

## Horseracing - UK - December 2012

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"Although attendances will slip back in 2012 and football continues to outperform it in the betting market, horseracing stands on the threshold of potentially another key period of its development not just as a spectator sport but as a player in the wider leisure market.

A new television deal putting all terrestrial coverage on Channel 4 creates an opportunity to develop a structured season viewers will find easier and more compelling to follow. Racecourses are able to build on earlier rounds of major capital investment with smaller-scale projects that enhance the experience of spectators, and successful central marketing initiatives are set to roll out more widely.

Threats to growth remain, however, in the fragile nature of the sport's relations with the betting industry and its need to develop a broader range of products and platforms to attract the younger leisure pound."

– David Walmsley, Senior Leisure Analyst

### In this report we answer the key questions:

- Is 2012's anticipated decline in racing attendances a blip or a trend?
- How can horseracing stem its long-term decline in the betting market?
- Will the absence of racing on BBC television damage the sport?
- How can racecourse facilities develop in a difficult investment climate?
- How can the sport attract new, younger audiences?

Horseracing has enjoyed something of a revival in fortunes within the British spectator sports market in recent years after investing heavily in new facilities and marketing initiatives to raise its public profile and broaden its appeal.

Attendances topped six million in 2011 for the first time since 2004, racecourse revenues are also on the up and the sport has enjoyed a major turnaround in the value of its media rights. However, consumer spending on horserace betting continues to fall in the face of competition from football, gaming machines and new web-based products, and there has been little progress in agreeing a new mechanism through which bookmakers contribute to the funding of the sport.

This report examines developments in the British horseracing market, with a particular focus on consumer spending both on- and off-course.

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