



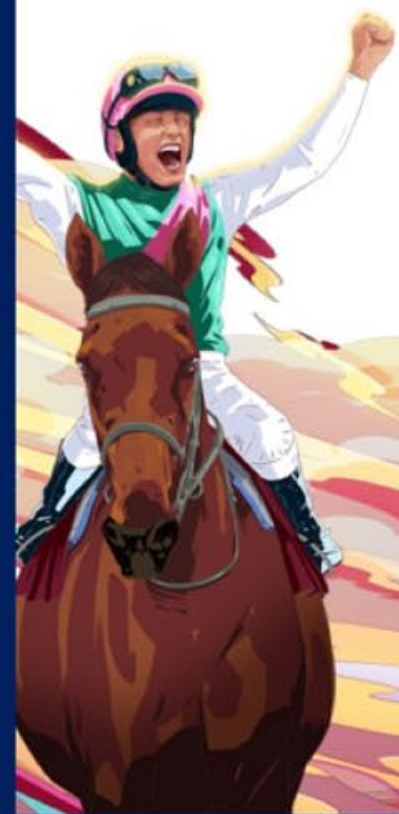
59th ICHA

Engaging fans and attracting new audiences – what racing can learn from other sports

Ben Cleminson

CEO

Square in the Air Communications





SQUARE IN THE AIR

**Full-service creative marketing agency
operating in the sport, horse racing,
betting and online gaming sectors**

59th ICHA



WORLD POOL



SPOTLIGHT[™]
SPORTS GROUP

TIMEFORM



Genius
SPORTS

William HILL



CITYA.M.





“Everybody in racing is doing such a brilliant job and we’d be lost without so many people, but we need to market the sport better. We can do more. We’ve got to do more.”

AIDAN O’BRIEN

RACING POST, SEPTEMBER 2025

Racing's innovations

59th ICHA



JockeyCam



Docuseries



Digital Hub at Sha Tin



World Pool



VR Headsets



The Racing League



Chevaux dans la Ville



Sectional Times/Data



David Power Jockeys' Cup



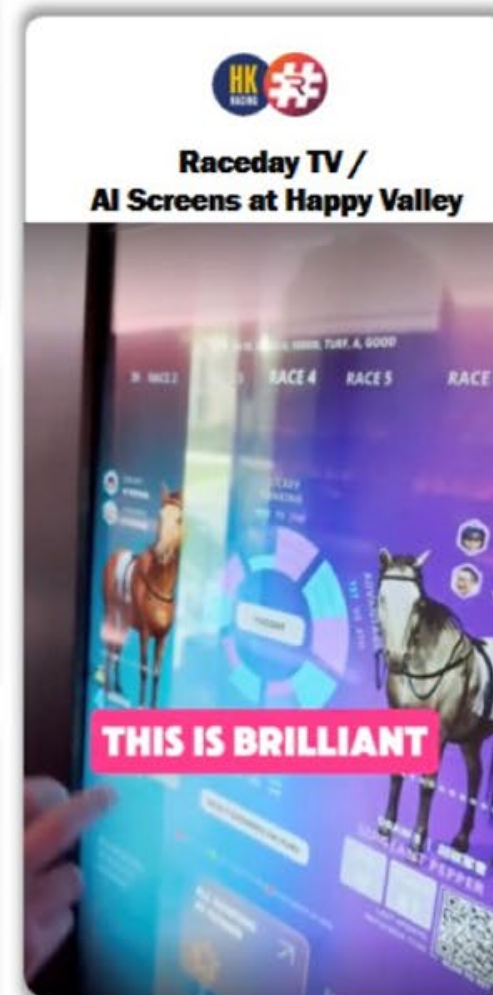
National Racehorse Week



New Races (The Everest)



Gaming - Umamusume



SQUARE
IN THE AIR



What we can come up against

“We’ve done it like this for years”

“Jockeys and trainers won’t buy into it”

“Racing is different”

“We can’t do that in racing”

“Who’s going to pay for it?”

“We’ve tried that before”

“Too expensive”



**What are other sports
doing and what can we
learn from them?**

Growth & Engagement

59th ICHA



▲ **63%**

Increase in global fanbase (now 827 million) since 2018

👁️ **42%**

Females now represent 42% of overall fanbase (up from 37% in 2018)

THE **HUNDRED**

▲ **£1BN**

Brought in via stakes in eight franchise teams when sold this year

👁️ **1BN+**

Video views across all platforms since its launch in 2021



▲ **96%**

Uplift in World Champs viewing on the back of 'Luke Littler Effect'

👁️ **4.8M**

Viewers for 2024 final, biggest ever non-football event on Sky Sports



▲ **300%**

Increase in social media engagement in Tour de France Femmes in 2025

👁️ **8.7M**

2025 final stage viewers, highest audience in 20 years

Four Key Themes for Fan Engagement

Insight & Innovation

- Data, AI, broadcast tech
- Turning raw numbers into drama and new experiences

Personalisation & Access

- Fans expect choice: different feeds, clips and formats
- TikTok highlights to JockeyCam streams, we need to lower barriers

Storytelling

- Characters, rivalries, journeys
- Fans follow *people and narratives*, not just results

Cultural Framing

- Sport thrives when it spills into lifestyle, fashion, food, music

Why they matter:

- Insight & Innovation makes it exciting and smart
- Personalisation & Access makes it possible
- Storytelling makes it emotional - it makes fans care
- Cultural Framing makes it relevant and sticky

Together, they turn sport from something you watch into something you live, share and belong to.

How do we get fans closer to the action?



Broadcast Innovation



Technology & AI



**Participant
Profile Building**



Creators & Celebs

A close-up of a camera lens with bokeh lights in the background. The lens is the central focus, showing its intricate glass elements and metal housing. The background is a dark blue with out-of-focus light spots in shades of blue and white, creating a bokeh effect. The overall mood is professional and technological.

BROADCAST INNOVATION

Broadcast Innovation

What are **other sports** doing?

F1



- Camera innovation : Driver's Eye, Rear Light, drones
- Data visualisation
- Mic'd up drivers and engineers

Football



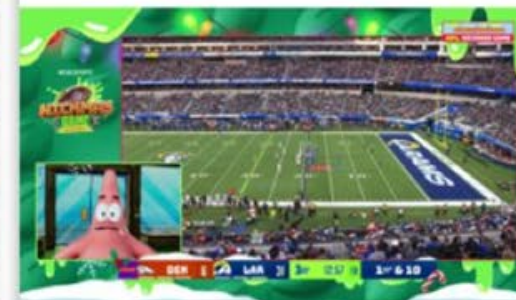
- New cameras: Railcam at the Emirates; RefCam
- Data visualisation - Premier League Data Zone
- Referees mic'd up during VAR checks

Rugby Union



- TNT Sports has mic'd up players
- Now looking to introduce wearable technology like player cameras and in-game heart rate monitors

NFL



- CBS-Nickelodeon alternate telecast of 2024 Super Bowl featuring SpongeBob and Patrick Star
- Combined real life footage with AR and animated graphics



Broadcast Innovation

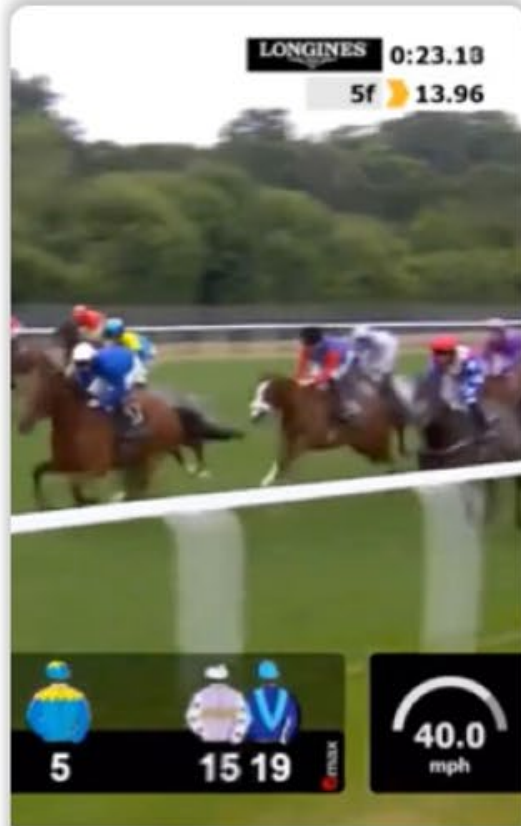
What is **racing** doing?



JockeyCam



Live Streaming



Sectional timings/data



New camera shots

Broadcast Innovation

What **more** can racing do?



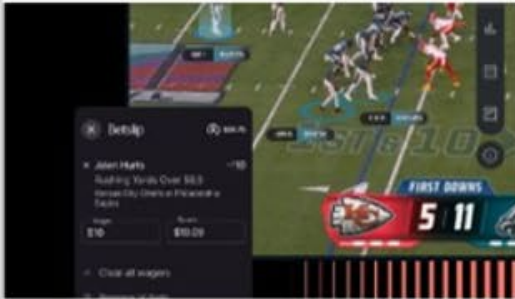
1. **Mic up:** jockeys and trainers for pre-race, mid-race and post-race discussion, insight and reaction
2. **JockeyCam:** all jockeys in big races to have JockeyCam to give viewers the chance to follow their horse during the race, via a designated app
3. **Cameras and drones:** even greater investment in new and exciting cameras, including drones
4. **Heart rate monitors:** on jockeys to see changes pre, during and post race
5. **Data visualisation:** further integration to give viewers greater insight and tell compelling stories

TECHNOLOGY & AI

Technology & AI

What are **other sports or companies** doing?

BetVision (NFL, Football)



- World's first interactive in-play betting experience powered by robust data and AI technology

Basketball



- NBA was an early adopter using AI to generate automated highlights distributed on social media channels in seconds

Cycling



- Warner Bros Discovery launched Cycling Central Intelligence, a generative AI-powered platform in partnership with AWS which supports commentators

Rugby Union



- CapGemini is the new Digital Transformation Partner of Six Nations Rugby
- Also heavily involved in cycling and other sports

Technology & AI

What is **racing** doing?



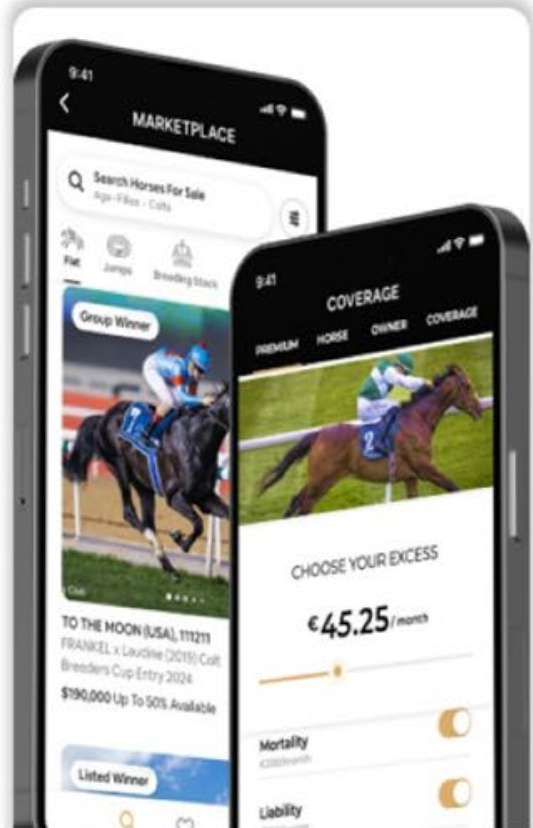
AI screens at Happy Valley



Sha Tin digital hub



Equium – training performance



HALO: Horse-Powered AI

Technology & AI

What **more** can racing do?

59th ICHA



1. **Digital transformation partner:** AWS or CapGemini
2. **Digital speed camera:** turn furlong/metre polls into speed cameras to aid jockeys and provide interesting speed perspective for fans
3. **Pre-race:** AI-powered race previews, leaning into interactive betting experience – touch-to-bet
4. **During race:** Augmented Reality visual overlays of jockey/horse biometrics alongside AI-powered commentary
5. **Post-race:** AI-generated automated highlights to identify key moments and auto-clip for social media

A close-up, high-contrast portrait of a man's face, looking directly at the camera with a serious expression. His skin is glistening with sweat, and his eyes are sharp and focused. The lighting is dramatic, with deep shadows and bright highlights. The overall color palette is dominated by blues and greys, giving it a professional and intense feel.

PARTICIPANT PROFILE BUILDING

Participant Profile Building

What are **other sports** doing?

Darts



- The Luke Littler Effect (Instagram 4k > 1.3m > 1.9m)
- Nicknames / branded clothing
- Walk on music

Football



- Players arriving at stadium to huge fanfare
- Glass-fronted tunnels to give fans unique access

UFC



- UFC Embedded (YouTube) boosts fighter profiles by showing short, snackable, free-to-air content during fight week

Motorcross



- Creative branding opps on clothing leading to more engagement with the riders and extra merchandise options

Participant Profile Building

What is **racing** doing?



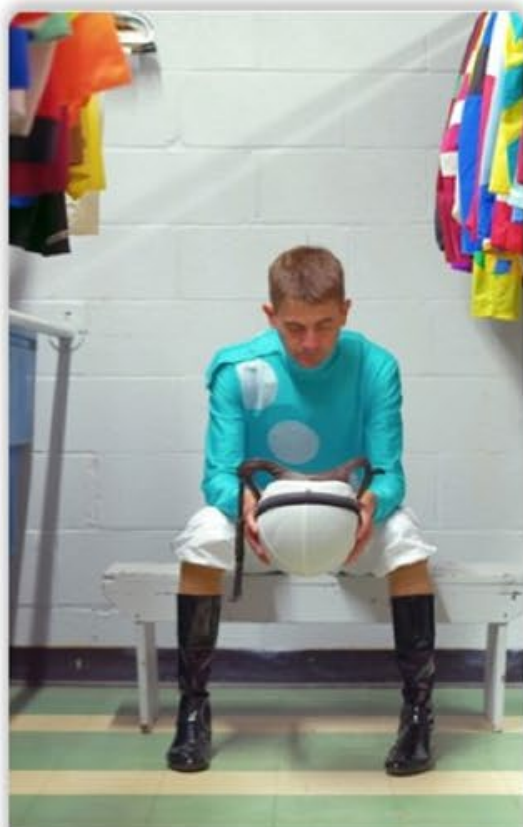
WE'VE had a great run of things with a lot of the Classic trials and it was great to win the French Guineas with Henri Matisse.

Having so many trials winners ahead of Epsom is great, but they are only trials, and the horse who won the Guineas – **Ruling Court** – sets the standard for the Derby.

The Lion in Winter will come on a lot for his run at York. I wasn't hard on him. And we shouldn't take anything away from **Pride Of Arras** who was so impressive in the Dante. I have a lovely book of rides on Lockinge Day, the first of which is **KING'S GAMBIT** in the Aston Park (12.50). He had a good season last year and is expected to improve again.

THE RACING NEWS (1995) sets the standard in

Jockey blogs & columns



Docuseries



Interviews



Social media

Participant Profile Building

What **more** can racing do?



1. **Jockeys' entrances:** designated entrance at racecourses with opportunities for selfies, autographs, photographers, camera crews
2. **Weighing room:** open up to get more behind-the-scenes content/insight
3. **Helmets off:** jockeys come into the paddock without helmets to become more recognisable
4. **Jockey profiles:** on big screens/broadcast when winning a big race – photo, key statistics, etc.
5. **Social media:** training from experts, partnering with company like Arwen.ai to manage/limit hate

Participant Profile Building

What about **the horse**?

Frankel

Huge marketing opportunity that the UK industry really got behind



Kauto Star v Denman

Incredible heavyweight bout between best two jump horses from same stable going for the Gold Cup



Participant Profile Building

What can we do with some of the most exciting horses in training?

Ka Ying is Rising

Project a giant animated image of Ka Ying Rising literally rising up Hong Kong's tallest building, the International Commerce Centre, ahead of HKIR



Horse Fan Area for Major Races

To build atmosphere, create individual horse fan areas on the track where fans of, for example, Sovereignty, Sierra Leone or Fierceness can go to cheer for their favourite horse leading up to and during the BC Classic



A red carpet event with spotlights and stanchions. The scene is set in a dark environment with a red carpet leading towards a bright light source. Several spotlights are positioned on a truss above the carpet, casting beams of light onto the carpet. The carpet is flanked by stanchions connected by red ropes. The overall atmosphere is one of a high-profile event.

CREATORS & CELEBS

Creators & Celebs

What are **other sports** doing?

Football



- Beckham & Friends Live CBS watchalong
- Bundesliga streaming rights - That's Football
- Celebrity owners / board members

F1



- Aston Martin and TikTok - 'Creator Collective'
- Celebs waving the chequered flag at the end of the race

Tennis



- US Open - 50 content creators (from fashion influencers to food vloggers) attended
- Over 2.3 billion digital impressions

AFL



- Huge performance with Snoop Dogg before last month's Grand Final
- Overwhelmingly positive sentiment on social



Creators & Celebs

What is **racing** doing?



Major Influencers



Raceday TV



Famous owners



Celeb participants

Creators & Celebs

What **more** can racing do?

59th ICHA



1. **Watchalong:** Kentucky Derby watchalong with Griffin Johnson and celebs/racing participants
2. **Fan parks:** live watchalongs at fan parks for the biggest meetings
3. **Non-racing creators:** partner with major creators like Beta Squad to visit a yard ahead of a big meeting or go racing and set them a challenge
4. **Fashion collab:** work with a cool fashion brand to bring elements of racing silks into their designs
5. **Documentary:** feature with Tony Parker or Antoine Griezmann focused on their horse racing interests

Four Key Themes



Insight & Innovation



Personalisation & Access



Storytelling



Cultural Framing

- These turn sport from something you watch into something you live, share and belong to
- We don't need to invent anything new – the technology is out there
- Grow the audience >
Attract new sponsors >
Bring more money in



**“Be not afraid of going slowly,
be afraid only of standing still.”**

CHINESE PROVERB



59th ICHA

Thank You

Ben Cleminson

CEO

Square in the Air Communications

