

A dramatic silhouette of a horse and jockey in mid-jump over a fence, set against a bright, hazy sky. The horse is captured in a powerful, leaping pose, with its front legs tucked and back legs extended. The jockey is leaning forward, maintaining balance. The background shows a blurred crowd of spectators and other horses, suggesting a high-stakes racing event.

PROJECT BEACON

SPRING 2026 UPDATE

BRITISH
HORSERACING'S
INDUSTRY STRATEGY



PROJECT BEACON – A REMINDER

Project Beacon was British racing's most in depth piece of customer research to date.

The findings provide us with a deep understanding of our fans, both present and future, and are being used to drive the sport's approach to engaging with our customers.

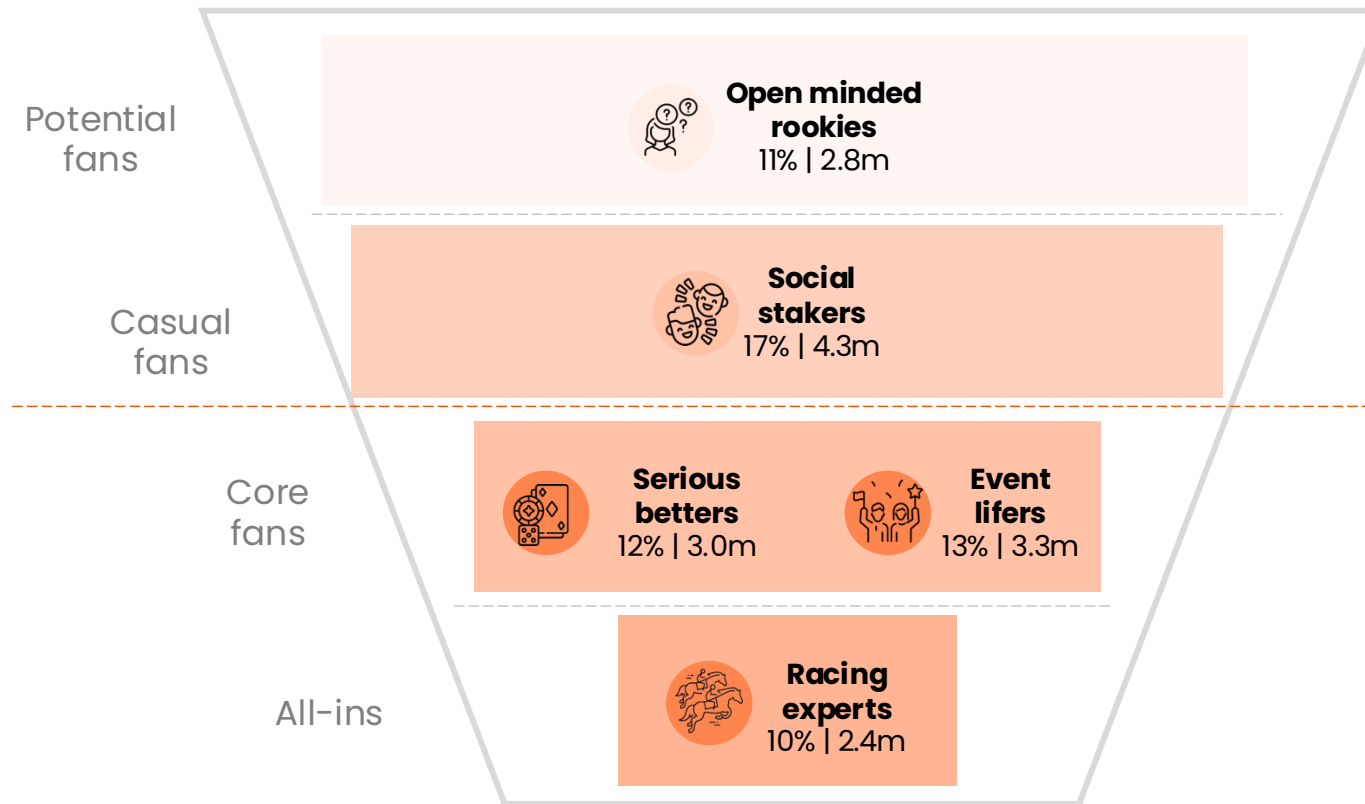
There are 25.2 million adults in the UK and Ireland in the addressable market (non-rejectors of horseracing).

Within the addressable market there is massive potential for growth: Two thirds of the accessible market (16.9m) are potential fans (who have no current engagement with horseracing) or casual fans (who have irregular, one-off engagements with horseracing).

To drive growth, we need to focus on these core growth audiences.

TARGET AUDIENCES

Eight different types of customer have been identified amongst the 25.2m addressable market. Amongst the eight target audience groups the research has identified growth and retention targets for British horseracing. This also includes detailed information as to the profiles of the people in each audience group and the best channels through which to reach them.



GROWTH TARGETS

Research has shown that British racing should focus on two main growth targets.

Open Minded Rookies: A younger audience with large growth potential, open to watching horse racing

Social Stakers: Currently engaging with racing but mostly as a social pastime, but who could be encouraged to attend more and engage more with the sport itself

RETENTION TARGETS

In addition, the sport should also focus on three main retention markets, ensuring that we continue to maintain the interest of those who are already engage with the sport:

- **Serious Bidders**
- **Event Lifers**
- **Racing Experts**

Some of these audiences may also be growth targets for racehorse ownership.

WHAT NEEDS TO BE DONE

The research identified six core areas or “jobs to be done”, which the sport must focus on to drive engagement.

Address welfare concerns

Shift perceptions and grow layperson understanding of the treatment of horses

Demystify the sport

An easy way to understand form and the sport enables more emotional investment and lead to a sense of more educated betting

Create a race structure and narrative

A clear and simple structure to follow that fosters support and creates a narrative to follow (e.g. a league or top tier)

Build emotional connection

Generate organic interest in the world of horse racing - the big players and personalities, as well as the drama and adrenaline of the sport

Evolve the race day experience

Race day experiences that drive deeper engagement with the sport and cater to a wider set of audiences

Making ownership more accessible

Make ownership feel attainable, with lower cost and easier to become involved in

THE APPROACH

- British racing is working collectively to deliver Project Beacon, led by the British Horseracing Authority. The six “jobs to be done” have been mapped across the sport, with working groups established to deliver these actions.
- Project Beacon is very much an industry initiative, and collaboration across different organisations for the greater good of the sport is essential for its success. Progress in Q1 shows how embedded the research is across the industry.

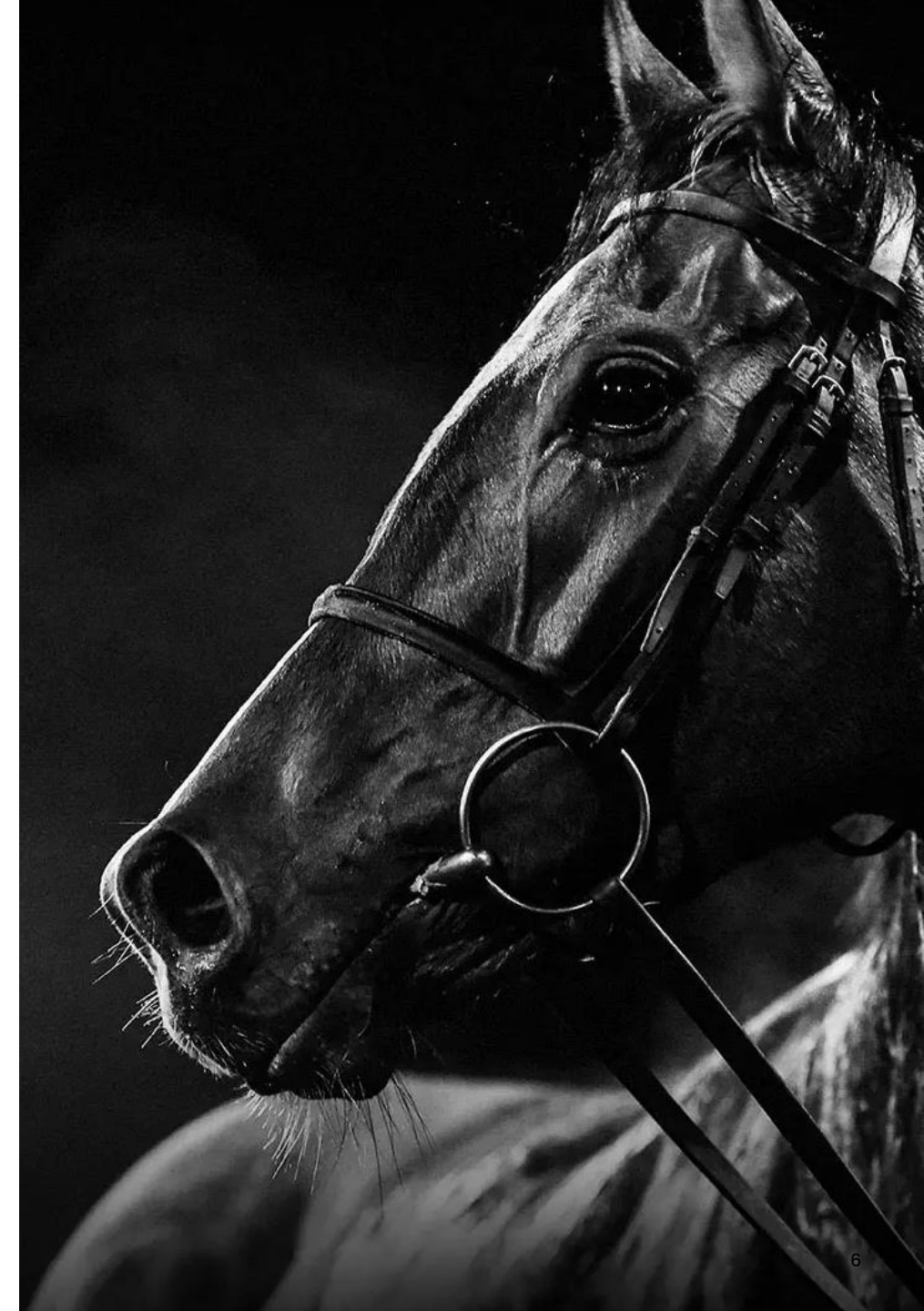


PROGRESS SNAPSHOT

| Job to be done | Q1 progress summary |
|---------------------------------------|---|
| Addressing welfare concerns | HorsePWR campaign, Horse Welfare Board, GBR, BHA digital activity |
| Build an emotional connection | The Going is Good campaign, social media and TV content from GBR, Broadcasters, Racecourses |
| Demystifying the sport | Social media content from GBR, Broadcasters, Racecourses |
| Evolve the raceday experience | Extensive updates being introduced for festivals in 2026. Raceday Experience & Marketing Group co-ordinating and showcasing work from racecourses |
| Create a race structure and narrative | Development of funding and delivery plans |
| Make ownership more accessible | Development of funding and delivery plans |

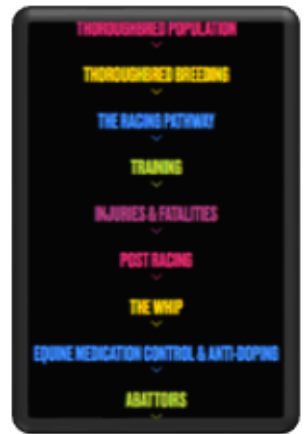
- The Future of Racing event hosted by the BHA and Flutter on February 10th showcased ten Tech businesses from around the world, pitching ideas to racing industry leaders as part of the sport's drive to secure future generations of racegoers.

[Future of Racing event brings innovative tech companies and racing industry leaders together to attract future generations of racegoers | British Horseracing Authority](#)



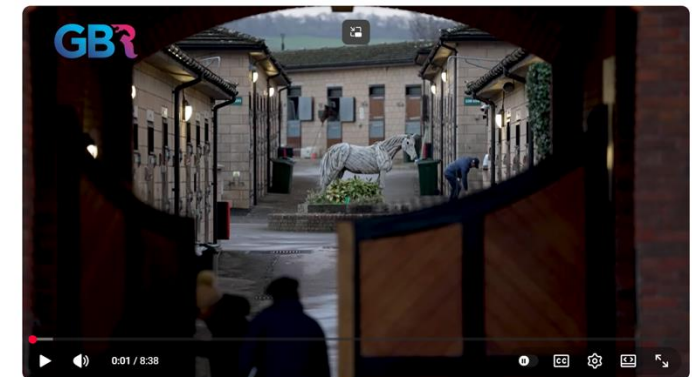
ADDRESS WELFARE CONCERNS

- HorsePWR remains the sport's primary campaign platform and digital resource dedicated to equine welfare in British racing. Driven by the core values of 'Purpose, Welfare, and Responsibility' the campaign helps to drive transparency, build trust, and reduce concerns about welfare with a focus on important stakeholders, (i.e. media and Government) plus consumer audiences identified via Beacon.
- The HorsePWR portal information pages were updated with 2025 data, heavily promoted to media during the Spring Festivals, and promoted to MPs with advertorials and direct mail materials pre-Aintree including a HorsePWR fact sheet.
- Media investment to drive consumer awareness commenced in early March funded via the HBLB as part of GBR's 2026 consumer campaign work. Media buying to drive HorsePWR visibility focused on major travel hubs and on digital channels, using META and YouTube, also retargeting people who had engaged with the 'The Going is Good' campaign.



ADDRESS WELFARE CONCERNS

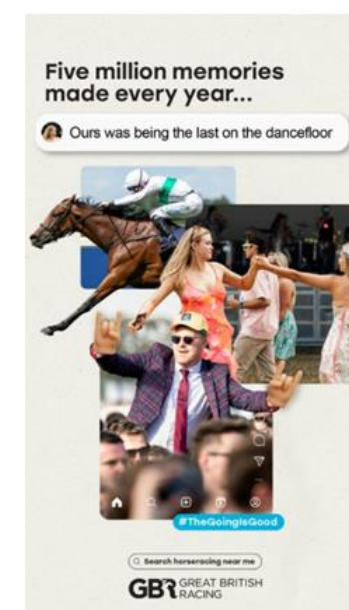
- To support the major Spring festivals BHA, GBR, and Jockey Club prioritised welfare-focused communication activity and content over the Q1 period.
- The BHA issued several welfare-related video and content pieces, alongside being visible in addressing equine welfare issues at the Cheltenham and Grand National festivals via its veterinary spokesperson initiative.
- GBR prioritised welfare stories with digital content created about retired racehorses, (Crambo and Lady Buttons), and influencer-led content and interviews at racecourses. A content series was produced with the veterinary team and released as a multi-part series in the build-up to the Cheltenham Festival. This has been broadcast on ITV and promoted via ITV's social channels. This content achieved 6m video views.
- The Horse Welfare Board published video stories on the sport's schooling trials pilot and new gallops maintenance training courses.
- The Horse Welfare Board is also continuing the development of the next iteration of its welfare strategy for the sport, which will be published later this year.



Veterinary Raceday Care | Behind the Scenes at Cheltenham

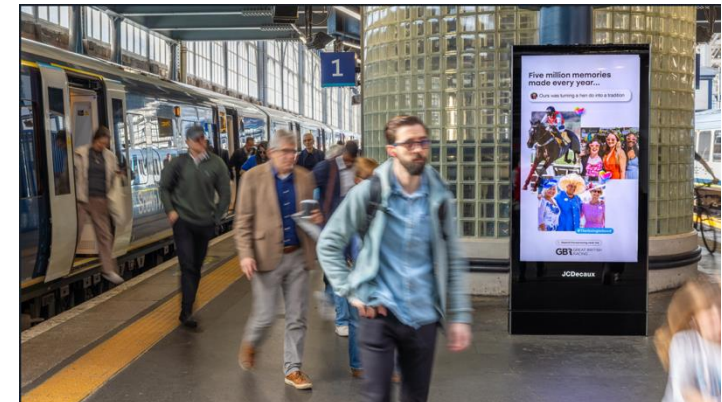
BUILD EMOTIONAL CONNECTION

- The Going is Good advertising campaign has been updated with Project Beacon findings for 2026, to target Open Minded Rookies and Social Staker audience groups, predominantly Millennials living in urban centres, with creative that focuses on a social day out at the races with family and friends.
- The Going is Good launched in February 2026, compared with May 2025, and:
 - Incorporated channel, creative and location insight from the 2025 version,
 - Aligned with racecourses' 2026 media plans,
 - Celebrated the success of 2025 attendances by updating to “Five million memories”,
 - Is fully designed to work in tandem with racecourse marketing and to avoid the competitive period when the FIFA World Cup takes place



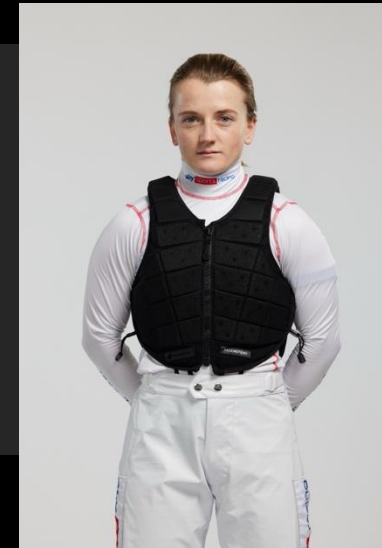
BUILD EMOTIONAL CONNECTION

- Attendance data from the Horserace Betting Levy Board and analysed by the Racecourse Association (RCA) shows that Q1 attendances were up 4.5% YOY.
- Against this backdrop, early indications would suggest that a combination of a central overall awareness and consideration campaign, in addition to local racecourse marketing activity is having a positive overall impact. Data from Halfspace shows a 10.1% increase in purchases of “General admission” tickets during Q1 2026 vs 2025, with 32% being from the target audience groups.
- It is not only the larger race meetings and festivals showing this growth; many smaller racecourses also showed Q1 attendance increases.



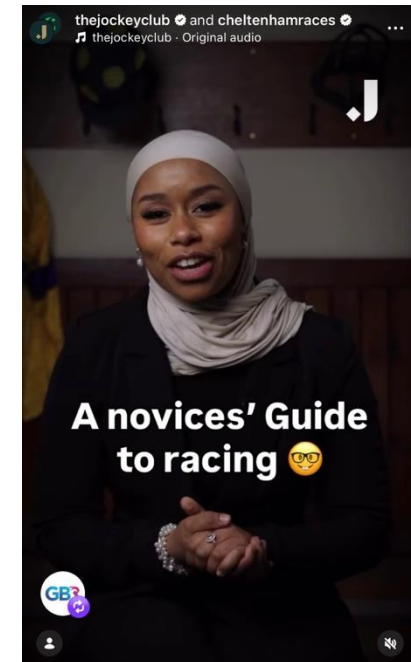
BUILD EMOTIONAL CONNECTION

- The Friday Night Live fixture series has succeeded in bringing racing to a younger audience thanks to the partnership between ARC, ITV and Invades. Attendance across the four fixtures was ~12k and existing fans also boosted consolidated peak viewing figures of >480k plus >1m views on X alone for the Constitution Hill win.
- RacedayTV reported a record Cheltenham Festival with >100m video views across social channels. This builds on the strategy of targeting younger audiences with fashion and celebrity focused strands of content and presenting talent led by Frankie Foster.
- A bank of 255 jockey images has been created for media and racecourses to use in articles, big screens, racecards and social media. This is part of a programme to raise awareness of the human athletes of the sport, supported by GBR and industry partners creating digital content with many of the jockeys to showcase their personalities and provide greater insight into the sport.



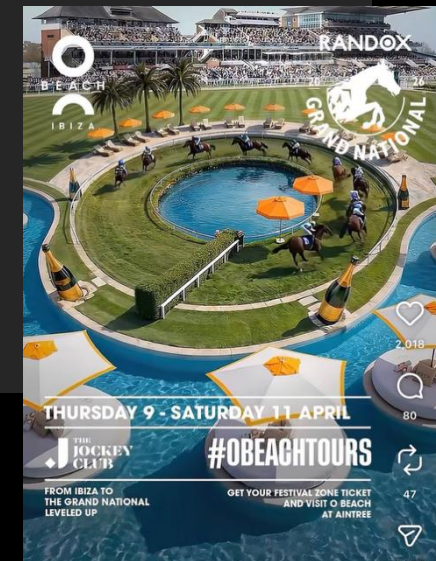
DEMYSTIFY THE SPORT

- Working with well-known talent and influencers helps to bridge the gap between racing crowds and new audiences. GBR has worked with Harry Clark, Chris Hughes and Alan Johns to create content that resonates with a non-core racing audience, for example taking viewers behind the scenes at racecourses, meeting different personalities involved in the sport and showing the sport from beyond the racetrack.
- Harry Clark's explainer series at Cheltenham in January covered multiple different aspects of a race day, including talking with starters, veterinary teams and bookmakers, reaching ~900k views.
- Similarly, The Jockey Club's myth-busting series fronted by Khadijah Mellah is broadening the reach of horseracing content by making it more accessible.



EVOLVE THE RACE DAY EXPERIENCE

- Racecourses are incorporating different elements of Project Beacon into the race day experience. For example Ayr racecourse launched its own racing club to introduce new people to racehorse ownership and Newbury has partnered with The Racing Club to offer annual members a free share of a horse.
- Ludlow introduced a behind the scenes event aimed at engaging young families, while Chester introduced an event called “Elevating Racing” resulting in a 30% uplift in racegoers feeling more connected to racing.
- The Jockey Club implemented a number of enhancements to the Cheltenham Festival including increased catering options, more seating and flexibility to move around the racecourse with drinks. Ibiza arrived at the Aintree Festival via O Beach.
- The Friday Night Live experience for Invades brought innovation to Friday evening race meetings with thousands of racegoers enjoying racing under the lights.



MAKING OWNERSHIP MORE ACCESSIBLE / CREATE RACE STRUCTURE AND NARRATIVE

Make ownership feel attainable, with lower cost and easier to become involved in.

Work in this areas has focused on finalising funding and delivery plans around enhancing the sport's approach to attracting and retaining owners.

A key part of this programme will be to encourage the existing core fans to take their first steps into ownership.

At the same time the ownership experience for owners of all types is also a focus.

Projects which are being developed include:

- A focus on syndicate ownership including promotion and the raceday experience for syndicate members.
- A review of the experience of owners across the board, from admin to raceday experience, cost, and simplicity of admin around ownership for large and small owners alike.

A clear and simple structure to follow that fosters support and creates a narrative to follow, (e.g. a league or top tier).

Project Beacon very clearly outlines how the year-round relentless nature of racing can be complex to outsiders or newer audiences. Therefore, there could and should be ways of simplifying some of the narratives, in order to make the sport more accessible.

The proposed governance reforms were key to enabling how Project Pace would progress. This has understandably been paused.

Discussions will recommence around strategies and tactics to create a race narrative and structure that encourages fans to engage on a more ongoing basis, e.g. across the course of "a flat season" rather than just dipping into an individual race on a sporadic basis.

IN SUMMARY



PROJECT BEACON

“jobs to be done”
embedded in
industry plans



+4.5%
Q1 YOY increase
in attendance



10TH FEB

Future of Racing
event hosted by Flutter



New raceday
experiences
introduced



>100m

Raceday TV video
views during
Cheltenham Festival



HORSEPWR

Refreshed
for 2026 and
live in Q1

**FRIDAY
NIGHT LIVE**



12k Attendances



>480k Consolidated peak
views on ITV



Record Q1 for GBR
video views

Record Aintree for BHA
social engagement

226,233 +3.7% YOY

Attendance at
Cheltenham
Festival



UPCOMING FOCUS

- An update on the Future of Racing will take place on 13th May, when York racecourse will be host to presentations from a number of industry representatives. This event is designed to provide a mix of Beacon updates from teams including GBR, the BHA, RMG, The Horse Welfare Board and Flutter, as well as presentations from some of the returning participants from the launch event.
- In the coming months we also expect to see:
 - O Beach and Queensberry Promotions in place for the Epsom Derby
 - Demystifying the sport explainers
 - Customer experience enhancements over the Summer in the form of family days, music nights, Jockey gym and signings
 - National Racehorse Week running August 22nd–31st
 - Launch of the next iteration of the Horse Welfare Board’s welfare strategy for the sport.



 **National
Racehorse
Week**
22-31st August 2026

