

REDC

HI HORSE
RACING
IRELAND

Horse Racing Ireland Tracker

March 2026

8906-2026



Background and Methodology



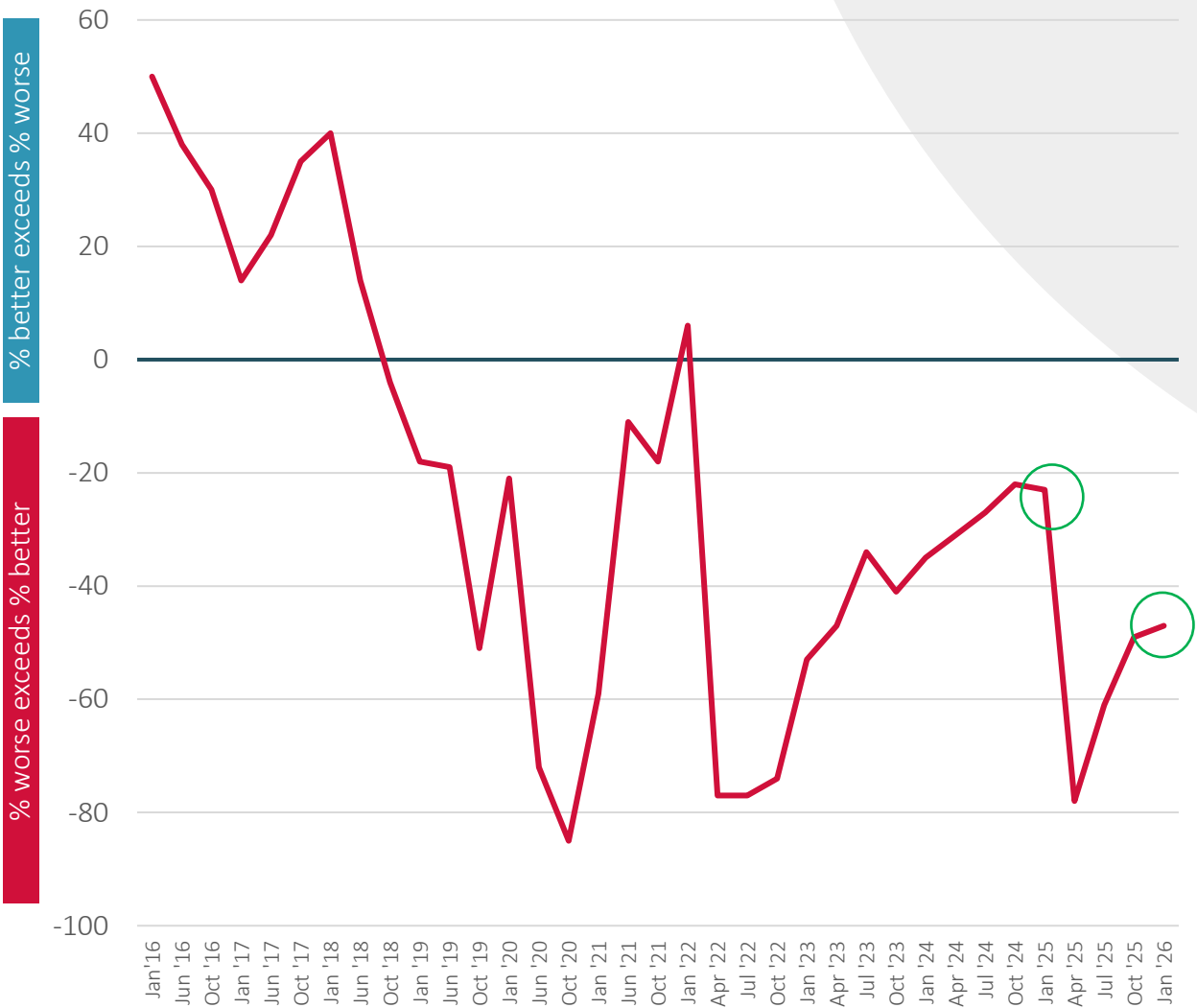
- This research aims to get a wider understanding of the adult population's usages and attitudes towards Horse Racing.
- Research was completed through an online survey amongst a nationally representative sample of adults aged 18+ living in ROI.
- Fieldwork took place from 6th – 14th February
- N=1,014 interviews were conducted.
- Results have been compared to research conducted in February 2022, 2023, 2024, and 2025.



Market Context

Consumer Mood
has improved
somewhat since H2
2025, but remains
notably dampened
vs January 2025

The RED C Consumer Mood – outlook for the Irish economy
% get better LESS % get worse over the next six months



RED C Consumer
Mood:

-47

+2 v Oct-25
-24 v Jan-25

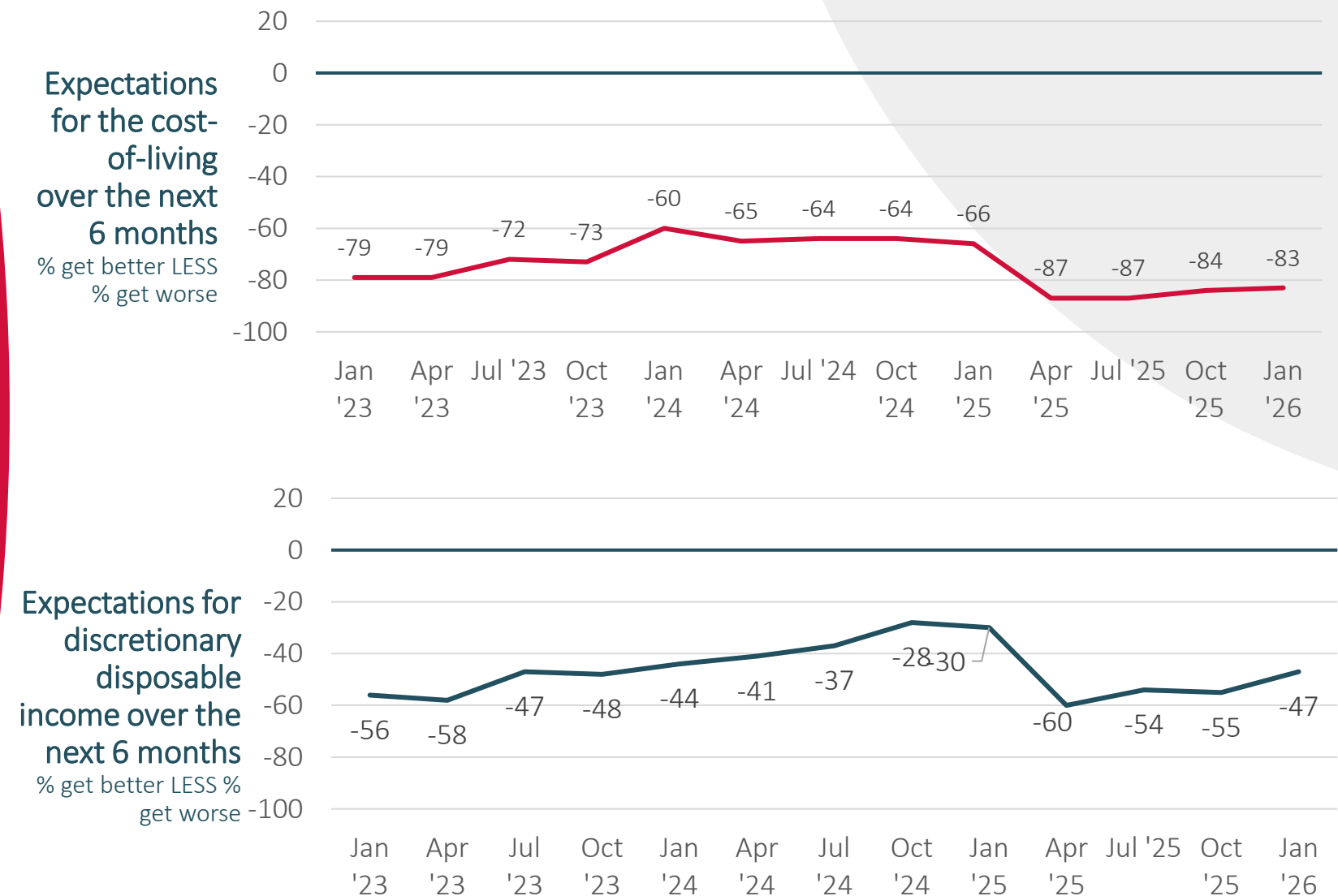
Above zero: % expect things to get better GREATER than % expect things to get worse
Below zero: % expect things to get better LESS % than expect things to get worse

Base: all adults living in ROI aged 18+

Expectations around cost of living and disposable income available also dampen amongst Irish consumers since January 2025

The RED C Consumer Mood – Cost of Living and Disposable Income

% get better LESS % get worse over the next six months

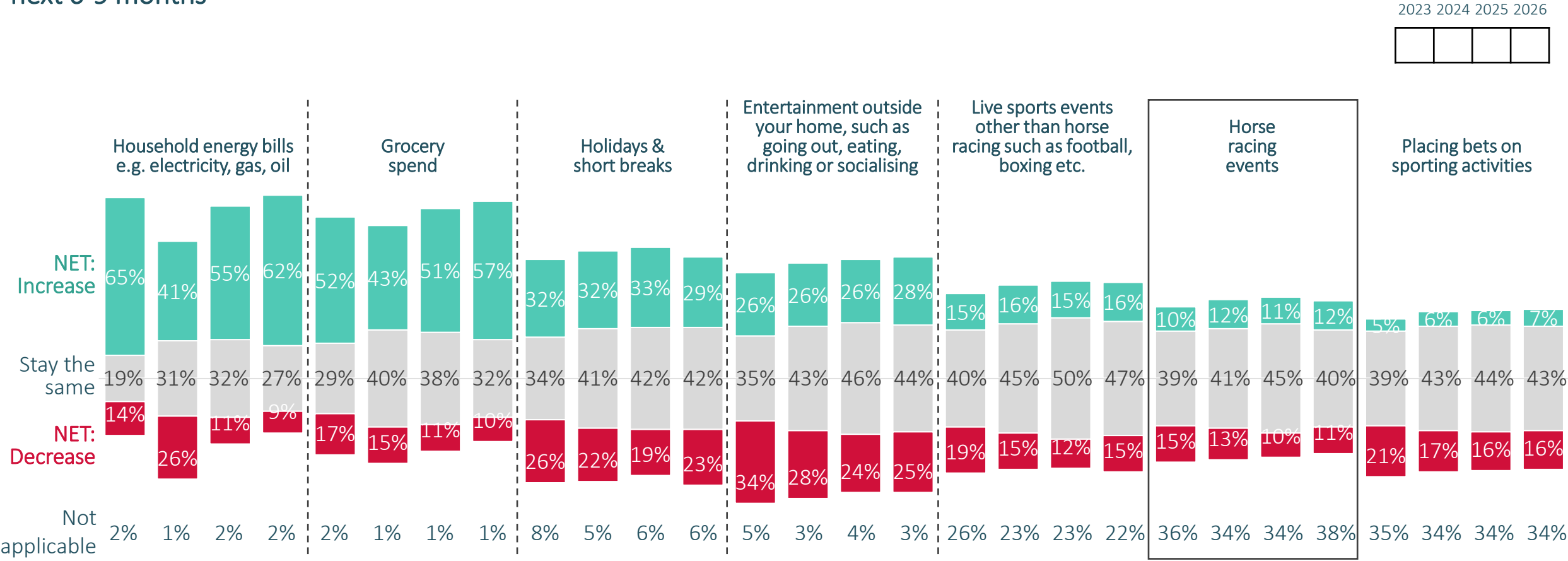


Intended spend on horse racing events remains steady YoY



However, increasing expectations of spend on household bills and groceries are a concern and could ultimately divert disposable income away from horse racing and other forms of entertainment in the longer term.

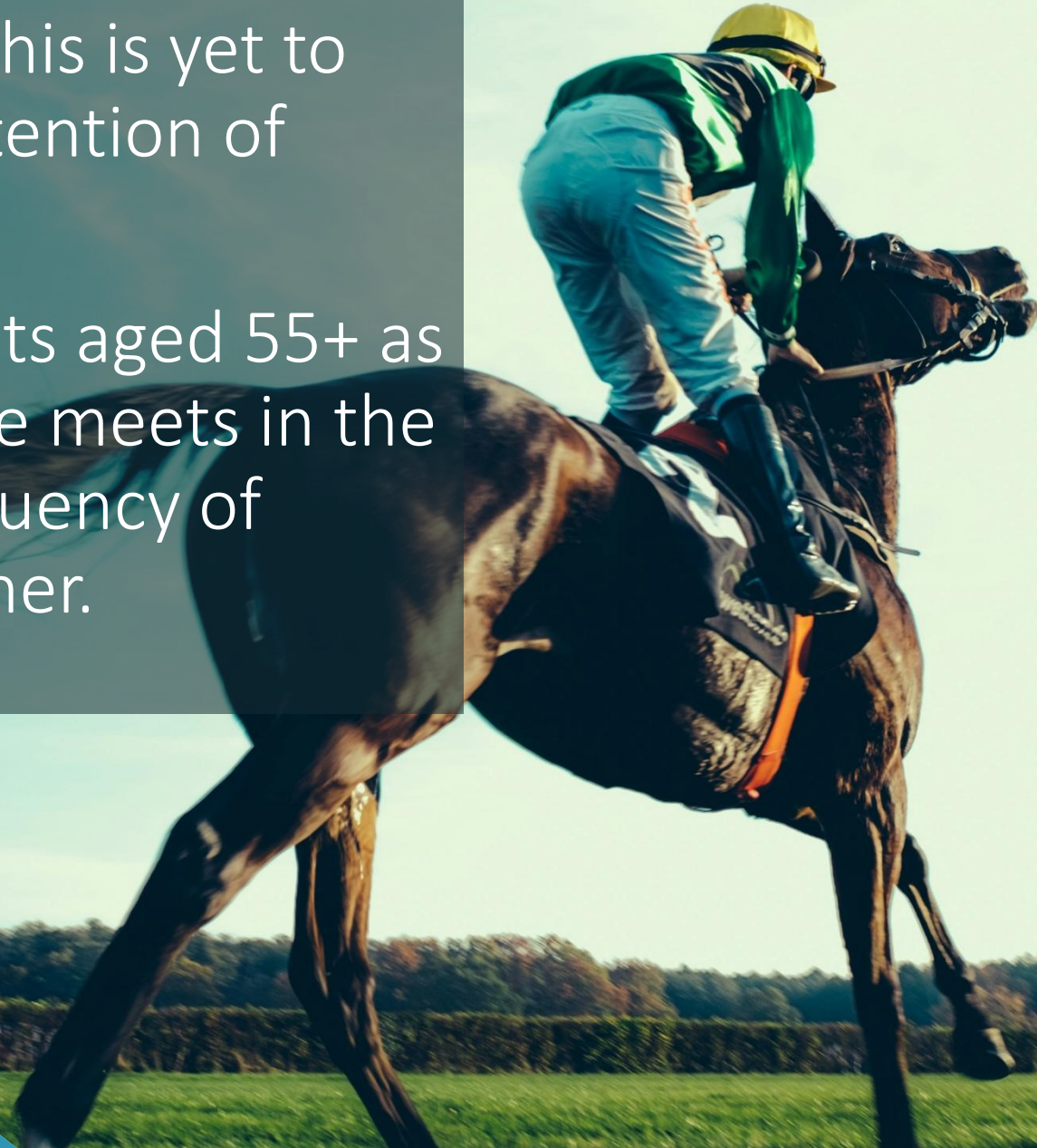
Areas where spending increase are planned in the next 6-9 months



The Results

Interest in horse racing rebounds after softening last year, but this is yet to convert into stronger intention of attending race meets.

Some concern with adults aged 55+ as interest in attending race meets in the future and planned frequency of attendance decline further.



Nearly 2 in 5 say horse racing is one of Ireland's national sports

We are not seen to be the main Irish sport however, as Gaelic Football and Hurling dominate.

Note: previous data was asked only on 'main sport'. %s and ranking remain the same as 2025 in that regard.

What is the national sport of Ireland?

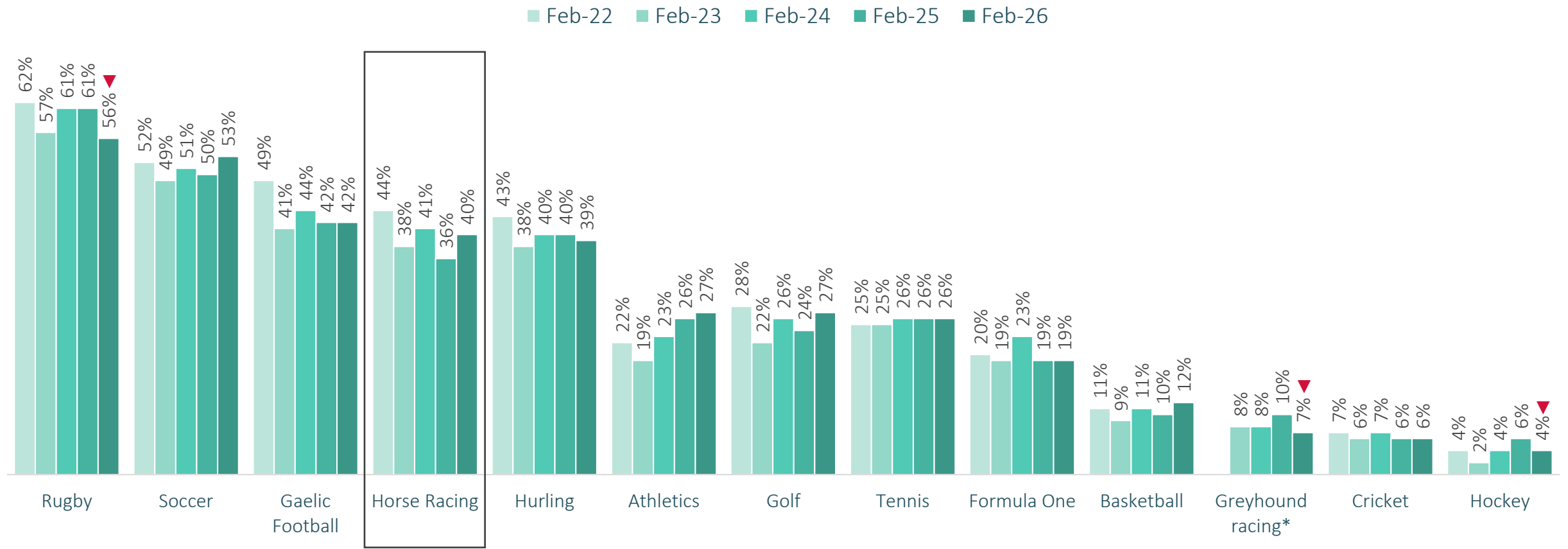
	Any national sport	Main national sport
Gaelic Football	87%	47%
Hurling	80%	35%
Rugby	44%	6%
Soccer	24%	6%
Horse Racing	38%	5%
Golf	12%	0%
Other	1%	0%

Interest in horse racing grows slightly following dip in 2025



Interest in horse racing is now in par with Hurling, whilst top sports like Rugby, Soccer and Gaelic continue to dominate the landscape.

Sports people are interested in



*Note Greyhound racing added in 2023
▲ ▼ Significant increase/decrease vs last year
Q5. Which of the following sports do you have an interest in?
Base: All adults aged 18+, Feb '26 (n=1,014)

Amongst those generally interested in sport, interest in horse racing rebounds

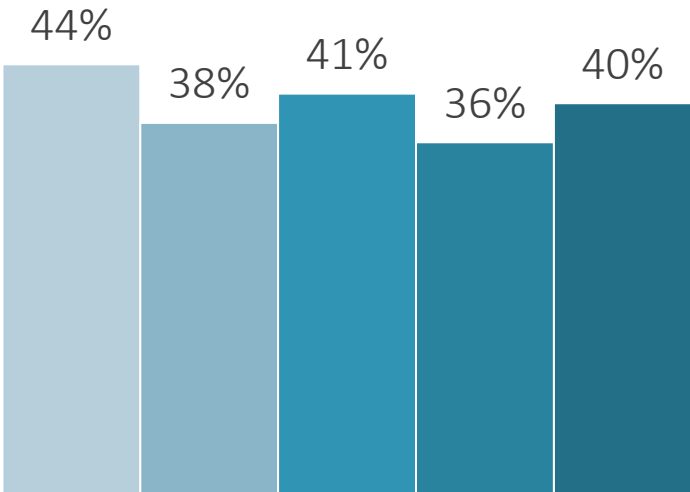


Any interest in Horse Racing

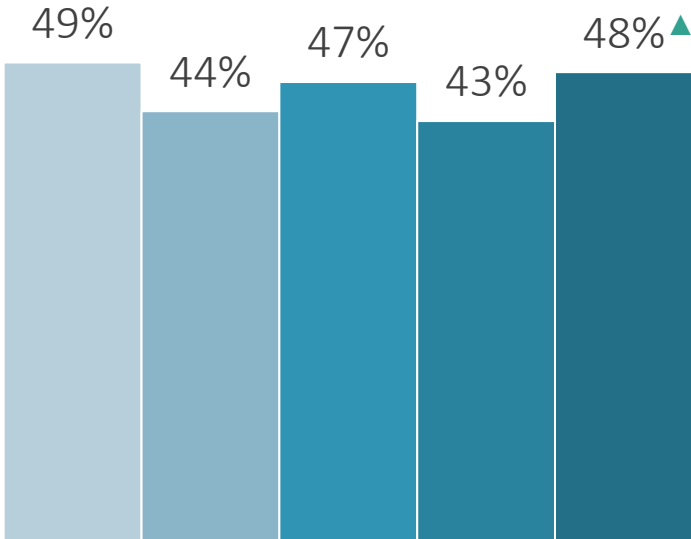
2022 2023 2024 2025 2026



Total Population showing any interest in Horse Racing



Those Interested in Sports showing any interest in Horse Racing



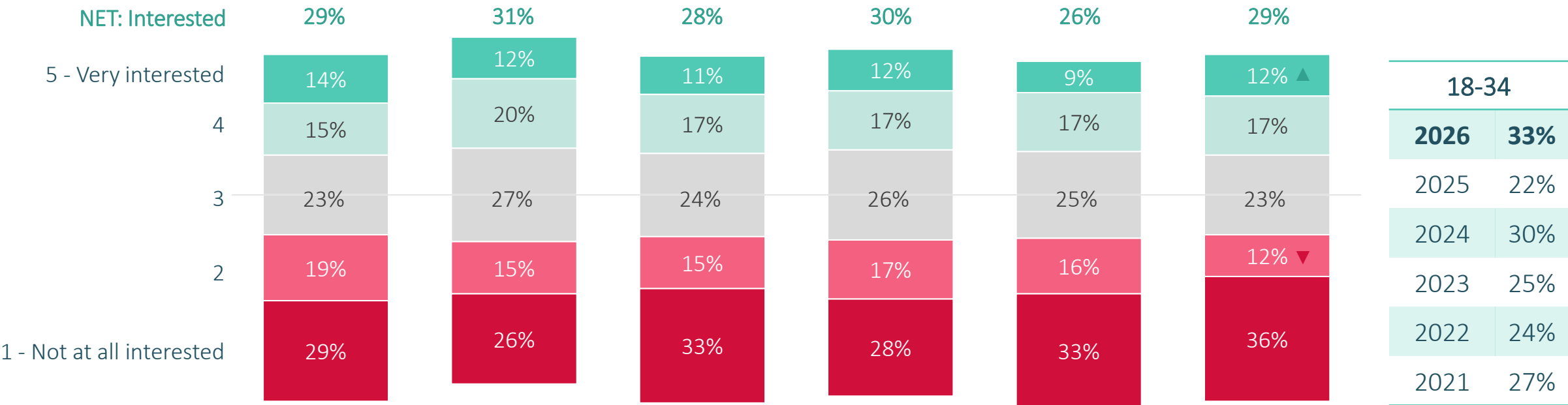
Specific interest in horse racing has grown in 2026



Very positive to see a notable uptick in interest in horse racing among 18-34s, up to over a third of this cohort now say they are at least somewhat interested in the sport.

Specific Levels of interest in Horse Racing

Jul '21	Feb '22	Feb '23	Feb '24	Feb '25	Feb '26



Q7. How interested are you in Horse Racing? Please give your answer on a scale of 1-5 where 1 is not at all interested and 5 is very interested.
Base: All adults aged 18+, Feb '26 (n=1,014)

Barriers to attending remain somewhat steady

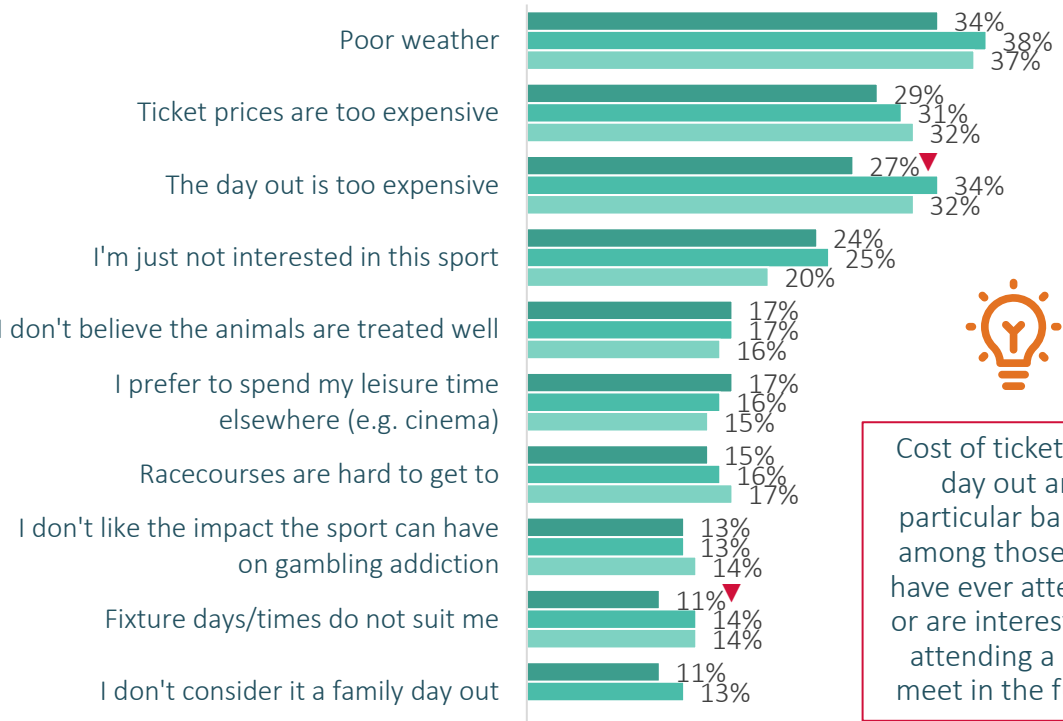


Though sense that the day out is too expensive has declined at a total level and among 18-34s.

Barriers to attending race days

Primary Barriers
Total

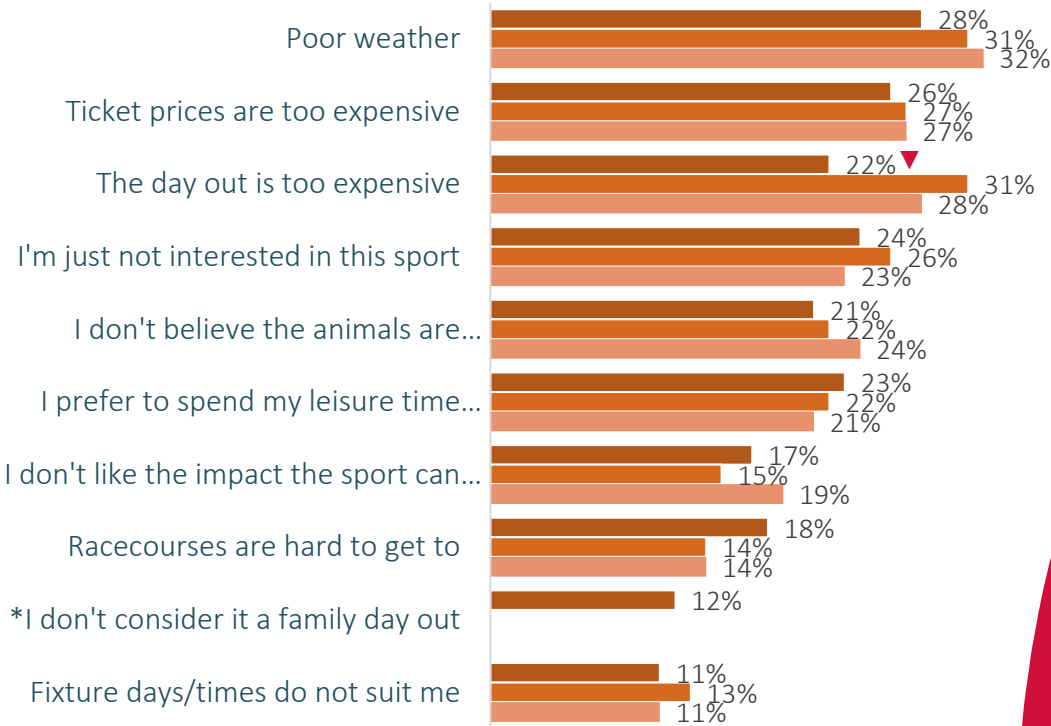
■ Feb-26 ■ Feb-25 ■ Feb-24



Cost of tickets and day out are particular barriers among those who have ever attended or are interested in attending a race meet in the future

Primary Barriers
18-34

■ Feb-26 ■ Feb-25 ■ Feb-24



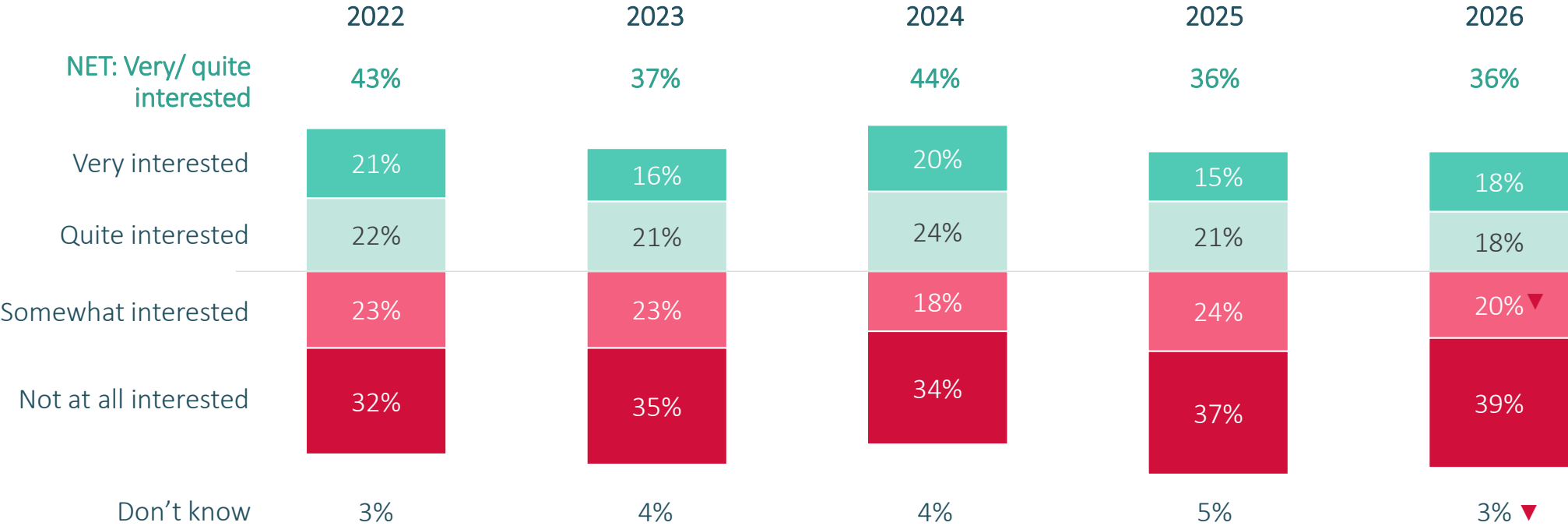
Q25b. What, if anything might stop you from attending more race days in the future?
Base: All Respondents Feb '26 (n=1,014)

Interest in attending future meets remains steady vs 2025



However, positive to see a shift from ‘quite interested’ into ‘very interested’ territory.

Interest in attending meets in the future



34% of 55+s now say they are very/quite interested in attending meets in the future (down from 43% in 2024)

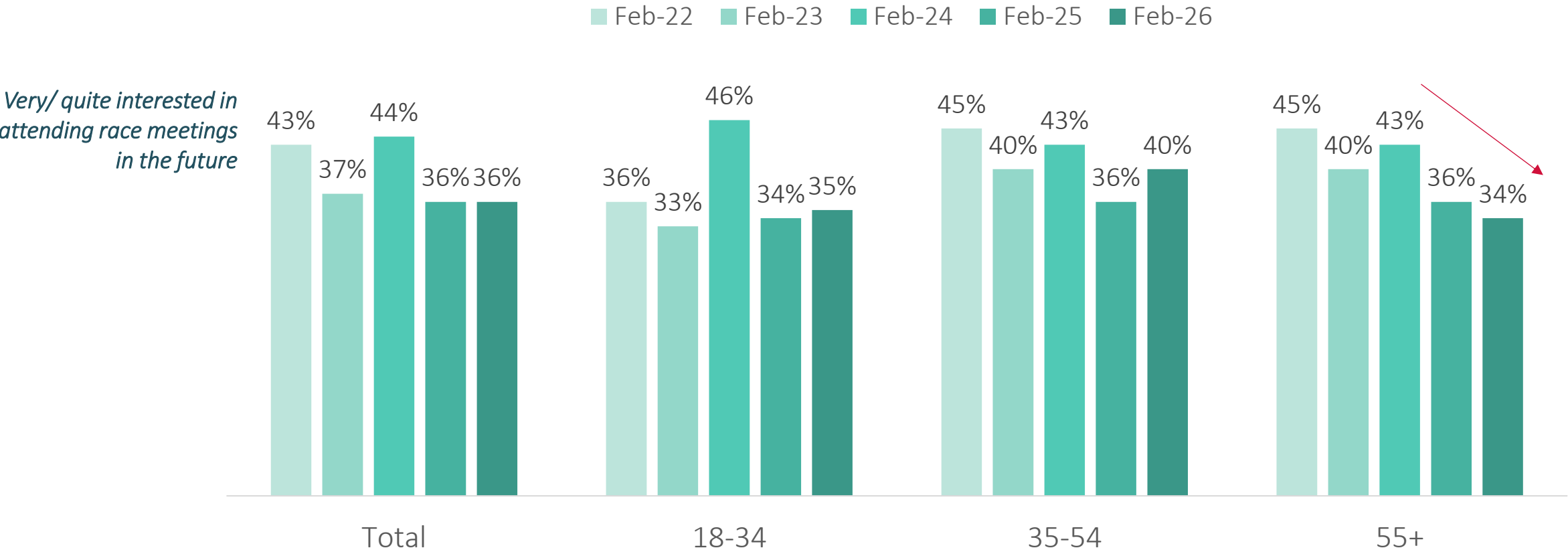
▲ ▼ Significant increase/decrease vs last year
Q.26 How interested would you be in attending a horse racing meeting in Ireland in the future?
Base: All Respondents Feb '26 (n=1,014)

Strong interest in future meets among under 55s



However, consistent declines in interest among 55+ could pose a threat to future attendance.

Interest in attending meets in the future



▲ ▼ Significant increase/decrease vs last year
Q.26 How interested would you be in attending a horse racing meeting in Ireland in the future?
Base: All Respondents Feb '26 (n=1,014)

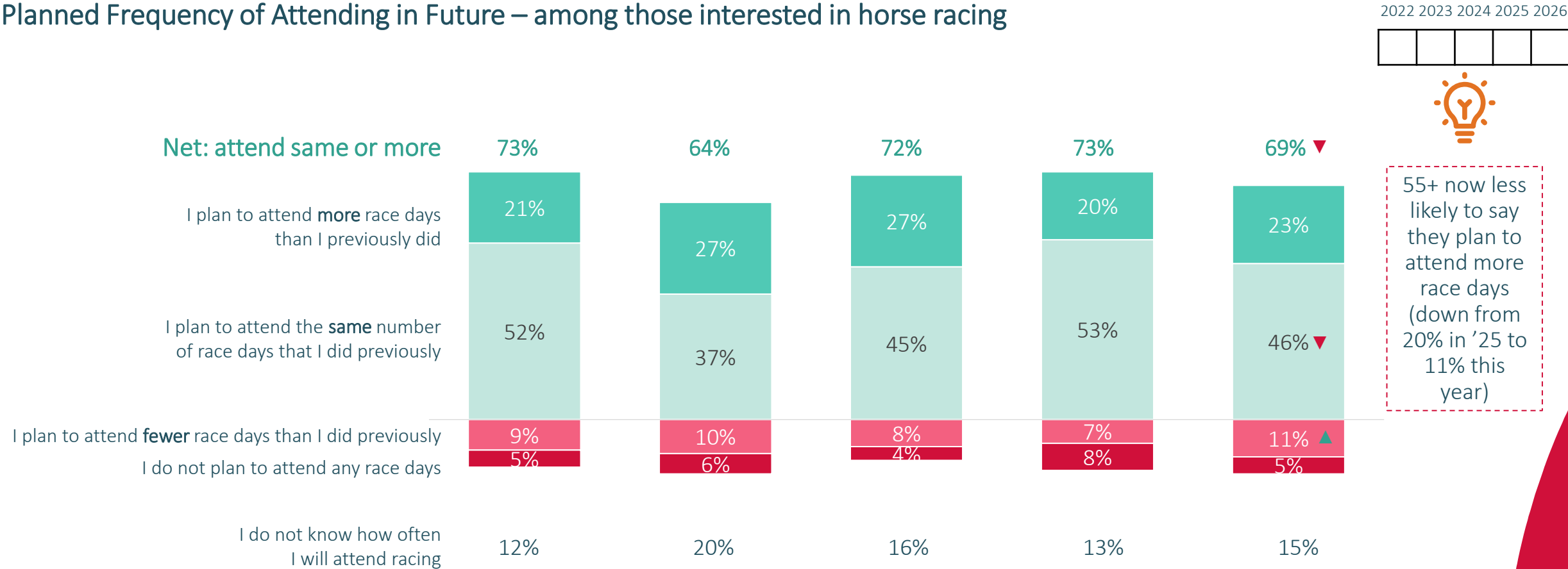


Day out being too expensive is a significant barrier among 55+ (35% vs 27% at a total level)

Less now say they will attend same number of race days as before

Worth noting that this cohort has become somewhat divided: there are now more people saying they will attend more days as well as more people saying they will attend less.

Planned Frequency of Attending in Future – among those interested in horse racing



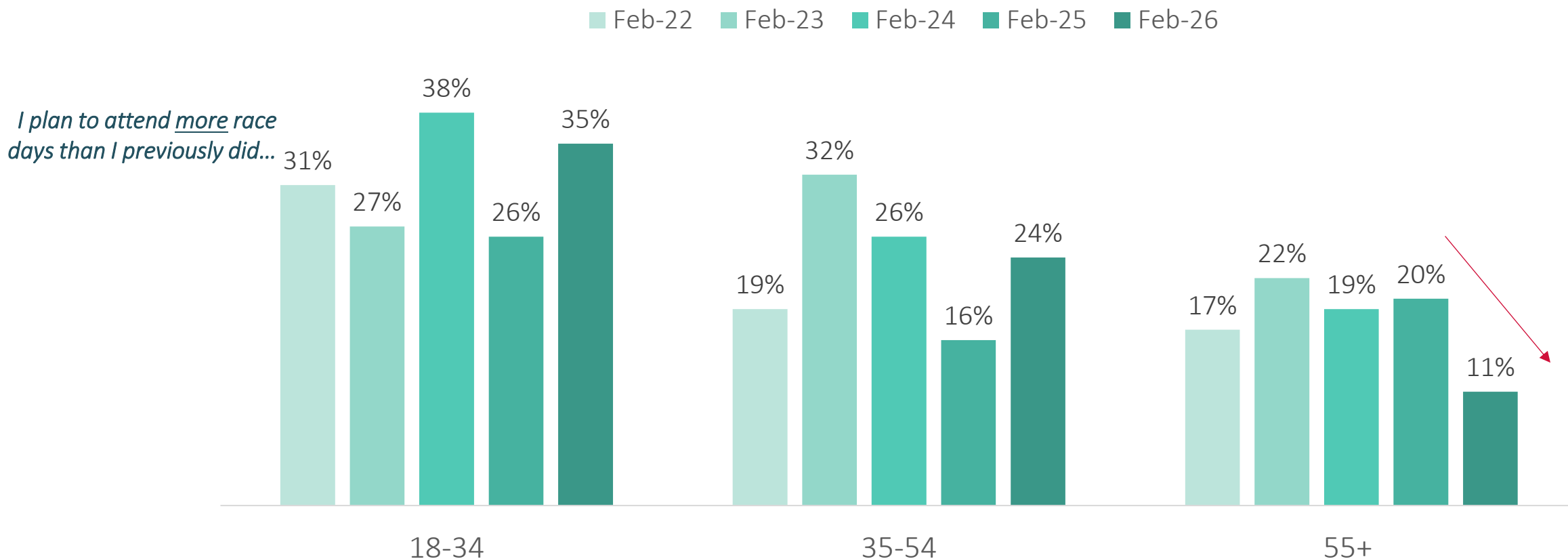
▲ ▼ Significant increase/decrease vs last year
Q37. Which of the following do you think will apply to you?
Base: All respondents who are interested in horse racing (n=292)

Drop is notably coming from 55+ adults



Planned frequency of attendance grows among under 55s to levels on par to 2024.

Planned Frequency of Attending in Future



We have regained Champions of the sport after a softening in 2025.

However, a proportion of the population remained concerned with animal welfare – with this growing minimally but steadily YoY since 2024.

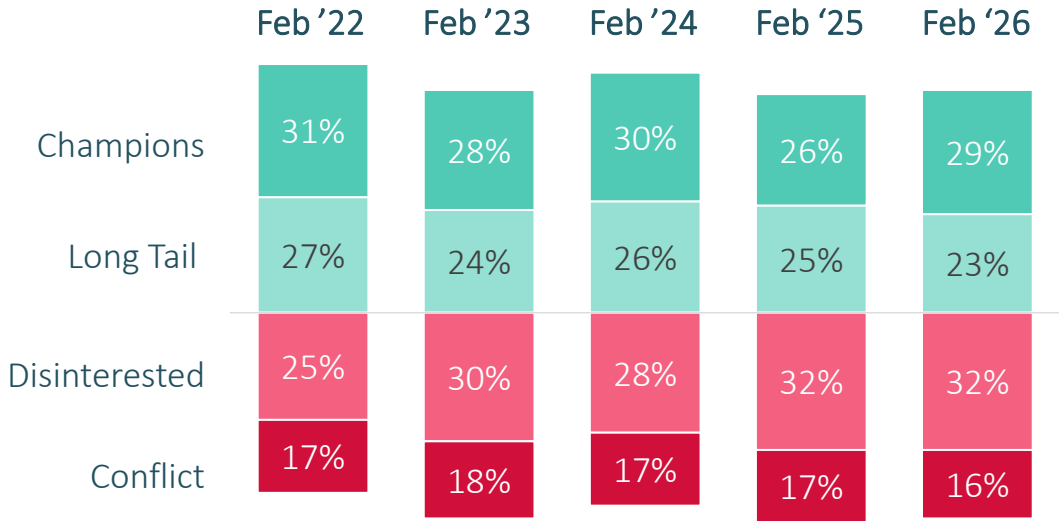


Champions of the sport grow after softening in 2025

Encouraging to see Champions in 18-34s rebound, but the cohort remains particularly polarised as it also has more Conflict than the total sample.

Scales of interest in Horse Racing

	CHAMPIONS	LONG TAIL	DISINTERESTED	CONFLICT
	We Must Protect	We Must Engage	We Must Accept	We Must Manage
WHO THEY ARE	These people love the sport of Horse Racing	Some interest and engagement in the sport but could move to positive or negative sentiment	Disinterested for softer rational such as general disinterest, weather, proximity, price etc.	Don't engage due to concerns about the sport ranging from welfare to gambling or alcohol
KEY STRATEGY	We must continue to protect and engage. They are doing a service to the sport and may bring in Long Tails.	A core opportunity to drive further engagement by educating them on the enjoyment and positivity within the sport.	These pose only a light opportunity by overcoming 'soft conflicts' but difficult to overcome as many are inherently disinterested in this sport	Must be managed as their disinterest is driven by conflict particularly animal welfare



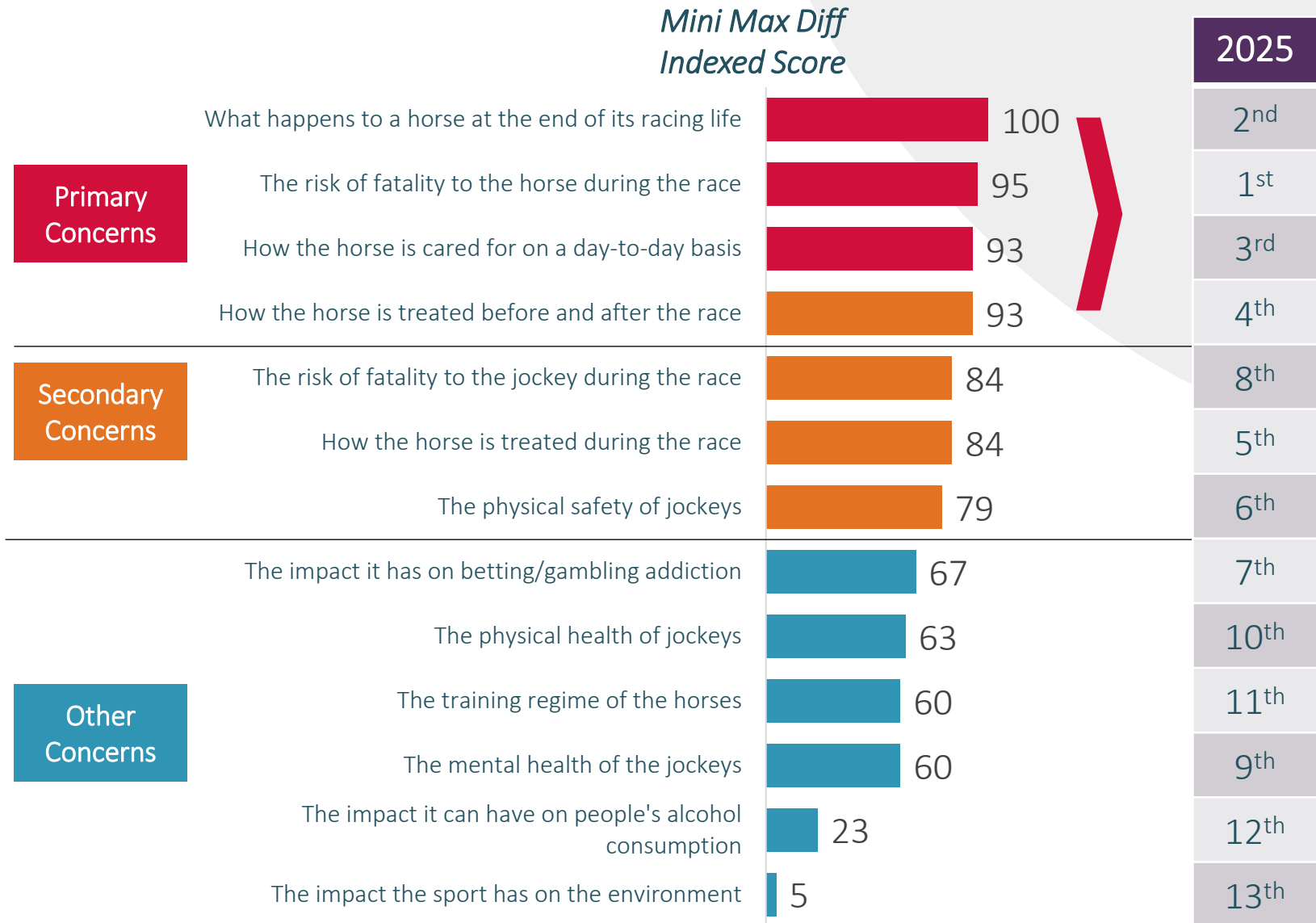
18-34	Feb '22	Feb '23	Feb '24	Feb '25	Feb '26
Champions	24%	25%	30%	22%	33% ▲
Long Tails	29%	25%	26%	26%	21%
Disinterested	24%	26%	22%	31%	24%
Conflict	23%	24%	22%	21%	22%

Top concerns with the sport remain similar, with end-of-life care now being the main primary concern



18-34s top concern is how the horse is treated before and after the race. For 35-54s it's the risk of fatality to the horse during the race, while for 55+ it's what happens to a horse at the end of its racing life

What are the things that concern people about horse racing?

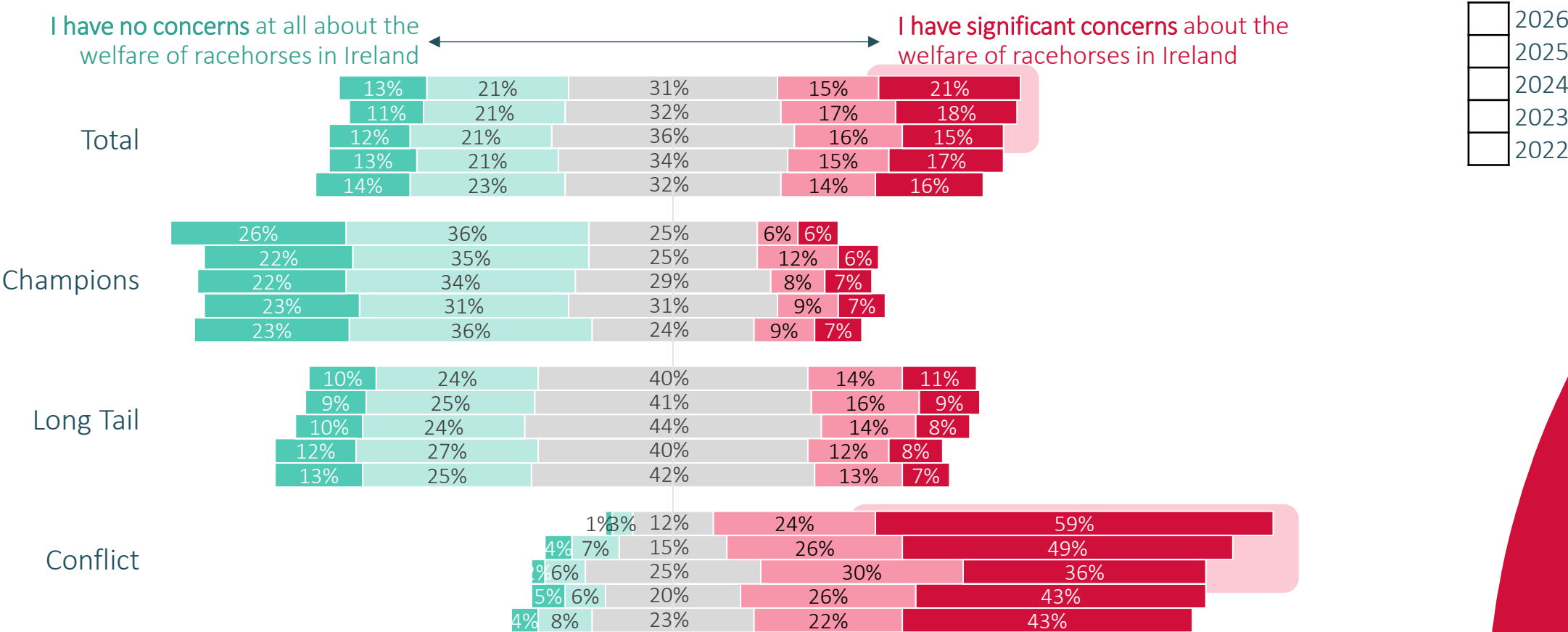


Proportion that have significant concerns is growing slowly



The growth does come notably from those in Conflict with the sport, as significant concerns with welfare of racehorses in Ireland have grown sharply in this cohort over the last two years.

Concerns about racehorse welfare



Q16. Thinking specifically about the welfare of racehorses in Ireland, where would you place your personal opinion on the following scale?
Base: All Respondents Feb '26 (n=1,014)

Most continue to agree our sport contributes positively to Ireland, but doubts remain around sustainability practices.

There is considerable opportunity here as most say knowing more about sustainable practices in horseracing would improve how they feel towards the sport.

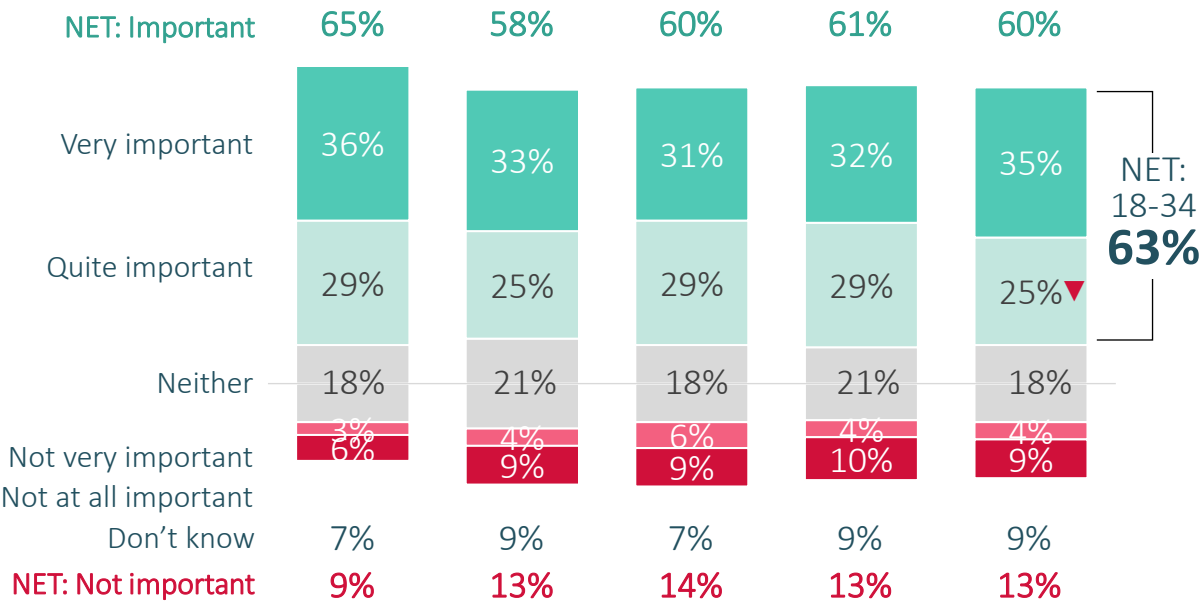
Sustainability is still seen to be important in the sport by most

Half of all adults say knowing more about sustainable practices in horse racing would improve their disposition towards the sport.

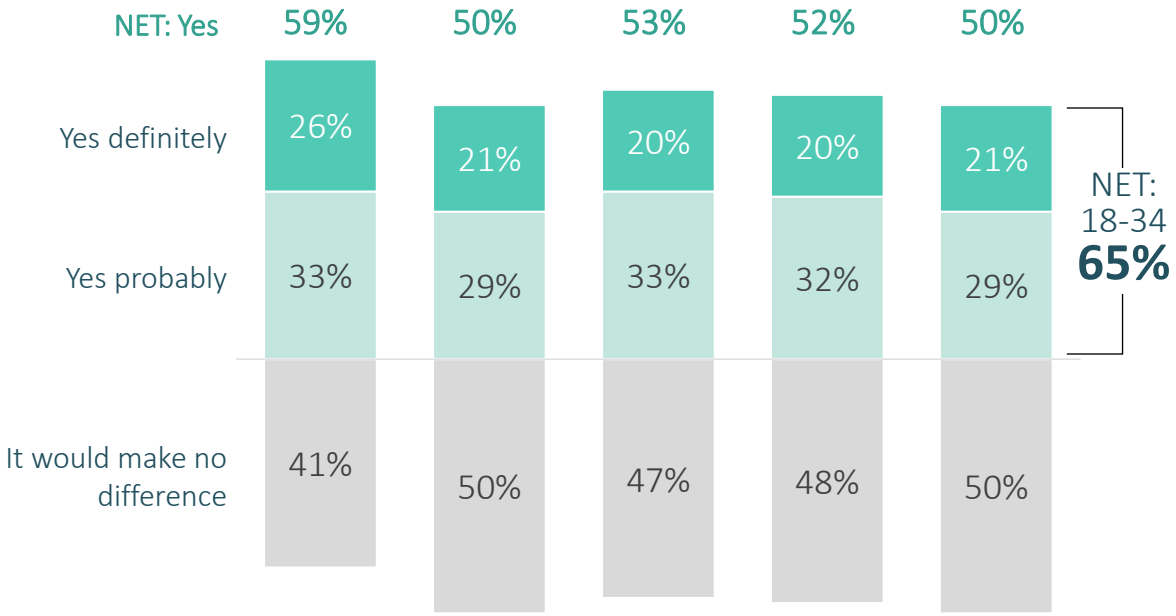
Attitudes towards Sustainability in Horse Racing

2022	2023	2024	2025	2026

Importance



Would Improve Disposition towards sport

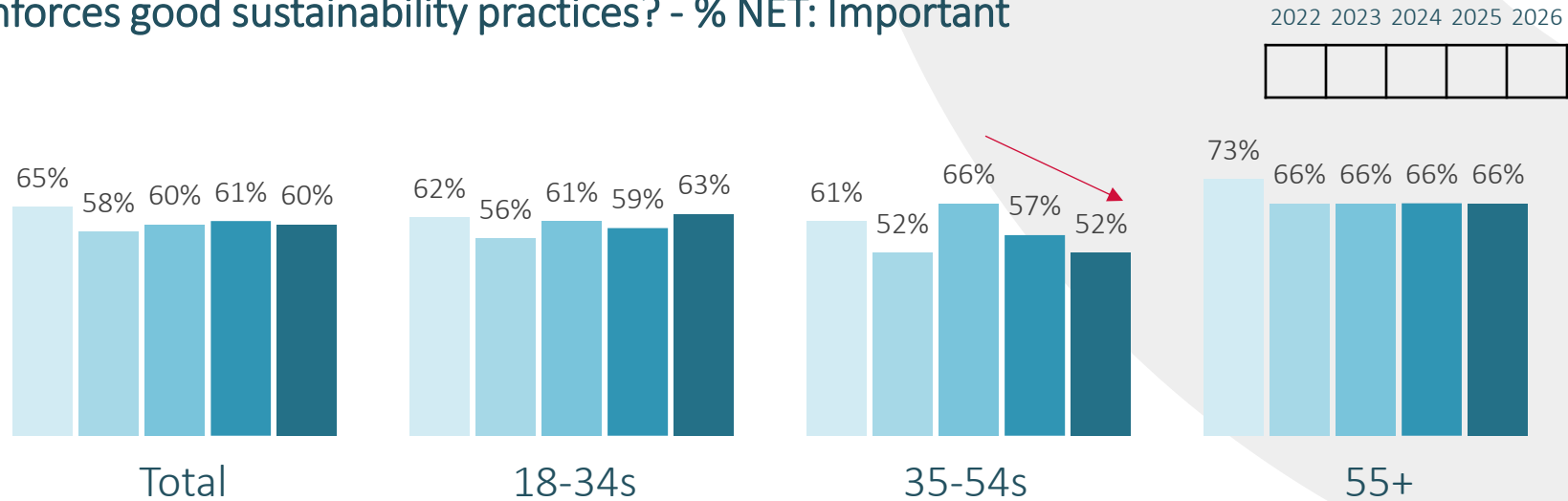


Q.19 How important is it to you, if at all, that the sport of horse racing as a whole enforces good sustainability practices?
Q.20. If the sport of horse racing was seen to be doing substantially more in terms of sustainability, do you think you would be more positively disposed towards the sport?
Base: All Respondents Feb '26 (n=1,014)

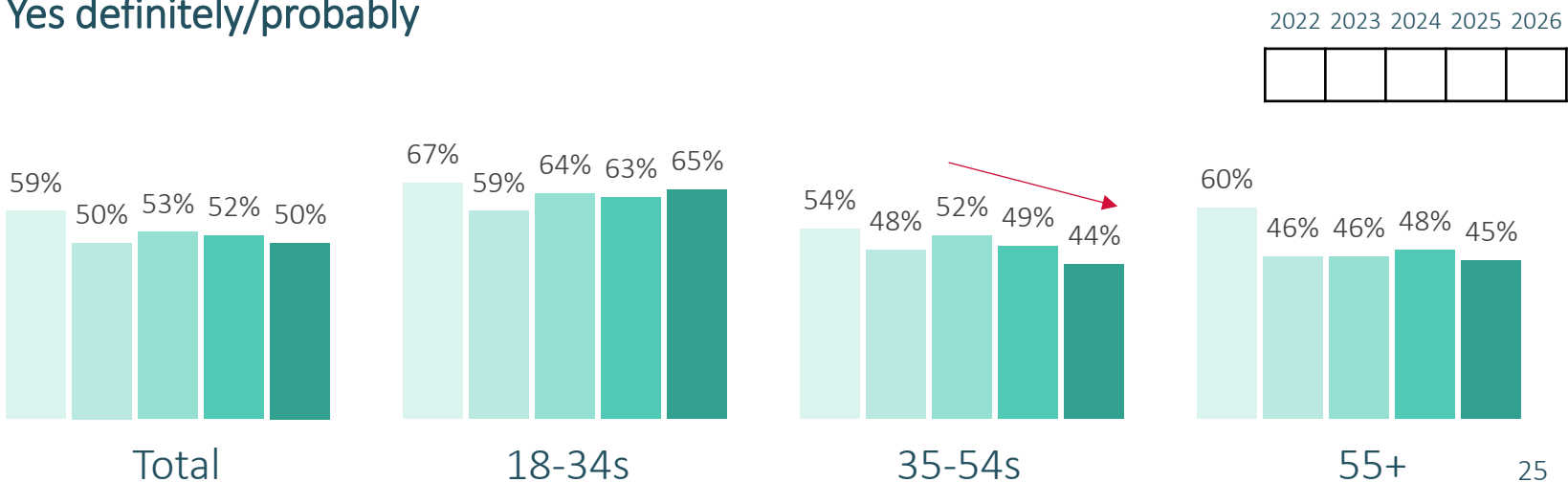
Importance of sustainability in the sport declines among 35-54s

Though 55+ are more likely to think it is important that the sport enforces good sustainability practices, they are less likely to be more positively disposed towards the sport if they saw more about their sustainability practices. 18-34s present the strongest opportunity: they think sustainable practices are important and their views on the sport are more likely to be positively impacted by visible sustainability.

How important is it to you, if at all, that the sport of horse racing as a whole enforces good sustainability practices? - % NET: Important



If the sport of horse racing was seen to be doing substantially more in terms of sustainability, do you think you would be more positively disposed towards the sport? % Yes definitely/probably



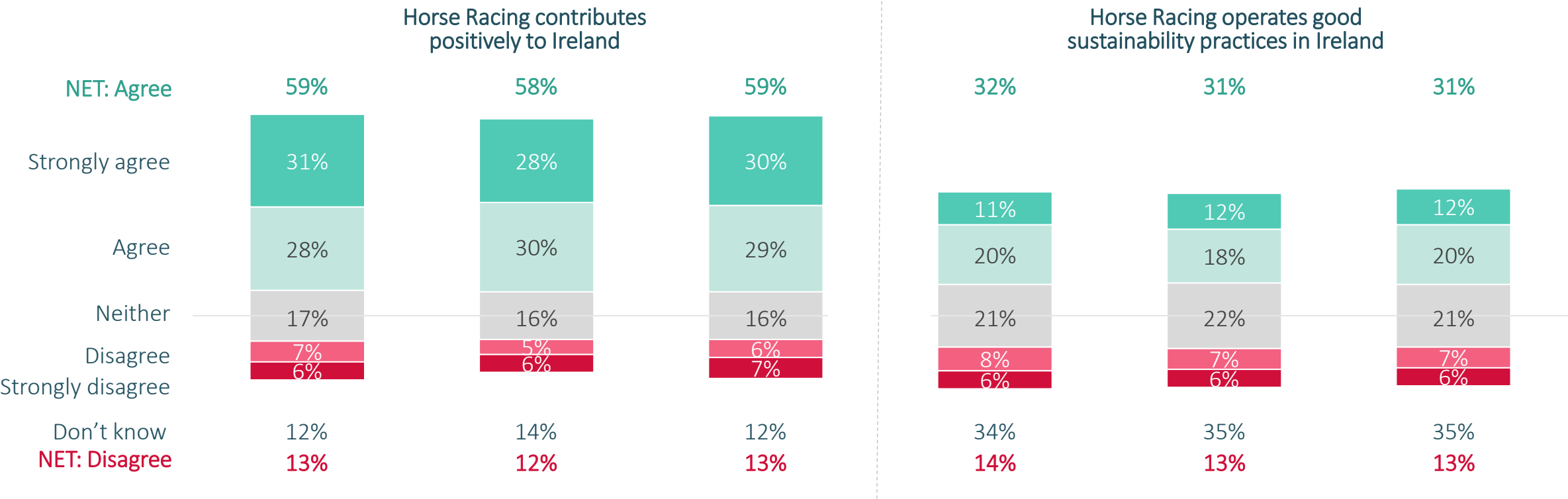
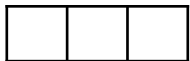
3 in 5 say horse racing contributes positively to Ireland



But knowledge on sustainability practices remains limited – nearly 2 in 5 say they don't know about them.

Impact of Horse Racing in Ireland

2024 2025 2026

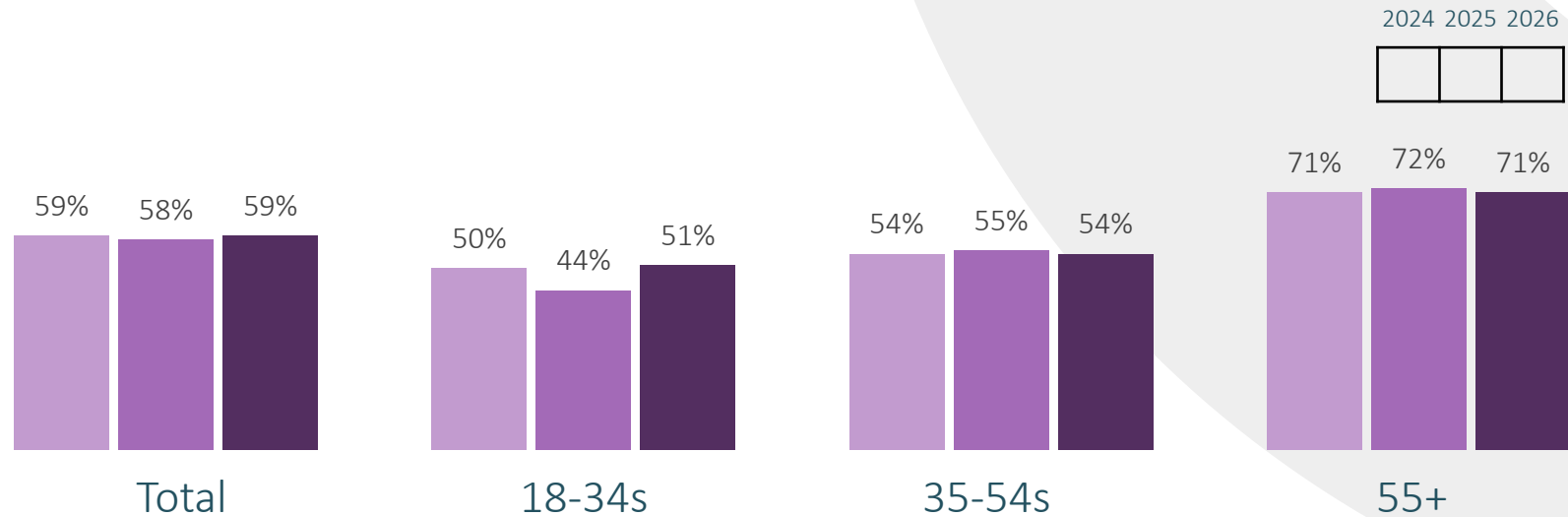


Q.20b On a scale is 1 to 5, where 1 means strongly disagree and 5 means strongly agree, how much do you agree or disagree with the following statement
Base: All Respondents Feb '26 (n=1,014)

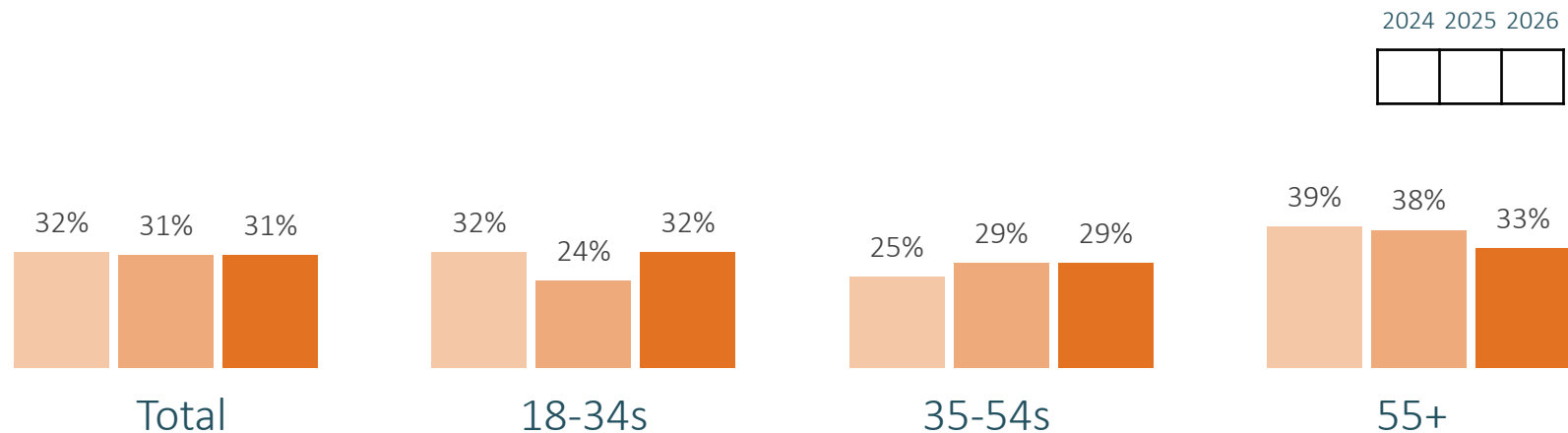
Perceptions the sport contributes positively to Ireland is notably stronger with 55+

However, agreement that horse racing operates good sustainability practices in Ireland has been declining among this cohort.

Horse Racing contributes positively to Ireland - % NET: Agree

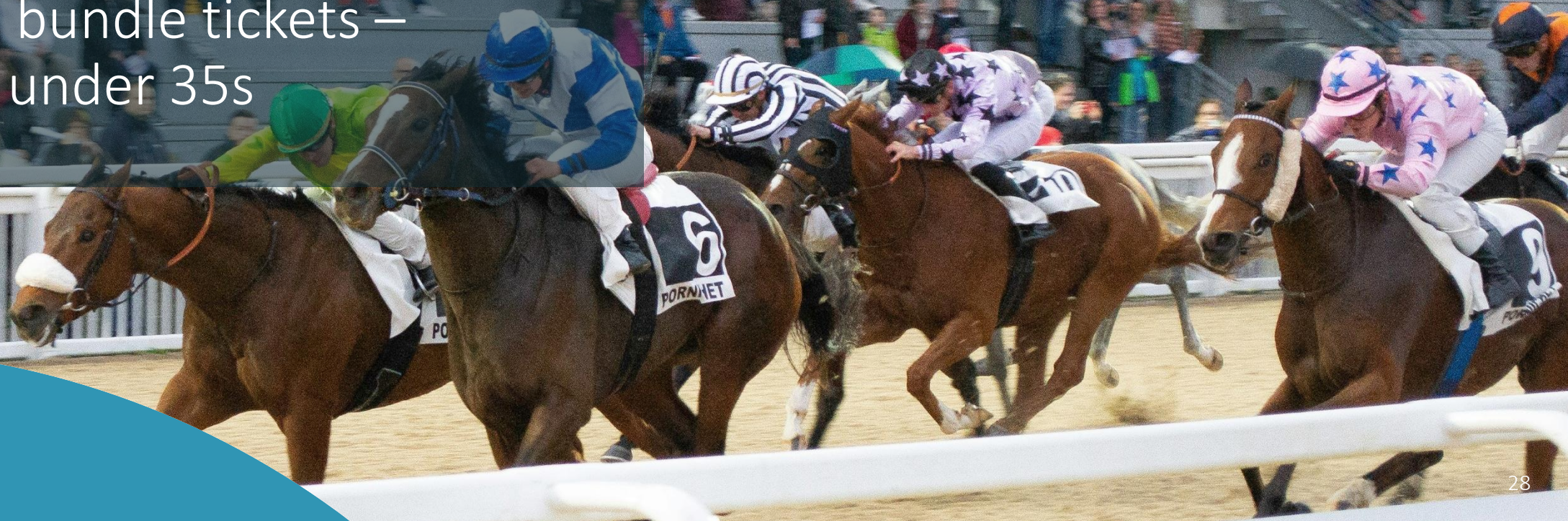


Horse Racing operates good sustainability practices in Ireland - % NET: Agree



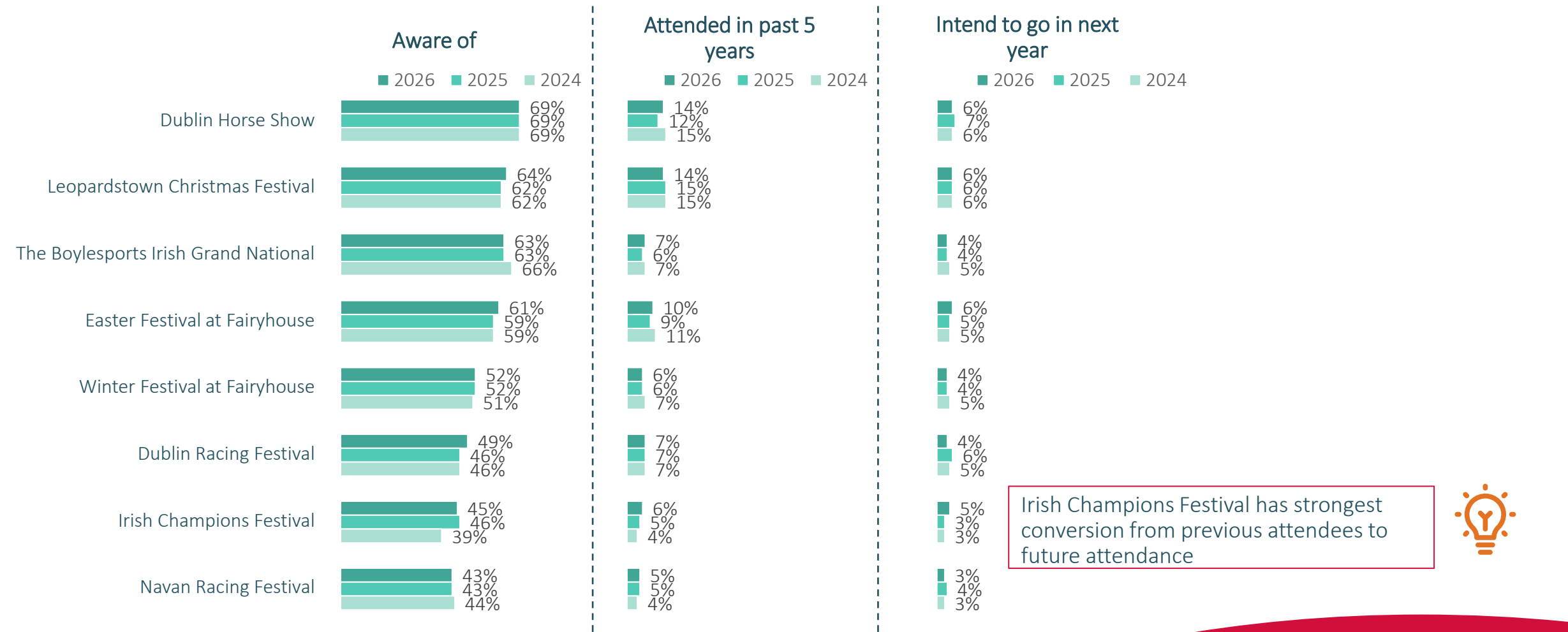
Consumers are still looking for more affordable options when going to a race meet, which trumps good atmosphere and the live experience.

Most also continue to express interest in bundle tickets – especially under 35s



Awareness and attendance of horse racing events remains steady

Awareness of Horseracing Events



Irish Champions Festival has strongest conversion from previous attendees to future attendance

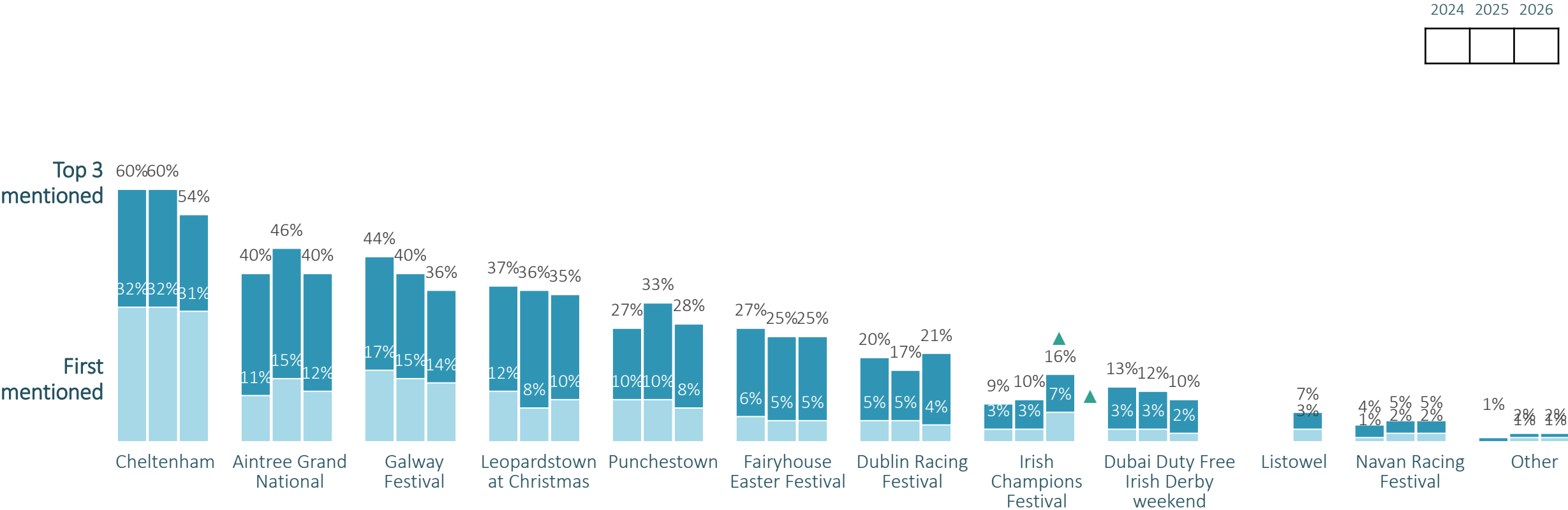


▲ ▼ Significant increase/decrease vs last year
Q.14 – Festival/Events Awareness,
Base: All Respondents Feb '26 (n=1,014)

Notable drop in Cheltenham being one of top 3 preferred festivals

Though smaller, positive to see a significant increase in those saying the Irish Champions Festival is one of their preferred festival.

Preferred Festivals

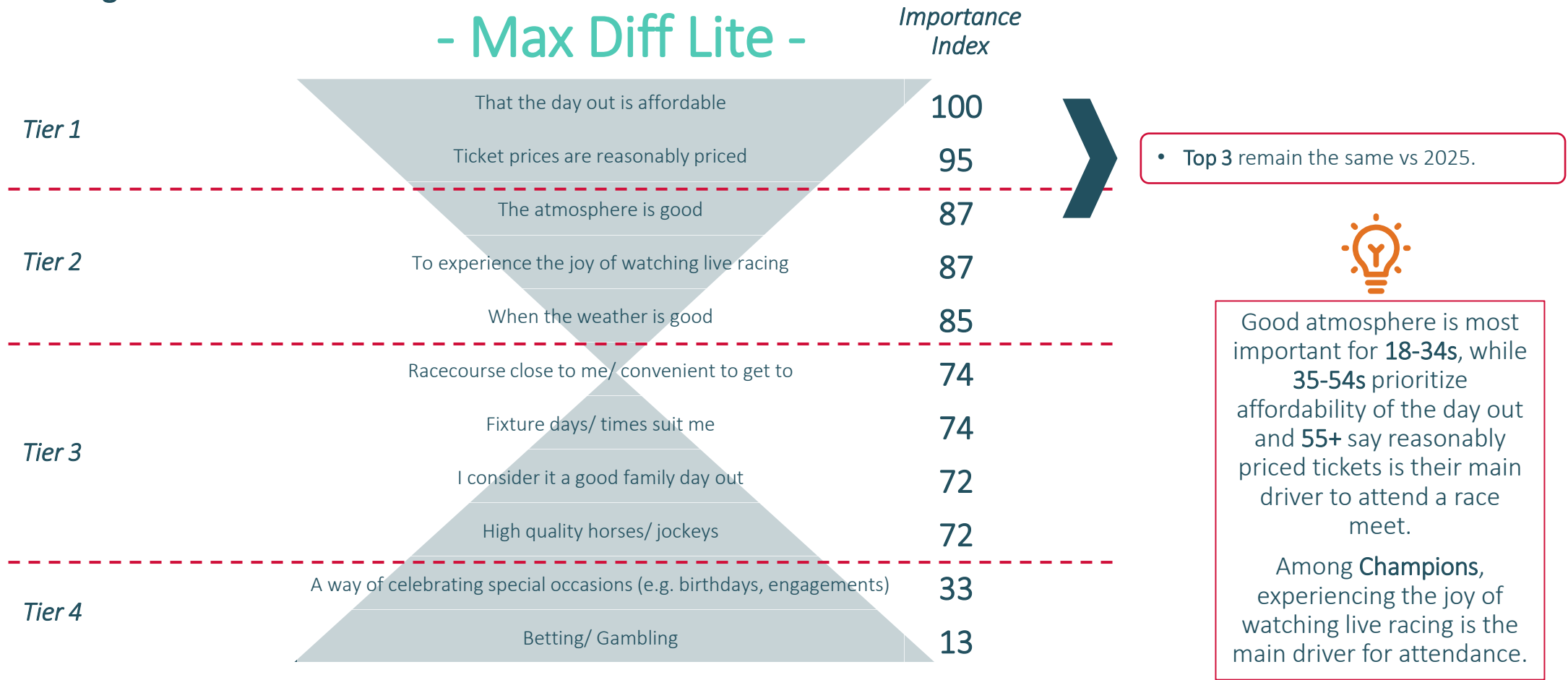


▲ ▼ Significant increase/decrease vs last year
Q12d Which of the following would be your favorite festival, if any? Please tick your top three.
Base: All interested in festivals; n=482

Affordability and reasonable prices are main drivers for attendance C

Good atmosphere and the joy of live racing are also important elements to communicate as they drive likelihood to attend

Key drivers to attending a race meet



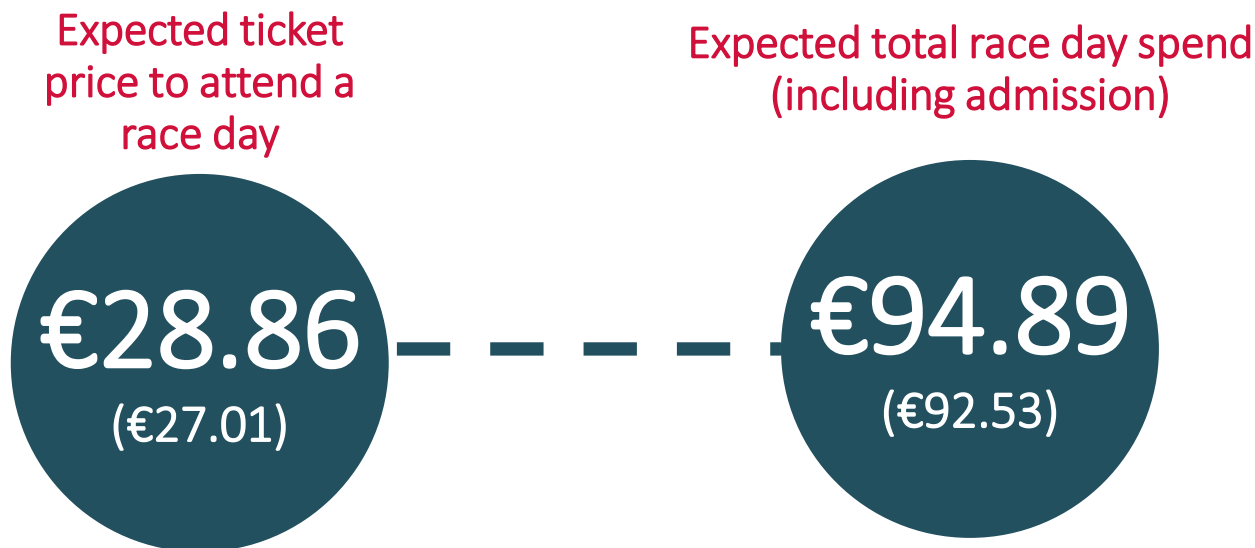
Q.24a Which, if any, of the following are important to you when attending a race meet.
Q.24b And which of these reasons is most influential in your decision to go racing?
Q.24c Which of these do you feel is least influential in your decision to go racing?
Base: All Respondents Feb '26 (n=1,014)

Most expect to spend around €95 on a race day



Out of this total spend, people expect that around €29 will be for the ticket to attend – meaning approximately €66 of disposable income is expected to be spent on other elements during the day.

Expected total race day spend including admission
(Excluding Festivals)



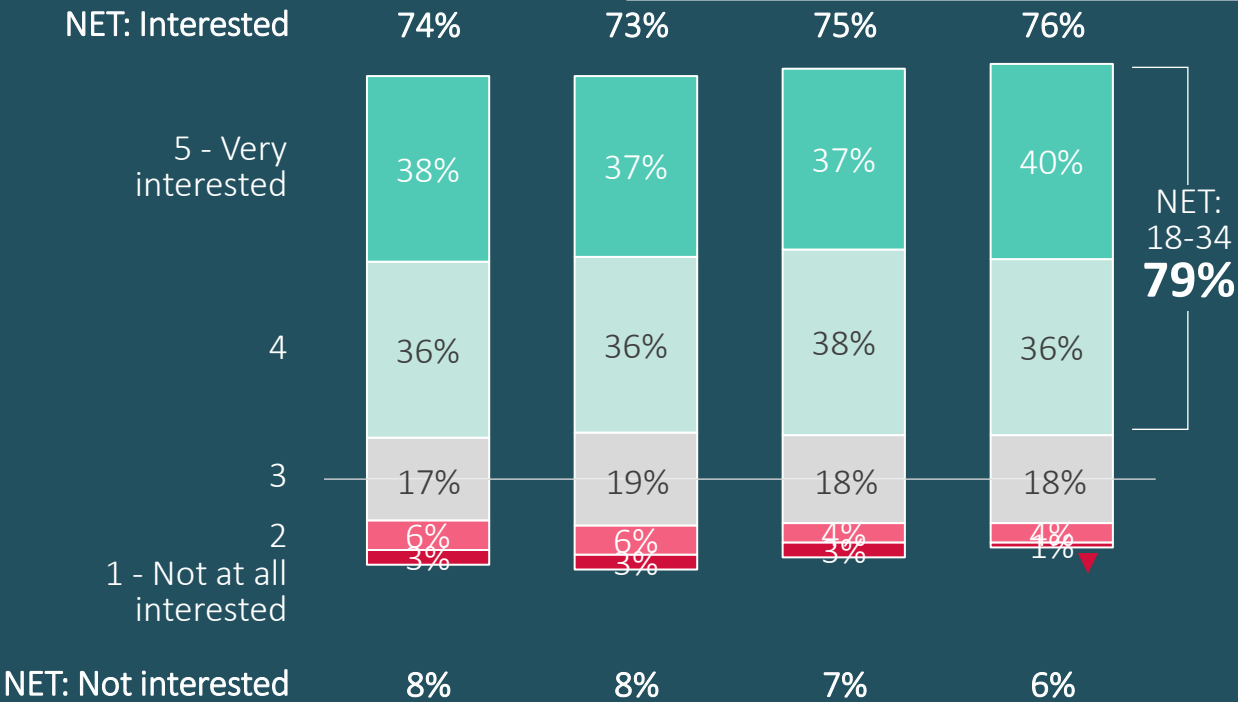
() = previous wave data

Interest in bundles remains high at nearly 4 in 5

Interest in bundle ticket at €35-50



Interest in bundle tickets is particularly strong among Flat racing fans (86%)

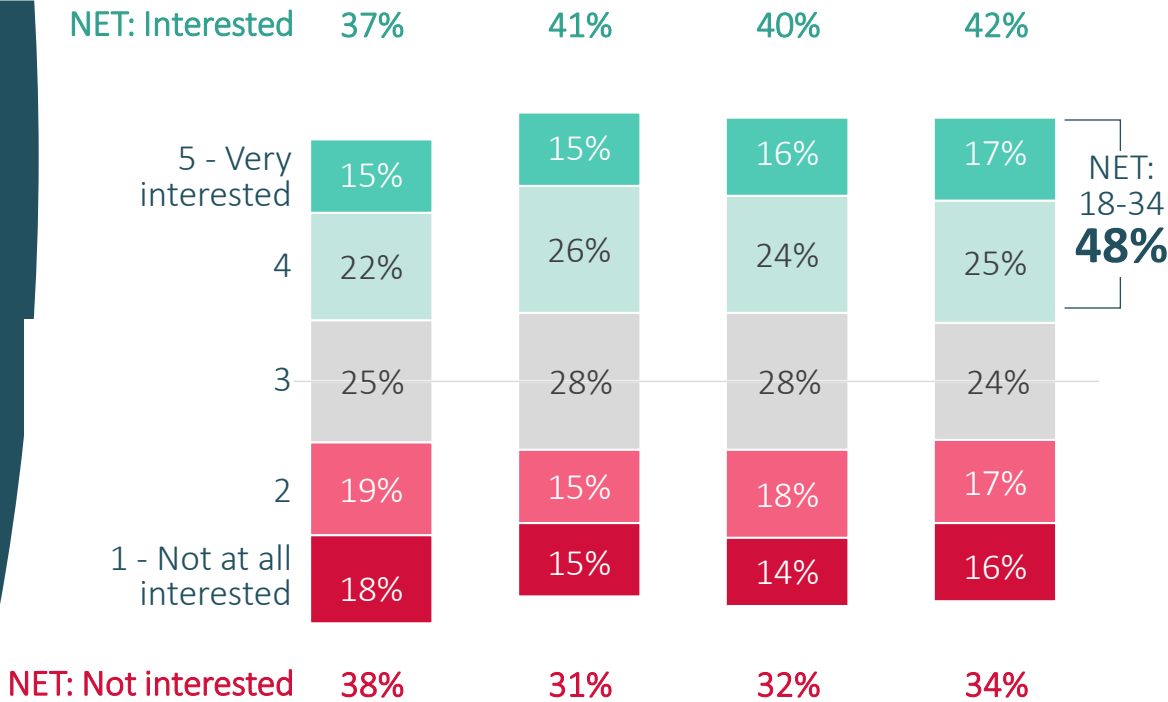


The modest gains in interest for upgraded tickets are also maintained.



Interest in purchasing an upgraded admission ticket – €80-100

2023 2024 2025 2026



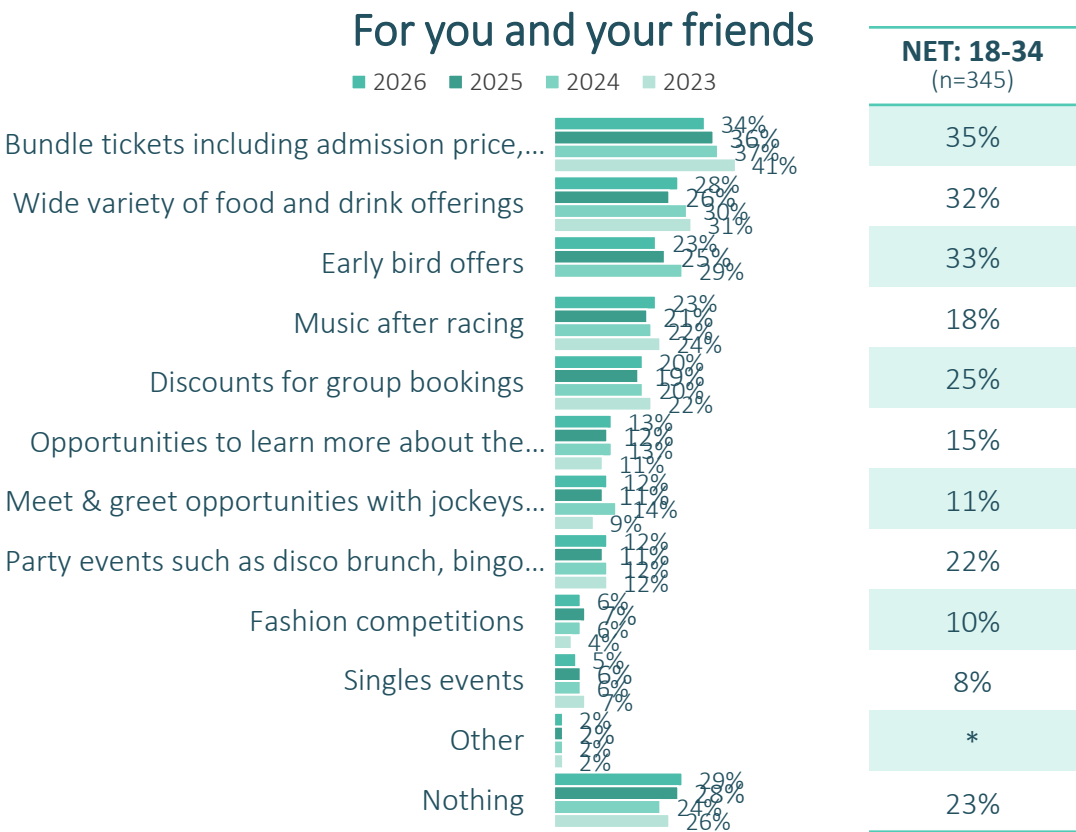
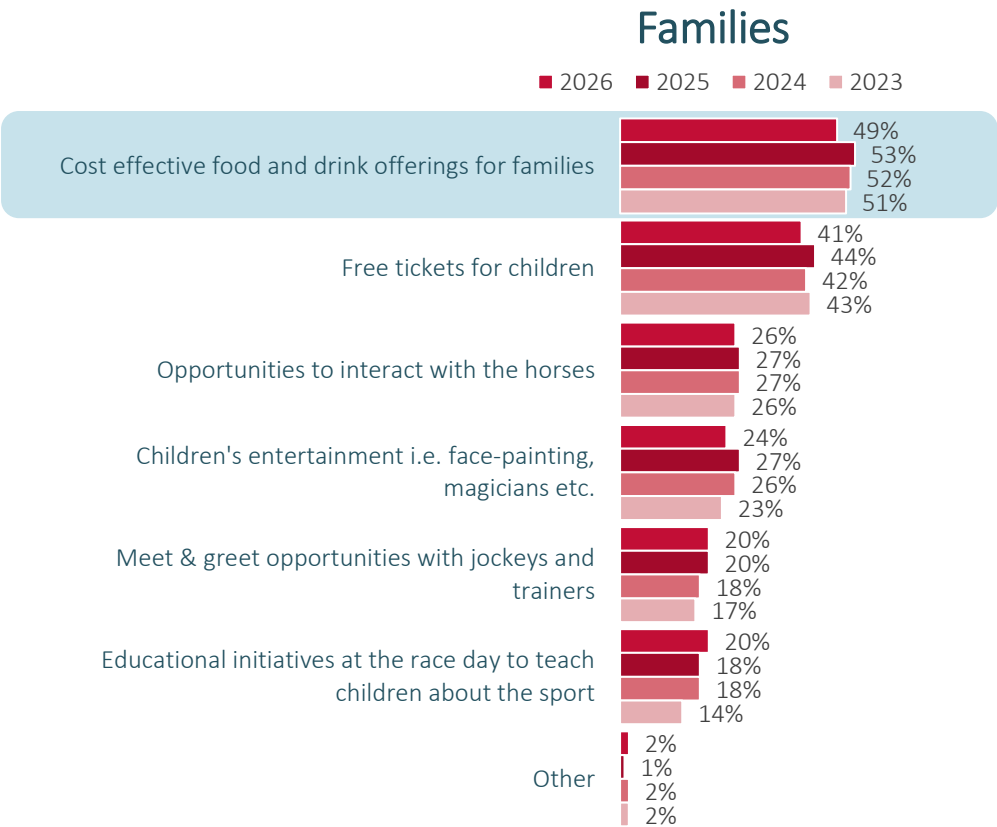
Q.29b How interested, if at all would you be in purchasing a bundle ticket to attend a race meeting. A bundle ticket would include admission, race-card, meal and drink voucher and a free bet, and would cost in the region of €35-€50.
Q.29c How interested, if at all, would you be in purchasing an upgraded admission ticket, which provides a dedicated seat and access to top quality food and drink, that would cost in the region of €80-€100
(Base: All respondents who would be interested in attending a horse racing meeting in Ireland in the future; n=579)

Families continue to look for cost effective F&B offerings



For those visiting with friends, bundle tickets are what would make race days more attractive.

Suggestions to make race meetings more attractive



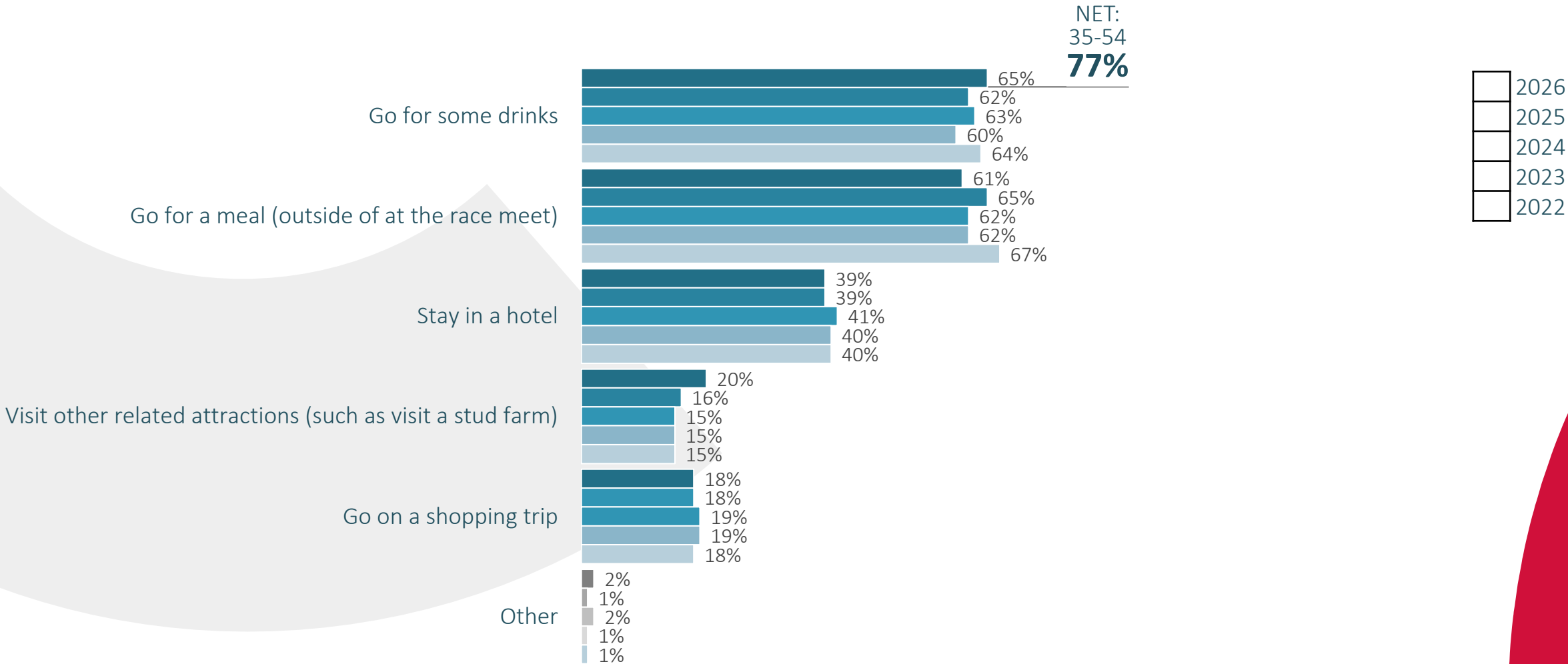
Q.27 – What, if anything, might make race meeting more attractive for you and your family?
Base: All respondents with dependent children (n= 345)
Q.27b What if anything might make a race meeting more attractive for you and your friends:
Base: All Respondents Feb '26 (n=1,014)

Drinks and meals are most common activities engaged in

Going for drinks is particularly popular with 35-54s.



Other activities engaged in during race meet events



Q29b. Thinking about when you attend race meets what other activities or experiences do you, or would you typically also engage in?
Base: All who ever attended a race meeting or intend to (n=484)

Frequent followers of the sport have slightly declined but a majority are still following occasionally (at least once a week)

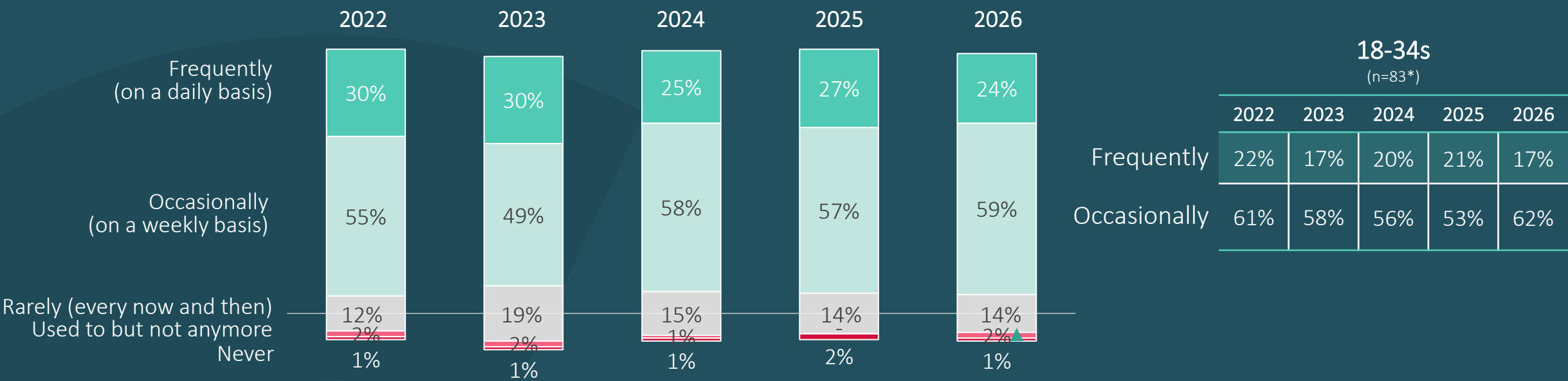
RTE remains significantly ahead when it comes to channels to follow horse racing, though a quarter are now also using Racing TV

Small decline in those frequently following horse racing



There are now more people following the sport occasionally, especially 18-34s.

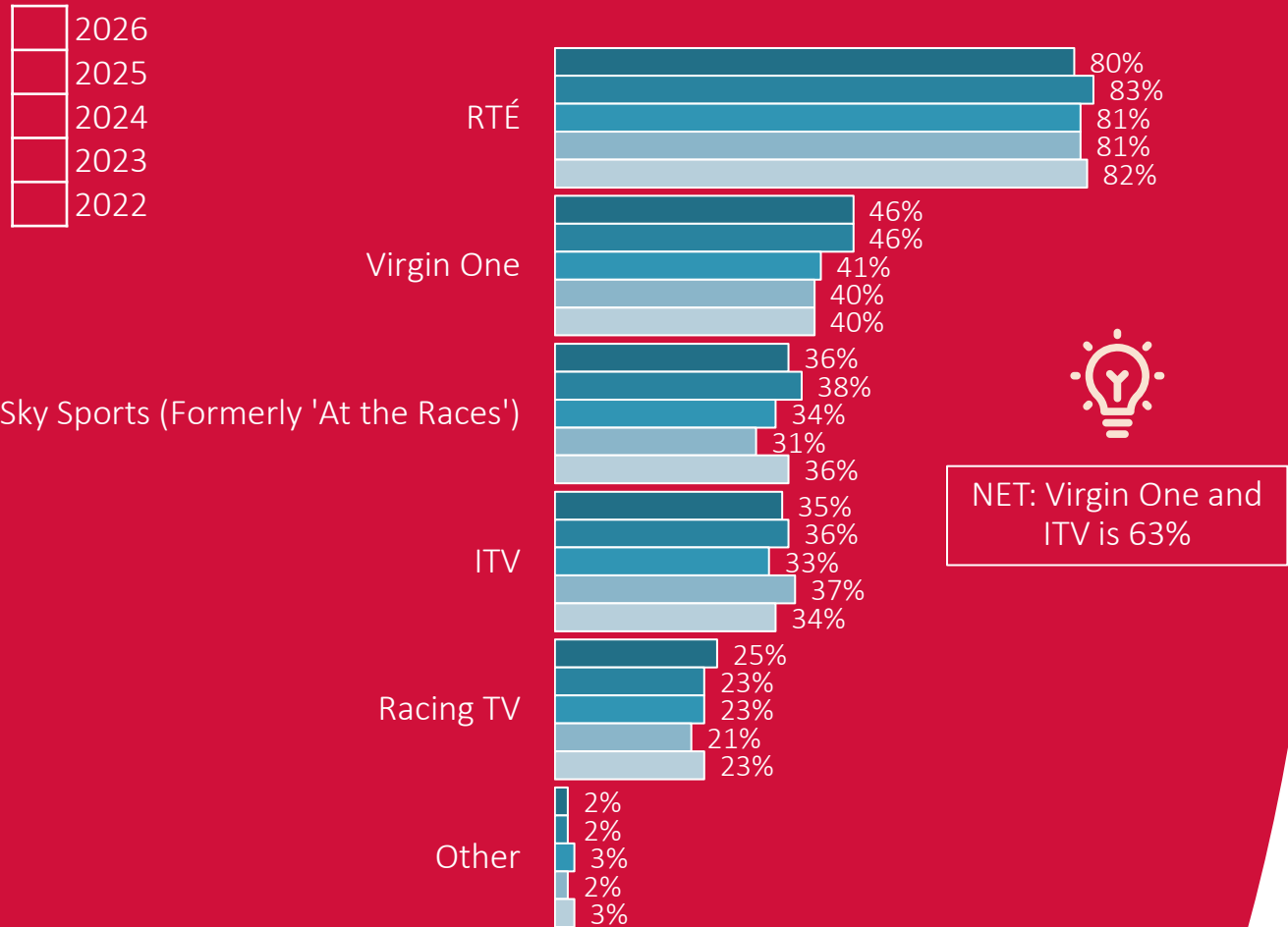
Frequency of following horse racing (among those interested)



*Caution: Small base size
Q9. How often, if at all, do you follow horse racing by reading, watching or listening?
Base: All respondents interested in horse racing (Feb '26, n= 292)

4 in 5 continue to follow horse racing on RTE

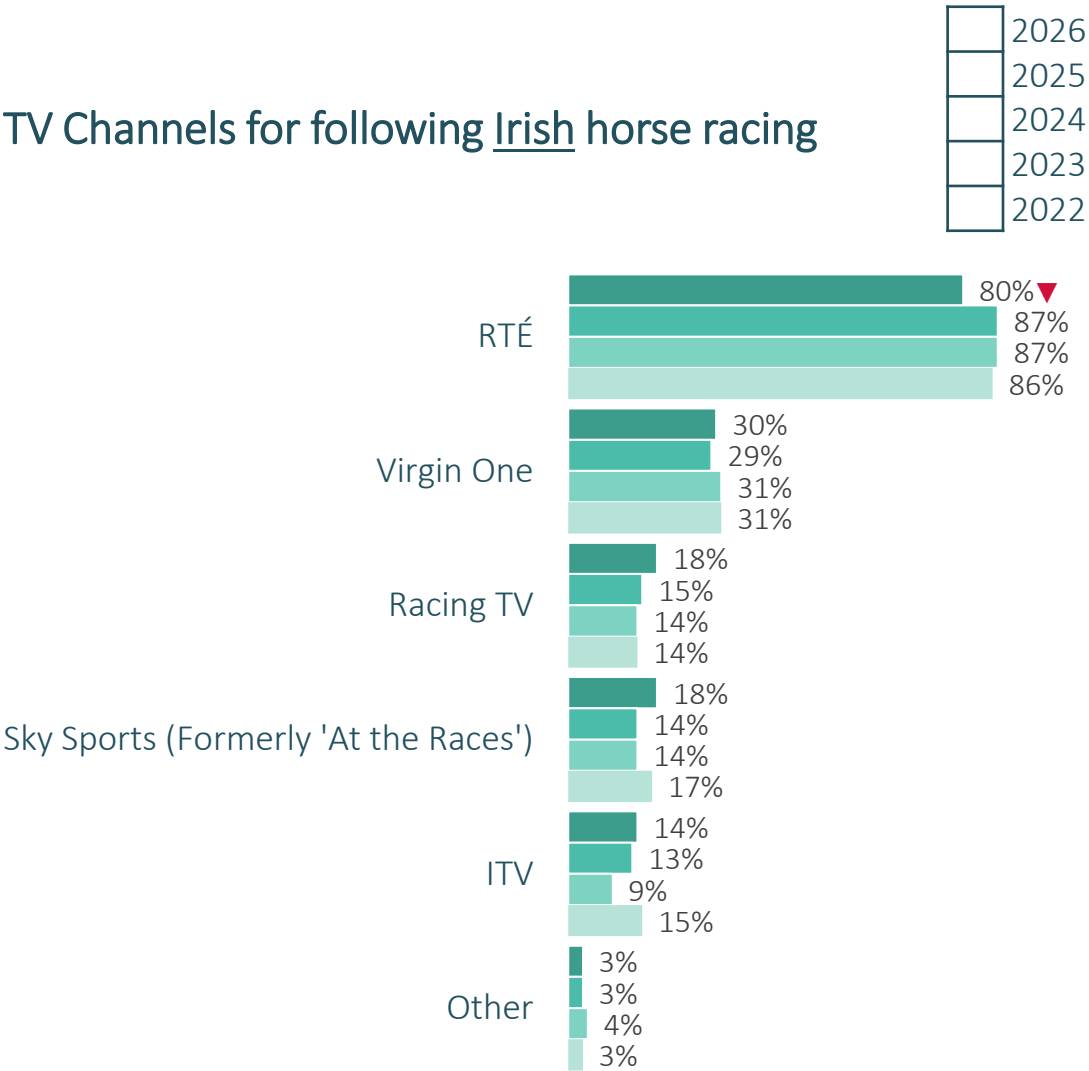
TV Channels for following horse racing



Q.11b Which TV channels do you watch horse racing on?
Base: All respondents who ever follow horse racing on TV (Feb '26, n=365)



TV Channels for following Irish horse racing



Q.11bi Which TV channels do you watch Irish horse racing on?
Base: All respondents who ever follow horse racing on TV (Feb '26, n=365)



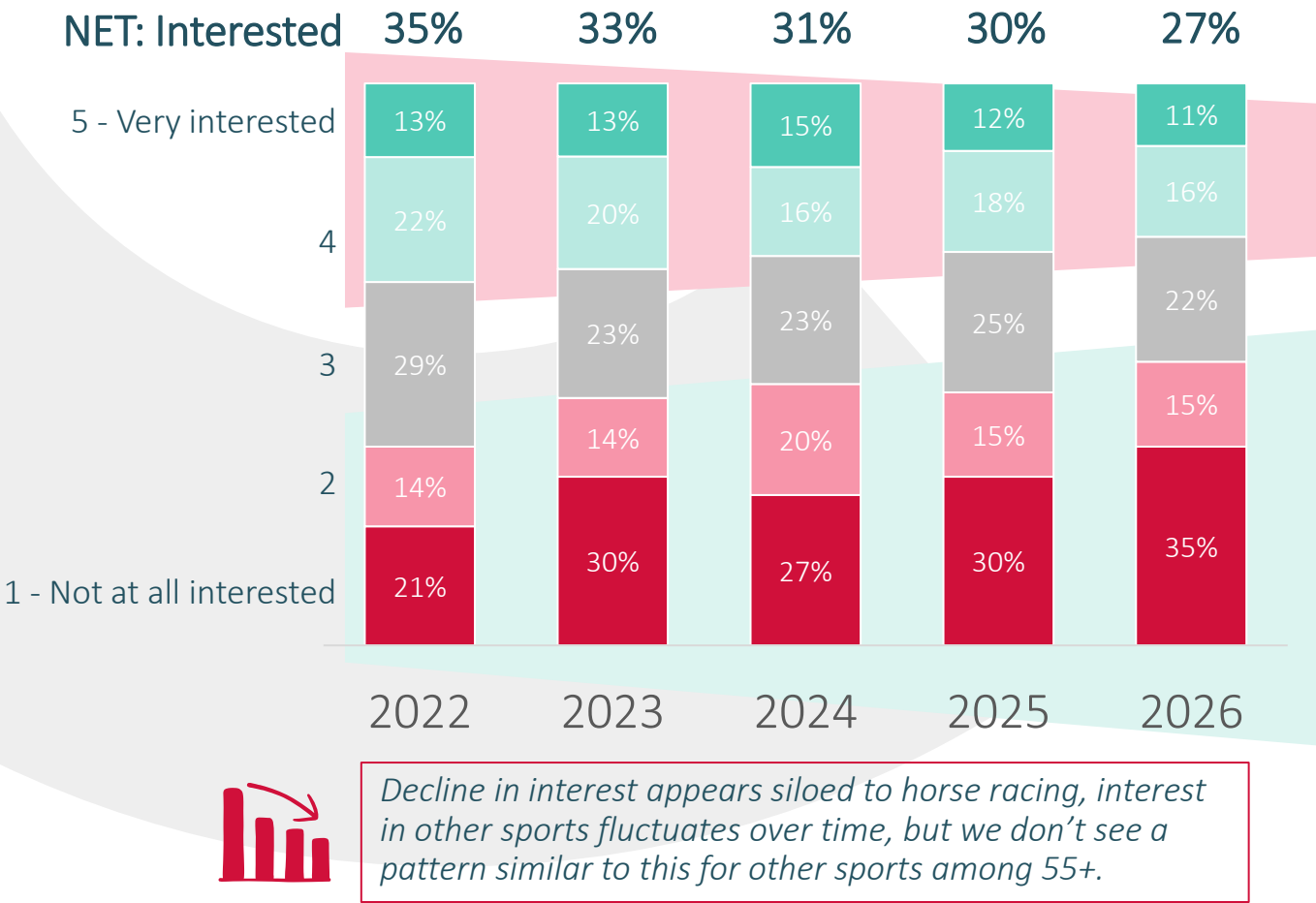
Deep diving 55+ consumers

Interest in horse racing has waned among 55+ over time

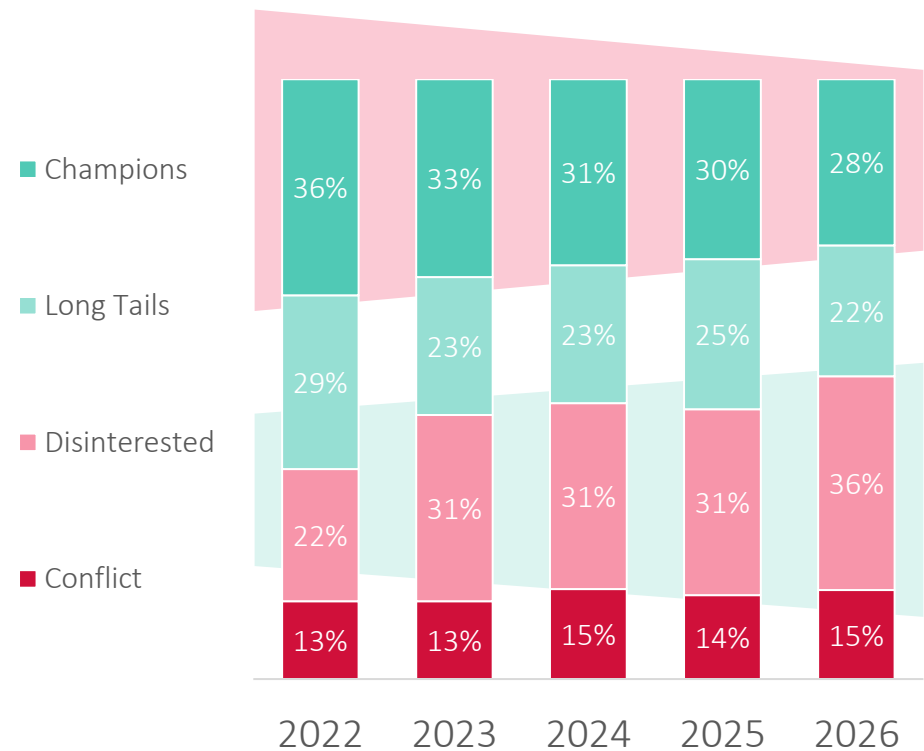


Though Champions decline in this age group, there remains opportunity to re-engage the cohort as Conflict remains small; 55+ are just falling out of love with the sport and becoming disinterested rather than actively disengaging.

Specific interest in horse racing



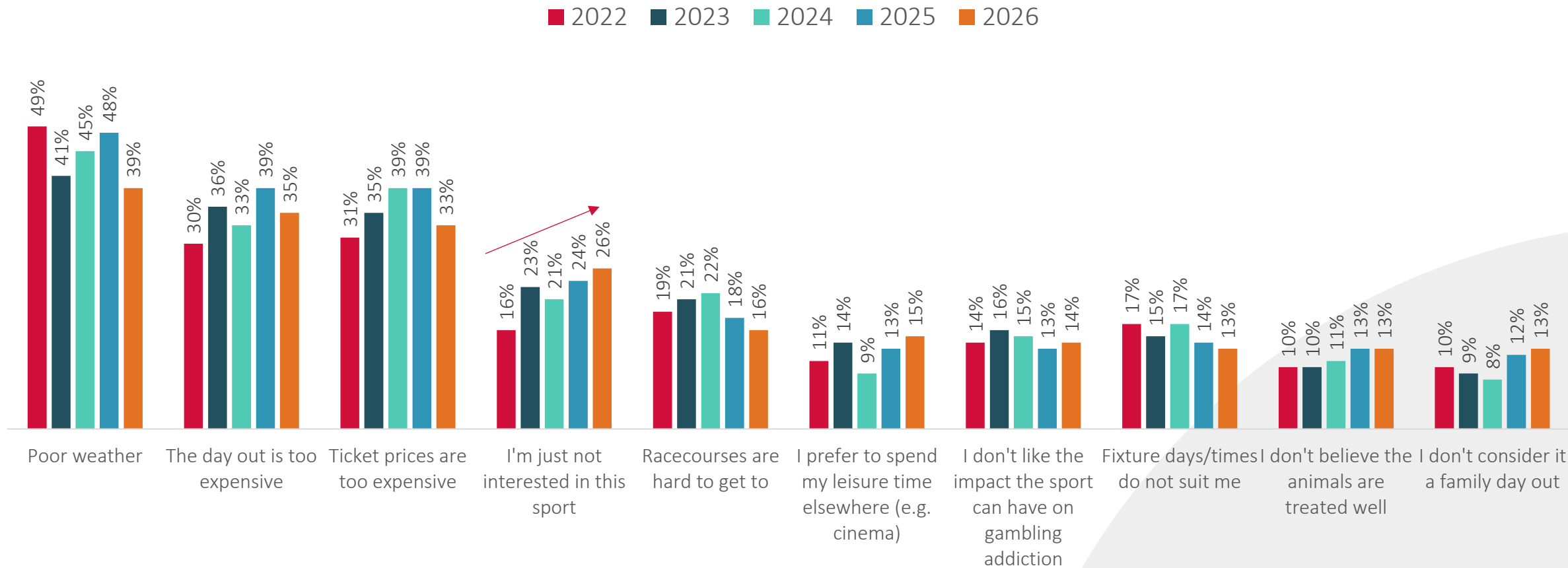
Scales of interest in Horse Racing



Lack of interest is also growing as the main barrier to attendance

Though weather and cost are the largest barriers, trends do not indicate an issue specific to this cohort that we don't see at a total level.

Top 10 Barriers to attending more race meets



Animal welfare concerns are historically higher among 18-34s

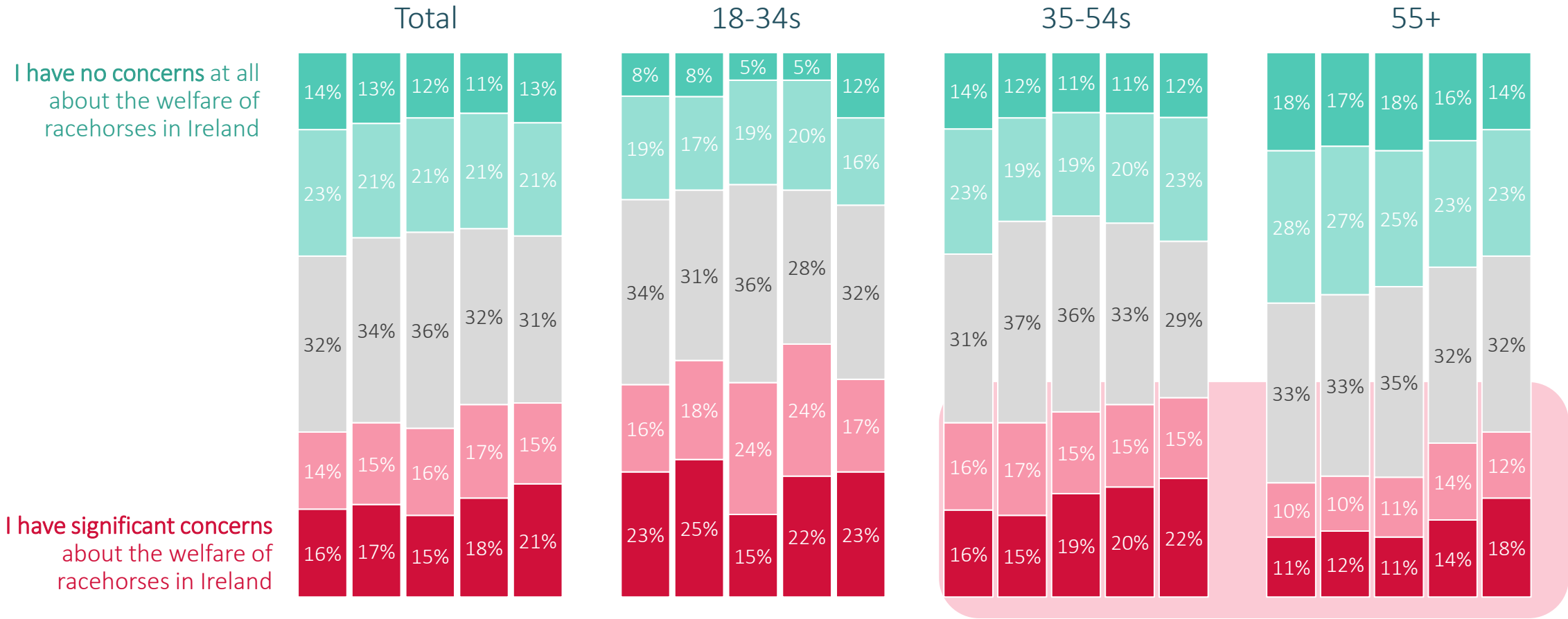


However, we are seeing a slow but steady growth in older cohorts, with a sharper increase in concerns among those aged 55+.

2022 2023 2024 2025 2026



Concerns about racehorse welfare



Q16. Thinking specifically about the welfare of racehorses in Ireland, where would you place your personal opinion on the following scale?
Base: All 55+ Feb '26 (n=363)



NET: Concern (1-2) among 55+ has grown from 21% in 2022 to 30% in 2026

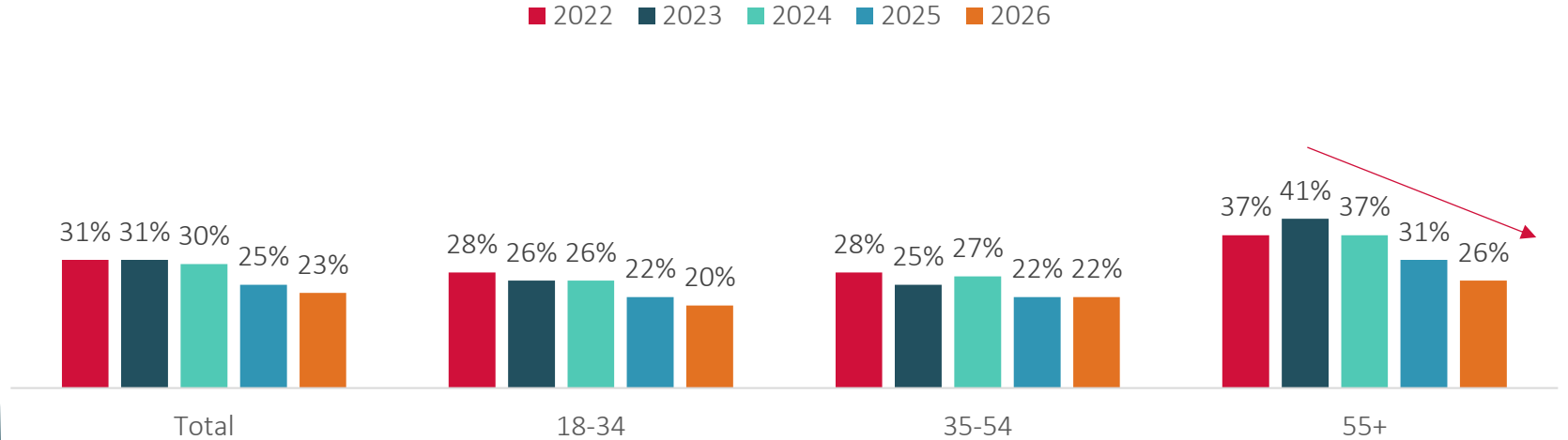
Though declines in hearing of HRI are noted across ages, the drop off in 55+ is much more significant over time

Though TV and national press remain key channels to communicate with 55+, we cannot dismiss the growing importance of reaching them online or via local press.

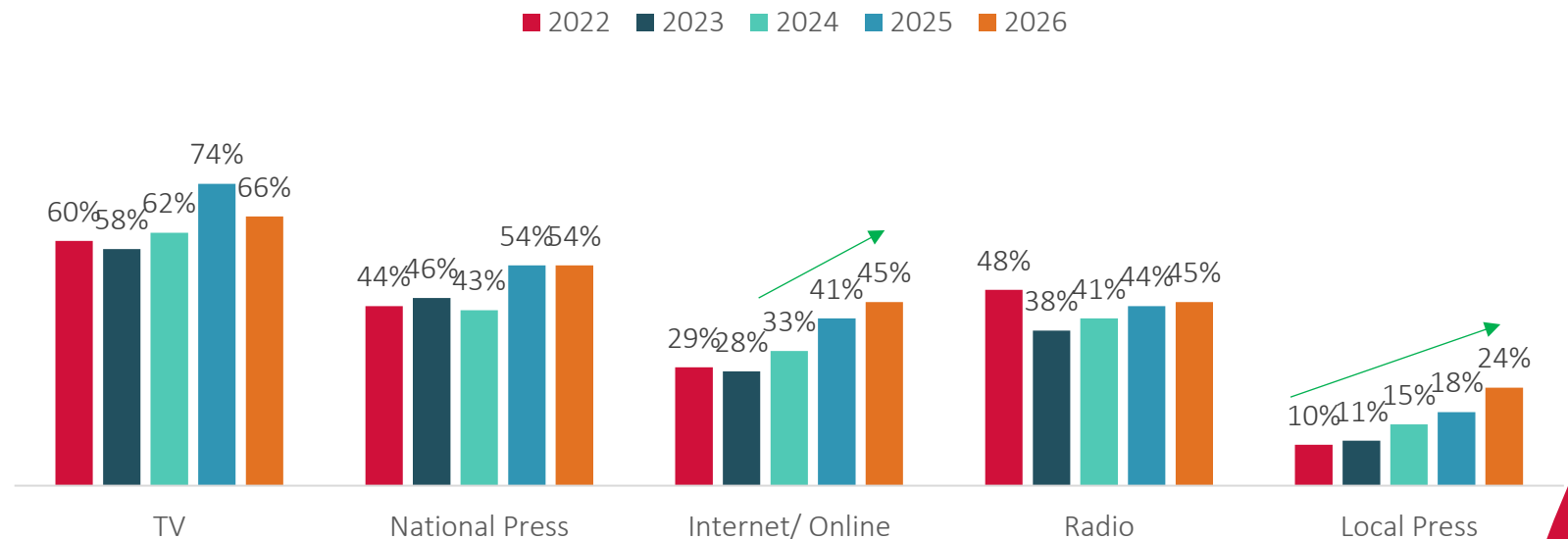
Q17a/Q17b

(Base: All 50+, n=363; All 50+ who heard about HRI recently, n=98)

Heard/saw anything about HRI



Where they saw/heard about HRI (55+)

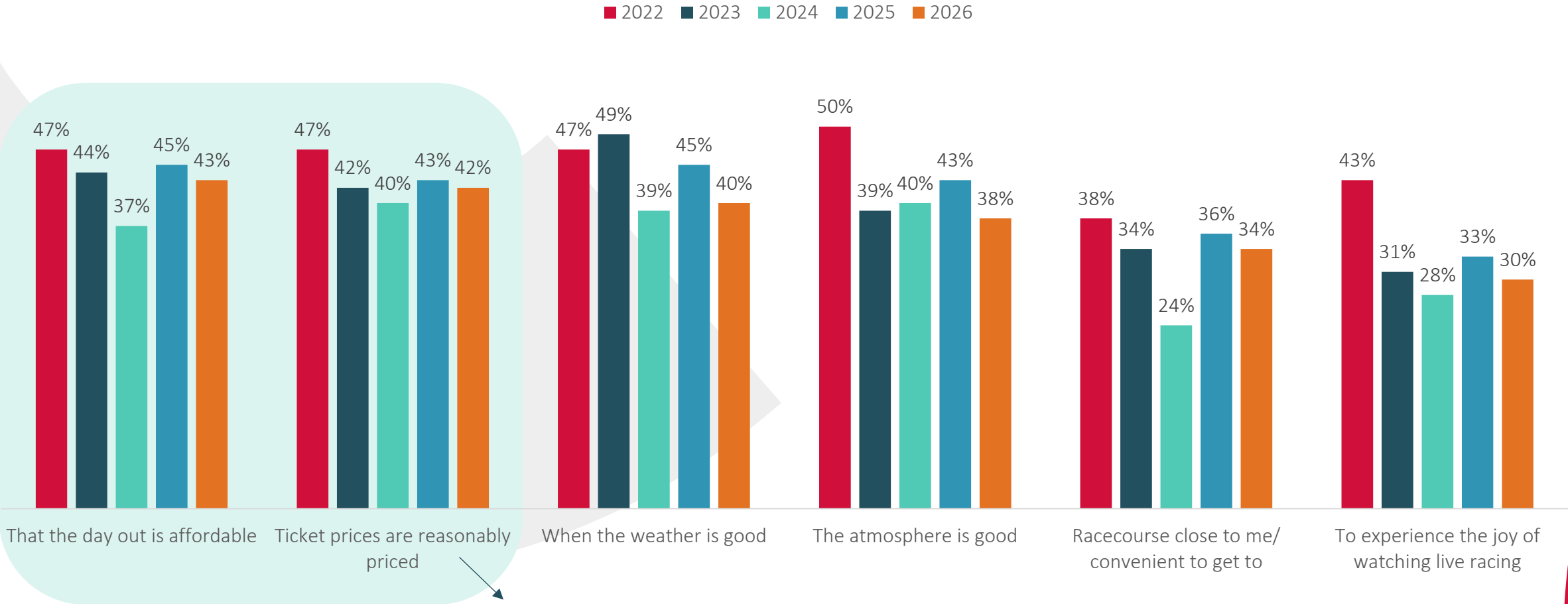


Affordability remains a key driver of attendance among 55+



This means that relying on a good atmosphere and experience of live racing is no longer sufficient to attract them, we need to speak to their wallets too.

Drivers for attending race meets among 55+ adults



Q24a.

Base: All 55+ Feb '26 (n=363)

Note: codes under 30% not shown

75% of 55+ who would attend race meets express interest in bundle tickets

So what can HRI do to re-engage 55+?

There is a growing imbalance with 55+ adults: interest in horse racing is declining while affordability remains a priority – this opens up room for other priorities to take away from the sport.

Re-engaging this core cohort will entail driving emotional connection with the sport and our brand, while also tapping into tactical-led comms to emphasise affordability and bundle options.



1

RE-IGNITE EMOTIONAL CONNECTION TO THE SPORT

55+ consumers are not necessarily rejecting the sport yet, but they are falling out of love with it. Worth noting that growing concerns with animal welfare do pose a challenge, and must be addressed before this converts into active rejection. To re-grow interest, it will be vital to connect with these consumers emotionally, linking the sport to the reasons why they used to love it.

2

AFFORDABILITY IS KEY, BUT ATMOSPHERE AND JOY STILL A HAVE ROLE TO PLAY

Affordability has remained one of the top drivers for attendance among 55+, while atmosphere and the joy of experiencing live racing have softened, exacerbating the gap between rational and emotional drivers. Improving perceptions on affordability can be helped with tactical-comms, but driving emotional connection through showcasing the good atmosphere and the joy of racing will also be vital to ensure 55+ feel our sport is worth spending money on.

3

PUT HRI IN FRONT OF 55+ THROUGH RELEVANT CHANNELS

Ad recall of HRI has dropped significantly among this cohort over time, more than with other age groups. Though TV and national press remain key channels, 55+s are increasingly relying on online platforms and local press to hear of HRI. We must ensure future comms engage these people through platforms they find relevant and are consistently using.

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