



# British Racing Industry Update 2016



**BHA**  
BRITISH HORSERACING AUTHORITY



**GREAT BRITISH  
RACING**





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## Foreword

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Our annual Industry Updates give stakeholders and participants an outline of the previous year's progress and developments, briefings on the issues we face as an industry, and an outline of our plans to tackle these over the coming year. They provide an opportunity for open, frank and interactive discussion on how racing can work together to help our sport grow.

Last year at the inaugural Updates, we set out the following four targets which we aim to achieve by working together in developing and implementing our strategies for growth:

- 1000 additional horses in training by 2020
- Betting participation levels up 5 per cent by 2018
- Racecourse attendances to reach 7 million by 2020
- £120 million extra income for the sport per annum by 2018

After the landmark signing of the Tripartite Members' Agreement between the BHA, RCA and Horsemen in October 2015, we have a good framework for agreeing and delivering the overall growth strategy for our sport. While we face some significant challenges, we are making good progress. The average number of horses in training has risen by more than 300, racecourse attendances rose to more than 6.1 million and overall prize money reached a record level.

However, it is clear that we continue to face some difficult issues, including our central funding from betting activity, our relationship with the Betting industry, inadequate levels of prize money across all fixtures, and the fact that the financial returns to many of our participants are simply not good enough. We aim to cover these throughout the course of the Industry Updates. There will be opportunities for you to ask questions on these, and indeed, any other issues, during the event and also afterwards by emailing your comments to [racingindustryupdate@britishhorseracing.com](mailto:racingindustryupdate@britishhorseracing.com).





# 2015 Key Statistics

## Targets...

**1,000**  
Additional horses  
in training by 2020

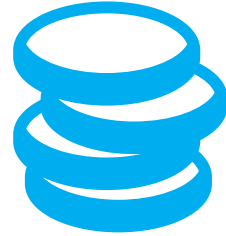


Racecourse attendances to reach 7 million by 2020

£120m extra income for the sport p.a. by 2018

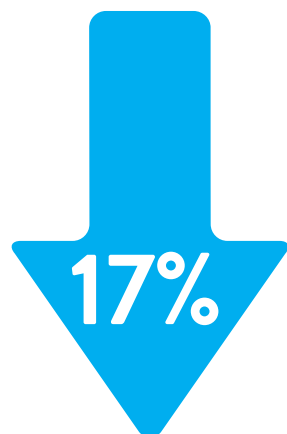


Betting participation levels up 5% by 2018

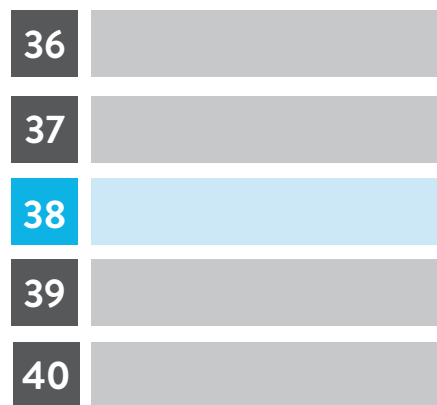


## Challenges...

Reduction in number of owners since 2007



38th in the international league table for ROI to owners



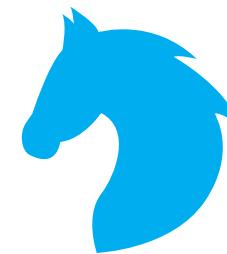
Increasing shortage of skilled stable staff



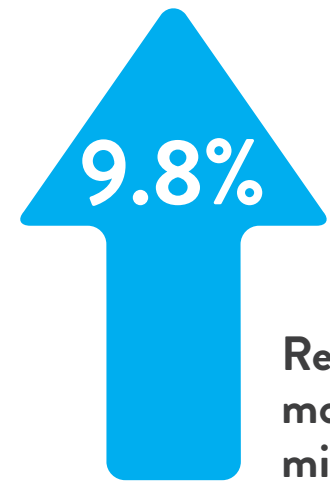
## 2015 Progress...



Attendance of 6.1 million, a growth of 5.3% from 2014



358 more horses in training, growth of 2.6% from 2014



Record prize money of £135.3 million in 2015



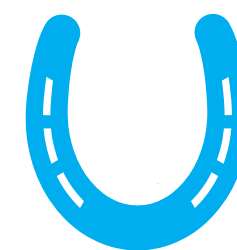
Members' agreement signed



New standard of sales testing implemented



Authorised Betting Partners established



£1 million Racing Foundation funding to address stable staff shortage

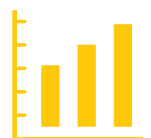


## Integrity and Regulation



### Objectives...

1. British Racing to be a world leader in integrity and regulation
2. Rules of Racing are clear, accountable, fair and consistent



### Actions

Integrity Review undertaken in 2015 to ensure British Racing's approach is modern, fair, accountable and in-tune with participants.

Focused on the following areas;  
People | Policies | Processes | Technical Capability

Review of findings and recommendations to be published in March 2016 and used to shape future strategy

Betting Customer Survey to further shape regulatory practice

Equine Anti-doping practices enhanced

- New Anti-Doping Rules implemented
- Dedicated Anti-Doping manager appointed for the first time in 2015
- British and overseas sales testing implemented
- Continued testing of international runners and permanent imports
- Collaboration with overseas jurisdictions on cobalt studies to maintain our position as World Leaders

Rules Rewrite project commenced, including separation of Rules from Policy

Stewarding Review will be undertaken in 2016 and will provide input into the Rules Rewrite



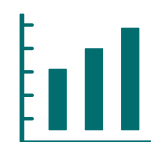
## Participant Welfare and Training

**Target** To support the long-term development and health of British Racing and its participants



### Objectives...

1. Generate and support a suitable and appropriate range of gateways into the Industry for new entrants
2. Provide a comprehensive portfolio of progressive training and development for Stud and Stable Staff
3. Support the long-term development and health of British Racing and its participants



### Actions

Continued refinement of the Careers in Racing website, which provides an ongoing pipeline of potentially suitable candidates - attracting a new workforce and aiding career development

- 342,000 visits to careersinracing.com in 2015 – rise of 16% on 2014

Employer Led Training Programme trial launched in 2015, with a minimum of 20 places available in 2016

- Gateway for over 19s to enter the industry who are no longer eligible for government funding or the Apprenticeship Scheme

Strategic work with Equine Colleges, the Pony Racing Authority and Pony Clubs to engage young people with an interest in horses

Expansion of the integrated marketing plan under the Careers in Racing brand, with initiatives supported by and developed with stakeholders

Work Rider Training Programme piloted for stable staff continuing into 2016

Personal Development Manager for Jockeys employed by Jockeys Employment and Training Scheme (JETS)

Careers Advice and Training Service specifically aimed at stable staff in partnership with Racing Welfare due to be launched in the second half of 2016

Newmarket Occupational Health Pilot successfully launched in 2015 following BHA welfare review in 2013, and to be expanded to Middleham in 2016

£1 million funding secured from the Racing Foundation used to underpin an expanded and enhanced programme of recruitment, regional training and athlete development planning for jockeys

BHA Welfare Development Manager appointed in May 2015 to manage and improve the welfare of participants

Review undertaken by Jardine Lloyd & Thompson (JLT Group) to improve insurance offering for racing's participants in 2016





## Racing and Betting

Target: Betting participation levels up 5% by 2018



### Objectives...

1. Generate fair and sustainable revenues from betting operators
2. Build relationships with betting operators
3. Grow betting activity on British Racing

### Actions

Ongoing co-operation in 2015 with Government who have confirmed their commitment to a Horserace Betting Right

Authorised Betting Partners established as an interim solution to recognise operators who contribute a fair and sustainable return to the sport

Racing and Betting Group established with senior representatives from both industries to aid a greater understanding of betting trends

Horserace Bettors Forum established and meets quarterly to gain insight into what appeals to consumers.

Establish a clear timetable for development and implementation of a replacement for the current levy scheme

Delivering ABP benefits to signed up operators and signing up additional betting organisations

Proposals for a Remote Betting Fixture List, as part of an overall review of the Fixture List, to be developed by summer 2016

Gaining further insight into betting trends through the Horserace Bettors Forum and the Racing and Betting Group to grow betting activity



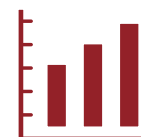
## Horse Population, Ownership and Breeding

Target: 1,000 additional horses in training by 2020



### Objectives...

1. Attract additional owners and improve retention levels
2. Enhance the ownership experience, both on and off the racecourse
3. Increase engagement with existing and potential owners
4. Identify opportunities to encourage owners to retain quality stock for breeding and racing their horses in Britain



### Actions

The modernisation of ownership administration

- Simplification of ownership registration structures, consolidation of owners' fees and the introduction of customer friendly administrative systems, due to be implemented in 2017

Centrally promoted national campaign around the thrill of owning horses through syndicates and shared ownership

- Funding secured by GBR and campaign to be delivered in the second half of 2016 which will complement existing marketing undertaken by syndicates

An online survey to be launched in March 2016

- To provide insight about the experience of new, existing and lapsed owners which will help shape future strategy

Improving the owners' raceday experience

- Continuing racecourse investment with the ROA
- Introducing competitive awards based on customer feedback

Breeding Initiatives

- Working with the TBA to review the fillies' Flat programme to enhance opportunities and uplift the potential value of the filly
- Continuing development of the Jump Pattern for fillies and mares, plus the creation of MOPS by the TBA





## Customer Growth

**Target:** Increase racecourse attendance to 7 million by 2020



### Objectives...

1. All Racecourses to better understand their own customers
2. The sport to build an insight led approach to growing attendances
3. The use of insight to help courses provide an improved customer experience

### Actions

6.1 million racecourse attendance in 2015, representing over 5% growth year on year

Data project sees all 58 RCA racecourses share their customer data for analysis, in order to provide accurate and detailed consumer insight for the first time

GBR and the RCA received aggregated analysis from which three KPI's have been identified to help enable growth

Target 5 million people from the 34 million who are aware of horseracing to consider attending

- Increase advance ticket bookings from 45% to 48% over 5 years
- Increase customer retention from 27% to 36% over 5 years

National 'Come Racing' campaign combined with 'Kids Go Free' messaging to be launched in 2016

Promote the social aspect of racing – identified as a key driver of racecourse attendance – through our PR and marketing messages

Use the customer insight to identify national sponsorship opportunities and grow racing's commercial assets

## 2016 Key Deliverables

**National campaign around the thrill of ownership run by GBR**



**Expansion of the employee-led training programme**



**Stable staff advice and training programme to be launched with Racing Welfare**

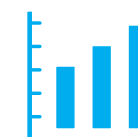


**Enhanced Fixture List**

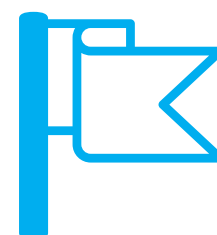


**Owner engagement survey**

**Delivering ABP benefits**



**National 'Come Racing' campaign**



**Stewarding Review**



**Rules rewrite**



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