

# Dog and Horse Racing - UK - November 2009

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## What is this report about?

UK consumers are still spending approaching £300 million a year on-course at horse and greyhound fixtures, and have been increasingly willing to spend more heavily in bars and restaurants than they do in the betting ring. But the perceived cost of the new social horse racing experience is becoming a barrier to attendance among key groups such as families and the young, and greyhound racing is still perceived more as an occasional leisure activity than as a regular one.

This report examines the impact of these behaviours and attitudes on the size and shape of the UK dog and horse racing market and assesses the way in which they affect its ability to address the challenges it faces on all three fronts.

## What have we found out?

- In 2008, on-course spending at dog and horse racing tracks grew marginally to £302 million, from £298 million the previous year. This came despite declining attendances in both sports, with food, drink and hospitality operations having been the main growth drivers.
- Although horse and dog racing attendances fell 5.5% and 19% respectively between 2004 and 2008, average attendances at horse racing's National Hunt meetings actually rose by 3.3% over the period and dog racing operators believe the decline in attendances and track closures may be bottoming out.
- Just over four in ten UK adults are current, lapsed or potential racegoers, giving horse and greyhound racing a potential audience of more than 20 million. However, current horse and greyhound racing spectators tend to watch one sport or the other; very rarely both.
- Young people and families are the most put off by the cost of going racing – particularly horse racing. Under-25s and parents of under-5s are the most likely to agree that going horse racing “would be too expensive in the current economic climate”.
- Women are actually more attracted to horseracing by the excitement and spectacle of the sport itself rather than its social side or any associations with glamour.
- Four in ten consumers who have been dog racing agree that the social side of the experience is the most important thing – showing that efforts to reposition the sport in this way have been successful. However, one in five of these also say it's a good part of a night out but wouldn't stay there all night.

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