

# BRITISH HORSERACING'S

## INDUSTRY STRATEGY FRAMEWORK



SUMMER UPDATE 2025





## OUR VISION

# BRITISH RACING WORLD-CLASS, THRIVING AND CONNECTED WITH THE NATION

A world-leading, culturally significant sport driven by the enduring power of the thoroughbred. Thriving in modern Britain, inspiring fans, and driving investment.





# INTRODUCTION

When British horseracing agreed a new governance structure in 2023, this included a commitment to develop a cross-industry strategy to help shape the future of the sport.

This was recognition of the **need for meaningful change** and that this could only be achieved if racing's multiple stakeholders **worked together in the best long-term interests of the sport**.

This is the first time that racing has developed a strategy for - and by - the whole of the sport. In some areas, we first needed to plug gaps in our understanding, to ensure the strategy was built on solid foundations.

While there is still much to do, this document sets out our **ambition for the future of racing** and the progress made so far.

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# FOREWORD & PROGRESS



# FOREWORD



For hundreds of years, Britain has been at the forefront of thoroughbred racing and breeding.

British racing is renowned for its rich heritage. We are home to top-class racing. Our breeding and training operations are amongst the finest in the world.

We are the nation's second biggest spectator sport, attracting millions of people to our racecourses each year. We are a thriving industry, sustaining tens of thousands of livelihoods and supporting local communities.

But we also face significant challenges. From falling customer engagement, economic and environmental challenges, to reduced competitiveness at home and the emergence of higher-quality opposition from overseas, action is needed now if we are to stay ahead of the pack.

To do this, the British racing industry is developing a long-term plan, which will tackle the immediate headwinds, explore untapped opportunities and shape the future of our sport.

This strategy is about growth.

**Growing the number of people engaging with our sport.**

**Growing the financial return to owners.**

**Growing the number of horses in training.**

**Growing our revenue so that we can invest in our people, horses, businesses, and communities.**

This strategy is our opportunity to strengthen our position as a world leader in thoroughbred racing and breeding and secure our long-term future.

## PROGRESS TO DATE 2023-25

# WE ARE MOVING RACING FORWARD

Over the past two years, we have laid some important foundations by focusing on our main priorities for action, including:

- A new approach to our fixture list
- A clearer focus on what our customers want
- Putting racehorse owners, our most important investors, at the heart of our strategy
- Meaningful improvements to the care and safety of our horses
- A new strategy for our workforce



Introduction of a tiered fixture list



Improvements to horse welfare delivered through *A Life Well Lived* to minimise risk, improve safety and traceability



Developing cross industry strategies for environmental sustainability and social impact



Launch of GBB Plus to incentivise the breeding, owning and racing of staying fillies and chasing mares



Published an industry workforce strategy with clear priorities for action



Established a new governance structure



Great British Racing restructure to promote and market our sport  
  
Promoting Jockeys



Major projects completed in 2024 included Syndicator/Club Manager regulation, Review of Regulatory Funding



HorsePWR campaign  
  
British racing's most significant public-facing welfare-themed promotional campaign

# WHAT WE WANT TO ACHIEVE



Sustained growth  
in attendances,  
ownership,  
betting on and  
watching racing



Racing that is  
competitive at all  
levels and  
exciting to watch



The best racing in  
the world, featuring  
top-class races,  
thoroughbreds,  
jockeys and trainers



A trusted sport,  
with strong  
social licence



A flourishing,  
financially  
sustainable  
industry





# INDUSTRY STRATEGY

## OUR VISION

# BRITISH RACING WORLD-CLASS, THRIVING, AND CONNECTED WITH THE NATION

A world-leading, culturally significant sport driven by the enduring power of the Thoroughbred — thriving in modern Britain, inspiring fans and driving investment.

## STRATEGIC OBJECTIVES

Inspire more people to **attend & watch** more often

Encourage & reward investment in **ownership & breeding**

Sustainable growth in **betting** on racing

Stage **competitive & high-quality** racing

Ensure responsible care of our **people, communities & environment**

Highest possible standards of **safety & welfare** for our racehorses

## DRIVERS



**ENGAGEMENT & EXPERIENCE**



**FIXTURE LIST & RACE PROGRAMME**



**GROWING INVESTMENT**



**FUNDING MODEL**



**TECHNOLOGY, DATA & INSIGHT**



**GOVERNANCE, REGULATION AND ADVOCACY**



**OUR WORKFORCE**



**POSITIVE SOCIAL IMPACT**



## STRATEGIC OBJECTIVE 1

# INSPIRE MORE PEOPLE TO ATTEND & WATCH MORE OFTEN

Fans are the beating heart of any top-class sport. They bring passion, atmosphere and investment. We need to ignite a wider and more diverse interest in racing, encouraging more people to share the thrill of the raceday.

## WHAT WILL WE DO NEXT

- 1 National consumer marketing campaign focused on the social and cultural aspects of our sport
- 2 Complete phase one of Project Beacon - racing's consumer engagement strategy
- 3 Continued development of initiatives to engage fans including simplified racecards
- 4 Series two of ITV's *Champions: Full Gallop* docuseries



## STRATEGIC OBJECTIVE 2

# ENCOURAGE & REWARD INVESTMENT IN OWNERSHIP & BREEDING

Owners are our most important investors and we must recognise and reward their commitment, providing a richer and more personal experience.

Breeders are pivotal to the success of British racing and we must take action now to reverse declines in the foal crop and ensure the long-term future of Britain's thoroughbred breeding industry.

## WHAT WILL WE DO NEXT

- 1 Incentives and intervention schemes to encourage buying and racing in GB
- 2 Strategic approach to the promotion of the benefits of breeding, owning and racing in GB
- 3 BHA/ROA Owner Relations strategic partnership initiatives focused on the ownership experience





## STRATEGIC OBJECTIVE 3

# SUSTAINABLE GROWTH IN BETTING ON RACING

Racing has a unique relationship with betting. Investment in our key priorities – whether that’s regulation, welfare, prize money, or the marketing of our sport – depends on the attractiveness of racing to betting customers. We need to grow our income from betting, doing so responsibly and sustainably.

## WHAT WILL WE DO NEXT

- 1 Introduce further measures designed to deliver consistently competitive racing across the year
- 2 Explore new opportunities within the fixture list to grow betting activity
- 3 Refine the scheduling of races, especially on Saturdays, to minimise race clashes
- 4 Work with government and the betting industry to develop a more sustainable funding model for racing



## STRATEGIC OBJECTIVE 4

# STAGE COMPETITIVE & HIGH-QUALITY RACING

We are an elite sport and must provide an exciting spectacle on the track at every raceday.

Whether it's flat or jump, major festival, or a summer evening at one of our smaller racecourses, all our racing will be competitive, while the quality of our very best racing will be world leading and awe inspiring.

## WHAT WILL WE DO NEXT

- 1 Identify and invest in our elite events to grow interest in the wider sport
- 2 Develop measures to support the supply chain of high-quality horses in Britain
- 3 Refine the volume of races and adopt more agile processes to support competitiveness





## STRATEGIC OBJECTIVE 5

# ENSURE RESPONSIBLE CARE OF OUR PEOPLE, COMMUNITIES & ENVIRONMENT

Racing is a rewarding industry to work in but we must be appreciative of our people and responsive to any challenges they may face.

Racing wants to be a good citizen, having a positive impact on the environment and in the communities in which we operate.

## WHAT WILL WE DO NEXT

- 1 Deliver training that meets the needs of our workforce and our employers
- 2 Provide wellbeing support that improves the day-to-day lives of our people
- 3 Collect, analyse, and utilise data to develop insights on our people
- 4 Complete work on cross industry strategies for environmental sustainability and social impact



## STRATEGIC OBJECTIVE 6

# HIGHEST POSSIBLE STANDARDS OF SAFETY & WELFARE FOR OUR RACEHORSES

Our relationship with the thoroughbred is unique. Providing – and being seen to provide – the highest standards of care and safety for our remarkable racehorses must always remain our highest priority.

## WHAT WILL WE DO NEXT

- 1 Working with stakeholders to ensure a timely implementation and handover of *A Life Well Lived*
- 2 Refreshed Horse Welfare Board, with new independent Chair and members, in place from July 2025
- 3 Next iteration of Horse Welfare Strategic Plan to be developed by the new Horse Welfare Board
- 4 Work continues on projects linked to traceability, safety, communications and aftercare





# HOW WE WILL MEASURE SUCCESS

A consolidated list of measures to help us focus and deliver between 2025 and 2028:

Inspire more people to <b>attend</b> & <b>watch</b> more often	Encourage & reward investment in <b>ownership</b> & <b>breeding</b>	Sustainable growth in <b>betting</b> on racing	Stage <b>competitive</b> & <b>high-quality</b> racing	Ensure responsible care of our <b>people</b> , <b>communities</b> & <b>environment</b>	Highest possible standards of <b>safety</b> & <b>welfare</b> for our racehorses
<ul style="list-style-type: none"> <li>▪ Increase attendance numbers at racecourses</li> <li>▪ Increase engagement in racing content across multiple channels</li> <li>▪ 3-month engagement score across each touchpoint</li> </ul>	<ul style="list-style-type: none"> <li>▪ Growth in owner and breeder investment</li> <li>▪ Delivering the optimum owner experience</li> <li>▪ Delivery of rewards and benefits across the industry to suitably recognise owner loyalty and investment at all levels</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increase attractiveness of British racing to grow betting turnover</li> <li>▪ Work with government and the betting industry to develop a more sustainable funding model for racing</li> <li>▪ Minimise impact of damaging and counterproductive betting affordability checks and proposed changes to government taxation policy</li> </ul>	<ul style="list-style-type: none"> <li>▪ Identify and invest in our elite events to grow interest in the wider sport</li> <li>▪ Increase in average field sizes across the fixture list</li> <li>▪ Growth in the number of high-quality horses being bred, trained and raced in Britain</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sustain valued employment and investment in relevant skills in racing</li> <li>▪ Reduced negative environmental impacts</li> <li>▪ Improved wider societal impact of racing</li> </ul>	<ul style="list-style-type: none"> <li>▪ Drive high quality care and support for the horse in racing</li> <li>▪ Welfare remains highest priority for the sport with clear KPIs and deliverables</li> <li>▪ Improve consumer perception of horse welfare concerns to increase engagement</li> </ul>

# HOW WE WILL **DELIVER** SUCCESS

A consolidated list of strategic initiatives to help us focus and deliver between 2025 and 2028:



## ENGAGEMENT & EXPERIENCE

**Customer & owner acquisition driven by targeted, engaging campaigns. Retention & development driven by delivery of high-quality experience**

- National marketing campaign
- Project Beacon - racing's consumer engagement strategy
- Fan Engagement initiatives
- Always-on PR and Social



## FIXTURE LIST & RACE PROGRAMME

**A balanced fixture list that aligns with the horse population & the size of the workforce, showcases the best racing, & grows revenues**

- Tiered fixture list highlighting elite events used to grow worldwide interest in the sport
- Programme to boost the supply chain of high-quality horses



## GROWING INVESTMENT

**Developing investable propositions, securing major investment, with strong investor relationship management**

- Project Pace
- BHA/ROA Owner Relations strategic partnership
- TBA Breeding strategy
- International relations strategy



## FUNDING MODEL

**A sustainable funding & financial model for British racing that enables growth**

- Funding review



# HOW WE WILL **DELIVER** SUCCESS

A consolidated list of strategic initiatives to help us focus and deliver between 2025 and 2028:



## **TECHNOLOGY, DATA & INSIGHT**

**Technology enabled, insight driven in our operations and decision making and using innovative tech and data to drive engagement**

- Racing Digital platform launched and further packages
- Technology and Data Strategy



## **GOVERNANCE, REGULATION & ADVOCACY**

**Transparent, seamless & accountable governance, regulation & decision-making, as the basis for credible & effective external advocacy**

- Duty harmonisation
- Financial Risk Checks
- Future proofing our integrity capabilities
- Rules, sanctions and guidance



## **OUR WORKFORCE**

**A well-resourced, appropriately skilled, motivated workforce**

- Industry Workforce Strategy
- Projects relating to recruitment, training, employment practices, inclusion and wellbeing
- Racecourse Facilities



## **POSITIVE SOCIAL IMPACT**

**An open and inclusive sport, which has a positive impact on society & the environment**

- Diversity and Inclusion strategy
- Social Impact strategy
- Environmental Sustainability strategy

# IN SUMMARY

A view of the key strategic initiatives to deliver in 2025:

## STRATEGIC OBJECTIVE 1

### INSPIRE MORE PEOPLE TO ATTEND & WATCH MORE OFTEN

1

National consumer marketing campaign focused on the social and cultural aspects of our sport

2

Complete phase one of Project Beacon - racing's consumer engagement strategy

3

Continued development of initiatives to engage fans including simplified racecards

4

Series two of ITV's Champions: Full Gallop docuseries

## STRATEGIC OBJECTIVE 2

### ENCOURAGE & REWARD INVESTMENT IN OWNERSHIP & BREEDING

1

Incentives and intervention schemes to encourage buying and racing in GB

2

Strategic approach to the promotion of the benefits of breeding, owning and racing in GB

3

BHA/ROA Owner Relations strategic partnership initiatives focussed on the ownership experience

## STRATEGIC OBJECTIVE 3

### SUSTAINABLE GROWTH IN BETTING ON RACING

1

Introduce further measures designed to deliver consistently competitive racing across the year

2

Explore new opportunities within the fixture list to grow betting activity

3

Refine the scheduling of races, especially on Saturdays, to minimise race clashes

4

Work with government and the betting industry to develop a more sustainable funding model for racing



# IN SUMMARY

A view of the key strategic initiatives to deliver in 2025:

## STRATEGIC OBJECTIVE 4

### STAGE COMPETITIVE & HIGH-QUALITY RACING

1

Identify and invest in our elite events to grow interest in the wider sport

2

Develop measures to support the supply chain of high-quality horses in Britain

3

Refine the volume of races and adopt more agile processes to support competitiveness

## STRATEGIC OBJECTIVE 5

### ENSURE RESPONSIBLE CARE OF OUR PEOPLE, COMMUNITIES & ENVIRONMENT

1

Deliver training that meets the needs of our workforce and our employers

2

Provide wellbeing support that improves the day-to-day lives of our people

3

Collect, analyse, and utilise data to develop insights on our people

4

Complete work on cross industry strategies for environmental sustainability and social impact

## STRATEGIC OBJECTIVE 6

### HIGHEST POSSIBLE STANDARDS OF SAFETY & WELFARE FOR OUR RACEHORSES

1

Working with stakeholders to ensure a timely implementation and handover of *A Life Well Lived*

2

Refreshed Horse Welfare Board, with new independent Chair and members, in place from July 2025

3

Next iteration of Horse Welfare Strategic Plan to be developed by the new Horse Welfare Board

4

Work continues on projects linked to traceability, safety, communications and aftercare

# THANK YOU

To learn more about the Industry Strategy and the work we are doing, visit our website

[britishhorseracing.com/about/british-horseracings-industry-strategy](https://britishhorseracing.com/about/british-horseracings-industry-strategy)

A particular thank you goes to the Horserace Betting Levy Board (HBLB) and the Racing Foundation, who are major funders of multiple programmes within the strategy framework. Their support is greatly appreciated.





British Horseracing Authority  
Holborn Gate  
26 Southampton Buildings  
London  
WC2A 1AN

020 7152 0000  
[info@britishhorseracing.com](mailto:info@britishhorseracing.com)

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