

RESULTS — RACECOURSE EXPERIENCE

NATIONAL RACEHORSE OWNERS SURVEY

2016



Part of ESP Properties
A WPP Company





RESULTS — RACECOURSE EXPERIENCE

1) The racecourse is the pinnacle of the ownership experience.

2) Racecourses are the shop window to ownership, not the salesmen.

3) New owners are motivated more by the social aspects of racing.

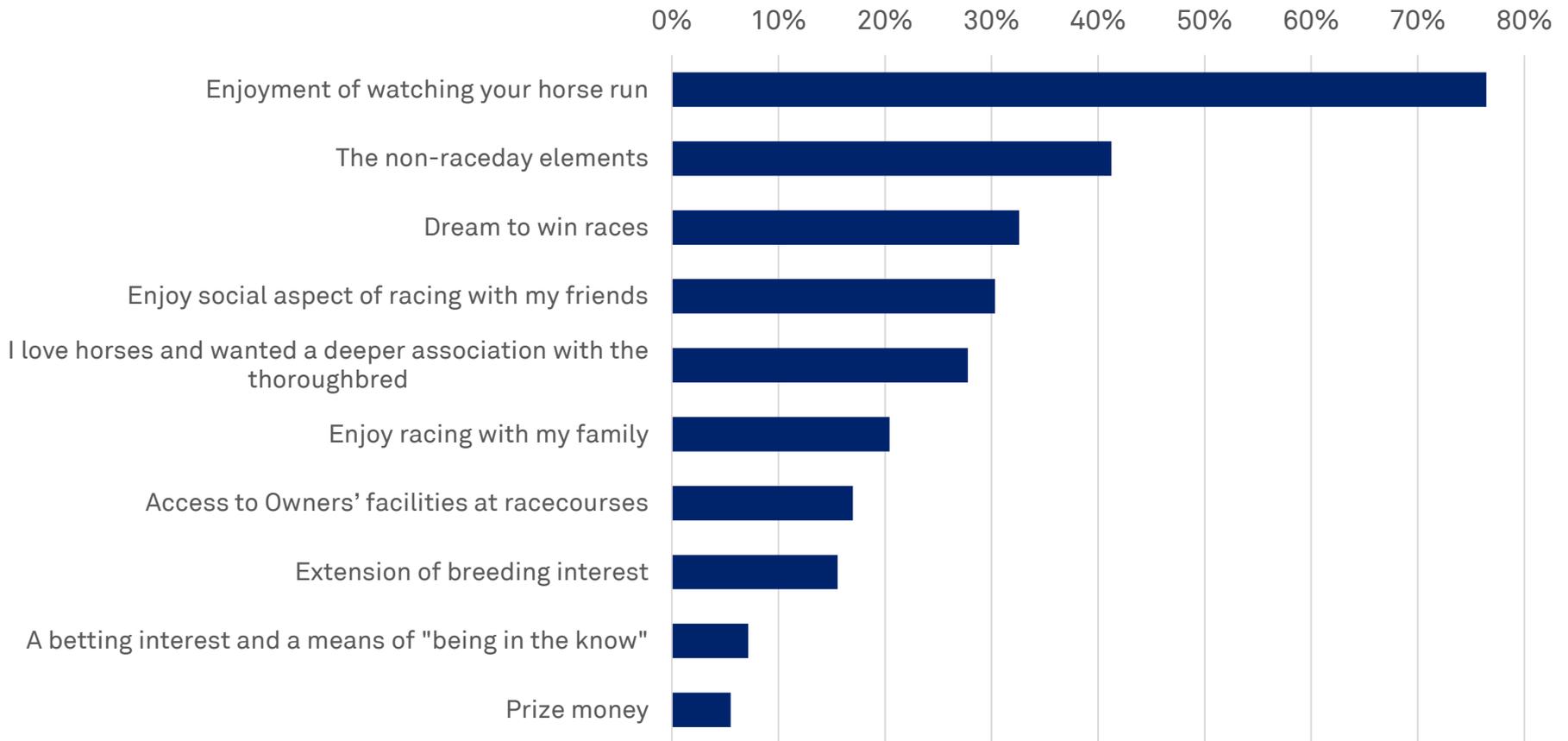
4) Winning is an important bonus, not the end all and be all.

5) Costs and prize money are primary lapse reasons; racecourse and trainer experience crucial.



MOTIVATIONS TO BECOME AN OWNER

The primary motivation to become an owner is the enjoyment of watching your horse run.



Owners enjoy the sense of being involved and privileges on a race day.

Being involved and being in the parade ring when jockeys mount up.
Male, 55-64

Meeting the jockey before the race and the de-brief after
Male, 55-64

It's good to get the horse to the racecourse, to be involved, to have the excitement and anticipation of the performance
Male, 45-54



Good facilities and being treated well by the racing fraternity
Male, 55-64

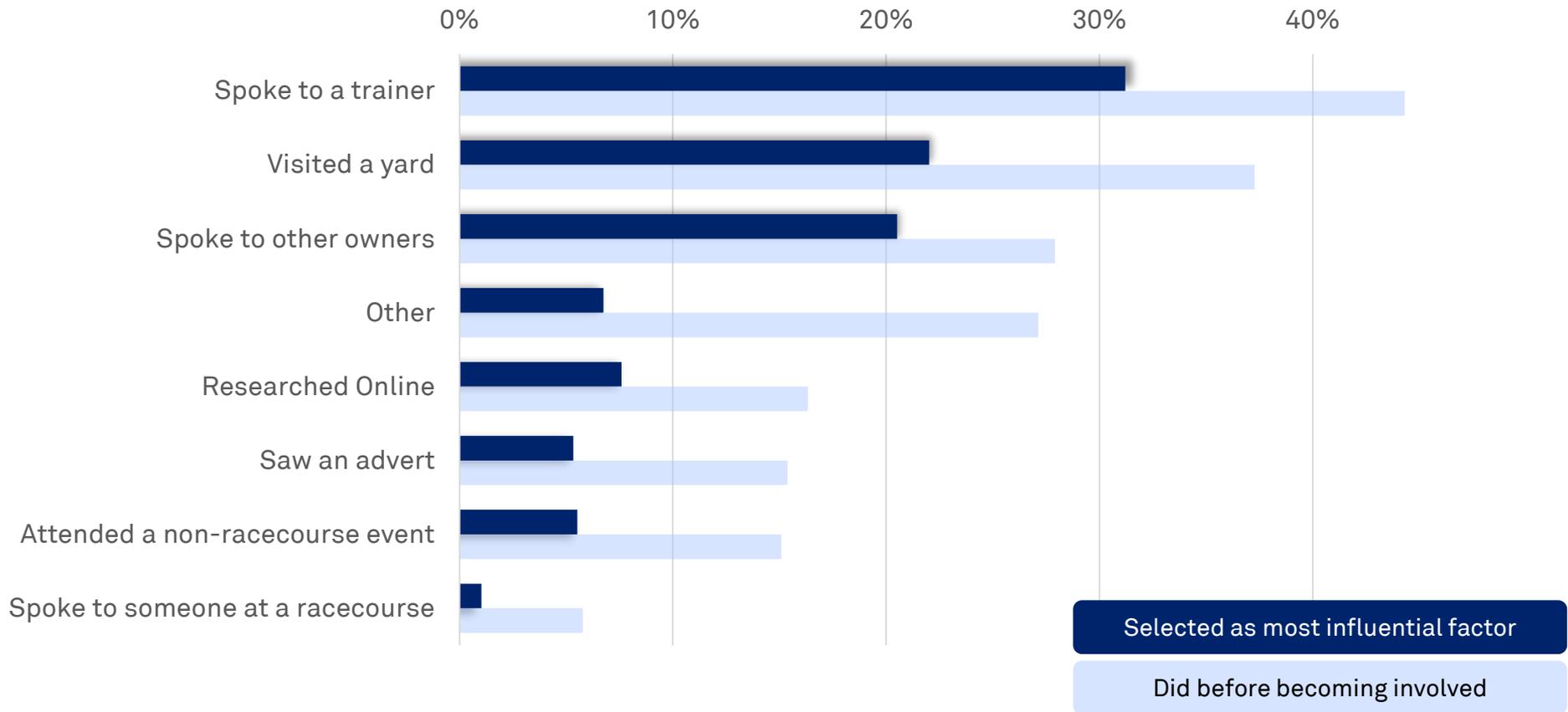
The privileges given to Owners in the way of tickets to take friends, hospitality given and generally being made to feel important
Female, 75+

Attending the parade ring, favourable car parking, and, in some cases, the Owners and Trainers facilities such as at Ascot or Goodwood.
Male, 65-74



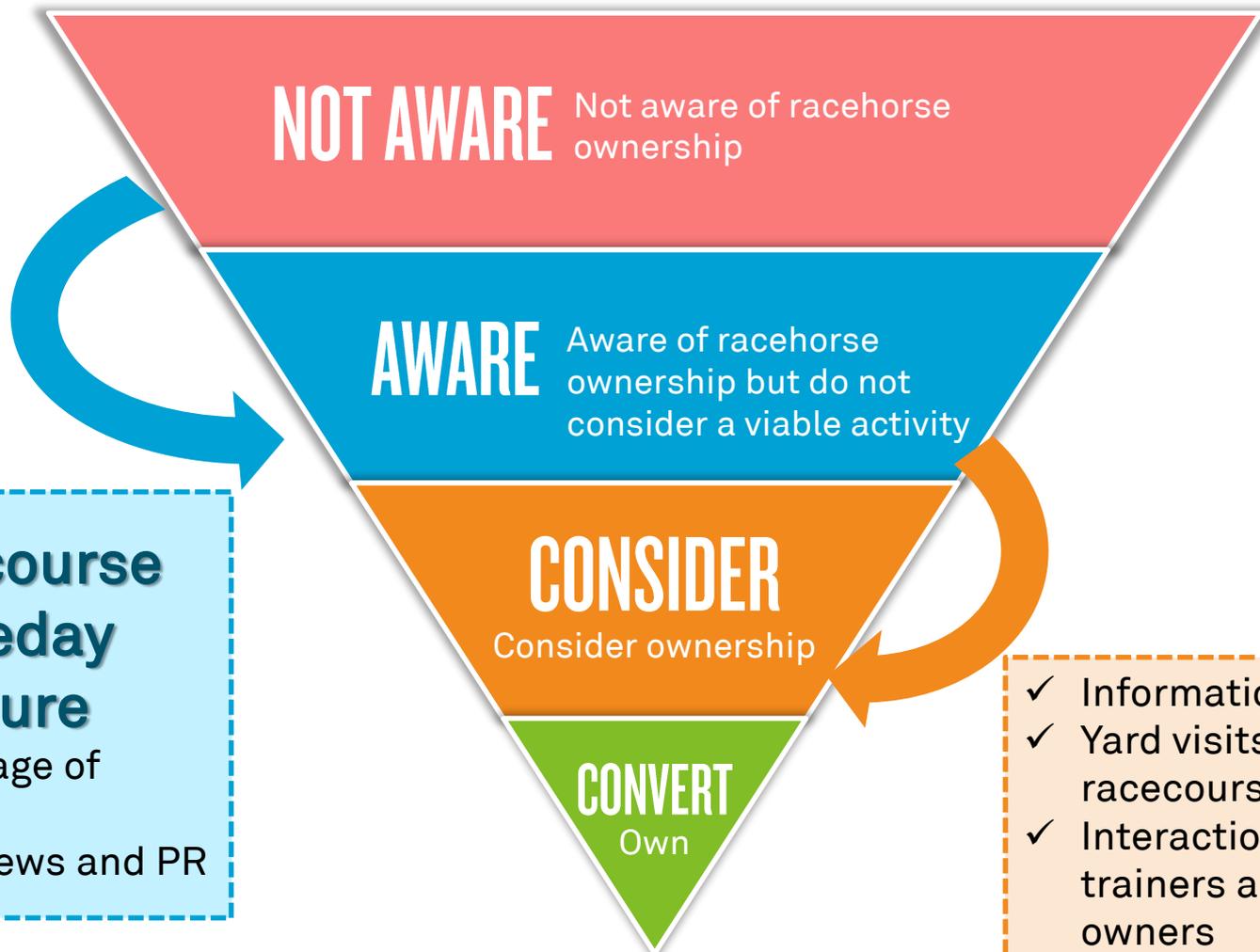
OWNERSHIP DECISION STEPS

Speaking to someone at a racecourse is not the most crucial step in the decision to become a racehorse owner.



THE CONVERSION FUNNEL FOR RACEHORSE OWNERSHIP

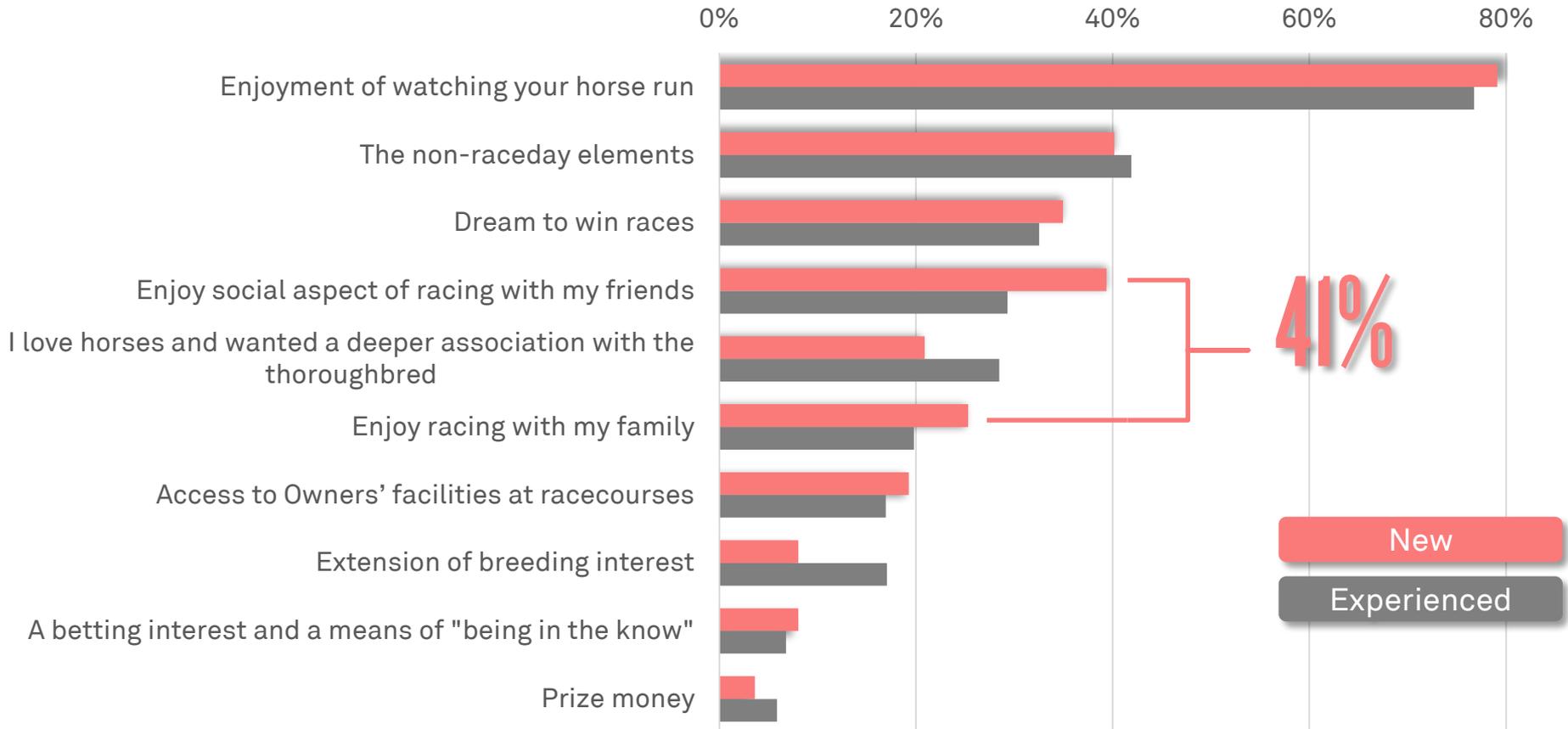
The ownership experience peaks at the racecourse – how can we signpost the routes in to ownership better to those watching?





MOTIVATIONS TO BECOME AN OWNER — BY OWNER TENURE

New owners are motivated more by the social aspects of racing.





IMPORTANCE OF WINNING RACES

Winning is an important bonus, not the end all and be all.





WHY DID OWNERS LAPSE?

Costs and prize money are most cited lapse reasons, but racecourse (44%) and trainer (29%) experience are crucial.



RACECOURSE EXPERIENCE — WHAT COULD BE IMPROVED

Owners find the racecourse experience to be inconsistent.

Being treated by some racecourses as a very valued customer. There is a huge gulf between the best and the worst in both how you are treated and in prize money offerings
Male, 55-64

Some consistency in how owners are treated in terms of parking and facilities. There are some real lows.
Male, 45-54

Better treatment of owners by some courses
Female, 55-64



More prize money and better owners' facilities at some of the smaller tracks
Male, 55-64

Prize money increased and placed money down to sixth and even some sort of prize for all participants
Female, 45-54

Needs to be better prize money unfortunately, it's not a sport where the financial rewards are evenly spread. Needless to say I don't have a Grade 1 horse!
Male, 45-54



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