resource regarding taxes and other incentives for equines and equine producers.

- Permanently Disabled Jockeys Fund (PDJF): The Permanently Disabled Jockeys Fund ("PDJF") is a 501(c)(3) public charity that provides financial assistance to some 60 former jockeys who have suffered catastrophic on-track injuries. Since its founding in 2006, the fund has disbursed over \$7 million to permanently disabled jockeys, most of whom have sustained paralysis or brain injuries.

The FTBOA supports PDJF's Florida-based event -- Jockeys and Jeans -- held at Gulfstream Park annually. The FTBOA also works with event organizers to create event awareness, maximize attendance, and provide contacts for potential silent and live auction donors. The FTBOA works with The Florida Horse to provide coverage of the PDJF's mission. The Florida industry receives recognition at the event and in the event materials.

FTBOA

2017 Industry Promotion Plan

- **Additional Organizations:** The FTBOA's CEO currently serves on the Florida Animal Industry Technical Council, an advisory council to the Florida Department of Agriculture and Consumer Services. He is also an Equine Technical Advisor to the Florida Farm Bureau. The FTBOA's CEO is regularly asked to speak as an industry expert to professional organizations, including Racing Commissioners International, and at conferences on simulcasting, Thoroughbred ownership, the gaming marketplace, and gaming regulation.

Sponsoring National Thoroughbred Events

- **Eclipse Awards:** Administered by the National Thoroughbred Racing Association ("NTRA"), the Eclipse Awards are the thoroughbred industry's highest honors, presented annually in a televised event to honor the best thoroughbred horses, industry participants, and media members – an evening frequently called the "Oscars of horse racing." The NTRA, Daily Racing Form, and the National Turf Writers and Broadcasters are organizers of the event, which is aired on Horse Racing TV, Television Games Network, and YouTube.

The lead-up to the event features a number of other industry related events, including a Thoro-Fan breakfast. Florida-bred Horse of the Year Mucho Macho Man was named the fans' "Racing Moment of the Year" at the breakfast in 2013 for his dramatic Breeders' Cup Classic win, which is one of America's top races.

The FTBOA is a sponsor of the Eclipse Awards week when it is in Florida. The sponsorship brings key recognition to Florida-breds and Florida's contributions to the sport at an international and world class level with recognition in collateral for the events, at event sites, the awards program and throughout the awards telecast. The FTBOA also hosts the champions' breakfast and presents copies of The Florida Horse throughout the events.

The mission of the NTRA is to increase the popularity, welfare, and integrity of Thoroughbred racing through consensus-based leadership, legislative advocacy, safety and integrity initiatives, fan engagement, and corporate partner development. The FTBOA works closely with the NTRA, informing members regarding the safety alliance program, legislative updates, and NTRA's discount programs.

- **National Thoroughbred Owners' Conference:** OwnerView, a website and information resource developed to assist both current and prospective thoroughbred owners, hosts a two-day National Thoroughbred Owners' Conference each year. The conference features panel discussions with prominent industry participants, as well as an exhibit hall and several informational and networking events with owners and industry representatives.

FTBOA's participation enhances the Florida climate by giving the Florida thoroughbred industry a platform to promote Florida to new owners and to create opportunities for existing owners to get involved. Florida's thoroughbreds receive recognition at the event, with FTBOA representatives serving on industry panels and actively promoting Florida farms at the event's opening reception. In 2016, the FTBOA worked with the event

FTBOA

2017 Industry Promotion Plan

planning committee to ensure Florida-bred recognition was maximized and the strong Florida thoroughbred brand was featured.

The OwnerView website provides accurate information on trainers, public racing syndicates, the process of purchasing and owning a Thoroughbred, racehorse retirement, and owner licensing. The need for a central resource to encourage Thoroughbred ownership was identified in a comprehensive economic study of the sport that was commissioned by The Jockey Club and conducted by McKinsey & Company in 2011. The OwnerView website launched in May 2012. OwnerView is joint project of The Jockey Club and TOBA.

In addition to the conference, the FTBOA partners with the website by supplying Florida-bred incentive program information and key industry information to promote what Florida has to offer.

Educating Florida on the Industry's Impact

- **Industry Economic Impact Studies:** The FTBOA works hard to assemble and disseminate key data on the industry's economic, employment, and tax revenue impacts to industry stakeholders, members, business leaders, legislators, and the community at large.

In 2014, the FTBOA gathered key racing industry stakeholders together to commission a study of the economic impact of racing breeds in the state of Florida. The resulting study, "Florida Horse Racing Industry Economic Impact: Racing, Training, Breeding and Racetrack Operations," was presented to the Florida Senate Committee on Gaming on February 3, 2014. Professional research was provided by Cummings Associates and Civic Economics. Since then, the FTBOA has shared the results locally and at the state, national, and international levels to help educate the public about the industry's significance.

The takeaway message is the Florida horse racing industry directly supports over 12,000 in-state jobs, pays those workers over \$400 million in wages and benefits each year, and generates an annual economic impact of over \$900 million. This impact is greater than the impact of spring training baseball in Florida.

In late 2014, the FTBOA worked with the Ocala/Marion County Chamber of Commerce & Economic Partnership ("CEP") and other key industry stakeholders to commission a study of the economic impact of equines in the thoroughbred breeding region of Marion County. Kathleen Davis of Sports Marketing Research Institute prepared the study. SMR assists major companies in determining where and how consumers are spend their discretionary income. Their clients include Major League Baseball, NASCAR, and the NFL.

The results were released to business and community leaders at a CEP breakfast event in March 2015. The study also was presented by the FTBOA's CEO at another CEP breakfast and at several other business events during the year.

FTBOA

2017 Industry Promotion Plan

Overall, the results of this study indicated that the total economic impact of the equine industry annually in Marion County is \$2.62 billion in revenues, \$1.60 billion in value added contribution to the Gross Domestic Product (GDP), and employment of 19,209 full-time and part-time jobs. The majority of equine impacts in Marion County are due to Thoroughbreds. These numbers have appeared in publications throughout the county, state, and nationally since their release.

- Industry and Community Affairs: In 2014, FTBOA created an industry and community affairs position in order to educate the Florida public on the industry's significant economic contribution. Industry and Community Affairs connects the business and hospitality community with the equine community in terms of economic growth and buying power. It also connects the Florida thoroughbred industry with other thoroughbred states and nations.
- Business Leaders Program: The FTBOA also created a business leader program to educate the local community about the industry by providing a free bus trip to attend horse races at Tampa Bay Downs, where these business leaders were met by hundreds of FTBOA members.
- Office Loan program: The FTBOA makes its offices available for meetings of local charitable organizations and businesses and a number have used the FTBOA board room or library to conduct their business, increasing their exposure to the Thoroughbred industry.
- Billboard campaigns: In 2016, FTBOA began a billboard campaign -- "Preserve Florida's Thoroughbreds, \$1 Billion Economic Impact" -- featuring a loving mare and foal to highlight the agricultural sector of the industry. Billboards are planned at major roadways entering/exiting the state to educate the public about the industry's significant state impact.
- Educational opportunities: FTBOA staff serve as representatives of the industry to public walk-ins to the FTBOA offices, scheduled and unscheduled tour groups, industry leaders, community leaders, and the business community. For example, the FTBOA has worked closely with Marion County realtors to highlight the industry's strong economic impact on the area. FTBOA staff also presents classes to the public to help promote the Florida thoroughbred and its impact on the state.
- Master the Possibilities: Master the Possibilities is a life-long learning community program with over 1,300 programs and more than 24,000 students in the Marion County area. The FTBOA works closely with this program to reach out to the local community. In collaboration with the On Top of the World team, FTBOA developed a "Horse Week" for Spring 2015, which included a week of dedicated learning about the role the horse industry plays in the county and state. About 300 students participated, with the student fees going to charity. In the last two years, over 600 students participated in FTBOA sponsored programs overall. A second program in the "Horse Week" series in 2015 was a program titled "Horse Film Series," which was developed to share different horse cultures from around the world with local residents.

FTBOA

2017 Industry Promotion Plan

- **Appleton Trips & Tours Program:** The FTBOA partners periodically with this quality program at the Appleton Museum to provide an inside look at the industry. In 2014, FTBOA staff hosted 60 participants at Goldmark Farm, which focused on special innovations that assist in providing Thoroughbreds with the highest standard of care.
- **Agriculture in the Classroom:** The FTBOA participated in the “Agriculture in the Classroom” literacy project, a state-wide reading event for kindergarten through fifth grade sponsored by Cattlewomen, Master Gardeners, FFA, extension and 4-H agents. The FTBOA provided resources to help create a booklet, “Drive through Florida,” for children to learn about Florida agriculture. The FTBOA is following up on this effort by collaborating to create a history booklet for the county.
- **Promotion of Equine Artists:** The FTBOA has long been involved in promoting new artists interested in equine subjects. In the 1960’s, the FTBOA worked with Black Stallion book series artist Angie Draper to paint Florida champions, which now grace the walls of the FTBOA industry museum and offices. The FTBOA supported many equine artists early in their careers and some are now considered some of the top artists nationally. The FTBOA averages one exhibition per year for local and state artists. Keeping the horse a focal point with artists ensures horses are a focus of arts and culture in the area and in Florida.
- **Florida Tourism:** The FTBOA partnered with VISIT Florida to bring a mini-horse to Tallahassee to promote the “Horse Capital of the World” in 2013. The FTBOA provided a weekly TV platform for Visit Florida commercials to be aired nationally and provided resources as Visit Florida creates tourism campaigns promoting Florida’s horses.

Supporting Local Organizations

- **Ocala/Marion County Chamber & Economic Partnership:** The Ocala/Marion County Chamber of Commerce & Economic Partnership (“CEP”) was formed to create a one-stop approach to local business retention, attraction, and creation efforts. The CEP’s desire is to be a unified voice and catalyst for the local business community. By working together with partners and community investors, the CEP continues to improve the quality of life and build a strong base for economic development in Marion County.

The FTBOA supports the CEP by participating in workshops/seminars, committees, and leadership events. FTBOA staff members participate as speakers and panelists and seek out additional opportunities to promote the Florida thoroughbred. FTBOA staff have spoken to the CEP membership, at committees, and also to the Leadership Ocala Youth and Leadership Ocala business leaders. The FTBOA CEO has also served on the board of directors.

FTBOA staff have invited CEP officials as guests on the Horse Sense radio show on NBC Sports Radio to promote cooperative initiatives, including the release of the above-mentioned economic impact study, the CEP-hosted Ireland Trade Mission program, and

FTBOA

2017 Industry Promotion Plan

other equine related partnerships. FTBOA staff were key in the launch of the CEP website portal promoting the equine community.

This participation enhances the Florida thoroughbred climate by keeping the Florida thoroughbreds' economic impact in front of key business leaders and emerging leaders. It also provides access to key leaders in other industry sectors that can work with the FTBOA on a variety of local, state, and federal issues as needed.

- Marion County Hospitality Council: FTBOA staff attends meetings of this group with the purpose of promoting the industry and providing resources, including Farm and Service directories.
- Farm City Week: National Farm-City Week, recognized by a White House proclamation, is organized by the National Farm-City Council, a non-profit organization dedicated to enhancing links between farm families and urban residents. The FTBOA contributed to the first Ocala Farm City Week back in 1963. Since then, the FTBOA has continued to be a valuable contributor to the Farm City Week coalition along with UF/IFAS Marion County Extension Service, the Marion County Farm Bureau, public schools, and the Florida Department of Agriculture. This coalition hosts events throughout the national week, including a Farm City Festival, Agricultural Hall of Fame dinner, and a Farm City photo contest created by the FTBOA. This participation enhances the Florida thoroughbred climate by showcasing the longstanding history of agriculture in the county and the place of the horses in that history.
- Florida Equine Institute & Allied Trade Show: Administered by the University of Florida IFAS Extension Service and the Central Florida Livestock Agents' Group, the FTBOA is a strong supporter of this one-day educational equine event. The FTBOA suggests topics for the event and for trade show vendors and promotes the event in advance to FTBOA members and to the community at large. FTBOA staff are onsite at the event, promoting the Florida thoroughbred. The FTBOA also partnered with organizers to offer a discounted ticket to the event for members. The FTBOA also works with Florida Equine Communications on publishing the proceedings of the institute. This participation enhances the Florida thoroughbred climate by providing equine practitioners key information from horse health experts and leaders in the field so they can make educated decisions in their equine businesses.
- Marion County Days in Tallahassee: The Ocala / Marion County Chamber of Commerce & Economic Partnership engages partners on legislative issues through the Business Advocacy committee, with special events held throughout the year with elected representatives. The goal is to provide a forum to educate partners on issues affecting businesses and the community, while providing an opportunity to be an active part of the process.

The Marion County Days annual event gives partners experience lobbying for priority issues at the Florida Capitol. Participants also hear from special speakers and members of the Marion County Legislative Delegation.

FTBOA

2017 Industry Promotion Plan

The FTBOA supports this two-day event by attending the reception with key representatives and promoting the Florida thoroughbred and its economic impact. FTBOA staff is also called upon as special speakers presenting key industry issues and sharing the lobbying process with business leaders.

This participation enhances the Florida thoroughbred climate by showing business leaders that FTBOA has strong skills in business advocacy and looks to develop key business partnerships to grow the economic benefits for all.

- University of Florida Large Animal Hospital: The UF Large Animal Hospital is the only equine veterinary hospital in Florida within a College of Veterinary Medicine and treats horses, cattle, alpacas, llamas, goats, pigs, and other large farm and food animals. The FTBOA works with the facility to promote their programs, serve as a resource, and share information with health care officials. This participation enhances the Florida thoroughbred climate by keeping industry participants abreast of key issues affecting equine health.
- College of Central Florida Equine Programs: FTBOA staff are guest presenters at equine program classes on the health of the industry and the opportunities for careers in the field. In addition, FTBOA staff discuss current topics of interest to students regarding the industry. FTBOA also works with CCF annually on a student scholarship. This participation enhances the Florida thoroughbred climate by promoting the industry to future participants.
- Future Farmers of America: The FTBOA supports FFA programs with recognition of their equine proficiency winners and assists with fundraising efforts for their local and state equine programs. The FTBOA also works with interested FFA students as volunteers and interns. FTBOA staff periodically attend the FFA state convention in Orlando. This participation enhances the Florida thoroughbred climate by promoting the industry to future participants.
- 4-H Programs: In Belleview, Dunnellon, and elsewhere around the state, the FTBOA supports 4-H programs with recognition of their thoroughbred breeding and sales programs and assists with fundraising efforts for their local and state equine programs. The FTBOA also works with interested 4-H students as volunteers and interns. FTBOA staff periodically attend 4-H fundraisers. FTBOA staff also give tours to area 4-H programs throughout the year that include visits to the museum, a local training track, and nearby horse farms to observe the local work being done with thoroughbreds. This participation enhances the Florida thoroughbred climate by promoting the industry to future participants.
- Thoroughbred Horse Shows – Run for the Ribbons: The Run for the Ribbons, Inc., is a non-profit program dedicated to improving the lives of thoroughbreds after their racing careers come to a close. Founded in 2014, the Run for the Ribbons Horse Show is a hunter/jumper series for thoroughbreds only. Several shows are held annually at Cedar Lock Farm in the Ocala area. The FTBOA shares expertise in fundraising, event planning, marketing, and publicity with the non-profit. The FTBOA also works closely with organizers to share stories of successful Florida-breds that are part of the series. The FTBOA presents the program's highest honors for both horse and rider at the annual awards gala. This

FTBOA

2017 Industry Promotion Plan

participation enhances the Florida thoroughbred climate by promoting the versatility of the thoroughbred after racing to the general public.

- **Stirrups and Strides:** Stirrups and Strides provides therapeutic horseback riding and driving to persons with physical, mental, or emotional challenges, improving the quality of life for these individuals and offering an opportunity for emotional and physical growth through horsemanship and competition. The FTBOA shares expertise in fundraising, event planning, marketing, and publicity. FTBOA staff periodically attend their largest fundraiser annually-- “Jammin’ at Jumbolair” – which is typically held in the Ocala area. The FTBOA also works to share success stories of retired thoroughbreds used in this program. This participation enhances the Florida thoroughbred climate by supporting a non-profit involved in the equine field and also promotes the versatility of the thoroughbred after racing.
- **Marion County Therapeutic Riding Association (“MTRA”):** MTRA offers the benefits of therapeutic horseback riding to persons of all ages and capabilities who are physically, mentally, or emotionally challenged. Serving the heart of Florida since 1985, MTRA is a PATH Premier Accredited organization. FTBOA shares publicity expertise with the non-profit and shares stories of successful Florida-breds that are used in the program. This participation enhances the Florida thoroughbred climate by supporting a non-profit involved in the equine field by promoting the versatility of the thoroughbred after racing to the general public.
- **Additional Associations:** Additional associations assisted in 2015 include the Boys and Girls Club, YMCA, Hospice of Marion County, the Heart Association, Marion Cultural Alliance, Florida Thoro-Fillies, the Marion County Literacy Council, the Marion County 4-H Club, Florida Parade of Equine Champions, Equine Alliance, and the Florida Center for the Blind.

Florida Thoroughbred Retirement

- **Florida Thoroughbred Retirement Foundation at Second Chance Farm at the Lowell Correctional Institution:** The FTBOA provides administrative and fund-raising support for Florida Thoroughbreds retired from racing that are cared for at the Florida Thoroughbred Retirement Foundation’s Second Chance Farm at the state’s Lowell Correctional Institution in Marion County. This program that gives inmates an opportunity to earn an equine certification degree while caring for retired thoroughbreds in their lifelong, post-racing home.

This is the only female program of its kind in the country and one of only a handful nationwide. Over 100 women have graduated from this life-changing program, with only 3 returning to the prison system. This 3% recidivism rate is remarkably good as compared to national averages of over 35%. The farm, founded in 2000, houses over 40 horses and 12 to 14 students participate in each session.

FTBOA

2017 Industry Promotion Plan

The FTBOA partners in this program with the Florida Department of Corrections and the National Thoroughbred Retirement Foundation. Funds are raised through business and industry supported charity golf tournaments, silent and live auctions, and open houses.

The FTBOA periodically hosts board meetings at the facility so board members can see first-hand the importance of the program's efforts. The FTBOA also has a thoroughbred retirement committee to assist with this program and other thoroughbred retirement efforts. This participation enhances the Florida thoroughbred climate by providing a strong program in the correctional system, providing a life-long home for Florida thoroughbreds, and providing educational opportunities that lead to gainful employment in the industry.

Membership Services: The FTBOA formed a membership services department in 2013 to engage membership in a unified way, and membership has increased through the department's initiatives. The FTBOA also engaged members in a communication survey in 2013, which led to a number of enhancements in the way the FTBOA communicates with its membership and the industry. Benefits to members include:

- **Member Discount Program Business Partnerships:** The FTBOA partners with over 40 businesses to offer discounts to FTBOA members and provide exposure to these business. From restaurants and hotels, to education and business services, the program draws from a broad spectrum of businesses.
- **Services**
 - Provide information, research, and deadlines for breeder incentive programs.
 - Provide reduced cost Jockey Club and Bloodstock Research pedigree services.
 - Offer copy, notary, and fax services to members for a nominal fee for industry-related items.
 - Provide resources for vendors, suppliers, and health professionals.
 - Provide information on trends pertinent to equine health.
 - Provide information on taxes and tax benefits available in the state.
 - Provide information regarding racetrack contacts, schedules, and requirements.
 - Provide licensing information.
 - Issue member surveys to better serve the members' needs and to gather first-hand information on industry trends.
- **Educational Programs**
 - Member Mentor Program:** Launched in 2015, the program gives new members a chance to meet existing members in specific areas of expertise in the industry - sales, breeding, broodmare management, stallion management, breeding to sell, breeding to race, etc. Educational programs designed around these topics are held throughout the year.

FTBOA

2017 Industry Promotion Plan

The FTBOA sponsors numerous seminars all year long and works in conjunction with the University of Florida's College of Veterinary Medicine, the Department of Animal Sciences, the Marion County Cooperative Extension Service, and the College of Central Florida.

Member Library & Research Center Services: The FTBOA keeps hard copies of Equibase, The Jockey Club, and racetrack information, as well as the latest racetrack condition books and statistics. The FTBOA's Research Center also includes historical sales catalogues, videotapes, rare books, and periodicals.

Industry Promotion: The nationally distributed magazine "The Florida Horse" and an annual Stallion Register and Farm & Service Directory are all complimentary as part of FTBOA membership. The award-winning publications keep members updated on industry news and the performance of Florida-breds nationally. Members also receive e-newsletters sharing information on economic impact studies and other reports regarding the industry.

Member Events: The FTBOA hosts several events for members throughout the year, including a day at Tampa Bay Downs, a trip to the finals of the Florida Sire Stakes at Gulfstream Park, advocacy trips to the Florida Capitol, charity holiday events, and an annual awards gala. The FTBOA also hosts member mentor programs and special event days sponsored by area farms.

Member Committees: The FTBOA encourages member engagement, with an opportunity to get involved in committees that include communications, social, charity and outreach activities/events, and thoroughbred retirement among others.

Agriculture Affiliation: The FTBOA maintains close affiliations with the Florida Department of Agriculture and Consumer Services, the University of Florida's College of Veterinary Medicine, Department of Animal Sciences, and other agriculture related associations to ensure the promotion of the Florida thoroughbred.

Industry Matters: The FTBOA is the voice for its members in the state of Florida in all matters concerning the thoroughbred industry. The FTBOA attends public hearings in addition to working one-on-one with governments at all levels. The FTBOA also acts as a liaison for its members with various horse councils and associations.

- **Communications**

Print: Through a variety of industry and community publications, racetrack overnights, programs, and collateral materials.

Radio: FTBOA staff serve as moderators and/or guest speakers on radio shows periodically focused on equine topics and how they relate to the community. Guest speakers include community leaders, business leaders, charity professionals, and equine professionals.

Website: The FTBOA's website serves as the primary portal for information on the Florida thoroughbred.

FTBOA

2017 Industry Promotion Plan

Informational Meetings & Events: The FTBOA holds informational meetings as needed to facilitate communication among members and with stakeholders, the community, and local businesses. Industry-initiated educational programs are promoted to FTBOA members and the general equine community.

The FTBOA provides several mailings annually regarding programs and services. Examples include registration, Florida Sire Stakes, and membership surveys. The FTBOA explores new technology to provide these services based on member preferences, for example, texting deadline reminders.

Literature Display with resource materials include:

- Printed racetrack condition books and racetrack overnights (print copies on demand)
- Sales results (print copies on demand)
- Community events related to the industry
- Thoroughbred retirement events
- National Thoroughbred Racing Association updates
- Thoroughbred Owners' & Breeders' Association updates
- Tax updates
- Conservation materials
- Small animal management materials (as available)

Education Station – Topical binders with information available online on equine related topics such as health, safety, market trends, economic reports, and studies.