

CONSUMER RESEARCH JUNE 2020



M E T H O D

We worked with **Opinium** to send out our first piece of consumer research since horseracing returned in June.

Eight questions covering **perception, awareness and consideration** were distributed to a randomly sampled group of **4,000 UK adults**, designed to be representative of the UK population across key demographic areas (age, gender, region etc). Over **half of this group are sports fans** and **9%** when questioned are **existing racing fans**.

The intention is to track opinion by asking a range of **repeat** and **one-off questions** again in late-July, August and into the autumn.

P E R C E P T I O N

Double the number of people (33%) felt racing's return was appropriate than didn't (18%)
49% of those surveyed were unsure or indifferent

76%

Of those who regularly follow the sport deemed it appropriate for racing to return behind closed doors on June 1st

39%

Agreed that horseracing demonstrated its ability to return to live sport safely, three times higher than those who disagreed (13%)

A W A R E N E S S

65%

Of those surveyed have been aware of racing recently (through TV, media, social media)

18%

Had watched racing on TV since the return, rising to 24% of males and 22% of those aged 18-34

8%

Said they had watched more racing since June 1st

A W A R E N E S S

Viewers are generally impressed with the experience of racing coverage

“ITV coverage of e.g. Royal Ascot has been superb”

“ITV have got their coverage spot on. Great team of presenters”

However, there is an opportunity for further education.

“More explanations of the various aspects of horse racing, and horse racing terms. Plenty of new people will be tuning in due to being able to watch live sports again, so it’s a good opportunity to get them into racing. ”

“More explanation of technical terms. Just general ‘how does it all work info’ like how often would a horse typically race. What are they trying to teach the horse when he is undergoing training? More background on jockeys so they stand out more as individuals.”

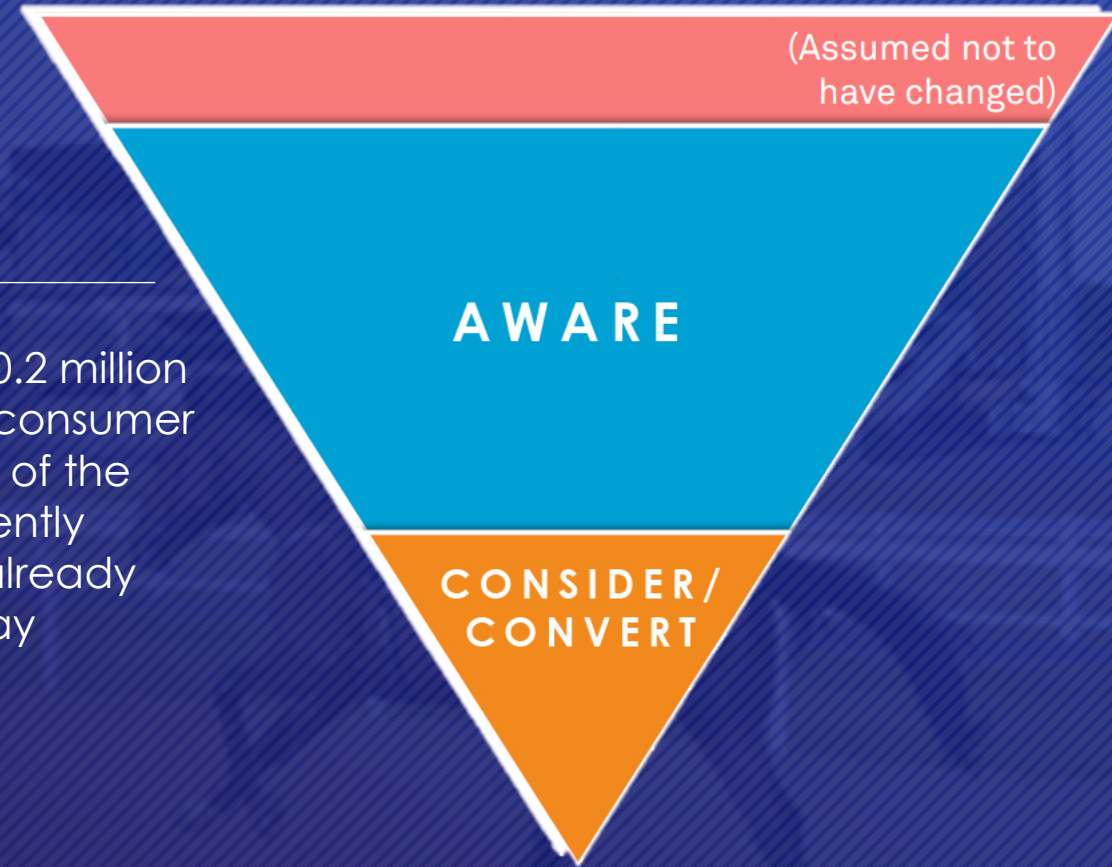
C O N S I D E R A T I O N

21%

Are likely to consider attending a racemeeting once crowds return

10.2M

This would roughly equate to 10.2 million and correlates with pre-Covid consumer data which showed that c.20% of the GB adult population were currently considering attending or had already purchased a ticket to a raceday



KEY FINDINGS

C O N S I D E R A T I O N

There are a few concerns amongst the public about returning to sporting venues. The below are the most popular responses to what measures (if any) would make them feel more comfortable about attending

11%

Wanted the guarantee of social distance measures in place – in particular aspects such as spaced out seating, compulsory set seats or outdoor space (3%)

8%

Would like masks and PPE to be worn by spectators and staff alike

6%

Would need to see strict hygiene procedures in place, such as regular cleaning and frequent hand sanitiser stations

5%

Said they would only consider attending once a vaccine is in place

A screening system for those entering the stadium, such as checking their temperature when they arrive, is much more popular amongst under 35s than over 55s (4% vs 1%)

ITV AUDIENCE

ITV have registered impressive viewing figures since June 1st with the highest terrestrial viewing figures since 2012 for both the Investec Derby and Royal Ascot.

2.3M

Nearly 2.3m viewers tuned into the Derby (31% y-o-y increase)

We have been discussing consumer behaviour with ITV and will continue to try and marry up our data.

14%

Average audience across all five days of Royal Ascot was up 14% y-o-y to nearly 1m (with 1.8m seeing Hayley Turner's win in the Sandringham on Thursday)

Their insight shows that although the audience has grown, this has tended to be lapsed viewers rather than new and the overall viewer profile largely remains the same.

1M

Over 1m viewers for the Northumberland Plate

However, the additional viewers for Royal Ascot were majority female (63%) and there was a 90% y-o-y increase of viewers aged 16-34 for the Derby broadcast.

W A V E 2 Q U E S T I O N S

To track and benchmark opinion we intend to repeat the following questions:

- **Have you seen or heard anything about horseracing recently? (through TV, media, social media etc)**
- **Have you watched any horseracing since its resumption behind closed doors?**
- **Would you say that you have viewed more or less horseracing on TV than usually at this time of year?**
- **How likely are you to consider a day at the races in the future once crowds are permitted?**
- **What measures (if any) would make you feel more comfortable about attending a sporting event in the future once crowds return?**

W A V E 2 Q U E S T I O N S

We are currently finalising the next set of questions but are looking to add in a further perception question around racing's 'favourability' and will also be testing certain scenarios around consumers returning to racecourses. An example of this is likely to be:

- **If racecourses were to open this autumn with 25% of capacity (and a range of measures in place) would you feel safe in attending?**

S U M M A R Y

- 1.** Despite no crowds since March we have retained the same proportion of people considering attending a raceday.
- 2.** Nearly two-thirds of those surveyed had seen something about racing on TV, media and social media recently.
- 3.** Hugely positive increase in ITV viewers, with the big meetings recording their highest figures since 2012. The audience profile largely remains the same, though, and the additional viewers tend to be lapsed rather than new.
- 4.** The data shows that a large proportion of the UK public are indifferent to the resumption of racing and the sport in general. This poses both a threat and an opportunity.
- 5.** The real value in the survey data will be tracking opinion and benchmarking against future polling in July and August. Further updates will be shared by GBR.