IMG GBR GREAT BRITISH RACING

2024 Social Media Landscape Report



Great British Racing is the sport's marketing and promotional body, working with all stakeholders across the industry. In creating this report our goal is to showcase the progress and growth that is being made across the industry on multiple social media platforms.

Social media represents the biggest opportunity that the sport has to keep itself relevant, engaging and informative. It also provides a key opportunity for the sport to enhance its integrity and increase transparency, which are essential for future prosperity.

Contents

SECTION 1
Overview
UK SOCIAL LANDSCAPE
EXECUTIVE SUMMARY

SECTION 2
Instagram
ROOM FOR NEW STARS
DIVERSE CONTENT OFFERING

SECTION 3
TikTok
CHANGES IN THE LANDSCAPE
PERSONALITY DRIVEN CONTENT
CONSISTENT FORMATS

SECTION 4
X/Twitter
GROWTH CONTINUES TO SLOW
NEWS OUTLETS WINNING
POTENTIAL ALTERNATIVES

SECTION 5
Facebook
RACECOURSES STILL GROWING
OWNERS GROUP CASE STUDY

SECTION 6
Summary
EXECUTIVE SUMMARY RECAP

SECTION 1

Overview



This report

Great British Racing has commissioned IMG to produce a social media landscape report, analysing trends, performance and year-on-year growth across the horseracing industry.

IMG has analysed the audiences of over 550 racing industry accounts across four social media platforms: Instagram, TikTok, X (formerly Twitter) and Facebook.

By analysing audience growth, IMG is able to understand which sectors have succeeded or struggled on each platform and provide insights for future social media use for all parts of the industry.

This report also covers the latest news and trends on each platform, helping the racing industry to keep fully updated on how to best use social media to achieve its goals.

This report is now in its eighth year and the amount of data we've been able to gather generates a great vantage point to assess how the sport's social media landscape is changing and growing.

Please note, there are QR codes displayed throughout the document, which will take you to social accounts or particular social media posts referenced.



Executive summary

Across the entire racing industry, overall social media followers (Instagram, TikTok, X and Facebook) grew to 46.9m* in 2024 vs. 34.3m in 2023.

1. The leading platform is still X with 16.8m followers but Instagram has closed the gap after growing to 13.4m. TikTok has grown to 9.5m followers** with Facebook now on 7.2m
2. Following significant retirements in 2024 from the likes of Frankie Dettori and Aidan Coleman, jockey followers decreased across Instagram, X and Facebook
3. The number of TikTok accounts across the industry (excluding influencers) remained very similar - 89 in 2024 and 88 in 2023 - however those who have invested time have reaped the rewards
4. The trend of Instagram being preferred by individuals (jockeys, trainers and owners) in the industry over X and Facebook continues
5. X is still popular among industry bodies as a way of giving people news and information, whereas Facebook is still impactful for racecourses

**The 12.6 million increase is largely due to the addition in tracking of Gemma Owen and Sam Dracott who have 7.3m followers across Instagram and TikTok*

***Of the 9.5m, 5.2m are from Owen and Dracott*



UK social media consumption

56.2M

SOCIAL MEDIA USAGE

In 2024 the UK had **56.2 million** active social media users, translating to **82.8%** of the population.

1h 49m

TIME SPENT (SOCIAL)

The average UK person spends **1hr 49m** on social media a day, down 7 minutes year-on-year.

6.4

PLATFORMS

The average UK person uses **6.4 different social media platforms** every month.

73%

MOST POPULAR

Facebook is still the most used social platform with **73%** of the UK population using it each month. Instagram (59.7%), X/Twitter (44.2%), TikTok (40%) follow in behind.

49h 29m

TIME SPENT (PLATFORMS)

TikTok comes out on top for average time per month spent on a platform by a person in the UK with **49h 29m,** compared with 27h the previous year.

52%

NEWS CONSUMPTION

The number of people in the UK who use social media to find out news is at **52%**, compared with 70% on television, 40% radio and 34% print media.

Tracking horseracing

We have picked out certain trends across the hundreds of accounts within the horseracing social media landscape that form that basis of this report. The number of accounts we analysed is up 26 from 531 in 2023 to 557 this year.

557

British racing accounts tracked across multiple social media platforms

6

The number of categories we broke the industry into:

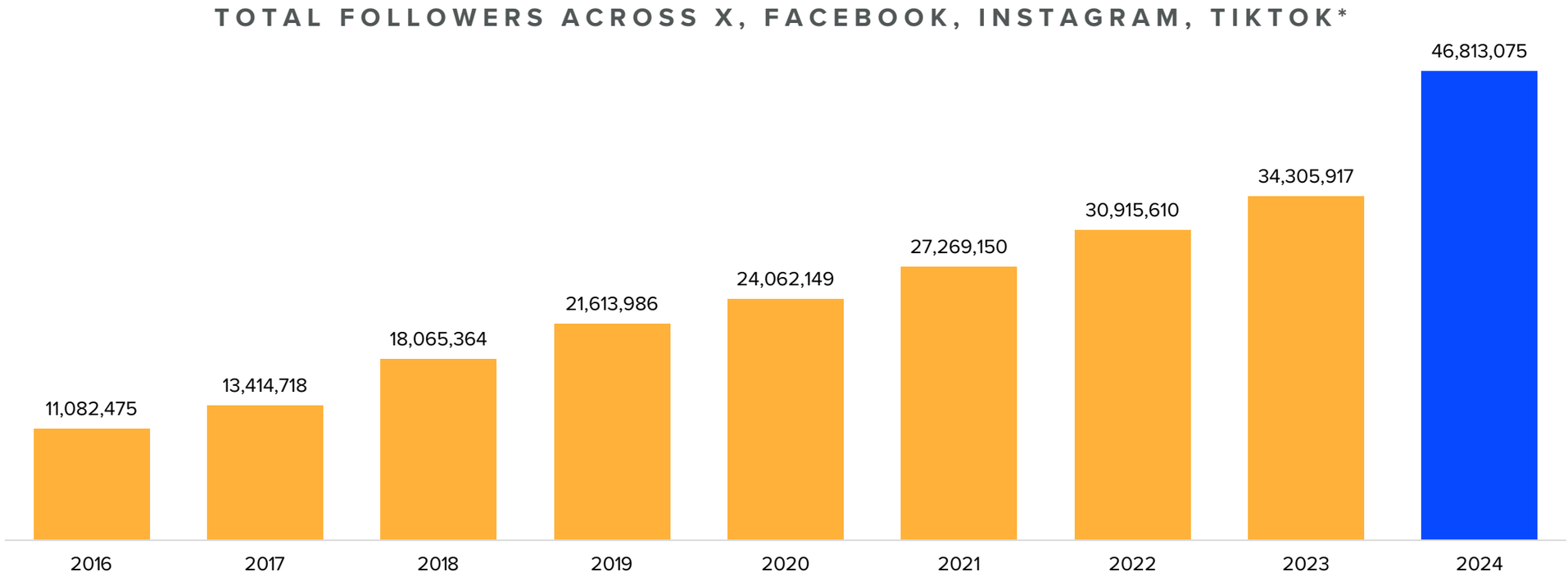
1. Racecourses
2. Industry bodies
3. Jockeys
4. Trainers
5. Owners
6. Influencers

9

Years worth of data available to measure industry progress

Date range for analysis: 26 September 2023 – 15 September 2024

35 million followers gained across nine years



Since the first of these reports was produced in 2016, the industry has grown from 11 million social media followers to over 46 million. On average, horse racing's audience in the UK on social media has grown by 18.9%** year-on-year.

**TikTok tracking began in 2022*

***Audience numbers for Gemma Owen and Sam Dracott not considered when calculating 2024 growth. With those included, average growth from 2016 – 2024 would be 21.9%*

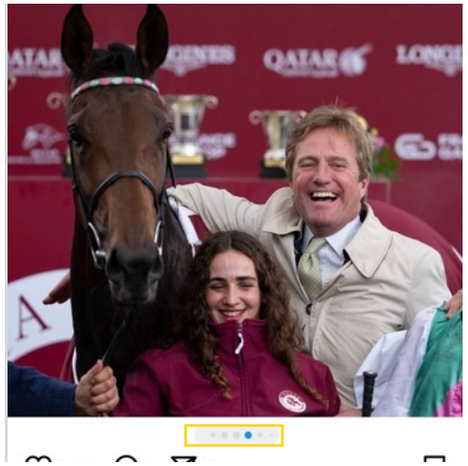
SECTION 2

Instagram



Platform updates

Instagram continues to be one of the more versatile platforms on offer in the social media space. The differing elements of the platform provide creators with the ability to shape their own approach. Some of the key updates from the past 12 months are:



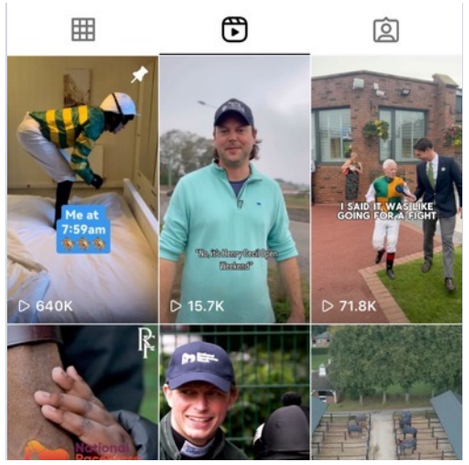
Carousel/Reels expanded

Instagram has expanded the maximum size of carousels to 20 slides and increased the maximum length of Reels to three minutes, giving you the ability to include more information in your posts.



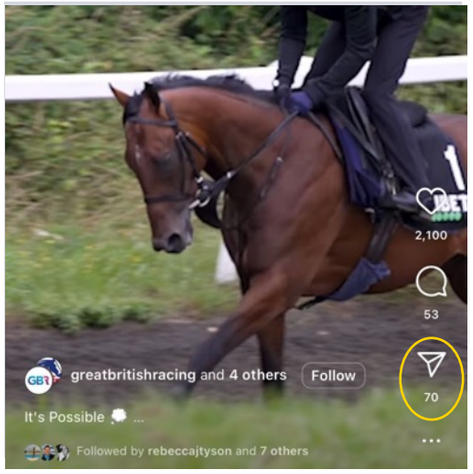
Multiple sounds on Reels

The platform now enables creators to add up to 20 sounds on a single Reel. Sounds typically boost the reach of your content, and you can now add more of them to a single Reel, giving you more flexibility in your video content.



10 or more Reels per month

Reels should be a part of your routine to maximise growth. It's recommended to produce at least ten a month, and ensure they have maximum impact by making them vertical.

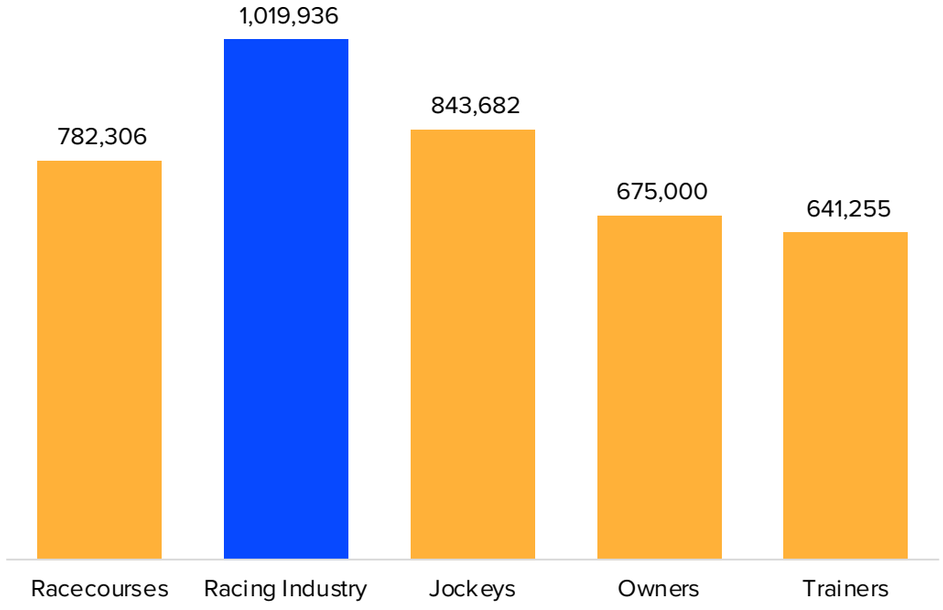


Post shares key for reach

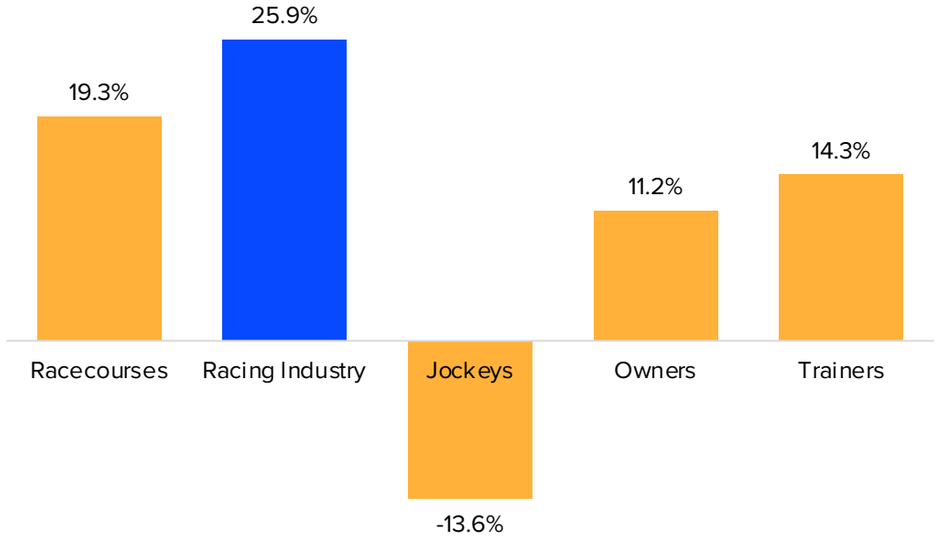
The number of shares a post has impacts reach a lot more than like/comment count and watch time, so ensure your posts are as shareable as possible.

Jockeys suffer dip after high-profile retirements

TOTAL FOLLOWERS



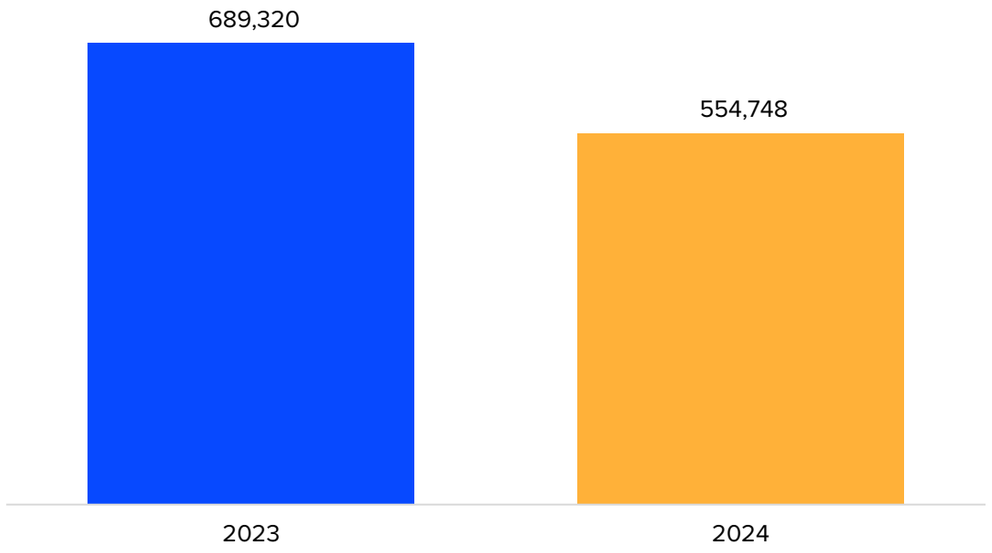
FOLLOWER GROWTH (%)



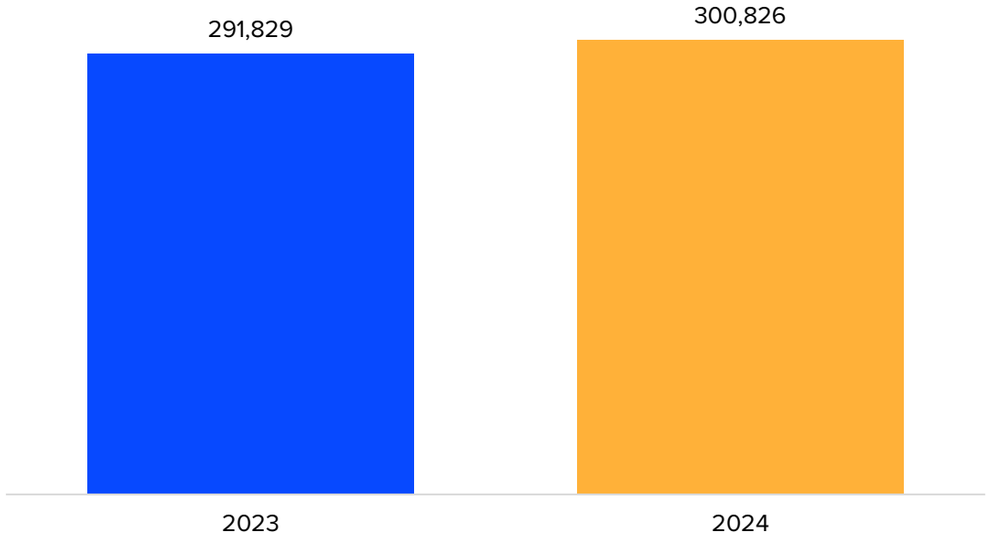
Racing Industry accounts now possess the largest total audience on Instagram in 2024, overtaking jockeys who endured a reduction in audience size following significant retirements over the past 12 months, with the likes of Frankie Dettori and Aidan Coleman now classified as influencers. Growth remained strong across all parts of the industry except for jockeys in 2024, showing that of the three platforms where large sections of the sport have accounts – X, Facebook and Instagram – Instagram is the one which has the strongest growth prospects.

Dettori retirement delivers significant impact

YEAR-ON-YEAR FLAT JOCKEY GROWTH



YEAR-ON-YEAR JUMP JOCKEY GROWTH



The jockey landscape on social media changed significantly in 2024, with various retirements leading to a 13.6% audience reduction. On Instagram, the bulk of the drop in flat jockey followers was down to the retirement of Frankie Dettori – in the 2023 report, he had over 160,000 followers on Instagram. With jump jockeys however, despite growth across platforms declining following retirements from the likes of Aidan Coleman, Jamie Moore and Paddy Brennan, Instagram actually grew by 3.1%,

If all retirements were discounted, jockey growth on Instagram was at a healthy 9.3%.

Jockeys should still prioritise Instagram to grow

There have been a number of high-profile retirements from the weighing room over the past 12 months.

This means there is now room for new stars to fill the void and become influential voices who can help the sport prosper.

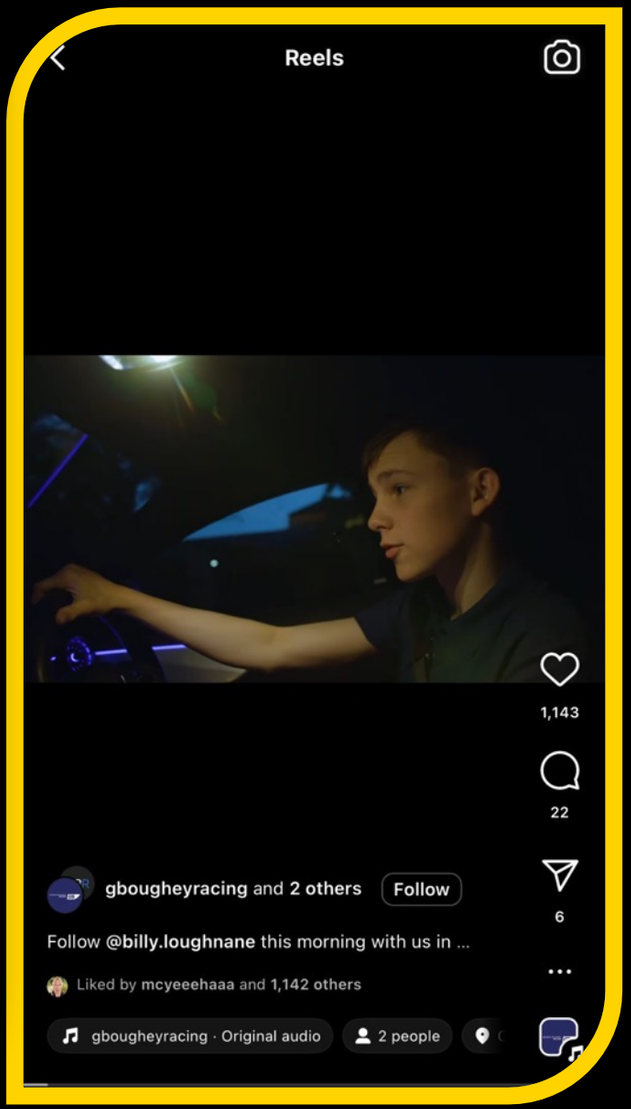
Instagram should still be seen as vital in reaching new audiences, along with TikTok. In the following Facebook and X sections, you'll see how growth has consistently plateaued on both platforms over recent years.

Instagram is not just a source of growth – it's an opportunity for people to learn more about athletes, so jockeys having an active and engaging presence will be able to communicate their brand most effectively.

Billy Loughnane is a great example of a young jockey who is very active on Instagram. His audience on Instagram has grown 87% over the last 12 months.

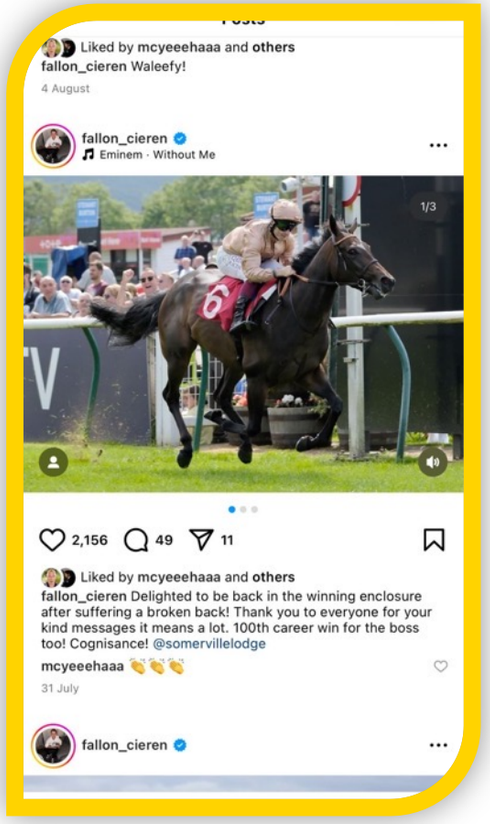
He provides regular race updates and posts behind-the-scenes content so his audience can find out more about him.





Scan for Billy Loughnane's Instagram

Other jockeys thriving on Instagram



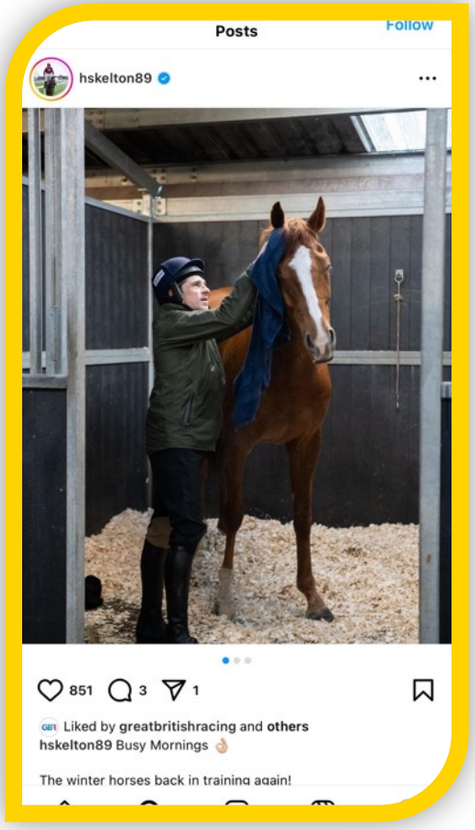
73%

Cieren Fallon
34.4k followers



28%

Harry Cobden
33.9k followers



35%

Harry Skelton
27.5k followers

Diverse content winning for industry accounts

As mentioned on slide 11, industry accounts now possess the largest audience share in the sport.

Among those to have enjoyed the biggest percentage growth in 2024 was The Jockey Club who increased their audience by 26.4%.

The Jockey Club has a very diverse Instagram offering and their success outlines the importance for certain accounts to produce content that appeals to different interests among existing and new audiences.

Often content away from the the track performs much better as users receive access to material they wouldn't normally get by other means like TV or being at events in-person.

The Jockey Club keeps formats fresh by introducing new series like their Trust-a-Trader sponsored series presented by Alan Johns on key sport updates and Best Jockey Cam Moments.

They also utilise on-screen text on Reels and carousels to maximise engagement opportunities.

Other accounts that focus on diverse content and achieved strong growth were The National Stud (78.7%), Juddmonte (54%) and Racing Post Bloodstock (53.3%).





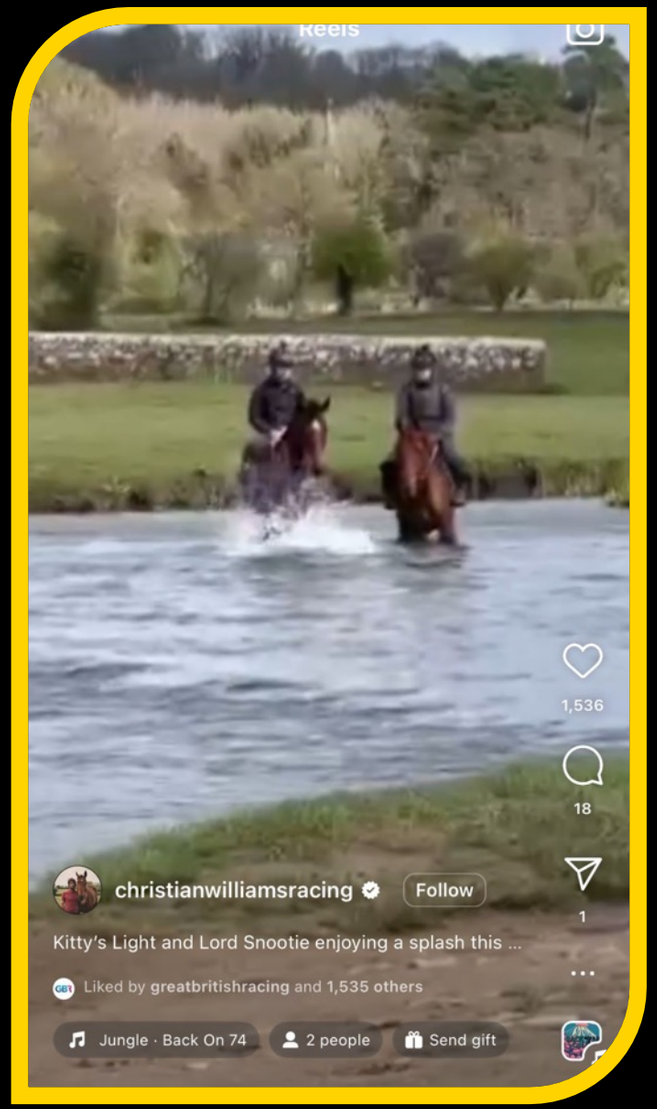
Scan for The Jockey Club Instagram

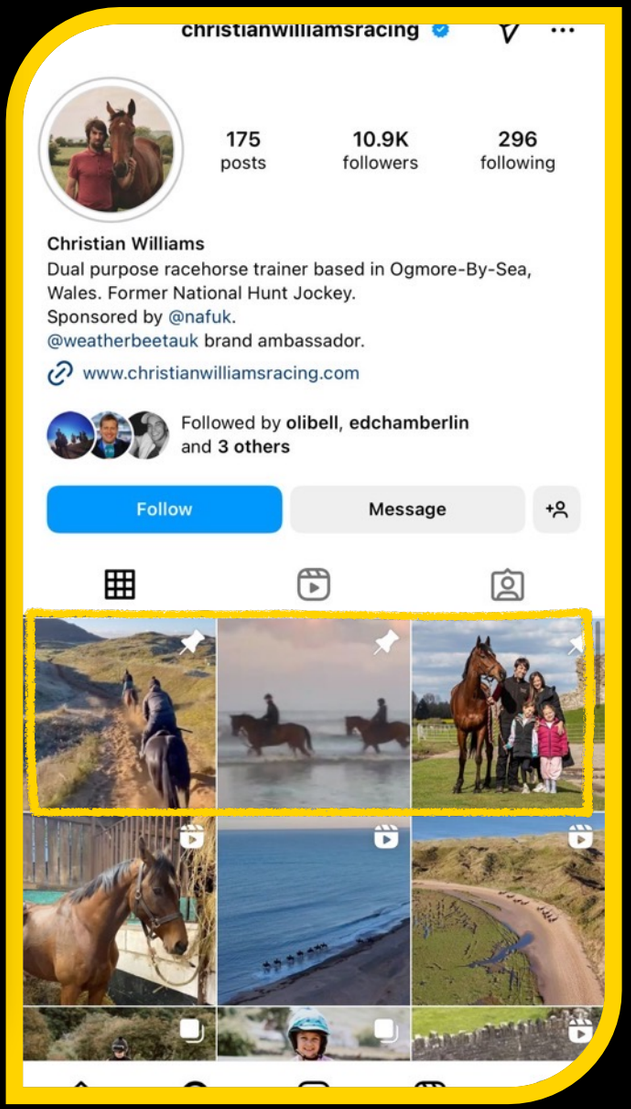
Christian Williams shows best practice

Jumps trainer Christian Williams has doubled his audience on Instagram over the past 12 months, thanks to a clear strategy to bring his operation closer to people on Instagram.

Christian's account showcases three key traits which can help any account maximise growth efficiently:

- **Accepting Collabs**
  - This takes a lot of work away and is a simple way for jockeys, owners and trainers to populate their Instagram accounts regularly
  - It also helps you reach new audiences, by having your profile seen by followers of the accounts you collaborate with
- **Regular posting**
  - In April 2024, Christian's account posted 25 times, capitalizing on the story surrounding Kitty's Light running in the Grand National. Being active around key moments in the calendar will help accelerate growth
- **Pinned posts**
  - Pinning your best posts, or the ones you want to make most visible, is a great way of ensuring your key narratives and stories can be seen by more people





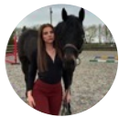
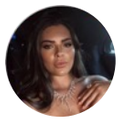
Scan for Christian Williams' Instagram

Instagram home for creators and personalities

With many jockey retirements over the past 12 months, and more and more people turning to Instagram to build an online presence, influencers now have a combined following of 9.4m.

- Working with these creators is a good way for other parts of the industry to help broadcast their stories at scale
- Instagram, alongside TikTok, is the place where people can build an online brand fastest for themselves in 2024
- The table (right) shows a list of prominent influencers who have significant audiences and relevant content and profiles to horses and horseracing in 2024

Notable horseracing creators on Instagram in 2024

	Account name	Followers	2024 growth
	Frankie Foster	327,487	7%
	Leonna Mayor	37,635	20.7%
	Meghan Nicholls	43,266	20.3%
	Millie Stennett	187,480	117%
	The Racing Blogger	50,764	67.4%
	Sam Dracott	290,639	Not tracked in 2023
	Gemma Owen	1,835,871	Not tracked in 2023

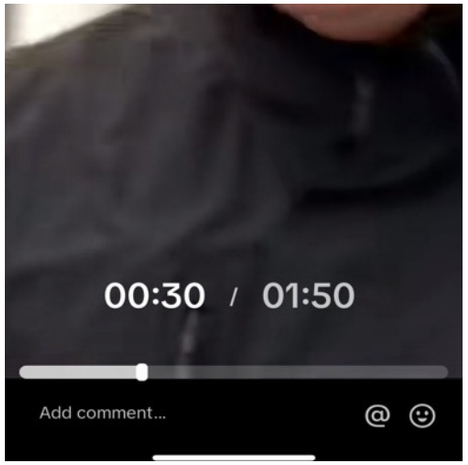
SECTION 3

TikTok



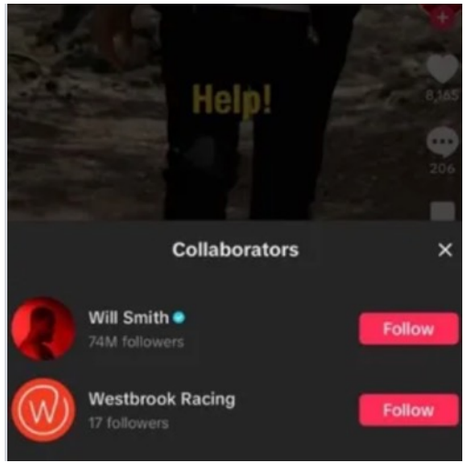
Platform updates

TikTok continues to be the place to reach Gen-Z audiences and subsequently the best platform to achieve the fastest growth. The platform is seeking to become more diverse like Instagram and give creators more revenue opportunities, with the below developments worth being aware of:



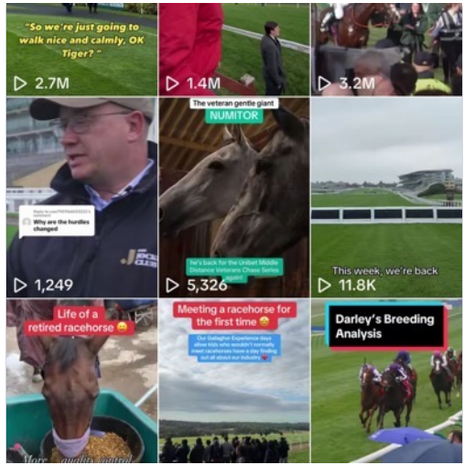
Hour-long videos

You can now upload TikToks of up to one hour to your feeds. Whilst it's unclear whether people utilizing this extra duration has found success, the platform is encouraging users to post longer videos, around 1:30 – 3 minutes.



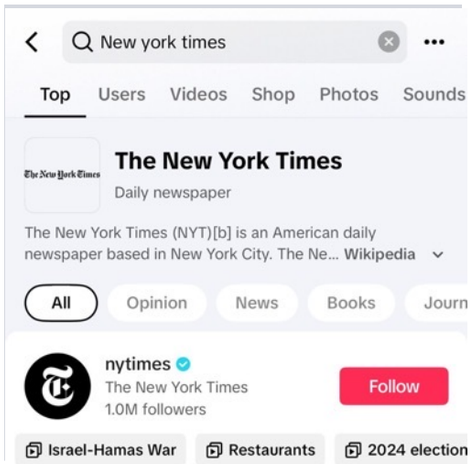
Collabs coming soon

Over the summer, a few select accounts were able to test with Collabs, which work virtually the same as Instagram Collabs. The full rollout is expected in the near future, and will give creators greater reach opportunities.



Custom thumbnails

TikTok now allows creators to upload their own thumbnails to their videos, which gives the ability to shape the look of your profile page and drive more views.



Focus on discovery

More and more users browse TikTok as a search engine, to learn more about anything and everything. It's important to have this in mind when creating your TikTok content.

TikTok uptake still slow within the industry

Generally across the industry, the number of individuals and organisations with TikTok remained similar with 2023 numbers. There still seems a reluctance or lack of knowledge from industry professionals on how to use the platform, but those who have invested their time and effort into building good content here have reaped the rewards.

The significant increase in influencer followers is down to the introduction in tracking of accounts with large audiences like Sam Dracott Farrier and Gemma Owen.

	Racecourses	Industry bodies	Jockeys	Trainers	Owners	Influencers
Accounts analysed	**59**	**33**	**129**	**110**	**46**	**181**
Accounts on TikTok	**22** *(22)*	**14** *(15)*	**36** *(32)*	**12** *(14)*	**5** *(5)*	**48** *(21)*
Total followers	**71,286** *(58,204)*	**591,224** *(308,751)*	**45,666** *(28,316)*	**38,168** *(42,209)*	**27,548** *(24,050)*	**8,133,356** (1,260,890)

(2023 number)

Personality-driven content helps individuals grow

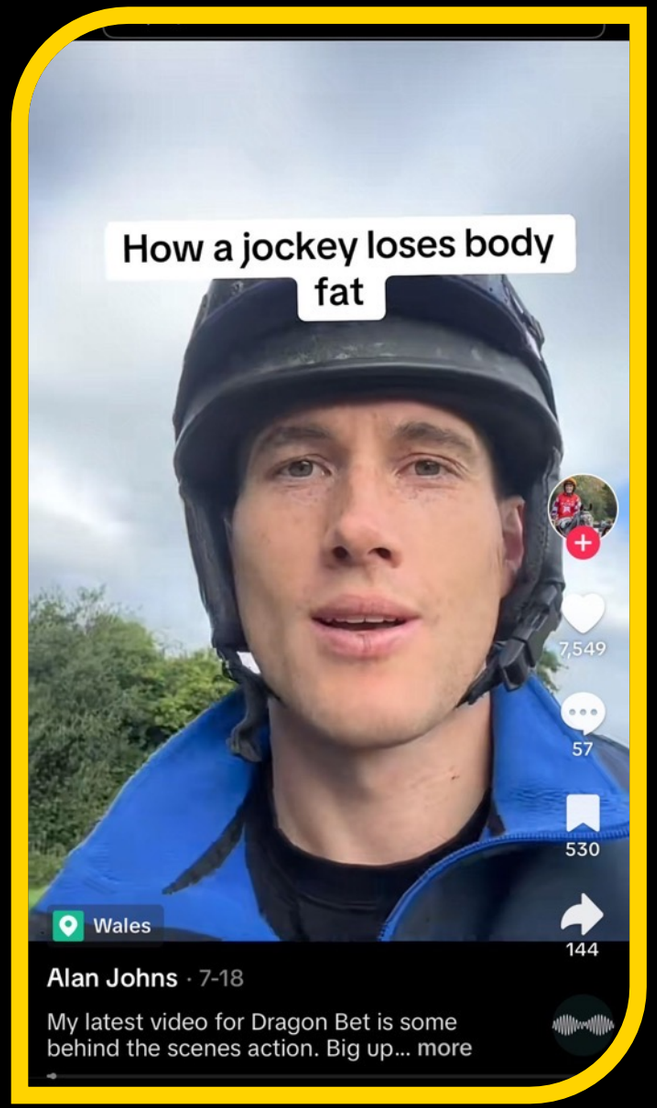
TikTok usage among jockeys and trainers remained similar to 2023 levels, showing that individuals in the industry still prefer other platforms to connect with their online audience.

However, Alan Johns and Tim Vaughan have around 13,000 TikTok followers combined, which may not seem significant but they're slowly building an engaged audience thanks to the insight they provide, and there are plenty of learnings for the wider industry.

Alan produces a variety of content from quizzing his fellow jockeys to showing his followers more of what he gets up to off the track. However, Alan's key selling point is how he ensures his personality comes across in all his videos. The consistency of this means his audience will return to his channel for more content, and likely end up following him.

He has even teamed up with his sponsors DragonBet and there are positioned on lots of his content, which will help Alan drive more value for them.

Tim has grown his audience to over 10,000 and most of his content is, like Alan, behind the scenes to show his followers more of what they wouldn't normally see.





Raceday.RTV engaging with new audiences

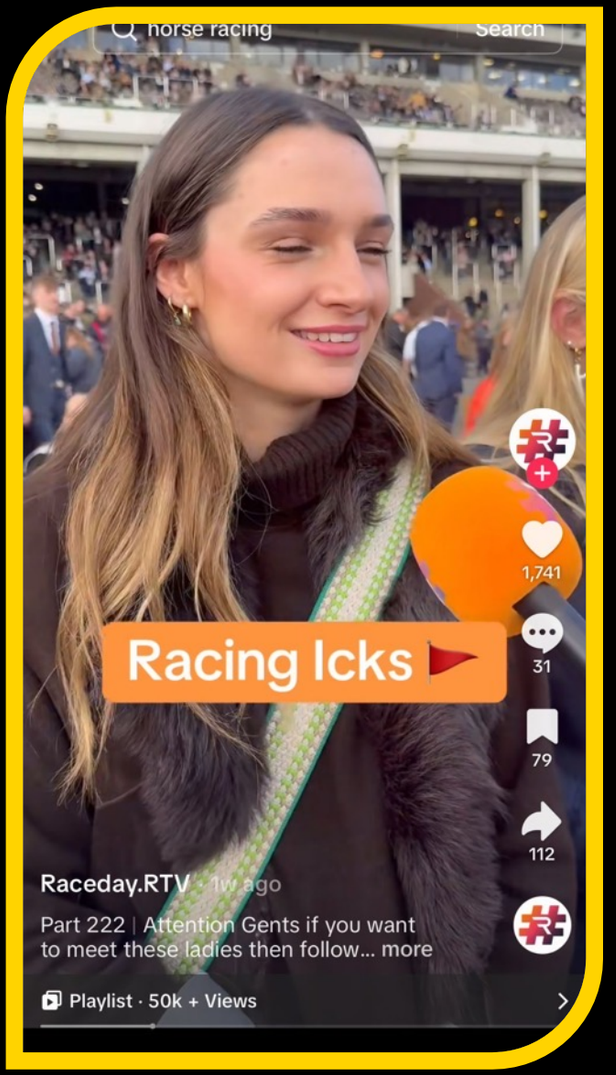
Raceday.RTV has continued their investment in producing vertical video, and as a result they've almost doubled their audience.

Now possessing over 120,000 TikTok followers, the account focuses all their content around the raceday experience to drive more fans through the gates.

There are many best practice principles the channel adopts which helps it succeed:

- **Using influencers as hosts**
  - Their use of talent like Frankie Foster and Sakara Bell helps their content feel more familiar to new audiences and increases chances of turning those new eyeballs in followers
- **Uncovering personalities**
  - Interviews with jockeys, trainers, owners and racegoers make up a large portion of their output, which ensures their content is more appealing to casual audiences
- **On-screen text**
  - They frequently add on-screen text to their content and thumbnails to add more context for TikTok users





Scan for Raceday.RTV's TikTok

Consistent formats on TikTok

Frankie Foster has become a frequent face and voice in the horse racing social media space.

His approach on TikTok is built around providing tips ahead of weekend action, reactions to the big news stories and providing historical context to certain elements of the sport.

Being consistent with these formats over a number of months has helped him generate repeat viewers of his content, as they know what to expect from his channel, and subsequently increase his chances of turning those viewers into followers.

As well as that consistency, Foster clearly puts plenty of time into the planning of his content. No time is wasted in the videos he posts as he tries to make them as engaging as possible for the viewer.

The battle for attention on social media is fierce, so ensuring every second of your content, especially on TikTok, is as engaging as it can be is important to succeed.





Scan for Frankie Foster's TikTok

SECTION 4

X



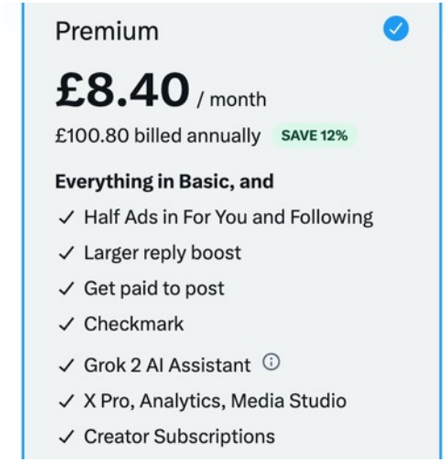
Platform updates

X continues to change drastically leading to many high-profile individuals and organisations re-assessing their strategies on the platform. As the platform remains widely-used in the horse racing industry, the below updates should be useful to those active here:



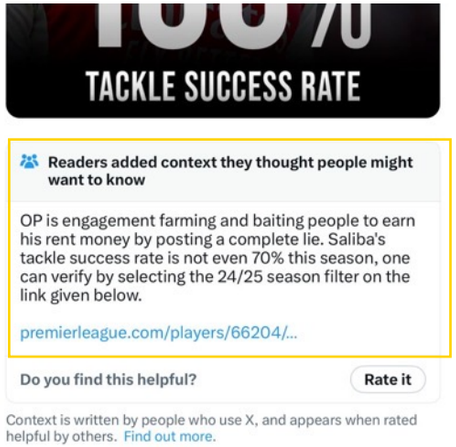
Some sports accounts de-prioritising X

A handful of sports accounts are reported to have began de-prioritising the platform over recent months as they seek more effective routes to sharing news and information with their audiences. With X's algorithmic changes, many see alternatives like WhastApp Channels and Threads as better options.



Premium importance grows

Having a subscription to Premium (i.e. a blue tick) significantly boosts reach on regular posts and replies, and allows you to post longer videos and copy. Premium subscriptions vary in cost but are important if X is a key part of your strategy.

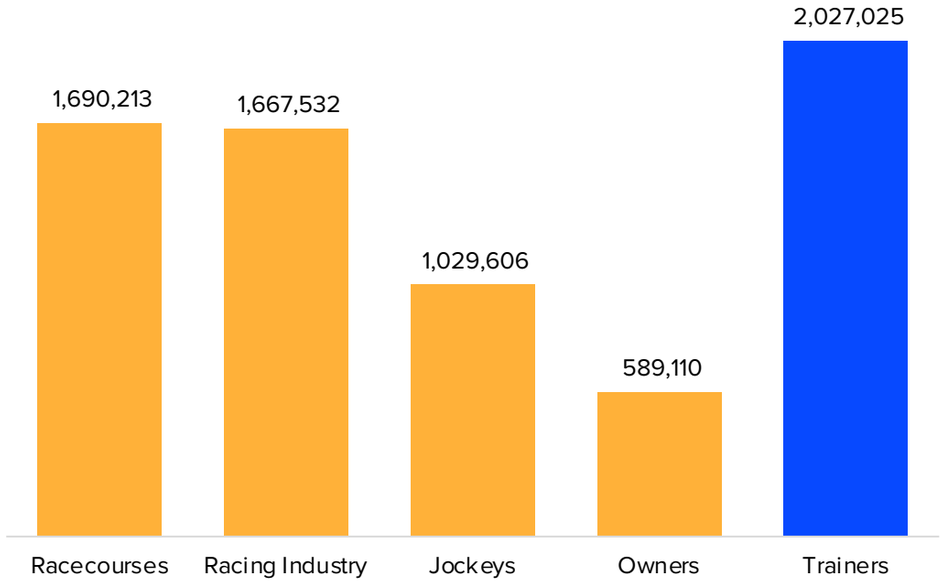


Community notes prevalent

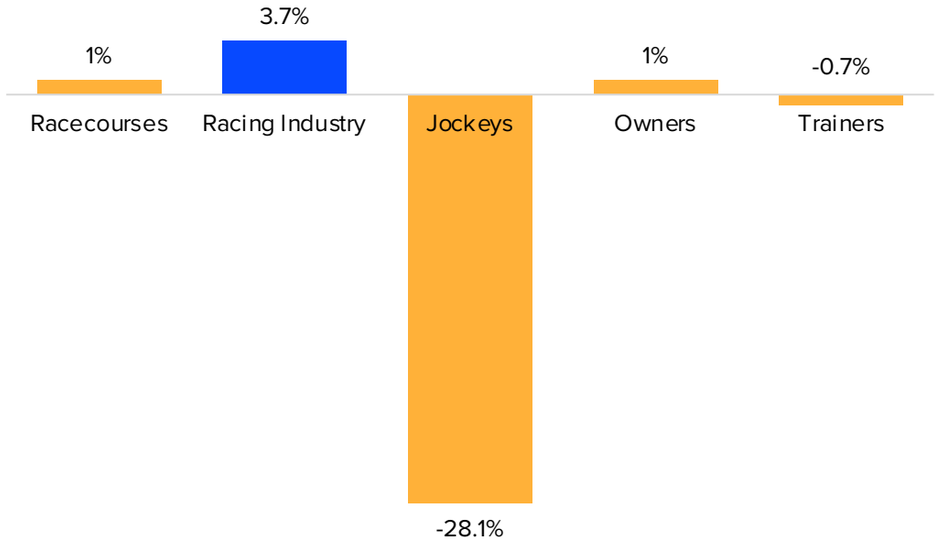
Community notes continue to grow in significance as the platform seeks to correct misinformation. As many sports accounts aim to be the source of truth when it comes to news, it's important to be triple checking facts to ensure X doesn't hit you with one of these.

Growth slowing considerably on X

TOTAL FOLLOWERS



FOLLOWER GROWTH (%)



The trend of growth slowing in recent years has continued into 2024, with jockeys experiencing a significant drop due to retirements from the likes of Dettori and Coleman. General audience size for racecourses, owners and trainers remained similar to 2023 numbers. Industry accounts witnessed the best growth but it was still marginal compared with Instagram.

Jockeys focusing away from X

An unsurprising trend on X is the number of jockeys opting against creating accounts or having little success in building a big audience. Instead, jockeys increasingly are seeking to develop their brand and audience on other platforms like Instagram. Jockeys who have opted to create X accounts have little success with growth.

	New jockeys tracked in 2024 who have X	New jockeys tracked in 2024 who don't have X
	Joe Leavy	Joshua Thompson
	Tyler Heard	Charlie Maggs
	Finley Marsh	Ben Smith
	Patrick Wadge	Lily Pinchin
	Jack Hogan	Callum Hutchinson
	Caoilin Quinn	Mark Winn
	Freddie Gingell	Brandon Wilkie
	Fergus Gillard	Pierre Louis-Jamin
	Bruce Lynn	
Total X following:	6,807	N/A
Total Instagram following:	13,426	20,555

Users still flock to X for news updates

Despite usage on X falling among individuals in the sport, media outlets like ITV Racing, Sky Sports Racing, Racing Post, At The Races and Racing TV continue to see a benefit to being on the platform.

Whilst their growth isn't astronomical, it does point to people still using X as a way of receiving updates on the sport.

In this group, you have broadcasters that own the rights to the sport's big races and their growth suggests people who start following the sport will still come to X to watch highlights and interviews.

You also have the Racing Post who provides the most regular news updates and insight from the stories in the sport.

It remains to be seen if X continues to be a trusted news service for people in the industry in the coming years, but in 2024 it certainly still has its place.

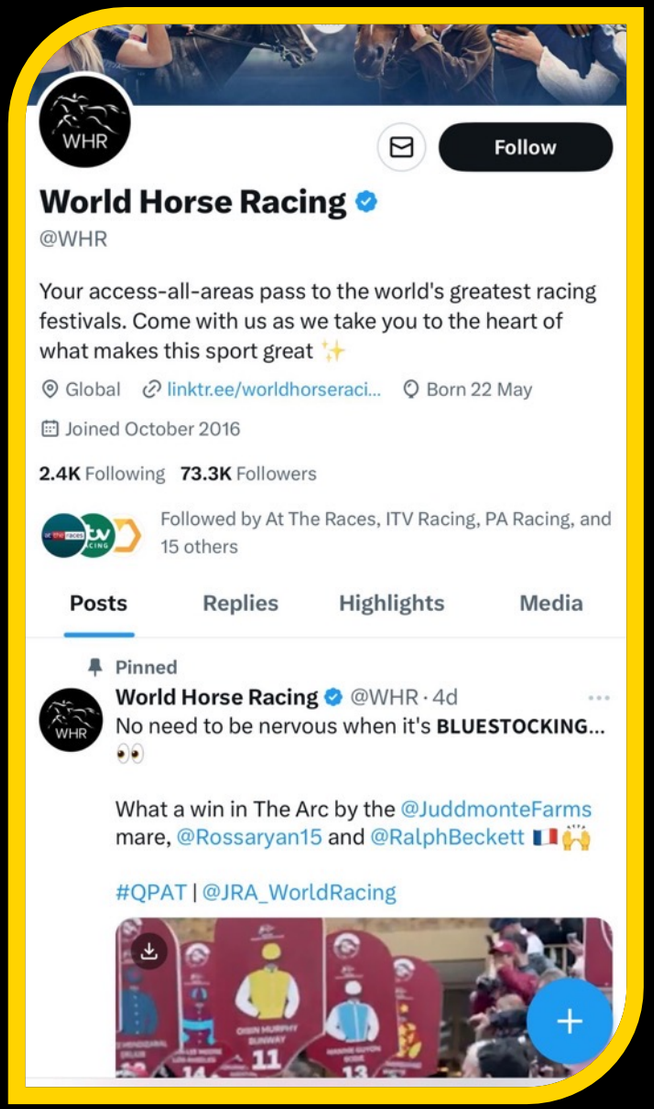
Account	Followers	2024 growth
	150,172	8.4%
	52,174	9.2%
	273,351	3.3%
	262,714	3.6%
	232,824	5.5%

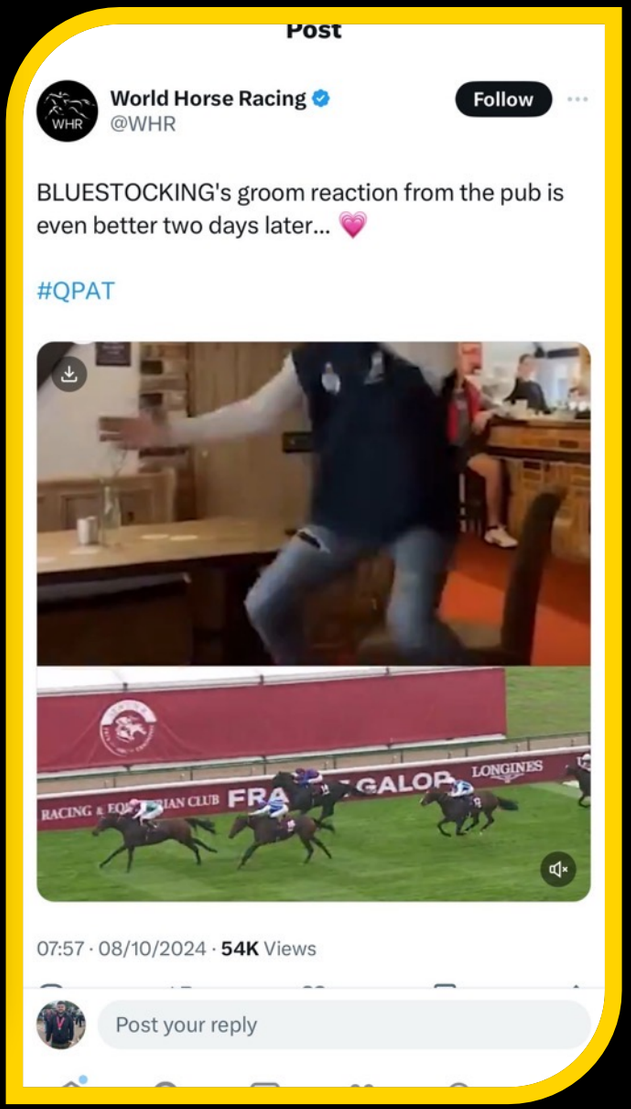
World Horse Racing continues to grow

World Horse Racing (WHR) is leading the way when it comes to growth on X, having grown by 13.2% in 2024. In a time where it's hard to gain new followers at scale, WHR has continue to grow over the past five years.

Their wide remit (covering worldwide aspects of the sport) means they're able to connect with a larger audience, giving them an advantage, but they still display many best practice traits like:

- **Quality over quantity**
  - Despite a wealth of stories to cover across the world, they do a good job of selecting the content they think will reach the most users and generate the most engagement
  - The battle for attention is fierce on X, which is why taking time to select the best content is crucial to ensure you are a visible and relevant voice on the platform
- **Clean profile**
  - When users visit WHR's X profile for the first time, they instantly gain an understanding of what the account is, and the content they produce
  - They also use a Linktree which is an easy way of signposting additional content on other channels and showing how people can reach you directly





Scan for World Horse Racing's X

Threads and Channels offer X alternatives

In 2024, X is still widely-seen as an important tool for the sports industry in connecting with existing audiences and broadcasting important news updates.

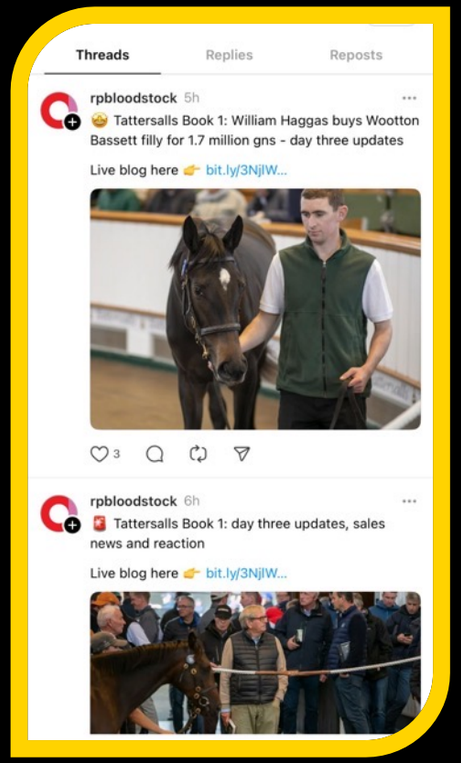
However, with the platform constantly changing and the landscape looking unclear, some accounts in the space are prioritising other platforms to be their information service to fans.

We discussed Threads in our 2023 report, and whilst the platform is still in its infancy, we recommend clients launch a presence there and use as a news service for those big updates.

Similarly, WhatsApp Channels are relatively new and under-developed, but with the amount of WhatsApp users in the UK (41.4 million) we expect Channels to grow in importance and become a powerful information-sharing tool for sports accounts in the coming months and years.

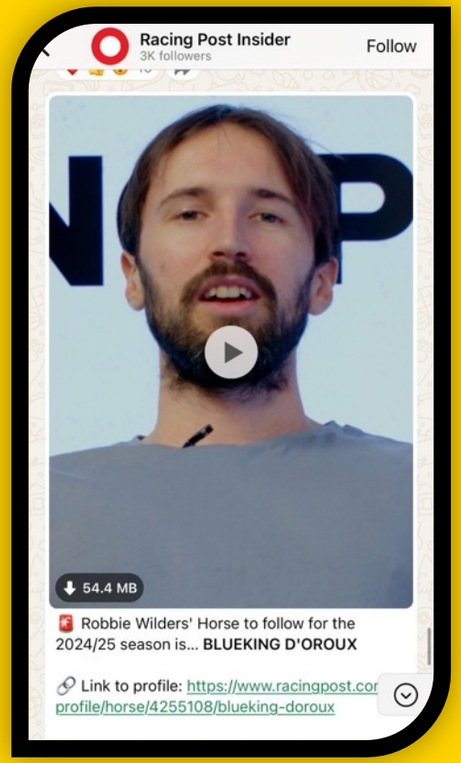
Source: Backlinko: Top 10 WhatsApp Countries Ranked (accessed October 3, 2024)

Threads



- **Ability to create account automatically from existing Instagram profile**
- **Ability to share text-based posts, images and video**
- **Timeline mimics X, but less ads and priority for verified accounts**

WhatsApp Channels



- **One-way broadcasting tool, users can only 'react' to your post**
- **Ability to share imagery, video, external links, voice notes and more**
- **No ads, and users can receive notifications seamlessly to their device**

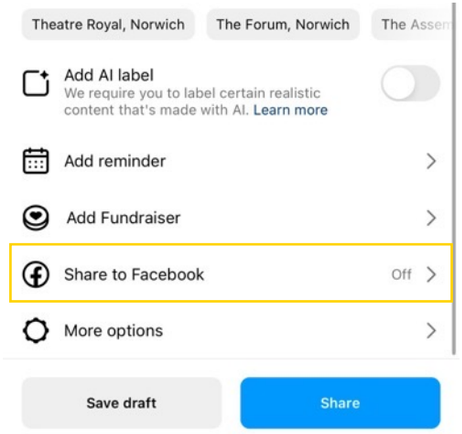
SECTION 5

Facebook



Platform updates

Facebook remains the largest social media platform in terms of worldwide usage with over 3 billion monthly active users, 1 billion more than Instagram. Whilst platform developments aren't as frequent as newer platforms like TikTok, there have been a few important ones for accounts to note in 2024:



Crosspost Reels from Instagram

Whilst Reels have been a thing on Facebook since 2021, their usage has been minimal until recently. Accounts are now able to crosspost Reels from Instagram seamlessly to Facebook



Groups can now contain 5,000 users

Meta now allows users to create groups of up to 5,000 people on Messeanger. This would be a powerful tool for owners or trainers to communicate key messages to a highly-engaged segment of their audience, for example

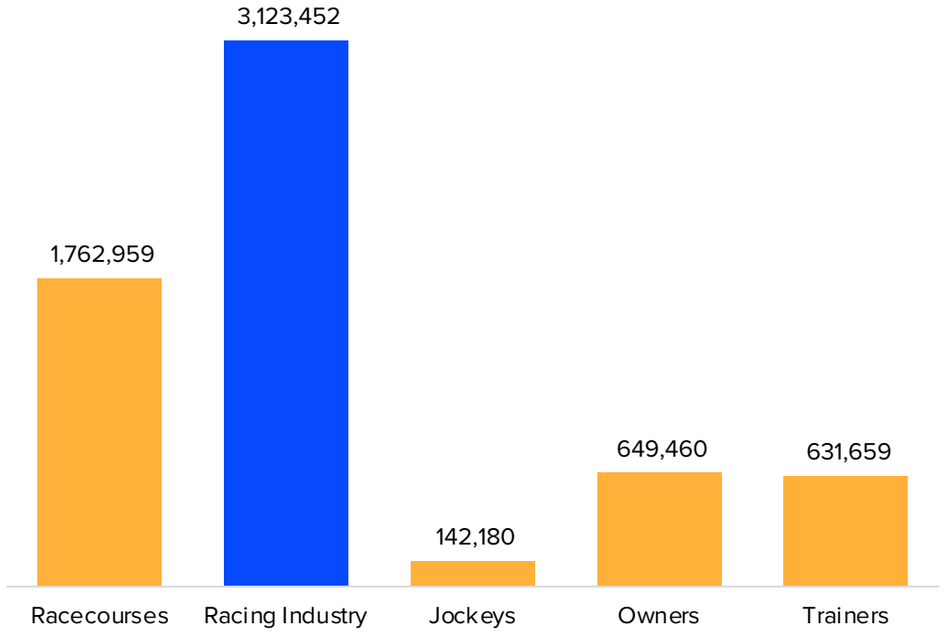


Full-screen mode now available

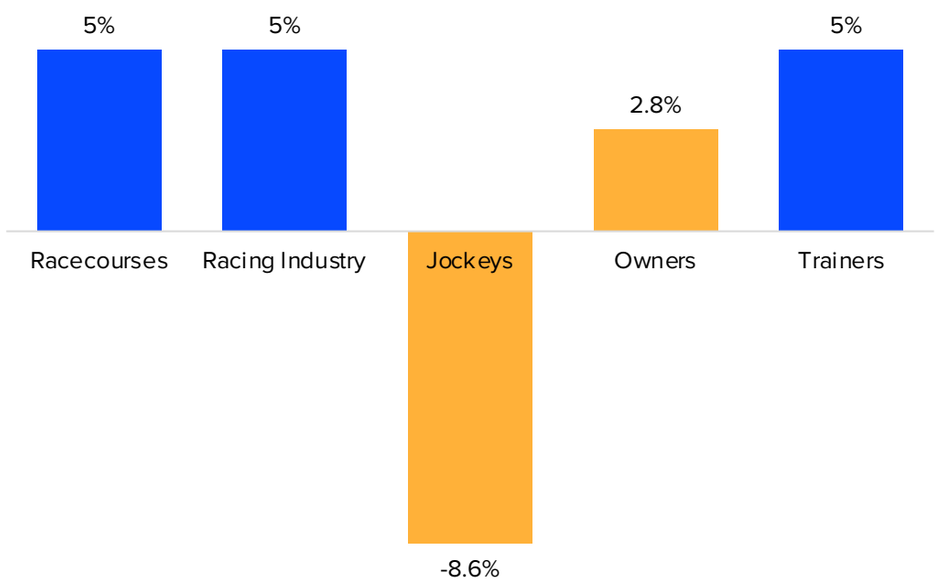
Facebook has introduced an updated video player that brings together Reels, longer videos and Live content all in one full-screen, engaging experience. This is an important one to note for users that regular create video content bespoke for Facebook

Facebook still growing minus jockeys

TOTAL FOLLOWERS



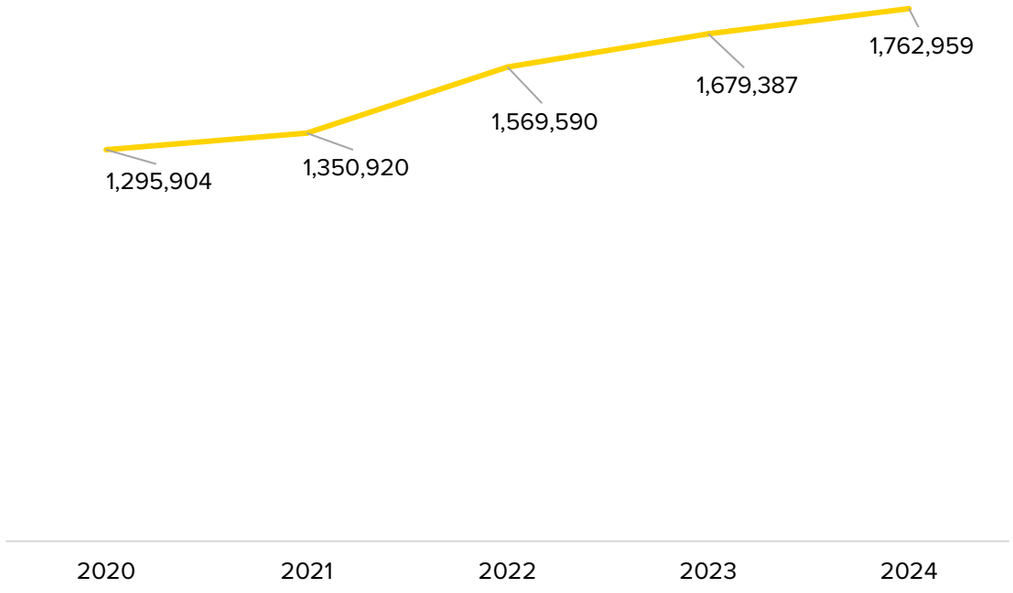
FOLLOWER GROWTH (%)



Similarly with X and Instagram, jockey presence on Facebook reduced significantly following retirements from Dettori, Coleman and more. However, across all other aspects of the industry, growth was steady. Industry accounts still possess the largest overall following, followed by racecourses who are still an important part of the horseracing landscape on Facebook.

Racecourses still thriving on Facebook

FOLLOWER INCREASE OVER FIVE YEARS



BEST GROWTH IN 2024

Racecourse	Followers	2024 growth
Cheltenham	128,879	10.7%
Chepstow	29.984	11.8%
Epsom Downs	26,111	11.3%
Kempton Park	22,461	9.1%
Newcastle	36,172	8.5%
Uttoxeter	36,126	12.6%

Facebook is still one of the most powerful paid advertising platforms, due to its large user base, and this potentially explains why racecourses are still growing. Being the most relevant area of the industry for e-commerce (selling tickets and other products), many may use paid media for this and therefore awareness of their brand will increase and drive more followers as a by-product of that paid activity.

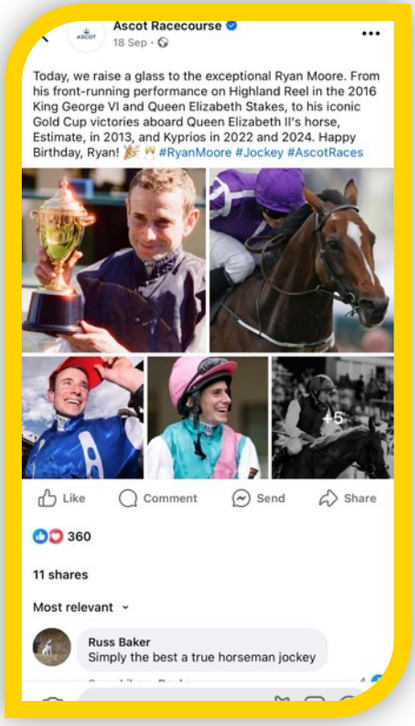
Facebook has an older demographic than the likes of X, Instagram and TikTok, and perhaps racecourses on the platform are appealing to older users and fans of the sport as an information source for and race meetings.

Use Facebook to engage with existing fans

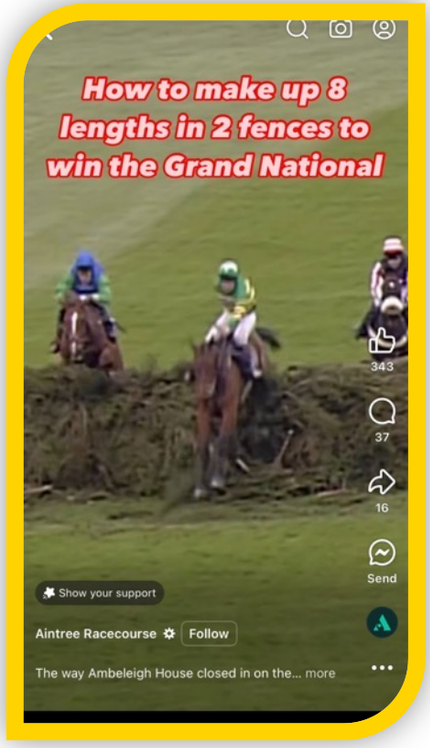
With racecourses having their tentpole events across the year, it's crucial to keep your audience engaged away from these times. Some of the prominent British racecourses utilise good tactics to ensure their fans remain interested throughout the year:



Cheltenham actively asking for engagement



Ascot celebrating iconic jockeys



Aintree highlighting memorable moments

Owners Group utilises Facebook for community

With the rise in popularity of horseracing syndicates, people are keen to receive regular updates on their horses and connect with fellow owners.

Facebook is still one of the most popular social platforms for people looking connect with others, and the Owners Group UK clearly has a lot of success in bringing them together via regular updates on where their horses are running and subsequent performances and results.

Shareholders will regularly flock to the comments to wish horses and staff good luck, and share their emotions with fellow owners around results.

Providing opportunities through posts for fans to react and engage will drive increased fandom and will strengthen interest that owners have, leading them to likely purchasing more shares in future.

Facebook in 2024 should ultimately be seen as the platform that can drive community among an existing fanbase.





Scan for Owners Group Facebook profile

SECTION 6

Summary



Executive summary recap

Across the entire racing industry, overall social media followers (Instagram, TikTok, X and Facebook) grew to 46.9m* in 2024 vs. 34.3m in 2023.

1. The leading platform is still X with 16.8m followers but Instagram has closed the gap after growing to 13.4m. TikTok has grown to 9.5m followers** with Facebook now on 7.2m
2. Following significant retirements in 2024 from the likes of Frankie Dettori and Aidan Coleman, jockey followers decreased across Instagram, X and Facebook,
3. The number of TikTok accounts across the industry (excluding influencers) remained unchanged - 88 in both 2024 and 2023 - however those who have invested time have reaped the rewards
4. The trend of Instagram being preferred by individuals (jockeys, trainers and owners) in the industry over X and Facebook continues
5. X is still popular among industry bodies as a way of giving people news and information, whereas Facebook is still impactful for racecourses

**The 12.6 million increase is largely due to the addition in tracking of Gemma Owen and Sam Dracott who have 7.3m followers across Instagram and TikTok*

***Of the 9.5m, 5.2m are from Owen and Dracott*







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