



The Equestrian Industry in the UK

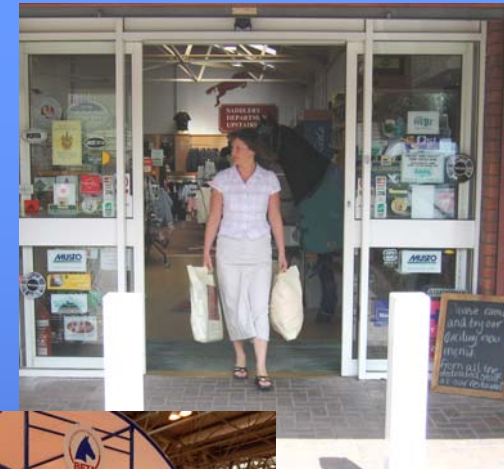


Claire Williams
Executive Director
British Equestrian Trade Association

British Equestrian Trade Association



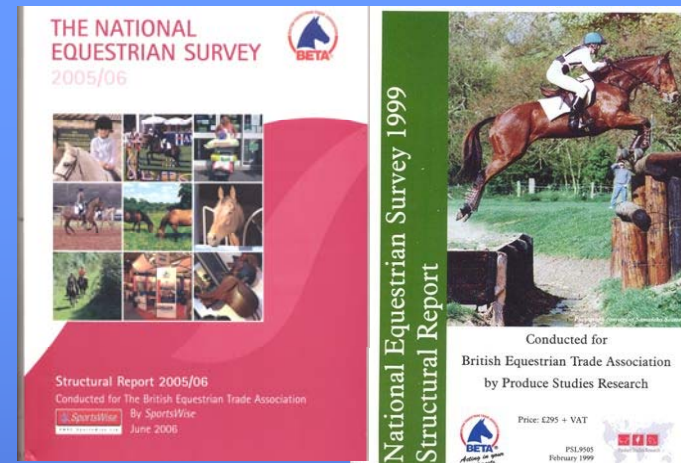
- Membership of 800
 - owned by members
 - helping companies become more profitable & professional
- Lobby Government at all levels
- Source of reliable market statistics
- Offer a wide range of benefits
 - Training courses
 - Riding promotion
- Funded through subscription & commercial activity



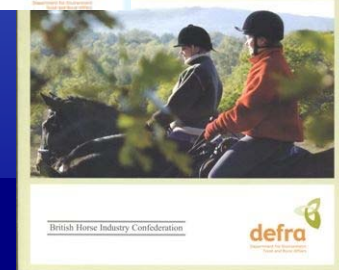
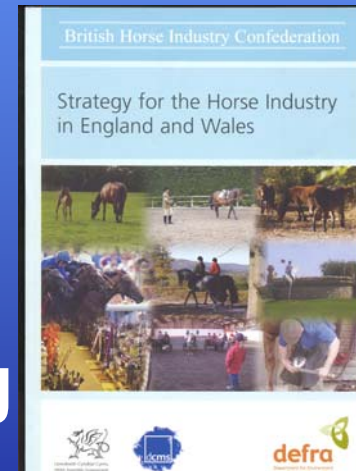
British Equestrian Trade Association



- National Equestrian Surveys
 - First independent study 1995
 - Follow ups 1999 & 2006



- Henley Report
- Deloitte / British Horseracing
- Strategy for the Horse Industry





Topics for Today



- **Horse Industry**

- how many riders?
- how many horses?

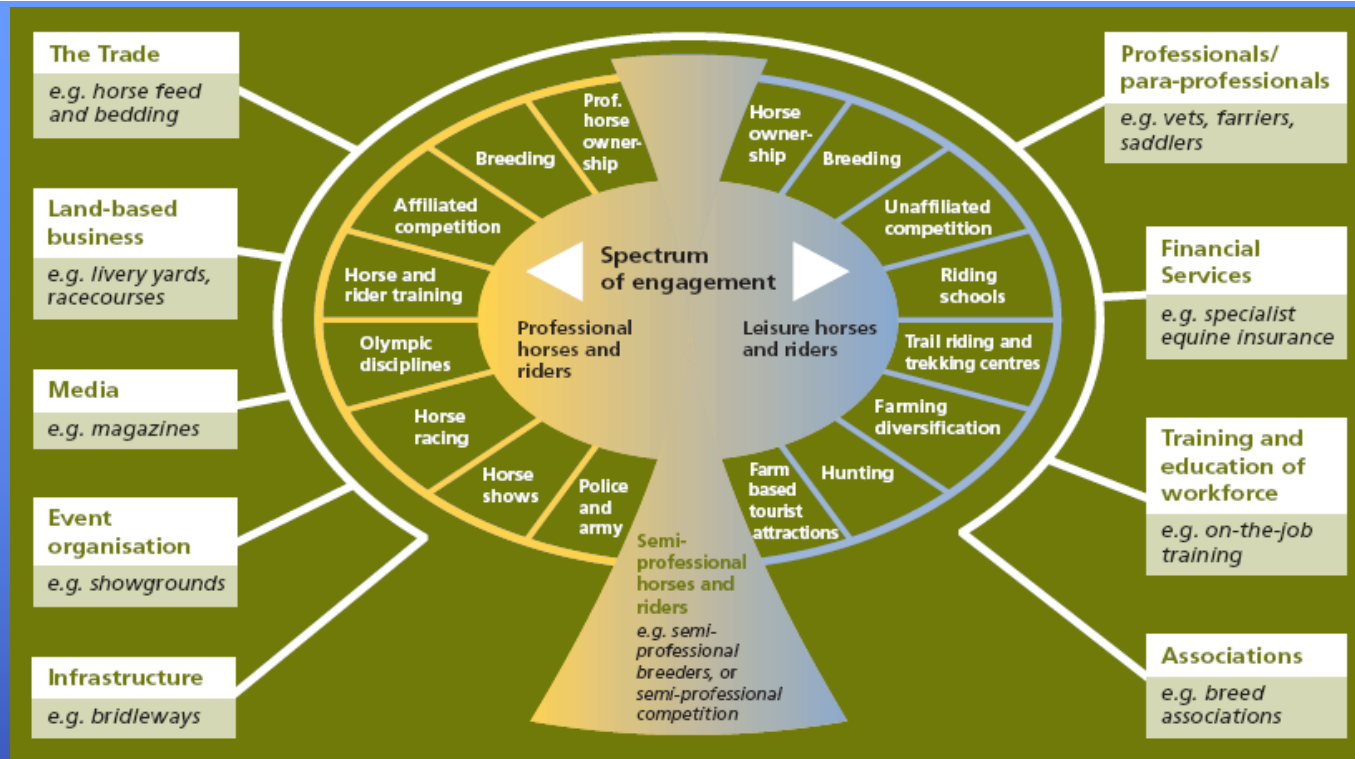
- **Equestrian Gross Output**

- how much is it worth?

- **Equestrian tourism as an opportunity and catalyst for growth.**



Industry Map



- **The Core**

- Activities based on the use, possession and ownership of horses

- **Providers to the Core**

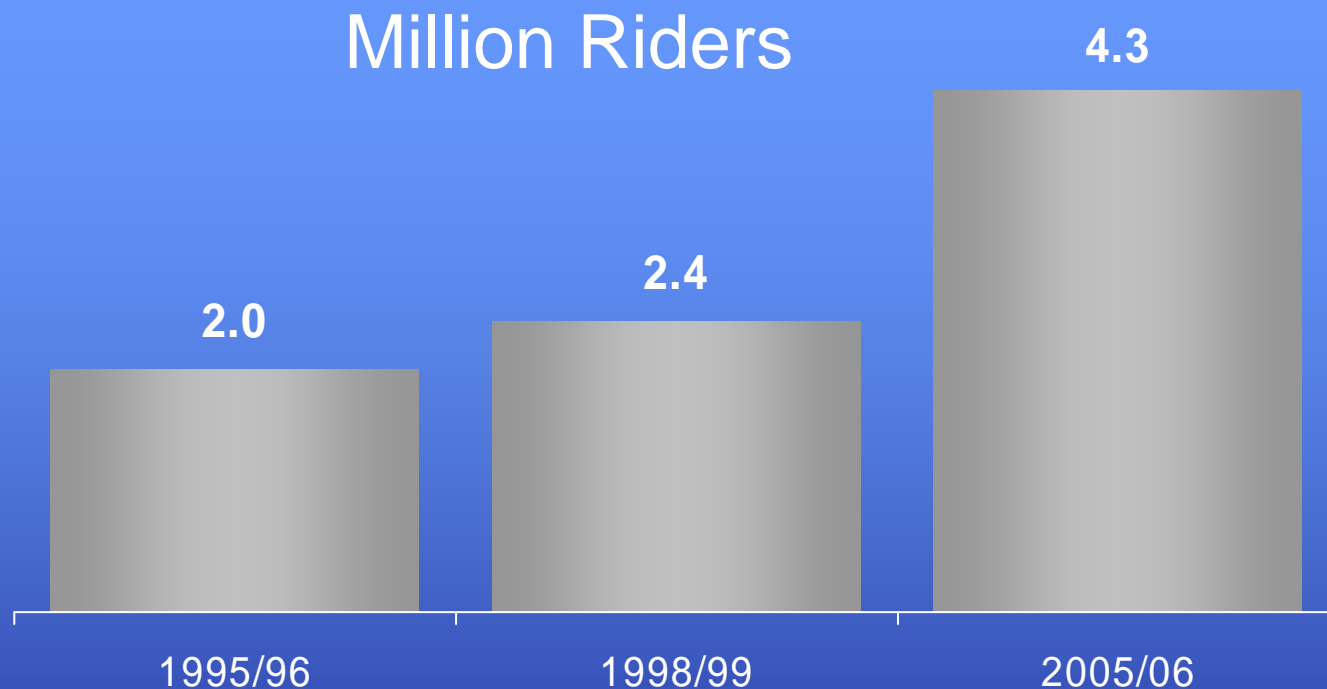
- Suppliers of goods and services



Horse Riding in GB

Horse rider numbers

■ estimated horse riders (million)



A growing population of horse riders in GB...

Horse riding 1995-2006 – 2006 based upon 5,078 interviews with representative sample of GB population

Estimates based upon GB population of 58.5 million people

Q *Have you ridden a horse in the last 12 months*



Comparison with other leisure pursuits

Pubs and Bars

Leisure 79% 1st

Golf

Sport 61% 19th

Horse Racing

Sport 45% 20th

Gymnastics

Sport 40% 26th

Rugby Union

Sport 39% 28th

Rugby League

Sport 37% 31st

Equestrian

Sport 35% 35th

Angling/Fishing

Sport 29% 37th

Rowing

Sport 28% 39th

Sailing/Yachting

Sport 18% 47th

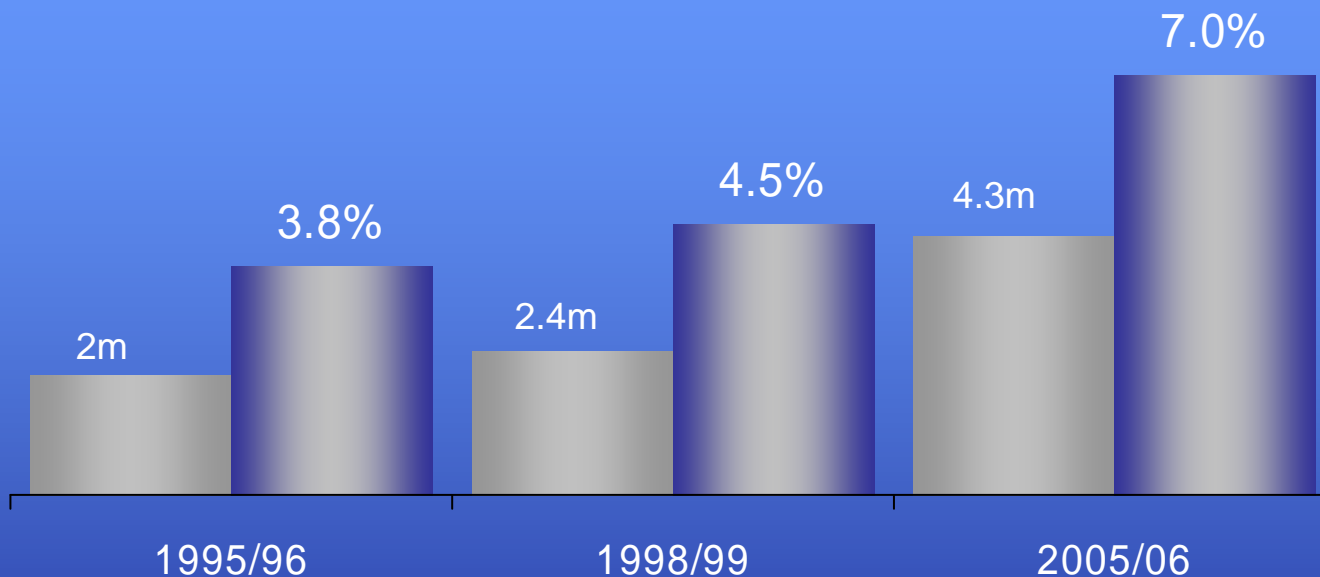


Horse Riding in GB

% of population

■ estimated horse riders (million)

■ estimated % of GB population



...greater % of GB population than recorded in 1999

Horse riding 1995-2006 – 2006 based upon 5,078 interviews with representative sample of GB population

Estimates based upon GB population of 58.5 million people

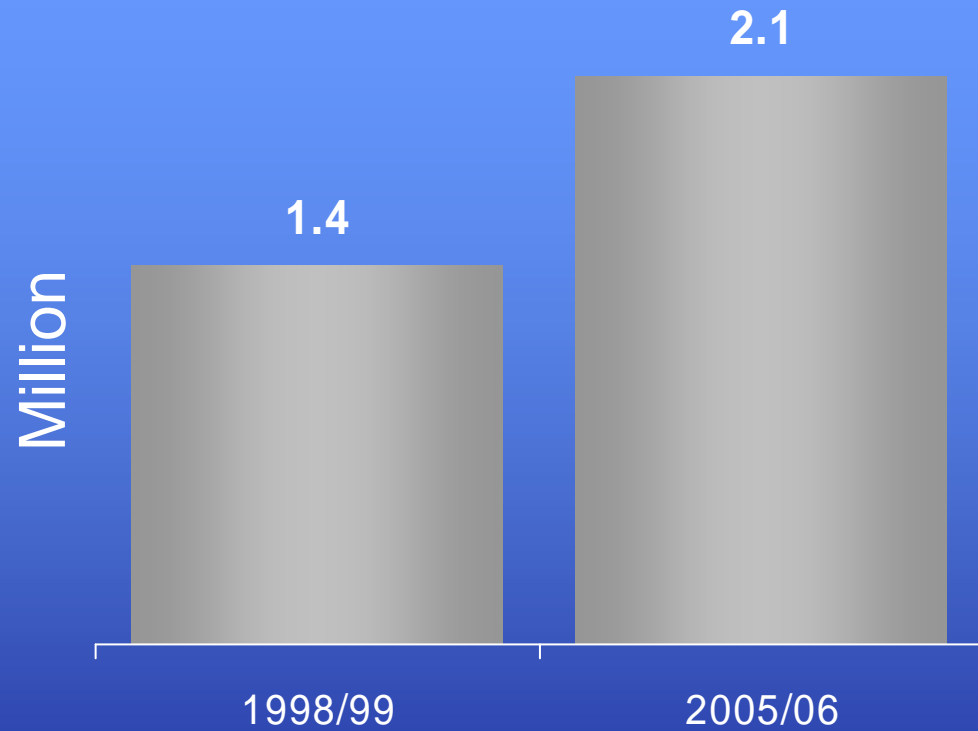
Q *Have you ridden a horse in the last 12 months*



Regular Riding in GB



Regular Riders (ride at least once a month)



A 50% growth in 'regular riders'

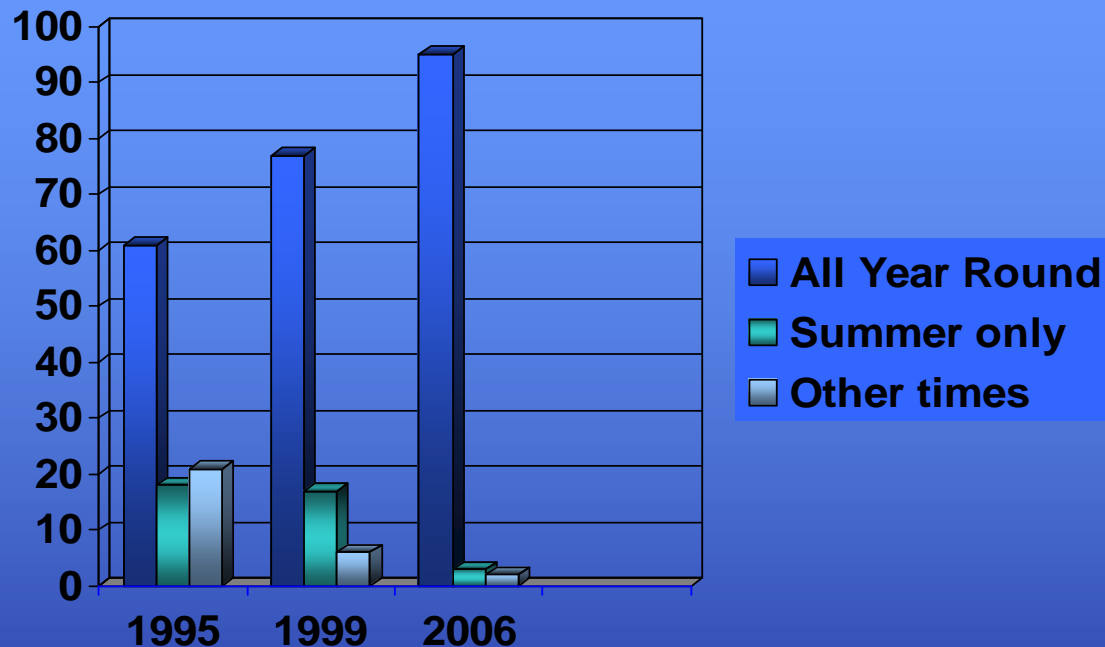
Horse riding 1995-2006 – 2006 based upon 5,078 interviews with representative sample of GB population

Estimates based upon GB population of 58.5 million people

Q Have you ridden a horse in the last 12 months/How frequently do you ride horses (387)



Seasonality



Riding now a year round activity

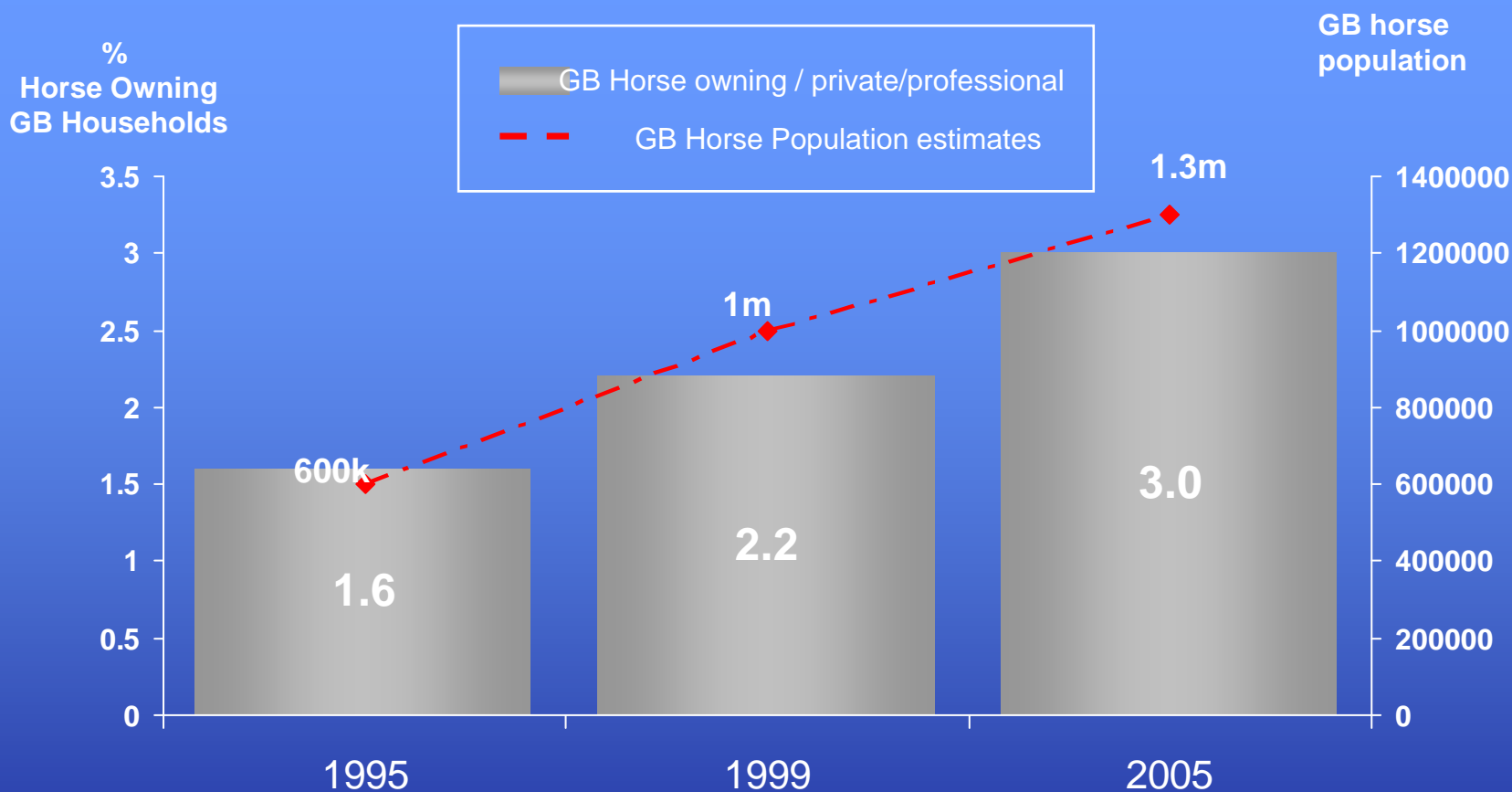
Horse riding 1995-2006 – 2006 based upon 629 interviews with regular riders

Q *Reasons for not taking up riding again?*



Horse Owning in GB

Horse population – private and professional



An estimated 1.3 million horse population in 2006

Horse riding 1995-2006 – 2006 based upon 5,078 interviews with representative sample of GB population

Estimates based upon GB population of 58.5 million people

GB horse population estimates – private and professional ownership

NB: Rounded to nearest 100,000



Horse-Related Expenditure

Private Households



Private household expenditure approaching **€5.3 billion**

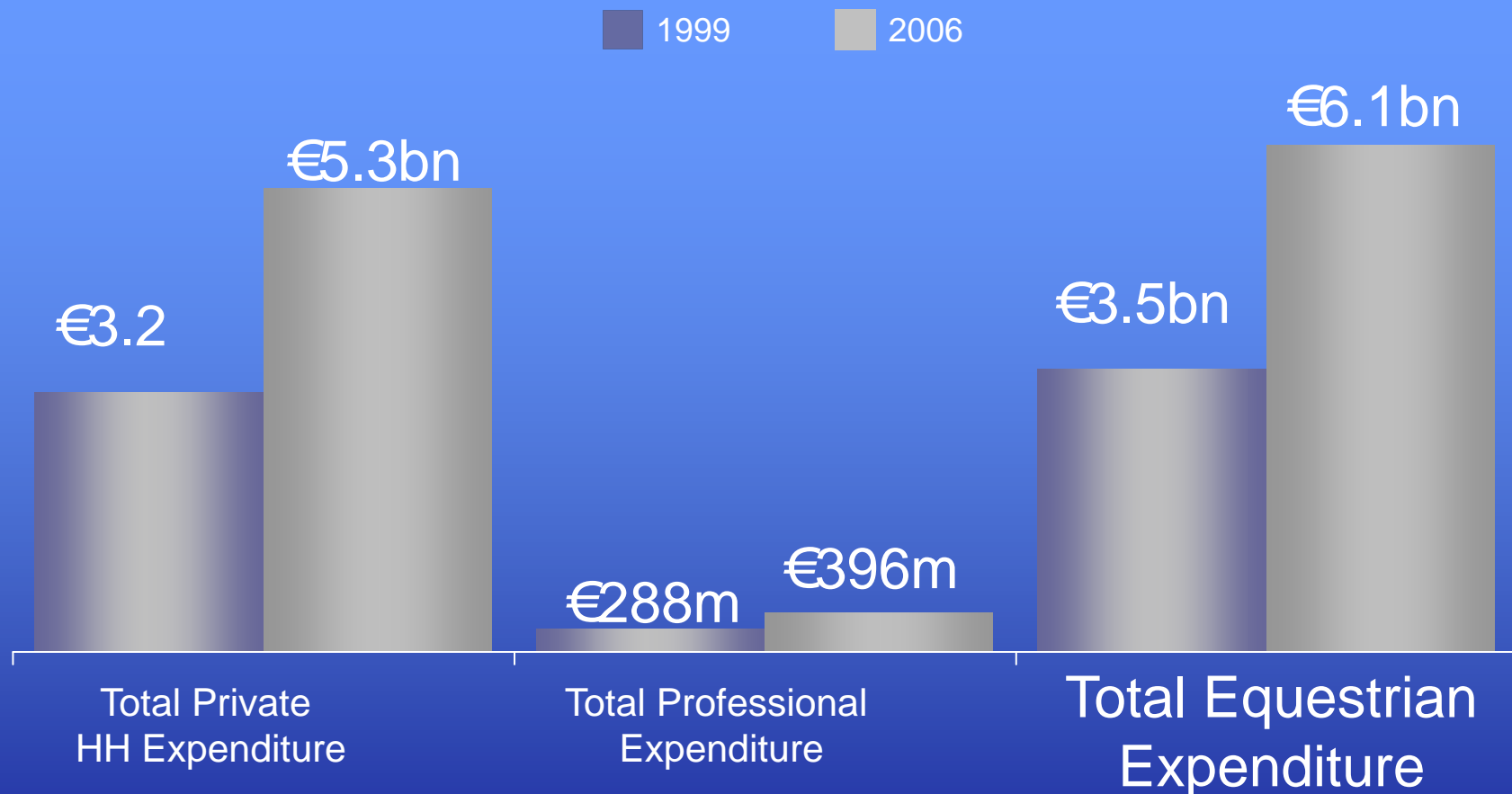
Horse related expenditure – 2006 based upon 828 interviews with horse owners

* based upon 51% of 'regular riders' taking an average 46 million paid for lessons per annum @ £21 per lesson



Horse-Related Expenditure

Total Gross Value Output



Total equestrian sector value estimated at **€6.1bn**

Significance of Tourism



*Wednesday 7th May -
Sunday 11th May 2008
Home Park Private
Windsor Castle
Venue for The FEI™ European
Show Jumping and Dressage
Championships 2009*

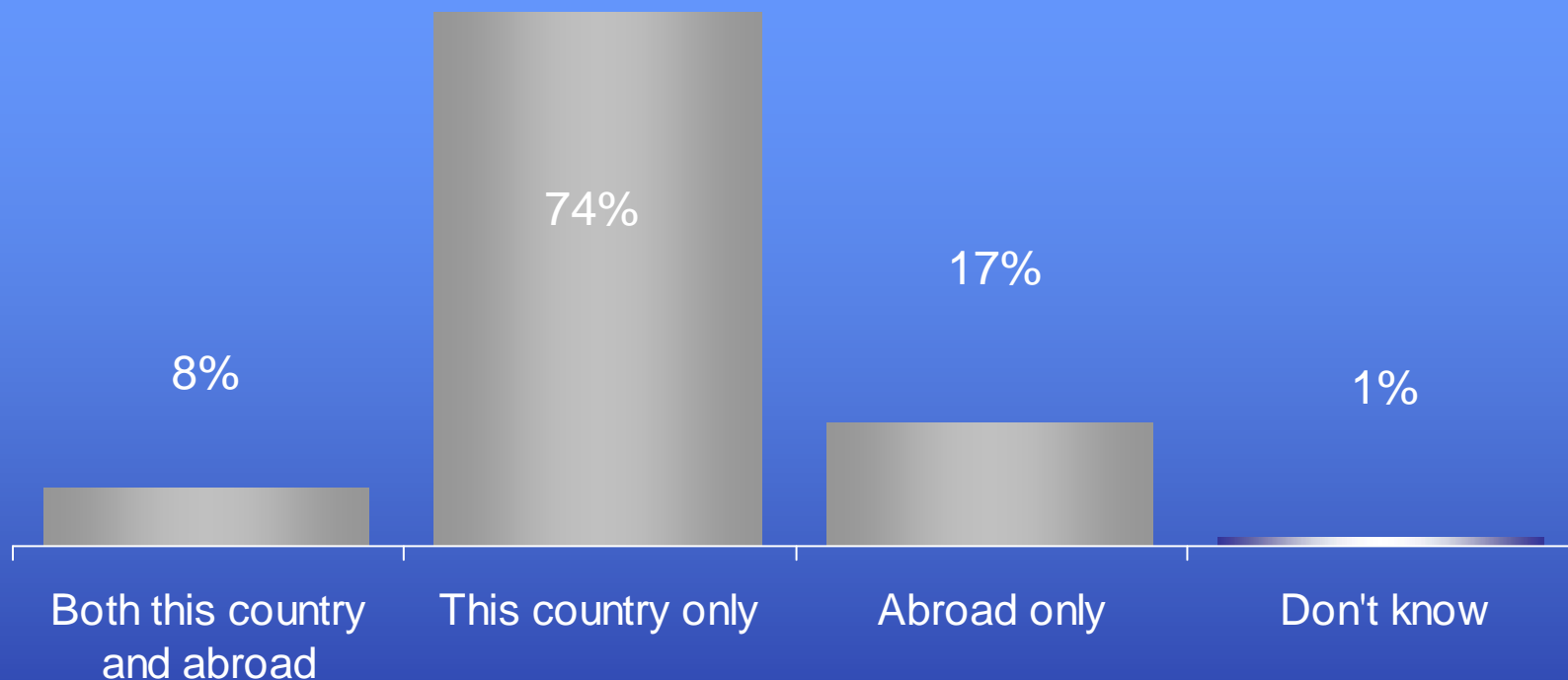


GO BEYOND



Households Where Riding Took Place in the last 12 months

2.8m households



25% of riding households rode abroad at some stage the previous year.

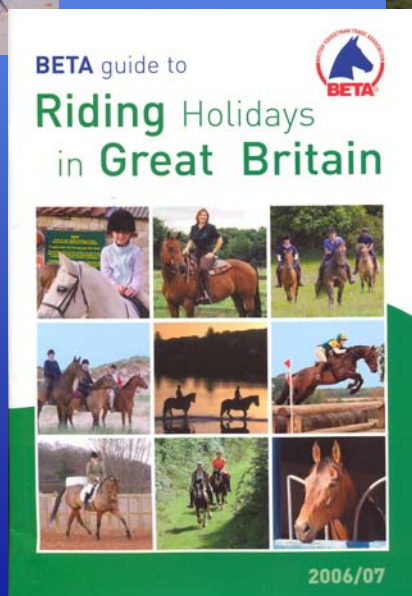
Significance of Tourism



- 150 + “Riding holiday” Centres
- 1500 – 2000 Riding Schools
- Nearly 500 Holiday and Trekking centres
- Numerous competition locations



Significance of Tourism





In summary



British Equestrian Industry

- 1.3 million Horses*
- 4.3 million Riders
- Consumer expenditure €6.1 billion
- Offering employment to over 260 000 people

