

2020-2024

STRATEGIC PLAN



The Association of
Irish Racecourses
CLG



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CHAIRMAN'S ADDRESS

As Chairman of the Association of Irish Racecourses (AIR), I am pleased to introduce this five-year strategic plan for the Association 2020-2024.

This strategic plan outlines the objectives of the Association and the actions which will be taken to ensure those objectives are realised over the next five years.

The Association of Irish Racecourses is the representative body for all twenty-six Irish Racecourses, North and South of the border. Our members collectively provide the venues for horse racing in Ireland which facilitates the running of over 360 race meetings and caters for in excess of 1.3m patrons annually.

This strategy has been devised following consultation with the Board of Directors of AIR, our members and our staff to ensure it reflects a well-rounded plan for the future of the Association for the next five years.

This strategic plan has been developed with great consideration of the key priorities of the Association. We are acutely aware that new and emerging topics, opportunities and challenges will surface during this period and the Association will apply our guiding principles to them as they come in the best interests of our members as the Association has always done since its establishment in 1964.

Many thanks to our Board of Directors and Chief Executive, Paddy Walsh who have given their time, expert insights and experience to the development of this strategic plan.



Conor O'Neill
Chairman
Association of Irish Racecourses



FOREWORD BY PADDY WALSH

As the representative body of Irish Racecourses, our aim is to work at all times in the interests of our members, those who own and/or operate the twenty-six racecourses nationwide. The primary functions of the AIR are:

- AIR deals with representatives of other industry bodies (owners, trainers, jockeys, the Irish Horseracing Regulatory Board etc.), with a view to developing initiatives to help the wider industry.
- AIR has a commercial focus and in recent times the main focus has been on media rights and Wi-Fi.
- Representation at HRI Board level, the Media Rights Committee, the Fixtures Committee, the Programmes Committee etc.
- Interaction with other bodies outside of the industry who have sporadic engagement with horse racing (government bodies and committees, economic consultants etc.).
- Negotiations on behalf of its members with third parties that provide regular services to its members.
- To communicate key messages on behalf of our members under the banner of the Association.
- AIR access cards and system.
- The Association also organises on behalf of its members, racecourse commentary services which it provides through a full-time employee and some third-party commentators.

- In the interests of cost efficiency, the Association also organises a group insurance scheme through its insurance brokers for those of its members that wish to participate in same.
- The Association also arranges for the services of the Meteorological Office to be available to all racecourses.
- AIR doesn't get involved in the day to day activities of members but supports key activities on their behalf as a representative body working in their interests collectively.

This document provides details of our plans for the next five years in key areas. With a growth and development mindset, we have created this strategic plan. Over the next five years, we will also maintain our delivery of general services and activities to our members.

I hope you find the information contained in this plan to be insightful and on point.



Paddy Walsh
Chief Executive Officer
Association of Irish Racecourses



INTRODUCTION

The Association of Irish Racecourses has developed a five-year strategic plan covering the years 2020-2024.

The strategic plan includes our strategic objectives and the actions required to achieve these objectives.

1.0 Keeping all racecourses united

2.0 Maximising revenue-generating opportunities

3.0 Communications

4.0 Racecourse standards

5.0 Sustainability



MISSION STATEMENT, VISION AND GUIDING PRINCIPLES

Mission Statement

“To represent the interests of our members, those who own and/or operate Ireland’s twenty-six racecourses.”

Vision

To represent our members to the highest of standards when promoting our collective interests for the good of our united association.

Guiding Principles

The Association of Irish Racecourses aims to uphold its reputation for fairness and to maintain the trust of its stakeholders.

We work with other associations and bodies within the horse racing industry, other industries and third parties on behalf of our members to ensure they enjoy the benefits of the best possible outcome every time.

We believe in open communications with our members and encourage the active participation of all members and our Board of Directors on a regular basis.

STRATEGIC OBJECTIVES 2020-2024

- Keeping all racecourses united
- Maximising revenue-generating opportunities
- Communications
- Racecourse standards
- Sustainability



OBJECTIVE 1 KEEPING ALL RACECOURSES UNITED

To ensure our collective buying power and negotiation strength for the benefit of all members, keeping all our member racecourses united under the umbrella of the Association of Irish Racecourses is vital.

Key initiatives to ensure a united front include;

- A transparent and detailed overview of the extensive supports offered by AIR to its members will be put in place to instil greater understanding, confidence and trust.
- A dedicated plan for racecourse visits to members' racecourses on non-race days will be rolled out to build the Association's relationship with individual members and their staff and give every member an opportunity to raise their opinions and concerns on a wide range of topics.
- A 'Proud Member of AIR' promotional campaign will be created to promote unity. Association membership stickers will be provided to all racecourses to highlight their membership and togetherness. This will demonstrate commitment to one another, to key stakeholders and all racegoers who attend their venues.
- A conscious effort will be made to continue to increase the many benefits that individual racecourses enjoy as a direct result of their membership of the Association. The introduction of group schemes, affinity deals, training supports and the introduction of a model sharing ethos will be rolled out as part of this plan.
- A minimum of 8 board meetings and 3 general meetings of the members take place annually, however, should the need arise to hold meetings on hot topics, these will be in addition to same. Agendas and minutes of all these meetings will be available to participants.
- Regular communications with members will be increased to ensure that the work done by the Association on behalf of all members is clearly communicated and fully understood.

OBJECTIVE 2 MAXIMISING COMMERCIAL OPPORTUNITIES

We will engage with third parties on behalf of our members to maximise all revenue-generating opportunities for the Association. The immediate areas for consideration in this regard include the development of media rights and the commercialisation of wi-fi and other digital assets. However, AIR is open to considering a wide variety of revenue-generating opportunities for the Association and in turn its members over the next five years.

Key Initiatives:

The development of media rights is an ongoing function of the Association.

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| <ul style="list-style-type: none">- The current media rights agreement with S.I.S. will be in place until 2023 however, renegotiation of same will happen during the lifetime of this strategic plan. In fact, in the early stages of this strategic plan rollout AIR will prepare for negotiations again. | <ul style="list-style-type: none">- On the other hand, the challenges here are far from simple and worthy of serious consideration from the formula itself and the ever-changing marketplace to members' perceptions and buy into optimising streaming profitability options. |
| <ul style="list-style-type: none">- There are many external factors here that may affect the outcome of such a deal e.g. Brexit. However, as a commodity Irish horse racing is extremely well placed. The Association represents all twenty-six racecourses across the entire country. Our close working relationship with Horse Racing Ireland (HRI) and the ease with which fixtures are allocated and changes facilitated also makes for an attractive proposition. | <ul style="list-style-type: none">- We will endeavour to renegotiate the very best deal we possibly can for our members in a fair and equitable manner. |
| | <ul style="list-style-type: none">- We will liaise with all relevant third parties involved in this process in a timely fashion. |

The commercialisation of Wi-Fi

- At the time of preparing this strategic plan, twenty-five of the twenty-six racecourses in Ireland have signed up to this programme and it is currently installed at eighteen of the racecourses, while the remaining seven racecourses will have it installed in time for their opening fixtures in 2020. Horse Racing Ireland has offered a fifty per cent grant for installation and AIR intends to commercialise this service to generate revenue for our members
- During the lifetime of this plan, we will endeavour to use this service as an opportunity for our Association and in turn its members to generate revenue for their individual racecourses.
- We will conduct due diligence to ensure the framework of any deal will be the very best opportunity for our members.
- We will investigate the opportunity to use the commercialisation of Wi-Fi to incentivise the general public to come racing in line with our mission statement and overall strategy.

Other revenue-generating opportunities:

- The over dependence on media rights for income has always been a factor of concern. AIR will endeavour to identify and investigate additional revenue-generating opportunities over the next five years on behalf of its members. An open mind, conscious consideration and due diligence are guaranteed in this regard. AIR will also engage with other large associations and groups to explore the possibility of attracting their members, employees and customers to come racing.



OBJECTIVE 3: FOCUS ON INTERNAL AND EXTERNAL COMMUNICATIONS

To ensure the rollout of an efficient communications system by the Association which will provide for greater internal and external communications.

Internal communication refers to how the Association will communicate with its members. We will ensure the most appropriate communications processes are in place to communicate with our members effectively. External communication refers to how the Association communicates with all individuals and groups outside of the Association, its membership and employees.

Key Initiatives:

- The AIR brand is very well established through the card system, however, a branding revival will be introduced. The logo will remain consistent and the focus will be on imagery and coherent messaging when communicating internally and externally.
- The design of a suite of consistently branded helpful materials for members will be uploaded to our website.
- Through the use of strong imagery and coherent messaging, we will re-energise the brand. The redevelopment of the website will also fall under this brief.
- We will continue to develop working relationships with other horse racing industry bodies, nationally and internationally and our peers representing racecourses all over the world.
- We are committed to liaising with all relevant third parties in a timely manner.

Stakeholder Engagement

- To foster a relationship with the many shared stakeholders and groups that members of AIR all work with on an ongoing basis.

- We will conduct a review of the AIR card system.
- To gain greater understanding through engagement with these stakeholders and identify key initiatives that the Association can implement to create better relationships, communications, workplace environments and synergy at Irish Racecourses.
- Without the racecourses there would be no racing venues. However, our members are dependent on the provision of services by others to ensure the racing product is delivered to their punters at their tracks. Relations between individual racecourses and these stakeholders, suppliers and

organisations vary from racecourse to racecourse and oftentimes from one race day to another.

- AIR will engage with stakeholders and make recommendations where necessary on behalf of its members. Similarly, we will make recommendations to our members following consultation with stakeholders in an effort to nurture and develop these relationships.



OBJECTIVE 4 RACECOURSE STANDARDS

Quality Mark

- The Association represents all members equally and recognises that each of the twenty-six racecourses in Ireland that we represent are unique.
- AIR encourages all members to continually improve the facilities at their racecourses and the Capital Development Fund has enabled many members to do so.
- The licencing of the racetrack and racing-related facilities is handled by the Irish Horseracing Regulatory Board (IHRB) and the authorising of facilities for patrons to come racing is conducted by Horse Racing Ireland. AIR will engage with these bodies to establish and influence clearly defined criteria on how each of these bodies assess racecourses for its members. We will furnish all members with this information to ensure greater transparency, trust and instil an ethos of continuous development of our collective venues going forward.
- AIR will review the current grading system and a new model for quality classifications will be drafted. This new independent grading system will allow for both the promotion and demotion of the status awarded to individual racecourses, to encourage members to strive for excellence and consistently develop each racecourse to the highest possible standards.
- We believe that AIR members would benefit from a model sharing ethos and AIR is committed to rolling this out to all members. Day-to-day activities at racecourses are not an area AIR is overly involved with, however, we believe the facilitation of successful model sharing amongst our members would be of great benefit to all and in-line with our overall remit. AIR will use the roadshow described under objective one and consultation with stakeholders described under objective three to develop this initiative for rollout.

- There are many employees at each of our members' racecourses. HRI offers an exceptional training and educational programme, many other non-industry bodies also offer nationwide training and education programmes annually. As part of our continued professional development ethos, AIR will engage with these organisations to ensure our members and their staff have access to and are aware of the various continuous professional development opportunities available to them.
- AIR will also encourage our members and their staff to network with other members of the Association and their teams in the interest of model sharing and knowledge sharing.
- AIR will introduce an association accredited panel of experts for members to engage with as specific requirements and challenges come up. We will identify a suitable panel and communicate their details to our members.
- AIR will encourage all our member racecourses to provide the highest possible standard of services to all their customers - be they members of the racing public, participants in the sport or other industry stakeholders



OBJECTIVE 5: SUSTAINABILITY

Our mission is to act for the long-term good of our members who provide the platform for horse racing to take place in Ireland and we also have a wider responsibility to their patrons and beyond. Each member is ultimately responsible for the welfare and environmental practices at their individual racecourses. However, the Association of Irish Racecourses (AIR) will encourage a sustainable ethos amongst our members in each regard.

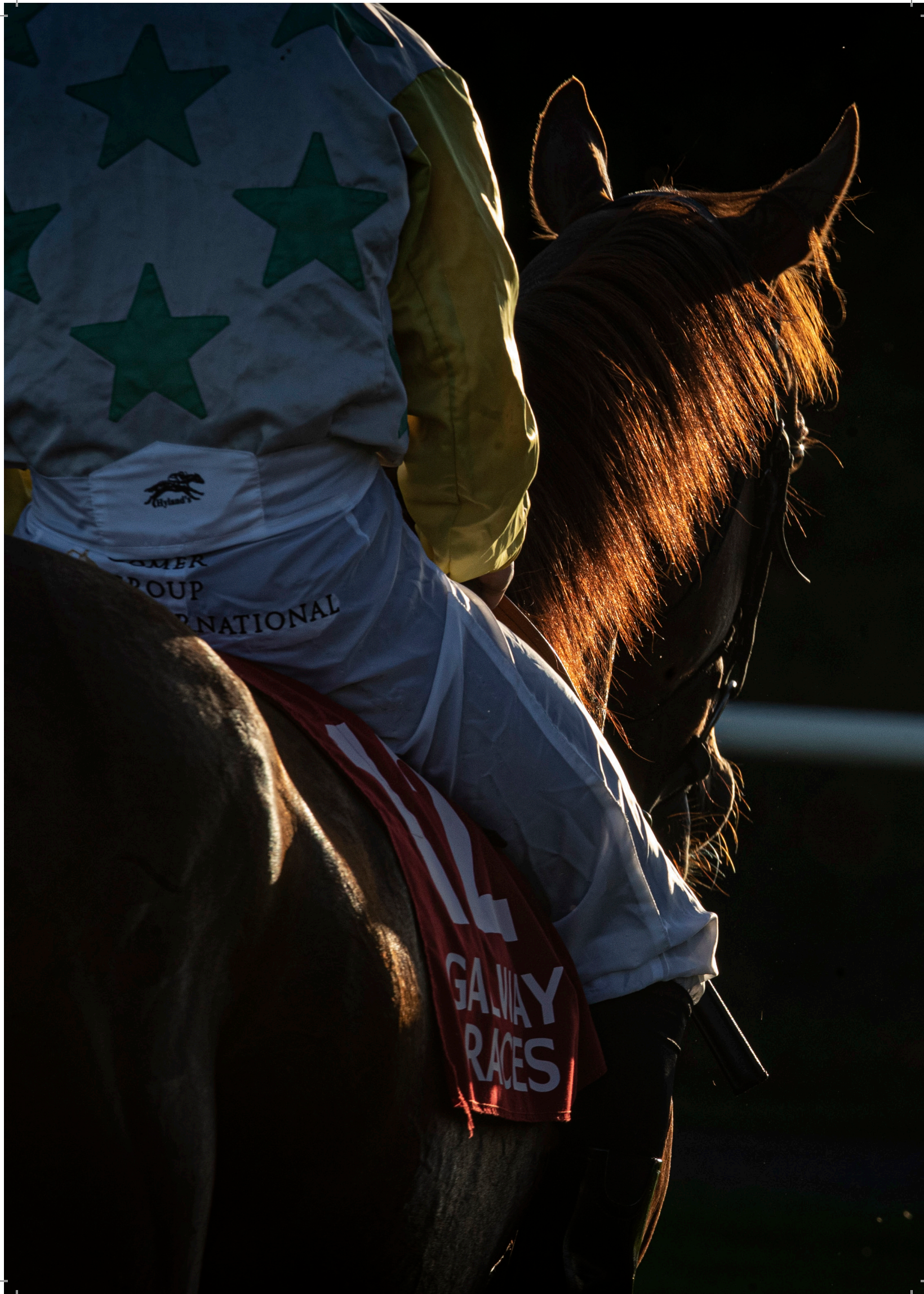
Horse Welfare

- The welfare of the horse is of paramount importance to the entire thoroughbred racing industry. The health and safety of all horses who visit our members' tracks is a top priority for the Association, our members and the teams they employ at their individual racecourses. We understand the importance and benefits of applying the best veterinary practices and care to horses at our members' facilities.
- There must be at least two Racecourse Veterinary Surgeons (RVS) on duty at any race meeting and the meeting cannot, under the Rules of Racing, go ahead without them. The Association encourages all our members to only employ vets who are members of the Association of Irish Racecourse Veterinary Surgeons (AIRCVS). The AIRCVS ensures that their members are appropriately qualified and they provide training and CPD in this specialist area of veterinary medicine.
- The Association encourages all member racecourses to ensure that an appropriate horse ambulance is on site prior to racing going ahead.
- We foster a responsible equine welfare ethos and encourage our members to continue to deliver the exceptional health and safety standards at racecourses nationwide.

Environment

- The Association recognises that it has a responsibility to the environment and we are committed to reducing our environmental impact and will continue to improve our environmental performance. We will encourage our members, suppliers and other stakeholders to do the same. All members have a responsibility to ensure that the aims and objectives of their sustainability policy are met.
 - We endeavour to comply with and exceed all relevant regulatory requirements and to continually improve and monitor environmental performance.
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- We will explore and communicate suitable resources and international recommendations for our members which detail how racecourses might go about reducing their carbon footprint.





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