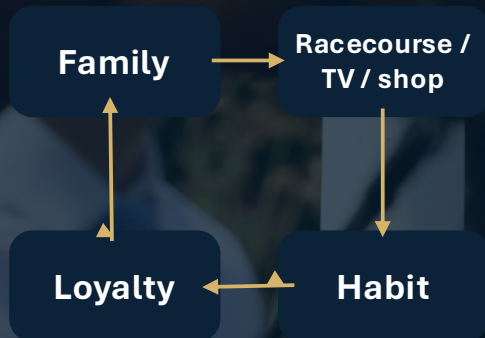


Racing used to inherit its audience. Now it has to earn it.

Adam Binns | AB Apex Advisory

The old habit loop is weakening:
family, racecourse, newspaper, TV,
betting shop, repeat.

OLD HABIT LOOP



NEW JOURNEY



EARN

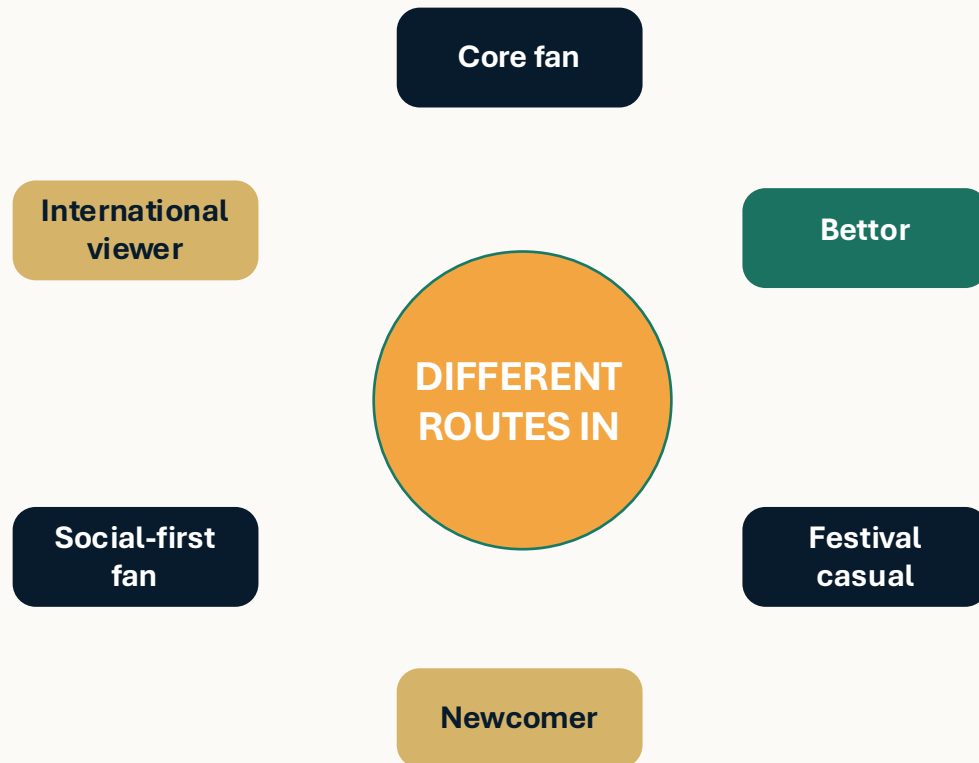
NOT INHERIT

- More competing entertainment
- Better product design



There is no single “racing audience”

Different audiences need different products, stories and routes in.



Core fans

depth, data and form

Bettors

confidence, liquidity and a reason to play

Casuals

story, simplicity and jeopardy

New fans

identity, community and access

“How do we show more racing?” is the wrong first question.

Distribution is local. Behavioural pressure is global.

Every market has different routes to the audience,
but the same structural pressures.

UK racing

free-to-consumer reach
& domestic habit

MENA / international racing

premium event packaging
& global distribution

Olympic / smaller sports

spikes around majors;
year-round visibility gap

1

Fragmented
viewing

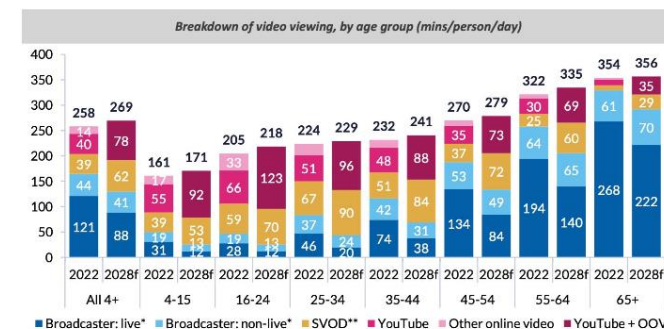
2

More choice

3

Harder habit
formation

Social video now shapes expectation, not just promotion. If trends continue, by 2028, forecasts predict live linear TV will decline by another 27% and will hardly be watched by anyone under 35 ...



Volume is not the same as value

Racing has abundance. The growth challenge is creating meaning, scarcity and clearer reasons to care.



Volume ≠ Value

+30%

fixture list
mostly low quality

45% → 25%

racers with
11+ runners

ABUNDANCE

fixtures • races • cards

CURATION

tentpoles • stories

MEANING

reasons to care



Characters

Jeopardy

Data →
meaning

Scarcity

Fewer clear narratives reduces stickiness

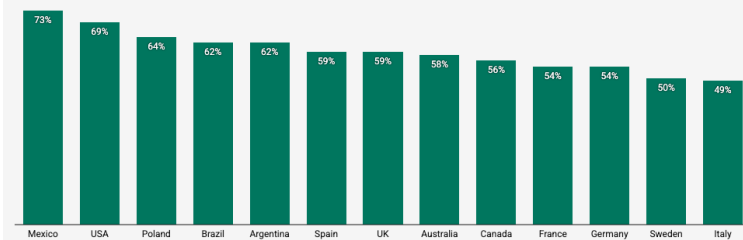
Creators are the new translation layer

Influencer-led rights are not just marketing; they help sports explain themselves in native digital environments.

50%+

of sports fans in most surveyed markets watch influencer watchalongs/commentary

Percentage of sports fans who watch influencer 'watchalongs' and sports commentary on social media



Source: Ampere • Get the data • Created with Datawrapper



The Overlap / DFL

LIVE FEED

pictures + timing

CREATOR LAYER

voice + context

COMMUNITY

conversation + identity

PARTICIPATION

playalong + return



CazéTV/ FIFA



Zack Nani / FFF

Racing needs translators, not just more feeds.



Build an attention stack, not just a broadcast plan

The right strategy combines reach, experience, participation and retention.



Three experiments WoTA members can run

Make racing easier to discover, understand, share and participate in.



01

Creator-led raceday pilot

one meeting
one market
one creator

02

Social pool-betting challenge

jackpot journey
team game
beat the expert

03

Year-round story calendar

tentpoles
characters
behind the scenes

Make racing easier to discover, understand, share and participate in.

The market model will differ by country. The job is the same everywhere.