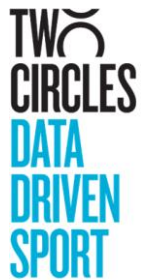


OVERALL RESULTS — EXECUTIVE SUMMARY

NATIONAL RACEHORSE OWNERS SURVEY

2016



Part of ESP Properties
A WPP Company



**PROJECT
METHODOLOGY**

RESULTS

Telephone Surveys

30 New, Lapsed,
Experienced
Owners

National Racehorse Owners Survey LIVE!

(12th April to 10th May)

Owner Database Analysis

2006-15 Data

Focus Groups

2 x York, 2 x London
(2nd and 7th June)

START





THE SURVEY RECEIVED

2,203 RESPONSES

Representative by age, region, gender and socio-economic profile of registered owners.
Picked up a few more younger and female owners.

Good split of sole, joint with family/friends, syndicate and racing club owners who race across flats (686), jumps (732) and both codes (582).

Bias in the overall sample of very experienced owners (10+ years = 1,097 responses).
Analysis for each question has been cut by ownership tenure/type.

**“Hard-to-reach”
owner samples
achieved**

New owners
(0-2 years) = 255

Lapsed owners
= 203

Not registered
with BHA = 208

Not ROA
members = 652

**PROJECT
METHODOLOGY**

RESULTS

NATIONAL RACEHORSE OWNERSHIP SURVEY INSIGHTS

- 1) 73% of Racehorse Owners started out with others.
- 2) Nearly one in four owners have taken a break, most due to finances or horse injury.
- 3) The most influential steps to ownership are speaking to a trainer or other owners.
- 4) New owners take more decision steps and are more likely to research online.
- 5) Owners want more information on costs and trainers.
- 6) Ownership is born out of family history, keen interest in racing or attraction to the excitement.
- 7) New owners are motivated more by the social aspects of racing.
- 8) Racehorse Ownership is an expensive, but exciting, rollercoaster!
- 9) New and syndicate owners think of the excitement above the expense.
- 10) Owners are not likely to recommend owning a racehorse to their friends.
- 11) Winning is an important bonus, not the end all and be all.
- 12) Trainers are approachable, but could communicate more information more regularly.
- 13) Costs and prize money are primary lapse reasons; racecourse and trainer experience crucial.
- 14) 3 out of 4 lapsed owners would return to owning if the circumstances were right.
- 15) ROA members are much more likely to remain in ownership for longer.