



Global Equestrian Research

Report for National Federations



FÉDÉRATION
ÉQUESTRE
INTERNATIONALE

March 2024



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Reader Guidance



ECONOMIC IMPACT OF EQUESTRIAN SPORTS

What is the economic impact of equestrian sports? What else characterizes the global equestrian sports market?

P. 17 ff.



POTENTIAL OF EQUESTRIAN SPORTS

How large is the global fan base of equestrian sports? What is the potential of equestrian sports in selected markets?

P. 25 ff.



EQUESTRIAN TARGET GROUPS

What different target group segments of equestrian sports interested exists? What characterizes them? What drives and hinders each target group segment to consume and practice equestrian sports?

P. 41 ff.



DEVELOPMENT OF EQUESTRIAN SPORTS

What direction can be derived to develop relevant equestrian target group segments?

P. 44 ff.



MARKETING EQUESTRIAN SPORTS

What are key benefits for a potential sponsor of equestrian sports?

P. 47 ff.

Initial Situation & Study Overview



Nielsen Sports will provide insights to drive the further development of FEI



Initial Situation

FEI has conducted a Global Equestrian Market research in 2016, which is still one of the most comprehensive studies about international equestrian sports. As the sport market is undergoing significant changes and the landscape of equestrian sports is shifting as well, FEI needs to obtain the status quo of the market to better understand the extent and specifics of global equestrianism across the key geographies and embrace the trends shaping the future of the equestrian industry.

Therefore, FEI is seeking a multi-dimensional research to reach the following objectives:

- obtain a broad and in-depth overview of the equestrian market
- analyze equestrian sports and its disciplines comprehensively
- develop a deep understanding of equestrian participants and fans
- gain meaningful insights and recommendations for the further development of FEI and the equestrian sport
- provide data-driven support to the NFs and other stakeholders



Five studies were conducted, aiming to maximize the acquisition of reliable data



Study Overview

Nielsen Fan Insights

(30 markets – global fanbase)

Custom Research

(8 markets – deep understanding of fans)

Economic Impact Analysis

(19 markets – 15 among which representing 66% of the global GDP)

National Federation Survey

(83 NFs responded, 63% response rate)

Digital Audience Profiler

(global digital users with deep dive in 4 markets)

Custom Research Group: BEL, FRA, GBR, GER, IRL, NED, SWE, USA

Nielsen Fan Insights Study Group: AUS, BEL, BRA, CAN, CHN, ESP, FRA, GBR, GER, IDN, IND, ITA, JPN, KOR, MAS, MEX, NED, NOR, PHL, POL, RSA, RUS, SAR, SGP, SWE, THA, TUR, UAE, USA, VIE

Economic Impact Analysis: AUS, AUT, BEL, BRA, CAN, CHN, DEN, FRA, GBR, GER, HUN, IRL, ITA, NED, NZL, ESP, SWE, SUI, USA

Digital Audience Profiler Deep Dives: BRA, IND, MEX, UAE

Nielsen Sports | Global Equestrian Research | November 2023



Management Summary



The global economic impact of equestrian sports – without horse racing and betting – has reached the scale of approx. USD 300bn per year

Global economic impact of equestrian sports

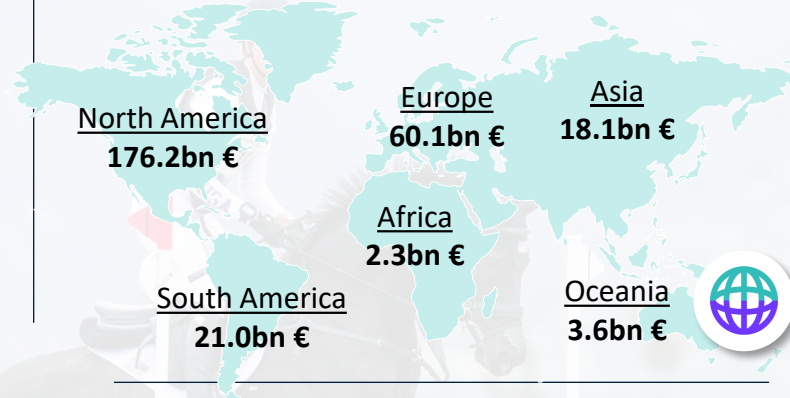
Global economic impact of equestrian sports per year

(includes all countries worldwide)

€281bn /
\$302 bn

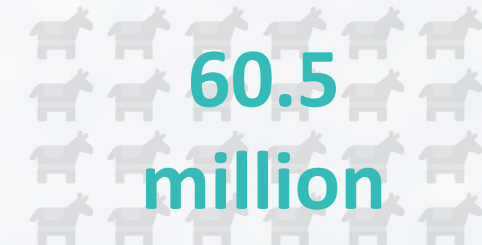


Economic impact by regions



Global horse population

(includes all countries worldwide)



Equestrian riders

(includes data for 16 markets worldwide)



Jobs related to the equestrian industry

(includes data for 41 markets worldwide)

4.2+ million

jobs related to the
equestrian
industry



Equestrian events per year

(includes data for 80 markets worldwide)

43+ thousand

regional / national / international
56% / 34% / 10%

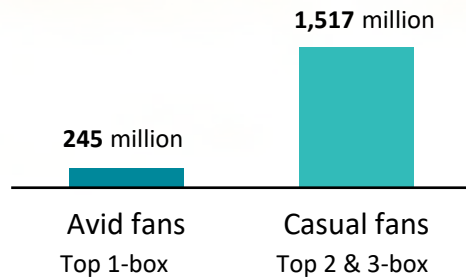


Equestrian has a large global fanbase, a strong image and a very attractive target group of active riders for brands

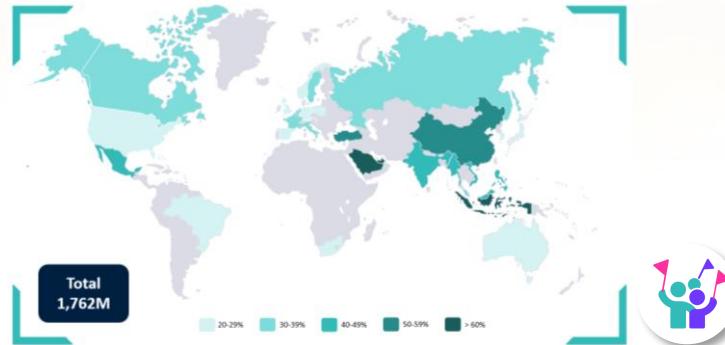
Potential of equestrian sports

Global fanbase of 1.7bn people (10-69y)

(across 30 analyzed markets)



High interest in Middle East and Asia



Strong image of equestrian sports

In the 8 analyzed markets people perceive equestrian sports as especially...

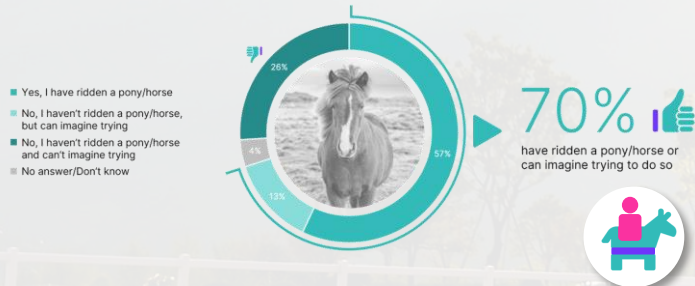
- 1 International 60%
- 2 Graceful 55%
- 3 Passionate 50%

(top-2-box)



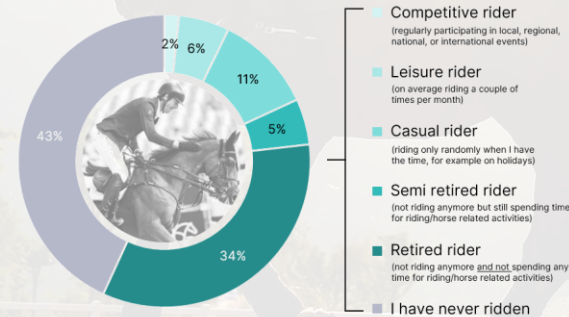
70% have ridden/can imagine to do so

(in the 8 analyzed markets)



Almost a fifth rides at least occasionally

(in the 8 analyzed markets)



Attractive target group

1.78x higher **sponsorship affinity** of Equestrian riders compared to total population.

Their **interest in products and services** is cross-sectoral

Selected highlight branches

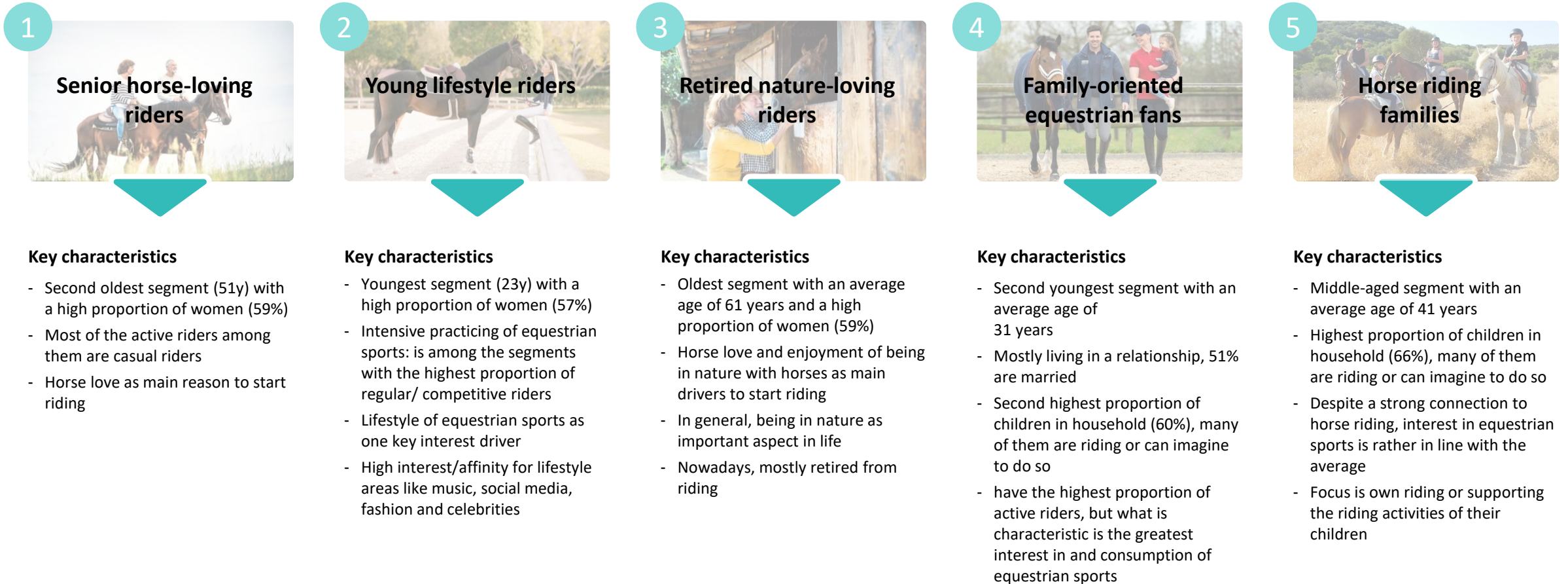
Luxury accessories	1.45x
Insurance	1.30x
Car	1.22x

1.23x higher



The results of a cluster analysis show that those interested in equestrian sports can be divided into five different segments

Exploring and understanding the equestrian target groups



The five equestrian target group segments differ in the extent they consume and practice equestrian sports

Development status of the equestrian target groups

	EQUESTRIAN INTERESTED (TOP-3-BOX)	SENIOR HORSE-LOVING RIDERS	YOUNG LIFESTYLE RIDERS	RETIRED NATURE-LOVING RIDERS	FAMILY-ORIENTED EQUESTRIAN FANS	HORSE RIDING FAMILIES
CONSUMPTION OF EQUESTRIAN SPORTS						
Following (at least several times per month)	50%	45%	56%	35%	60%	51%
Watching (at least several times per month)	47%	42%	53%	31%	58%	49%
Attending (at least once a year)	38%	31%	47%	22%	46%	42%
PARTICIPATION OF EQUESTRIAN SPORTS						
Ridden a pony/horse or can imagine to do so	88%	87%	89%	84%	91%	90%
Ridden a pony/horse	75%	75%	74%	73%	77%	76%
Casual Rider	21%	22%	18%	16%	23%	25%
Leisure Rider	17%	15%	21%	7%	21%	18%
Competitive Rider	4%	1%	7%	0%	8%	5%
Retired	33%	37%	27%	50%	26%	28%

Data-based recommendations can be derived to increase interest, consumption and practicing of equestrian sports

Overview first outline of directions for the equestrian fan development



INTEREST

Promote riding as mass sports

Personal experience and enjoyment of riding have the greatest influence on interest in and consumption of equestrian sports

Highlight sportive quality and performance of riders & horses

The fascination for equestrian sports is based on the high quality of the sport and the special performance of riders and horses

Expand equestrian lifestyle to a greater extent

Lifestyle aspect of equestrian sports is an important interest driver and should be further expanded and individually adapted to the target group segments



FOLLOWING

Design target group specific equestrian & horse content

Expand content offer around topics that generate a high interest across all target group segments and design target group-specific content that arouses particular interest of individual target groups segments

Build new theme worlds that match interests of target groups

Equestrian target group segments have a wide range of interests. To play a greater role in the lives of the identified target groups, new, exciting offers can be created by tapping into fields of interest

Play your content where your target groups are

All target group segments can be reached very well, especially via social media



WATCHING

Put the focus on riders & horses

Interest in riders and horses is a main factor that drives watching of equestrian sports. To increase the awareness of riders and horses and to emphasize what makes them special should be an important future element

Make special performance of riders and horses more visible

Broadcasting of equestrian events should embrace the opportunities to make the special performance more visible for the audience

Reduce barriers to watch equestrian sports

Increase media presence, inform the target groups where and when they can watch equestrian sports and offer good access options to watch the events



ATTENDING

Reinforce the social aspect of equestrian sports events

The social aspect is an important element for attending equestrian sports events. Therefore, it should be further strengthened and tailored to the needs of the target groups

Put the focus on riders & horses

Riders & horses should be even more in the center of equestrian sports events and one should create ways for the audience to get closer to riders & horses they are interested in

Reduce barriers to attend equestrian events

Inform where and when to attend events and especially convince those who had not attend events yet with attractive offers, connect those who not want to attend alone



PRACTICING

Utilize the strongest motives to start riding

Strongest motivations to start riding are love of horses and enjoyment of being in nature with horses. This motives should be further strengthened in the future to excite more people to start riding

Help riders to develop their skills and compete in a playful way

Future measures that help riders to improve their skills and to compete in a playful way, should positively contribute to the support of riding

Reduce barriers to practice equestrian events

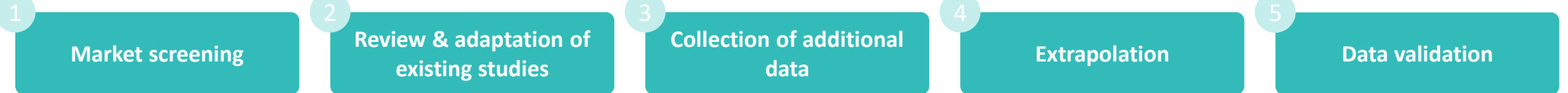
Create cost-effective offers for beginners, find ways to make riding less time-consuming, build connections between riders and those who are interested to start

Economic Impact Analysis



We calculate the global economic impact of equestrian sports in a five-step approach

Approach



1
Market screening

Search existing studies about the economic impact of equestrian sports and collect additional helpful data for characterizing equestrian markets

2
Review & adaptation of existing studies

Examine the comparability of economic impact studies (e.g., methodology, value chains)

Exclude areas that cannot be assigned to equestrian sports (e.g. horse racing or betting) and align economic impact studies

Extrapolate the economic impact of equestrian sports to present times (e.g., significant development changes, inflation)

3
Collection of additional data

Collect additional data that can be used for the extrapolation of the size of an equestrian sports market – for example, socio-economic factors or key metrics that characterize the equestrian sports market like horse population, number of equestrian riders, number of equestrian fans etc.

4
Extrapolation

Predict data for countries where no economic impact information is available in order to scale the global economic impact of the equestrian sports

5
Data validation

Test the extrapolation through plausibility checks and a comparison of country results with each other and with existing findings on the economic importance of countries

The calculation of the global impact of equestrian sports is based on three main data sources

Data basis



DESK RESEARCH

Desk research to find all existing studies about the economic impact of equestrian sports and collect additional helpful data for characterizing equestrian markets



NATIONAL FEDERATION SURVEY

Survey among National Federations to gather information about the economic impact of the equestrian industry and to win further knowledge about key characteristics of the equestrian market in the member countries of FEI

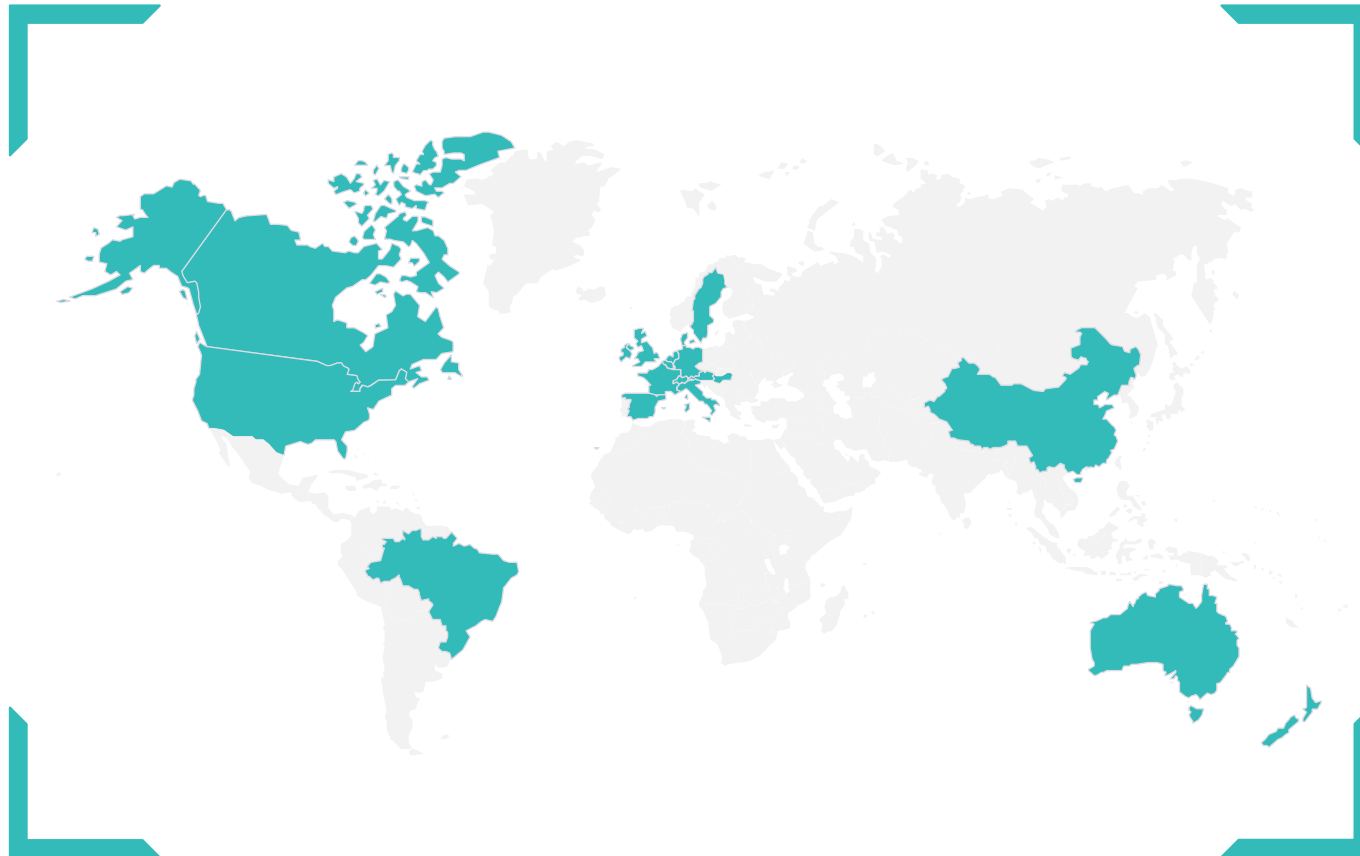


MARKET RESEARCH

Survey data of a custom research study for FEI in the equestrian selected markets (BEL, FRA, GER, IRE, NED, SWE, UK, USA) and access to Nielsen's global fan study 'Nielsen Fan Insights'

In total, information on the economic impact of equestrian sports was found in 19 markets

Overview of markets with economic impact data



- Australia
- Austria
- Belgium
- Brazil
- Canada
- China
- Denmark
- France
- Germany
- Hungary
- Ireland
- Italy
- Netherlands
- New Zealand
- Spain
- Sweden
- Switzerland
- UK
- USA

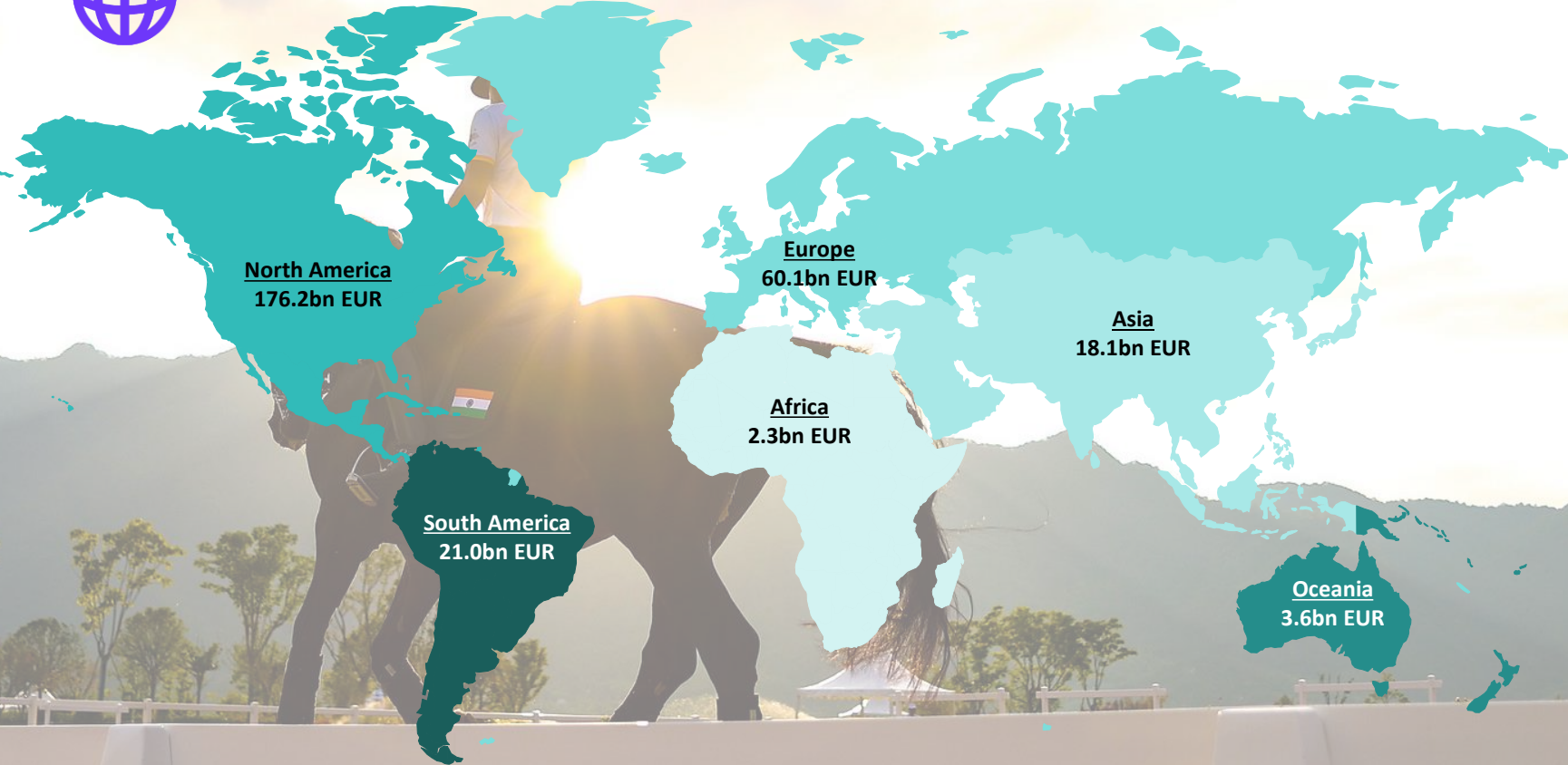


This means that **15** countries out of the 30 most economically powerful countries in the world (by GDP) are covered by the results of the desk research. The economies of these countries represent 66% of the global GDP.

Equestrian sport has an economic impact – without horse racing and betting – of EUR 281bn or USD 302bn worldwide

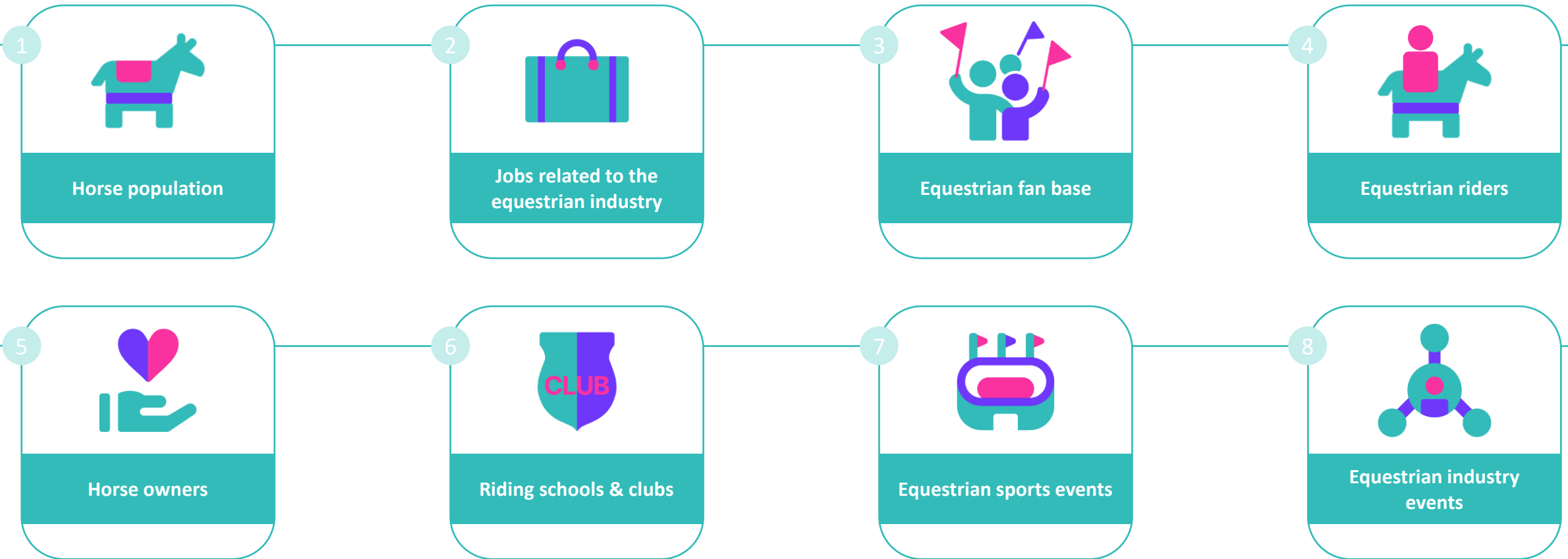
Global economic impact of equestrian sports

EUR 281.4bn
of global economic impact
per year



8 key characteristics of the global equestrian market are considered when analyzing the impact of the equestrian sports

Overview key characteristics of the global equestrian market



There are 60.5 million horses worldwide – the largest horse populations are in North America and Asia

Global horse population



60.5M

Global horse population

Africa
7.5M horses
12% of total population

Asia
14.6M horses
24% of total population

Europe
9.2M horses
15% of total population

North America
16.3M horses
27% of total population

South America
12.5M horses
21% of total population

Oceania
0.6M horses
1% of total population

Main Sources: Nielsen Sports Desk Research , FEI National Federation Survey 2023, FAOSTAT

Nielsen Sports | Global Equestrian Economic Impact Analysis | December 2023

Worldwide there are more than 4.2 million jobs related to the equestrian industry

Jobs related to the equestrian industry



4.2M +

jobs related to the equestrian industry
worldwide*

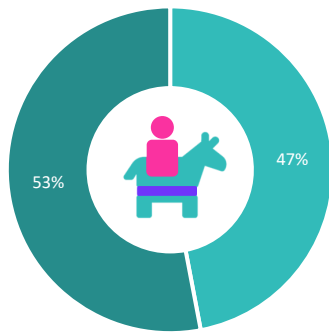
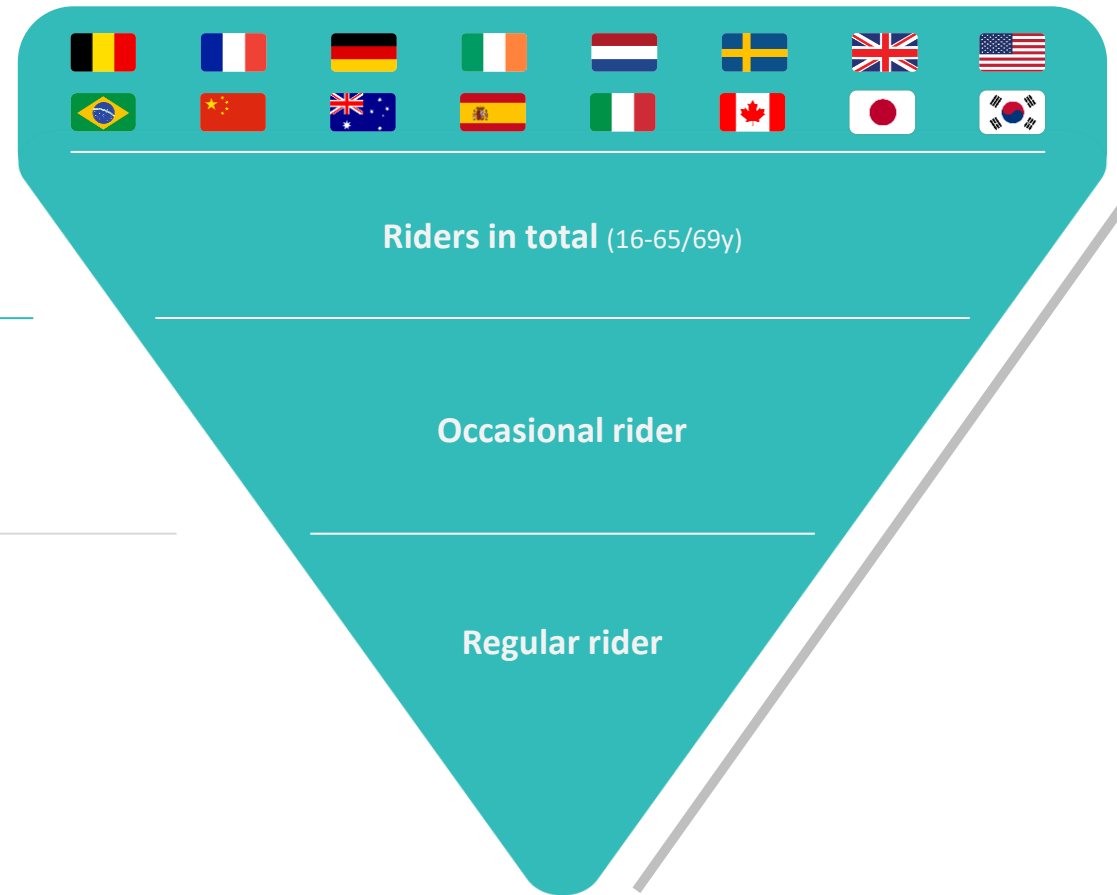


Main Sources: Nielsen Sports Desk Research , FEI National Federation Survey 2023 | * includes data for 41 countries worldwide

Nielsen Sports | Global Equestrian Economic Impact Analysis | December 2023

Across 16 global countries, there are 335M people who at least occasionally ride

Equestrian riders



Sources: Custom Research Study FEI 09/2023 & Nielsen Sports Fan Insights, 2022-2023

* Occasional rider is someone who rides only randomly when he/she has the time, for example on holidays | Regular rider is a competitive rider (regularly participating in local, regional, national, or international events) or a leisure rider (on average riding a couple of times per week or month)

Nielsen Sports | Global Equestrian Economic Impact Analysis | December 2023

There are more than 44 thousand riding schools and riding clubs worldwide

Riding schools and clubs



44k +

equestrian riding schools and clubs
worldwide*

Main Sources: Nielsen Sports Desk Research , FEI National Federation Survey 2023 | * includes data for 79 countries worldwide

Nielsen Sports | Global Equestrian Economic Impact Analysis | December 2023

More than 42 thousand equestrian sports events are held worldwide every year

Equestrian sports events



43k +



(regional/national/international)
equestrian sports events worldwide per
year* (56%/34%/10%)

31M +



attendees at equestrian sports events
worldwide per year**

Main Sources: Nielsen Sports Desk Research , FEI National Federation Survey 2023 | * includes data for 80 countries worldwide | ** includes data for 47 countries worldwide

Nielsen Sports | Global Equestrian Economic Impact Analysis | December 2023

To get a more comprehensive overview of the Global Fan Base, Nielsen Fan Insights study was conducted in 30 markets

NIELSEN FAN INSIGHTS

UNIVERSE

Nationally representative or urban (in some countries) population aged 16-69y

SAMPLE SIZE

- 1,000 respondents per each country
- Representative sample according age, gender and region per country

METHOD

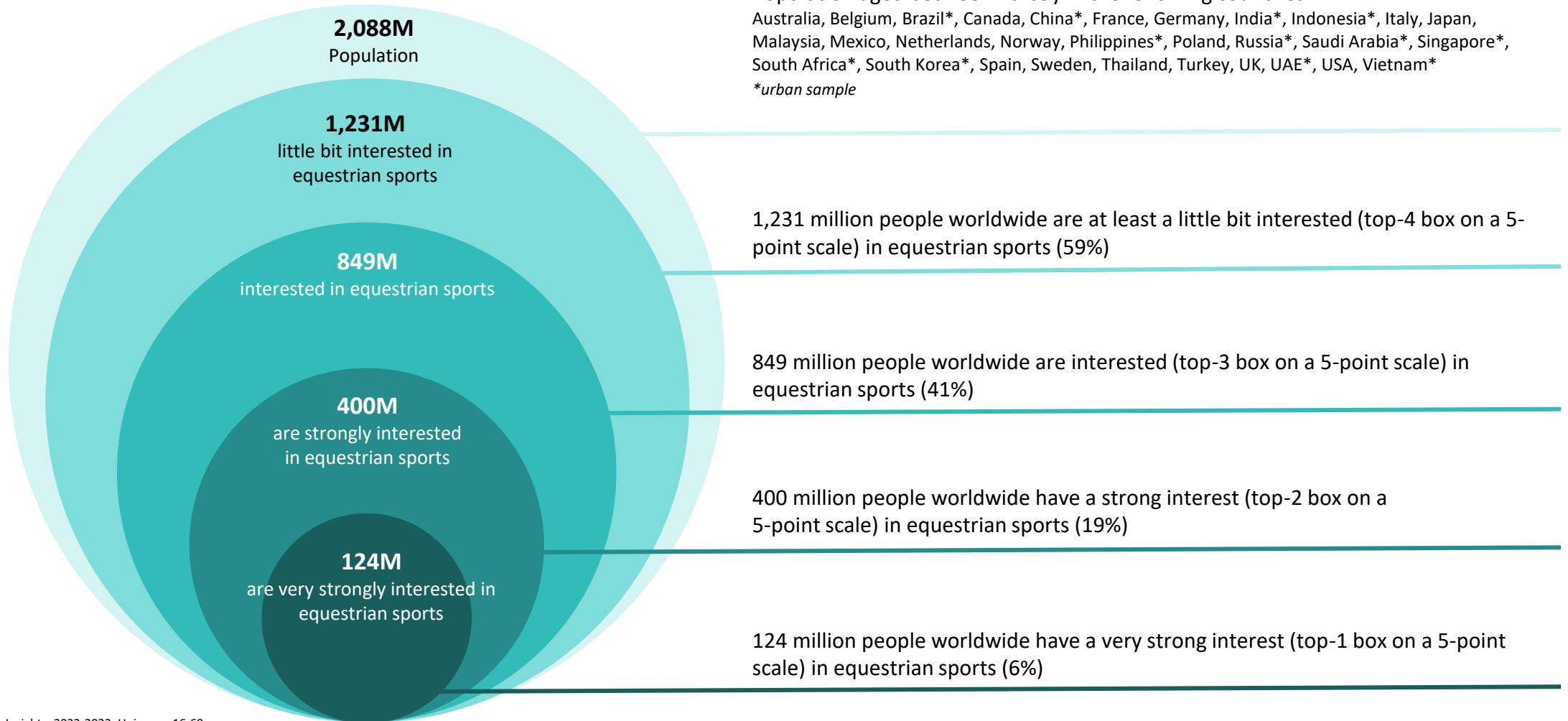
CAWI (Computer Aided Interview)

COUNTRIES

- FEI selected group: Belgium, France, Germany, Netherlands, Sweden, UK, USA
- FEI secondary group: Australia, Brazil, China, India, Italy, Japan, Mexico, Russia, Saudi Arabia, Spain, UAE
- Additional markets; Canada, Indonesia, Malaysia, Norway, Philippines, Poland, Singapore, South Africa, South Korea, Thailand, Turkey, Vietnam

The global sample from Nielsen Fan Insights shows 849 million interested in equestrian sports across the 30 analyzed countries

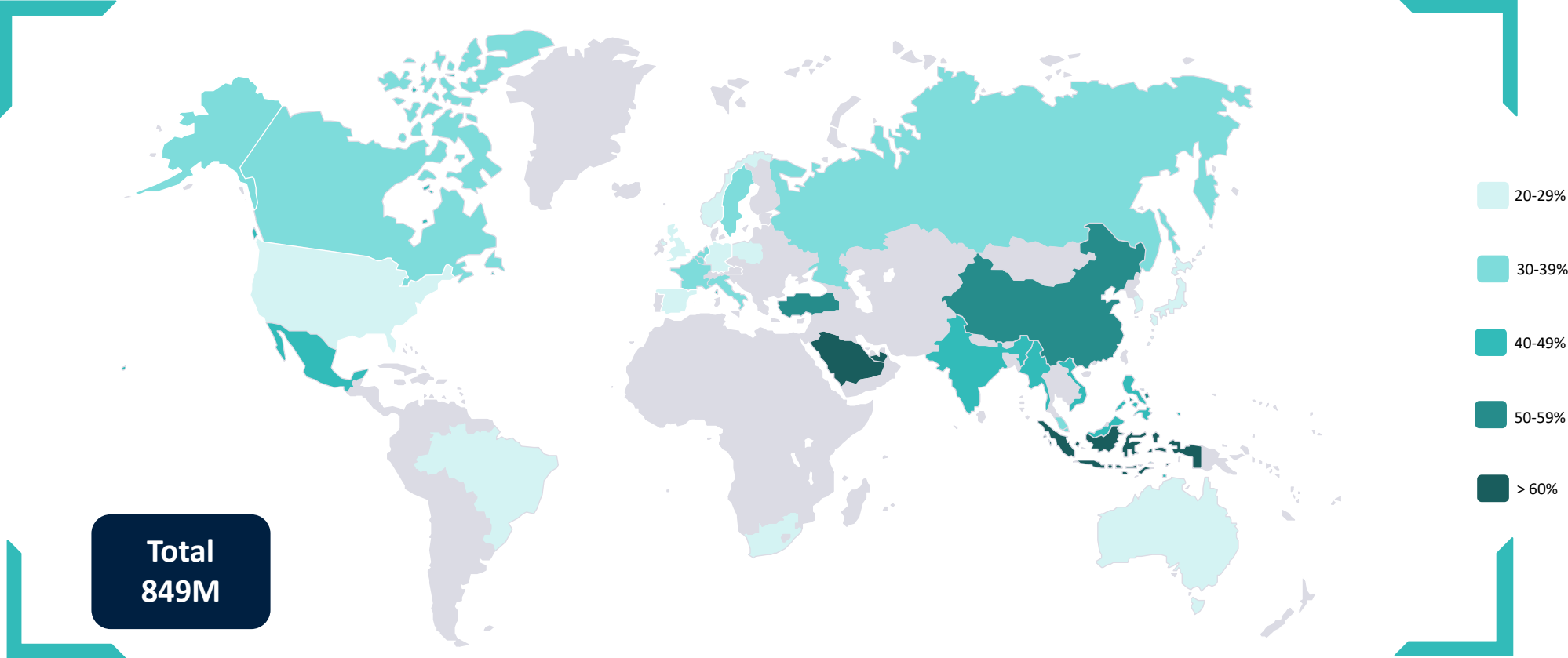
Global fanbase equestrian sports



Nielsen Sports Fan Insights, 2022-2023, Universe: 16-69 years
Nielsen Sports | Global Equestrian Research | November 2023

Particularly high interest in equestrian sports is in Middle East and Asia

Top-3-box interest in equestrian sports

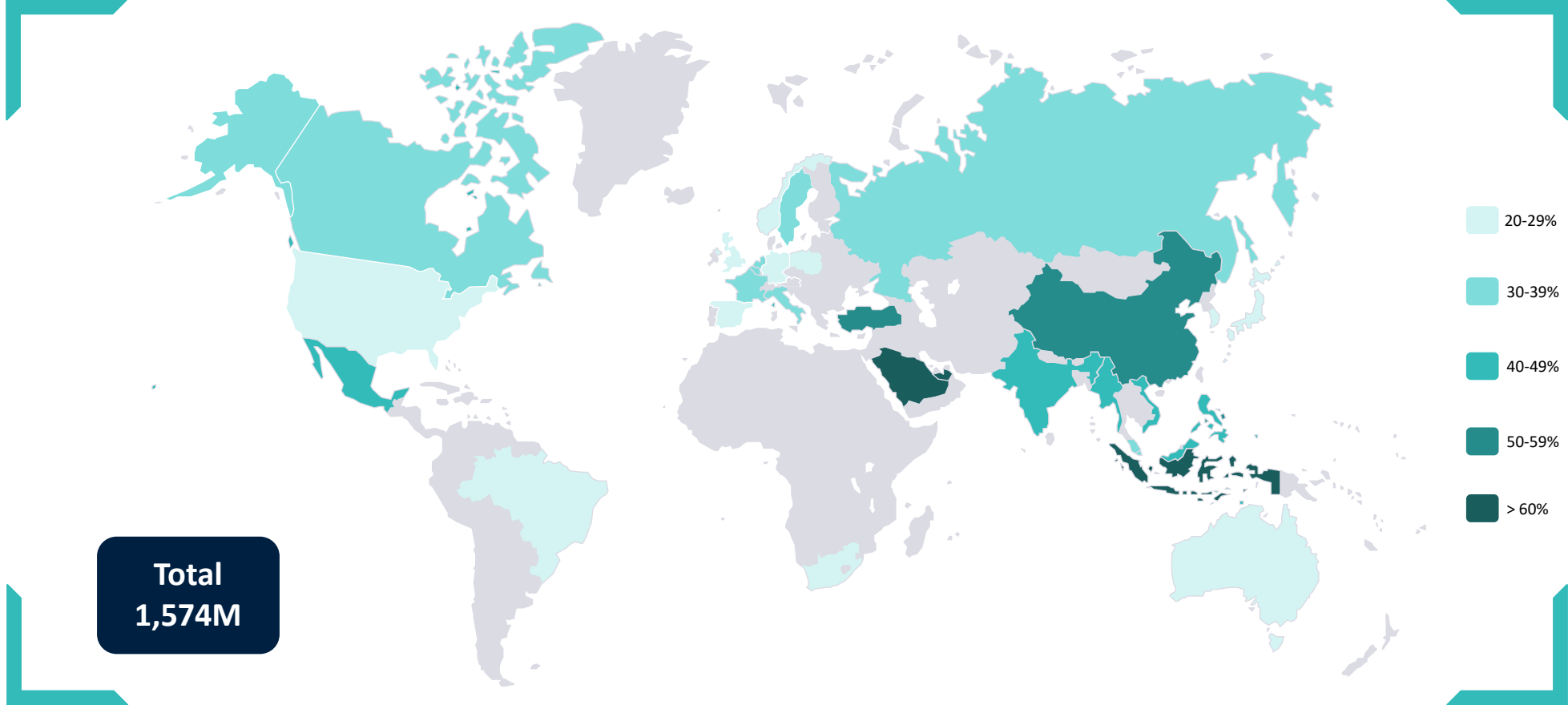


Nielsen Sports Fan Insights, 2022-2023, Universe: 16-69 years
Interest in equestrian measured on a 5-point-likert-scale, 1 = not interested at all – 5 = very interested
Urban sample for the following countries: Brazil, China; India, Indonesia, Philippines, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Turkey, United Arab Emirates, Vietnam

Extrapolated to the total population (16-69y), there is a global fanbase of over 1.5 billion people interested in equestrian sports

Extrapolation equestrian fan potential (top-3-box interest)

Extrapolation of urban samples to the total population aged 16-69y

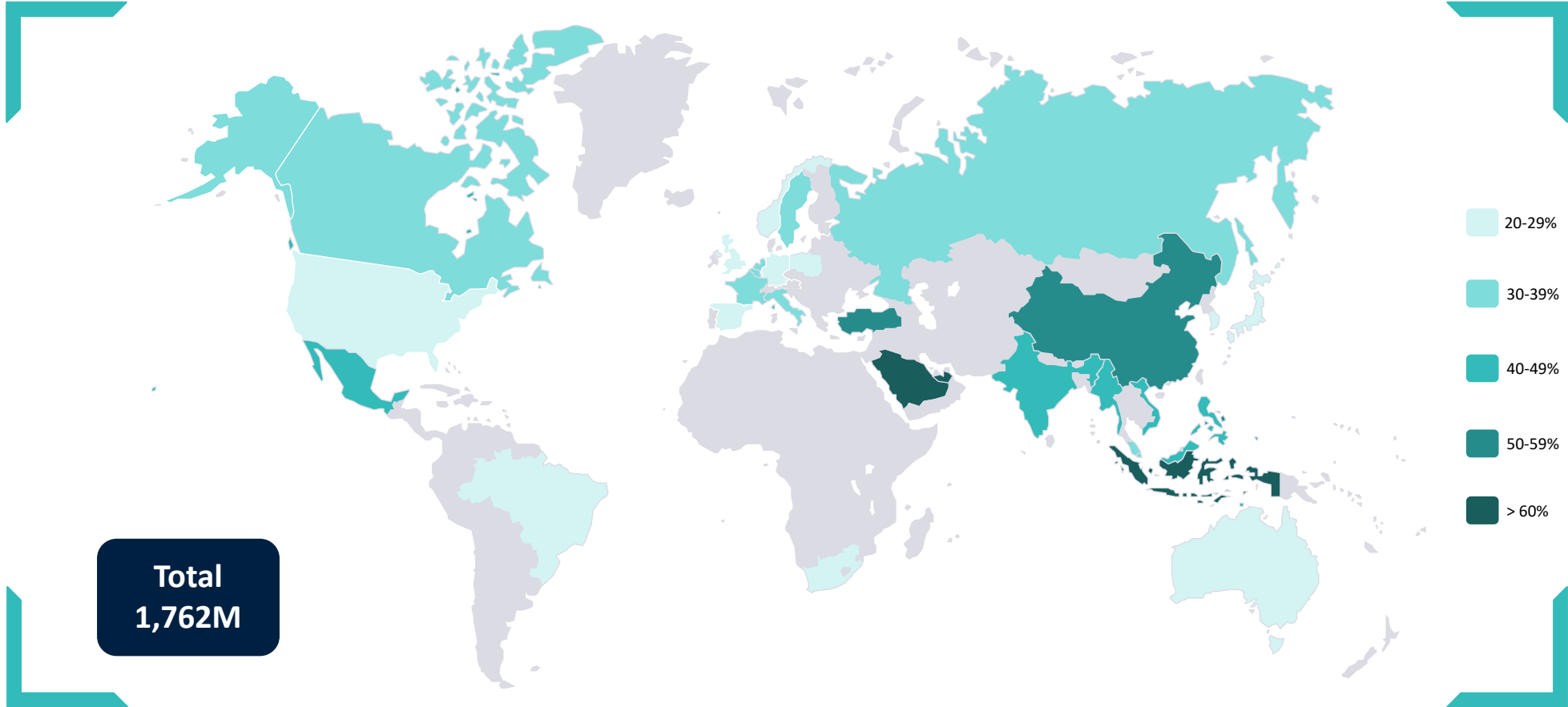


Nielsen Sports Fan Insights, 2022-2023, Universe: 16-69 years
Interest in equestrian measured on a 5-point-likert-scale, 1 = not interested at all – 5 = very interested
Urban samples extrapolated to the total population aged 16-69y for the following countries: Brazil, China; India, Indonesia, Philippines, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Turkey, United Arab Emirates, Vietnam
Nielsen Sports | Global Equestrian Research | November 2023

Extrapolated to the population of 10-69y, there is a global fanbase of over 1.7 billion people interested in equestrian sports

Extrapolation equestrian fan potential (top-3-box interest)

Extrapolation of urban samples to the total population aged 10-69y



Nielsen Sports Fan Insights, 2022-2023, Universe: 16-69 years
Interest in equestrian measured on a 5-point-likert-scale, 1 = not interested at all – 5 = very interested
Urban samples extrapolated to the total population aged 16-69y for the following countries: Brazil, China; India, Indonesia, Philippines, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Turkey, United Arab Emirates, Vietnam
Nielsen Sports | Global Equestrian Research | November 2023

Custom Researched Markets Perspectives



A customized market research was carried out in eight selected markets of equestrian sports



CUSTOM RESEARCH STUDY

UNIVERSE

- Nationally representative population aged 16-65y
- Subsample of at least a little interested in equestrian sports

SAMPLE SIZE

- 1,000 national representative respondents per country (age, gender and region)
- Boost on a number of 500 equestrian interested respondents per country

METHOD

CAWI (Computer Aided Interview)

Customized questionnaire designed together by the FEI, Nielsen and independent consultant

FIELDWORK

September 2023

COUNTRIES

Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA

The typical equestrian interested respondent is predominantly female and enjoys a higher education and income



Profile:
Equestrian interested

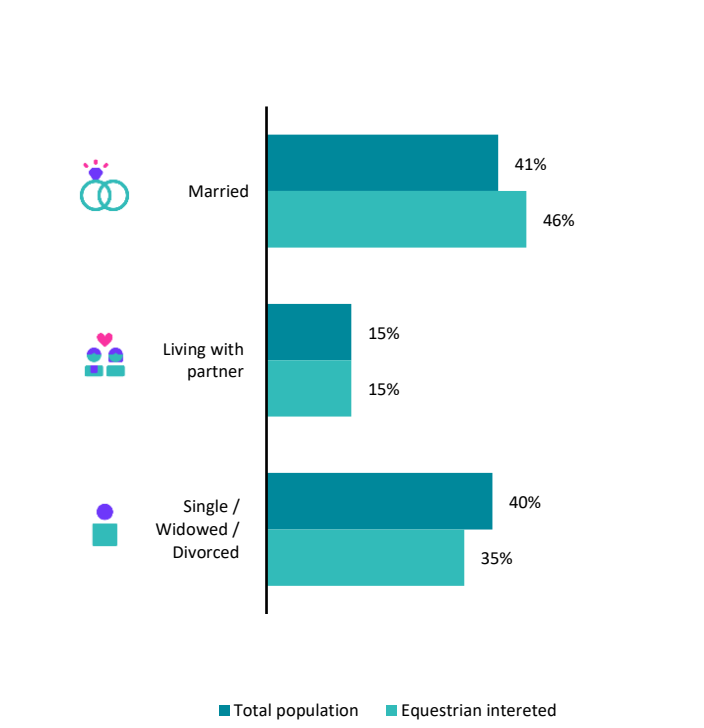
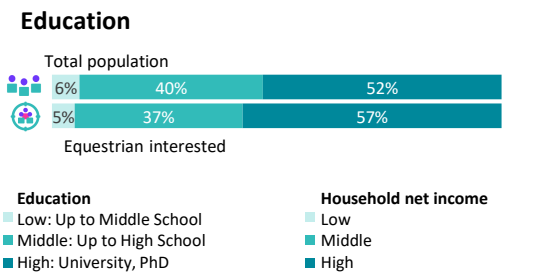
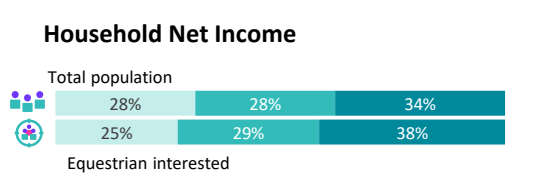
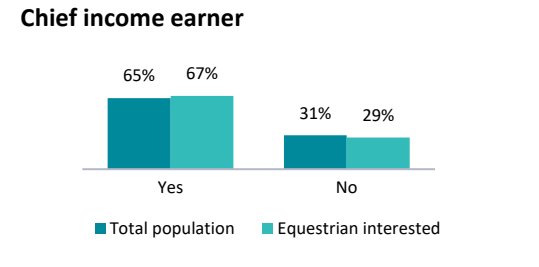
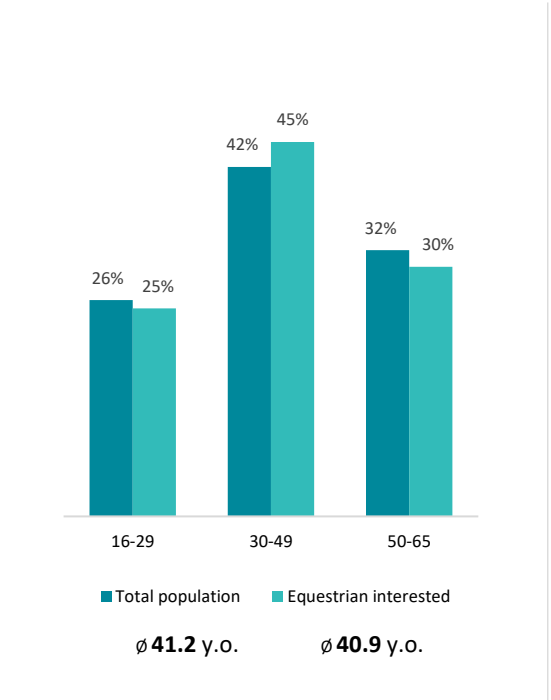
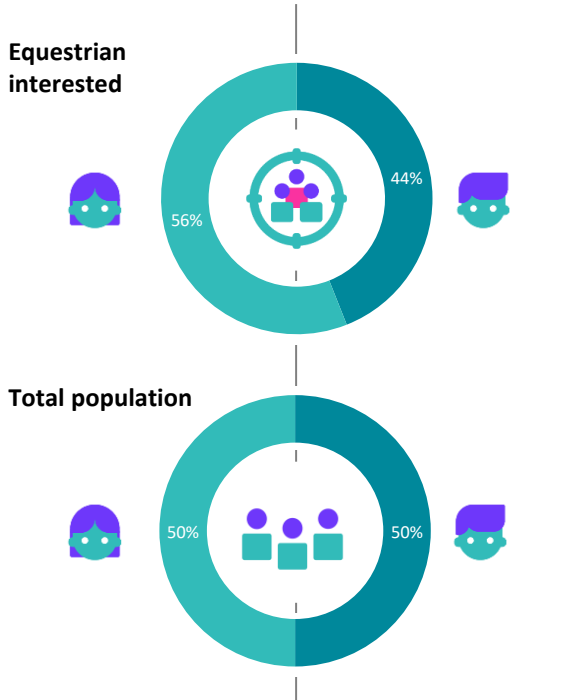


Population
104M



Question: Please tell us how interested you are in each of the following sports?
Target group: Equestrian interested respondents (top-3)

GENDER **AGE** **EDUCATION & INCOME** **FAMILY STATUS**



Global Equestrian Research, September 2023
Nielsen Sports | Global Equestrian Research | November 2023



Very attractive target group for brands due to their high interest in different branches and their very good reception for sponsorship



Profile:
Equestrian interested



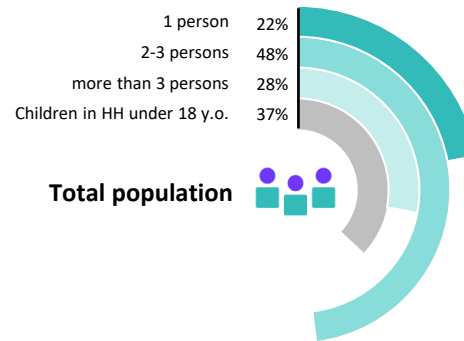
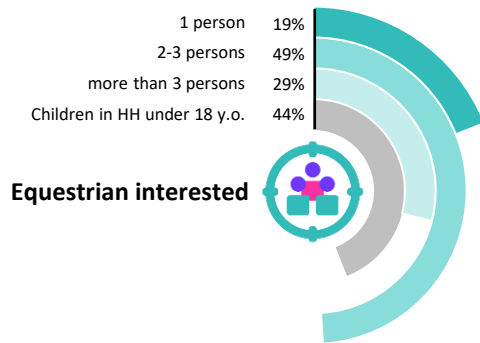
Population
104M



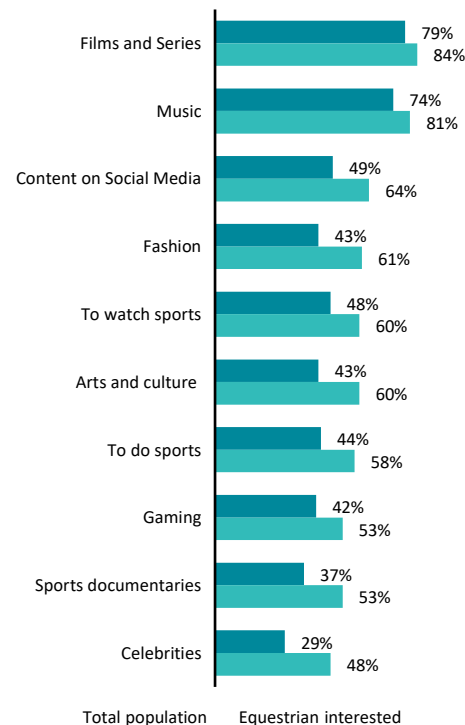
Question: Please tell us how interested you are in each of the following sports?

Target group: Equestrian interested respondents (top-3)

HOUSEHOLD SIZE & CHILDREN



INTERESTS



Top-5 branches



- 80%** Food products
- 75%** Fashion / Clothing / Shoes
- 74%** Travel / Holiday / Vacation services
- 73%** Consumer electronics
- 72%** Online shopping (E-Commerce)

Interest Score*: **Ø 59% vs. 50%**

Highest affinities compared to total population

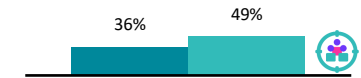
Index (interest level equestrian interested vs. total population)

- 162%** Private aviation
- 145%** Sports betting
- 141%** Animal feed and accessories
- 140%** Tires
- 135%** Sports equipment
- 133%** Luxury accessories

* Mean value across all 23 analyzed categories shows that equestrian interested people have a higher interest in the observed branches

SPONSORSHIP AFFINITY

I'm more likely to remember a company's name if it's sponsoring something I'm interested in than if it's a classical advertisement



I actively inform myself about brands that are involved as sponsors in my areas of interest



A company that is involved as a sponsor in my areas of interest is in general more appealing to me



I would choose a sponsor's product rather than rival brands if price and quality were the same

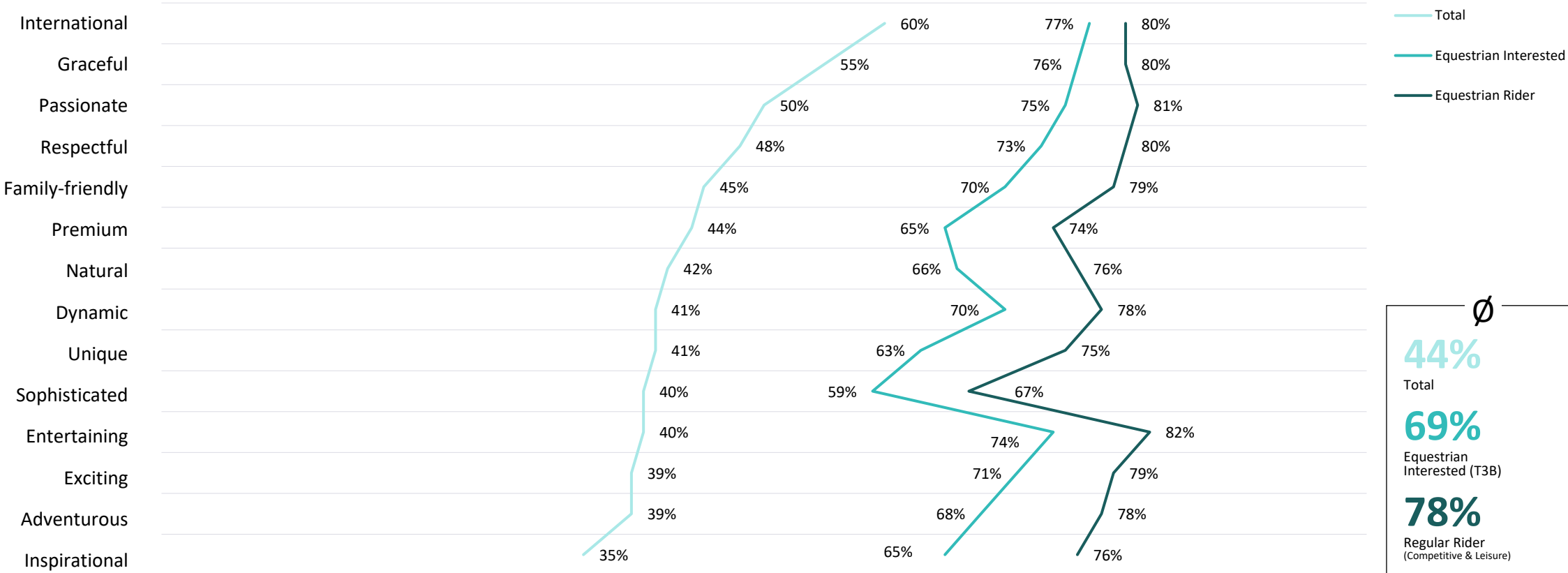


Top-2-box

Equestrian sports stands for the attributes international, graceful and passionate – high involvement groups perceive it as entertaining

Image of equestrian sports

Image top-2-box

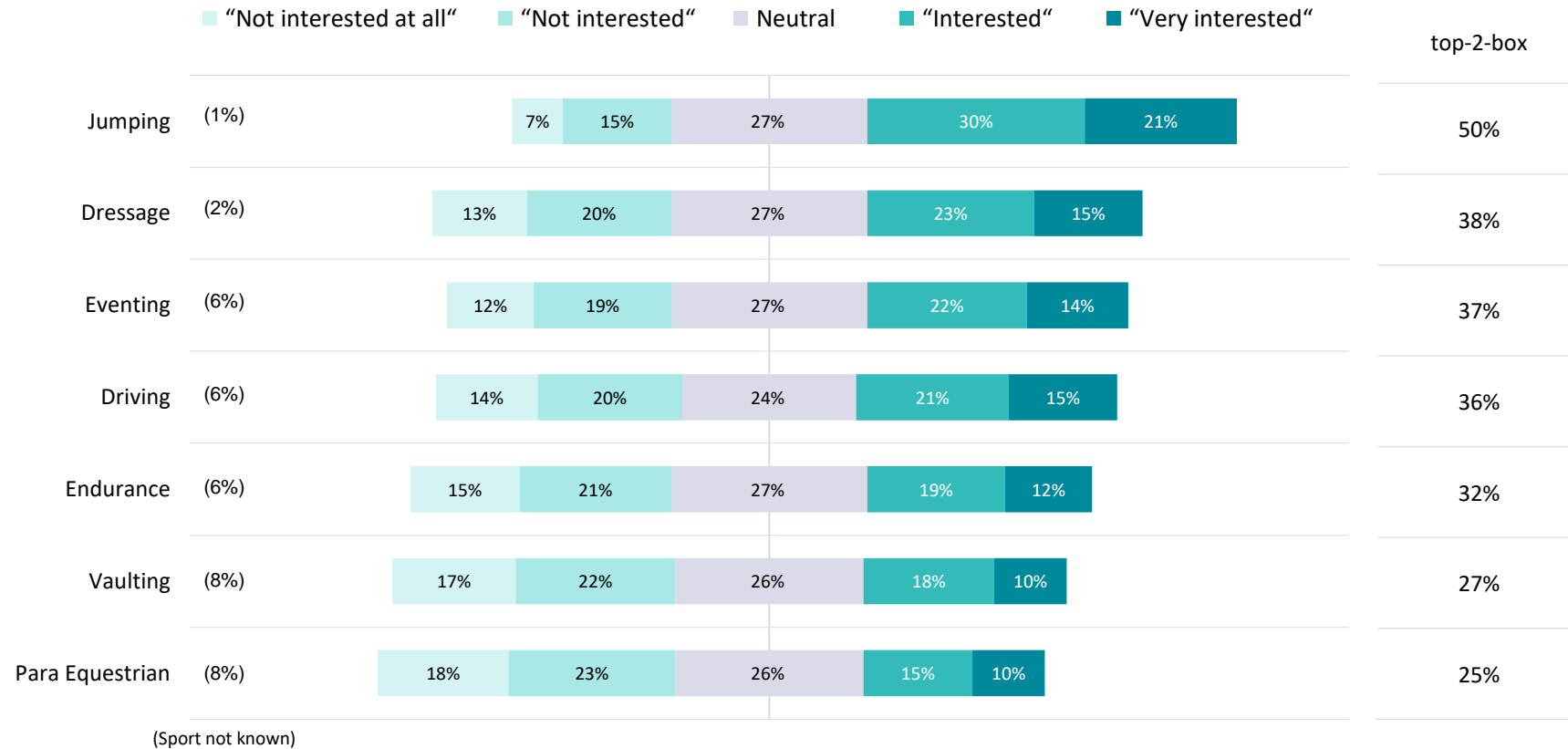


Global Equestrian Research, September 2023
 Countries: Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA
 Base: Total = national representative sample, 1,000 respondents per market; equestrian interested (top-3-box) in national representative and boost sample (n=4,000), regular rider in national representative and boost sample (n=936)
 Question: How appropriate are the following attributes to the sport equestrian in general? Please rate your answer on a scale from 1 = "Is not appropriate at all" to 5 = "Entirely appropriate".



Jumping is the equestrian discipline with the highest interest ahead of dressage and eventing

Interest in equestrian disciplines among respondents with at least a little interest in equestrian sports



Global Equestrian Research, September 2023

Countries: Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA

Base: Respondents with at least a little interest in equestrian sports (n=3,484)

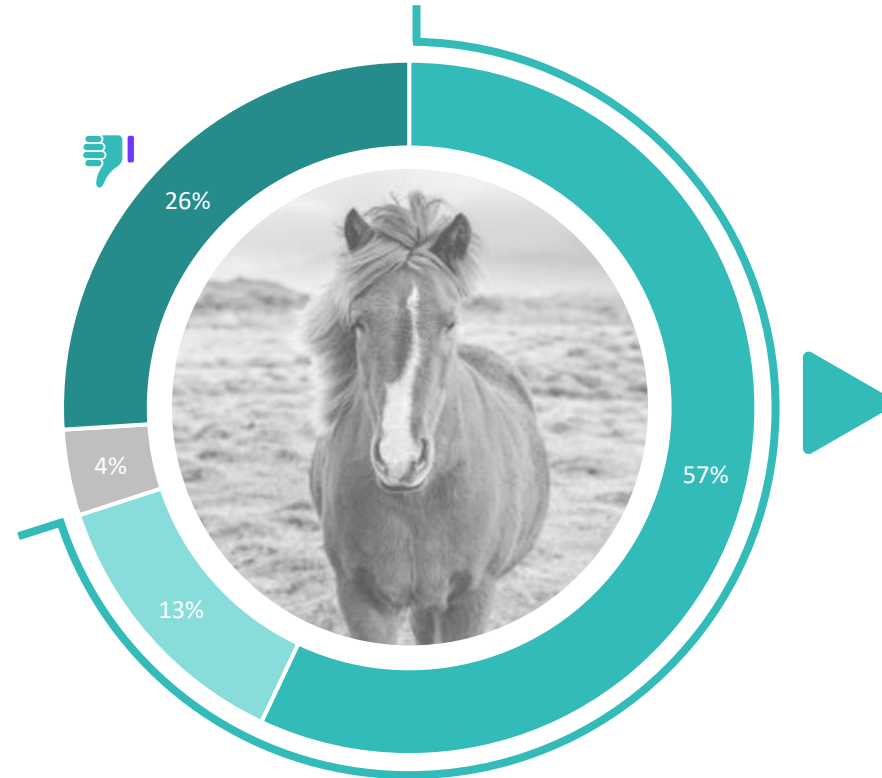
Question: You are at least a little bit interested in equestrian sports. We would like to find out how interested you are in each equestrian discipline. Please indicate how strong your interest is in the listed equestrian disciplines, by using the listed scale from 1 = "Not interested at all" to 5 = "Very interested".


Nielsen Sports | Global Equestrian Research | November 2023

Across the 8 analyzed markets, 70% of the respondents already have ridden a pony/horse or at least can imagine to do so

Trial horse riding

- Yes, I have ridden a pony/horse
- No, I haven't ridden a pony/horse, but can imagine trying
- No, I haven't ridden a pony/horse and can't imagine trying
- No answer/Don't know



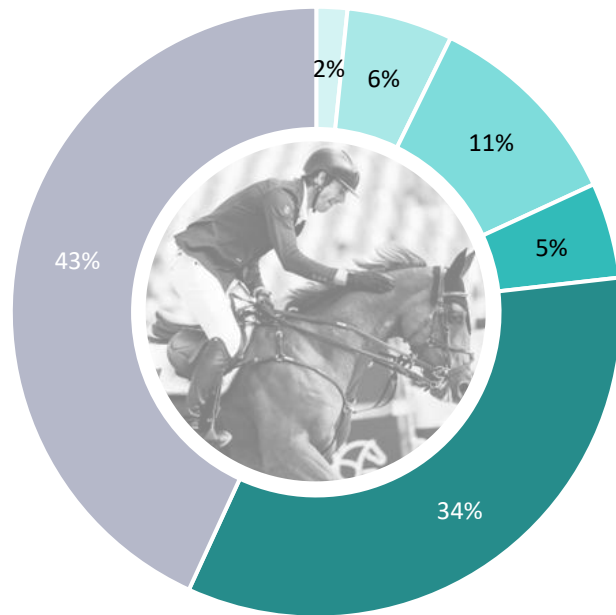
70% 
have ridden a pony/horse or can
imagine trying to do so

Global Equestrian Research, September 2023
Countries: Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA
Base: National representative sample, 1,000 respondents per market, n=8,000
Question: Have you ever ridden a pony/horse? / Can you imagine trying pony/horse riding?

Nielsen Sports | Global Equestrian Research | November 2023

Almost a fifth of the respondents (18%) rides at least occasionally when there is time, for example on holidays

Type of rider by gender and age



- **Competitive rider**
(regularly participating in local, regional, national, or international events)
- **Leisure rider**
(on average riding a couple of times per month)
- **Casual rider**
(riding only randomly when I have the time, for example on holidays)
- **Semi retired rider**
(not riding anymore but still spending time for riding/horse related activities)
- **Retired rider**
(not riding anymore and not spending any time for riding/horse related activities)
- **I have never ridden**

	Male n=3,972	Female n=4,028	16-29y n=2,101	30-49y n=3,346	50-65y n=2,553
Competitive rider	2%	1%	3%	2%	0%
Leisure rider	5%	6%	8%	7%	3%
Casual rider	10%	12%	11%	13%	7%
Semi retired rider	5%	5%	6%	5%	4%
Retired rider	29%	38%	29%	32%	40%
I have never ridden	49%	37%	43%	42%	46%

Global Equestrian Research, September 2023
 Countries: Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA
 Base: National representative sample, 1,000 respondents per market
 Question: Which of the following best describes your relationship with pony/horse riding?

Understanding the Equestrian Target Group

Results for Segmentation Groups





In a **four-step process** we will explore and understand the **equestrian target group** and outline first directions for further development

1) Segmentation

- Segmentation of people with (potential) interest in equestrian sports
- Performance of a cluster analysis that allows to reveal hidden structures among the group of people with (potential) interest in equestrian sports and identify distinguishing characteristics in order to segment in relevant equestrian target groups

2) Explore segments

- Exploration of the equestrian target groups resulting from the segmentation
- Comprehensive characterization leads to a clear picture of each equestrian target group segment

3) Understand segments

- Understand what drives and hinders each target group to consume (follow, watch, attend) and practice equestrian sports

4) Derive directions for the equestrian fan development

- First outline of directions to develop relevant equestrian target group segments

We concentrate on exploring, understanding and developing on the sample of those who have a general interest in equestrian sports

Segmentation process (1/2)

In a first step, the survey sample was divided into **two groups: respondents with a general interest in equestrian sports** (top-3-box on a 5-point scale) and **respondents who had little or no interest in equestrian sports** (bottom-2-box on a 5-point scale).

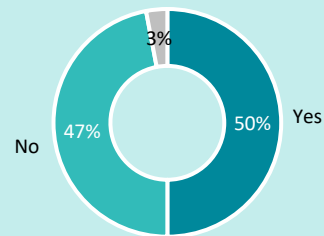
Based on the experience of previous, comparable projects, it has been shown that, as a first step, it is advisable to **concentrate on the sample of those interested in equestrian sports**. This sample represents 27.1% of the population aged between 16-65 years in the eight analyzed markets (Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA) and it offers already huge potential for the further fan development of equestrian sports.

Development potential among the group of equestrian interested (top-3-box)

Consume Equestrian Sports

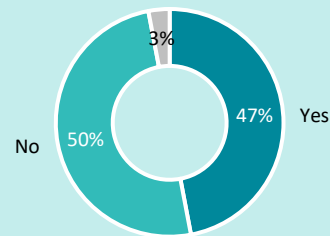
Following

Informing at least on a monthly basis about equestrian sports



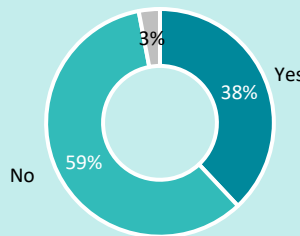
Watching

Watching equestrian sports at least on a monthly basis



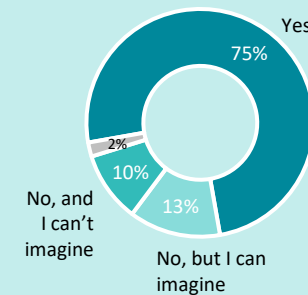
Attending

Attending equestrian sports events at least several times a year



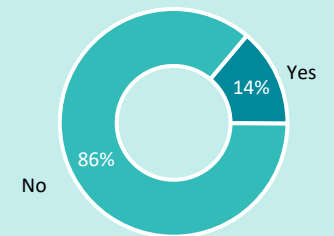
Practicing Equestrian Sports

Tried pony/ horse riding



Practicing equestrian sports

at least on a monthly base



Several potential segmentation solutions were explored before deciding for a solution consisting of five segments

Segmentation process (2/2)

To guarantee that the equestrian target group is clustered properly, Nielsen Sports conducted a **cluster analysis**. This multivariate statistical method ensures that all **hidden structures among the group of people with potential interest in equestrian sports will be revealed**. Furthermore, this exploratory data-mining approach will **identify the relevant distinguishing characteristic of the segments**.

1 Demographics

- Age
- Gender
- Family Status
- Household Size
- Children under 18y in household

2 Attitudinal Questions

- Interest in equestrian sports
- Drivers of interest in equestrian sports
- Interest in horses

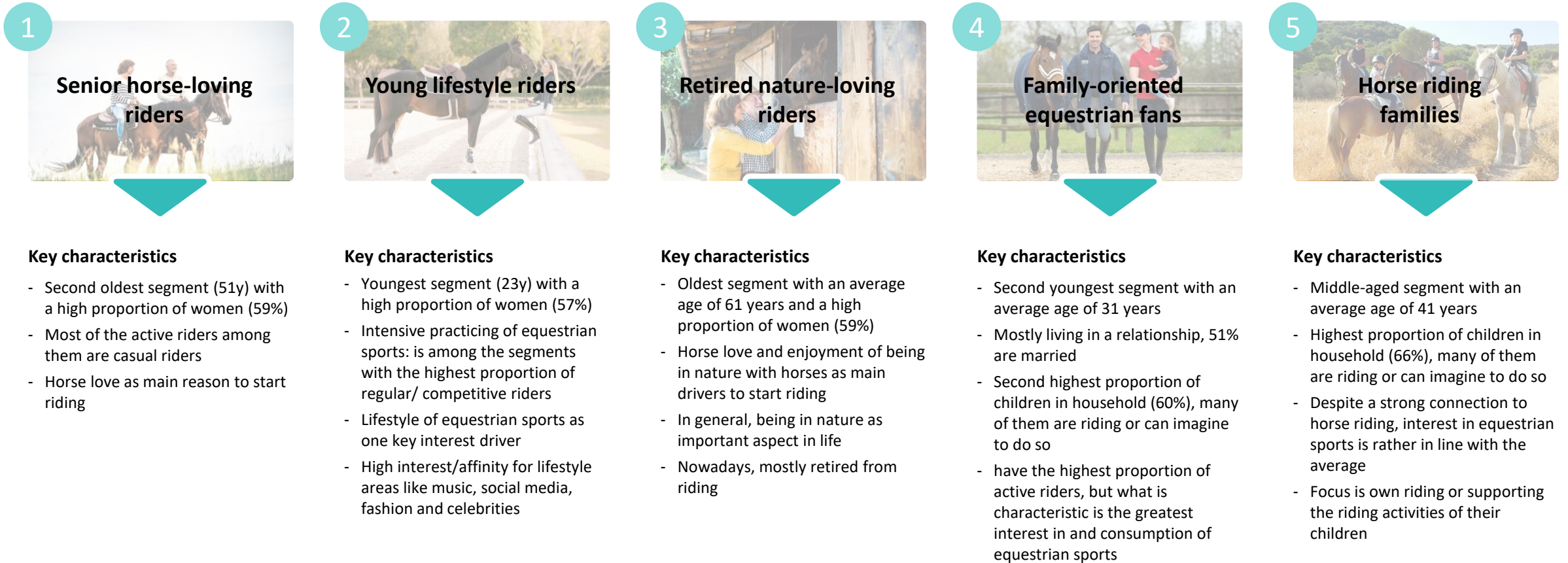
3 Behavioral Questions

- Practice of equestrian sports
- Horse ownership

Several potential segmentation solutions were explored before deciding for a **solution consisting of five segments** that led to the best statistical results and provides the required difference/mutual exclusivity between the segments

The five segments differ in terms of demographics, their consumption and practice of equestrian sports and underlying motivational drivers

Introducing the equestrian target group segments (1/3)



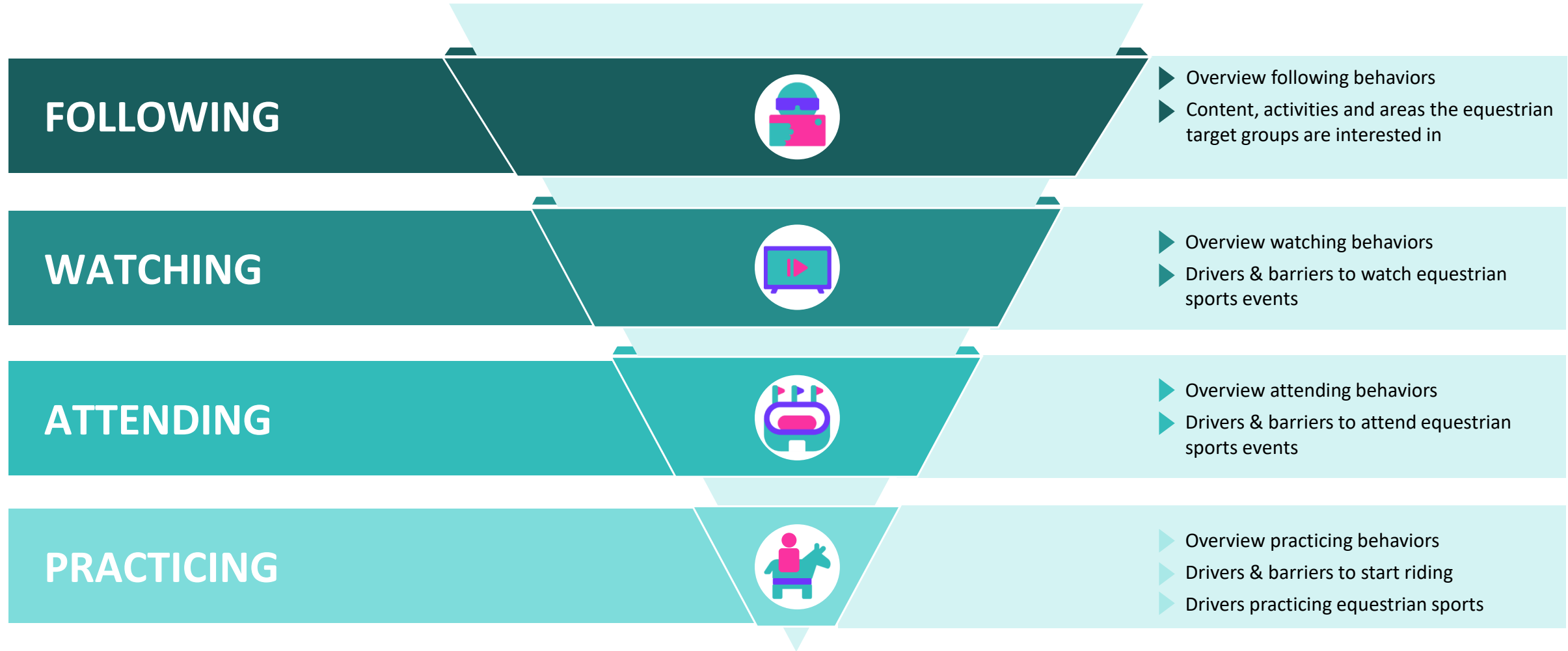
The five equestrian target group segments differ in the extent they consume and practice equestrian sports

Development status of the equestrian target groups

	EQUESTRIAN INTERESTED (TOP-3-BOX)	SENIOR HORSE-LOVING RIDERS	YOUNG LIFESTYLE RIDERS	RETIRED NATURE-LOVING RIDERS	FAMILY-ORIENTED EQUESTRIAN FANS	HORSE RIDING FAMILIES
CONSUMPTION OF EQUESTRIAN SPORTS						
Following (at least several times per month)	50%	45%	56%	35%	60%	51%
Watching (at least several times per month)	47%	42%	53%	31%	58%	49%
Attending (at least once a year)	38%	31%	47%	22%	46%	42%
PARTICIPATION OF EQUESTRIAN SPORTS						
Ridden a pony/horse or can imagine to do so	88%	87%	89%	84%	91%	90%
Ridden a pony/horse	75%	75%	74%	73%	77%	76%
Casual Rider	21%	22%	18%	16%	23%	25%
Leisure Rider	17%	15%	21%	7%	21%	18%
Competitive Rider	4%	1%	7%	0%	8%	5%
Retired	33%	37%	27%	50%	26%	28%

The following section contains all the important information along the fan development funnel

Consumption and practice of equestrian sports



In the following, data-based recommendations to increase interest, consumption and practicing of equestrian sports will be derived

Introduction to a first outline of directions for the equestrian fan development



INTEREST IN EQUESTRIAN SPORTS

What are the main drivers for increasing interest in equestrian sports? What measures can be derived to increase interest?



FOLLOWING OF EQUESTRIAN SPORTS

How can equestrian sports be followed more intensively and play an even greater role in the lives of the target group segments?



WATCHING OF EQUESTRIAN SPORTS

Which factors have a positive influence on viewing of equestrian sports? How can these factors be translated into measures?



ATTENDANCE OF EQUESTRIAN SPORTS EVENTS

What measures can make a positive contribution to ensuring that equestrian events meet the needs of the target group segments even better?



PRACTICE OF EQUESTRIAN SPORTS

What are the drivers and barriers to actively practice equestrian sports? What measures can be derived on this basis?

Data-based recommendations can be derived to increase interest, consumption and practicing of equestrian sports

Overview first outline of directions for the equestrian fan development



INTEREST

Promote riding as mass sports

Personal experience and enjoyment of riding have the greatest influence on interest in and consumption of equestrian sports

Highlight sportive quality and performance of riders & horses

The fascination for equestrian sports is based on the high quality of the sport and the special performance of riders and horses

Expand equestrian lifestyle to a greater extent

Lifestyle aspect of equestrian sports is an important interest driver and should be further expanded and individually adapted to the target group segments



FOLLOWING

Design target group specific equestrian & horse content

Expand content offer around topics that generate a high interest across all target group segments and design target group-specific content that arouses particular interest of individual target groups segments

Build new theme worlds that match interests of target groups

Equestrian target group segments have a wide range of interests. To play a greater role in the lives of the identified target groups, new, exciting offers can be created by tapping into fields of interest

Play your content where your target groups are

All target group segments can be reached very well, especially via social media



WATCHING

Put the focus on riders & horses

Interest in riders and horses is a main factor that drives watching of equestrian sports. To increase the awareness of riders and horses and to emphasize what makes them special should be an important future element

Make special performance of riders and horses more visible

Broadcasting of equestrian events should embrace the opportunities to make the special performance more visible for the audience

Reduce barriers to watch equestrian sports

Increase media presence, inform the target groups where and when they can watch equestrian sports and offer good access options to watch the events



ATTENDING

Reinforce the social aspect of equestrian sports events

The social aspect is an important element for attending equestrian sports events. Therefore, it should be further strengthened and tailored to the needs of the target groups

Put the focus on riders & horses

Riders & horses should be even more in the center of equestrian sports events and one should create ways for the audience to get closer to riders & horses they are interested in

Reduce barriers to attend equestrian events

Inform where and when to attend events and especially convince those who had not attend events yet with attractive offers, connect those who not want to attend alone



PRACTICING

Utilize the strongest motives to start riding

Strongest motivations to start riding are love of horses and enjoyment of being in nature with horses. This motives should be further strengthened in the future to excite more people to start riding

Help riders to develop their skills and compete in a playful way

Future measures that help riders to improve their skills and to compete in a playful way, should positively contribute to the support of riding

Reduce barriers to practice equestrian events

Create cost-effective offers for beginners, find ways to make riding less time-consuming, build connections between riders and those who are interested to start

Marketing Equestrian Sports



Equestrian has some very positive characteristics that can be used for successful marketing

Highlight Summary



1

Global Fanbase

Equestrian has a global fan base of approx. **1.5 billion people** (over 30 countries)



2

Strong Image

Equestrian has a very good image and stands in particular for being **international, graceful** and **passionate**.



3

Many Participants

In the equestrian's eight analyzed markets, **25% of the population** between 16-65y (94M) rides at least occasionally



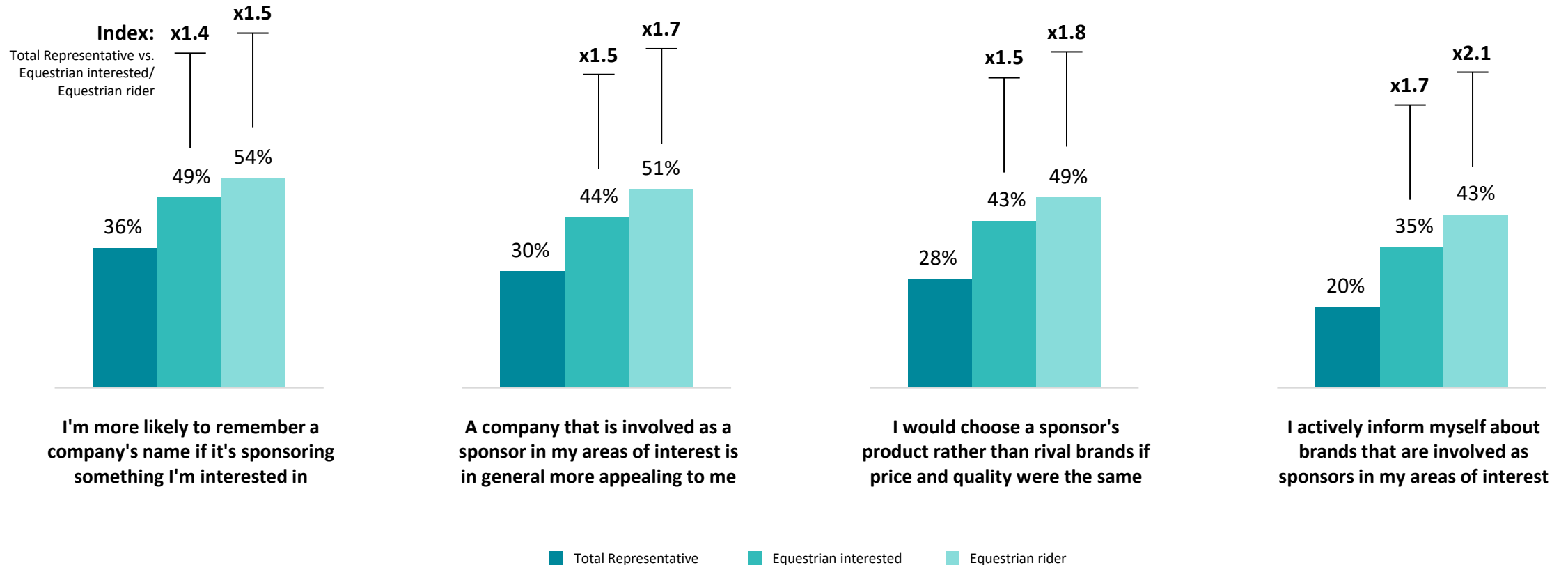
4

Attractive Target Group

Those interested in equestrian sports or equestrian riders enjoy a **higher education** and **income**. In addition, their **branch affinity** is 1.18/1.23 and their **sponsorship receptiveness** is 1.53/1.78 times higher compared to the general population.

Equestrian interested and equestrian rider have a much more positive attitude towards sponsorships than the total population

Brand effects of sport sponsorship

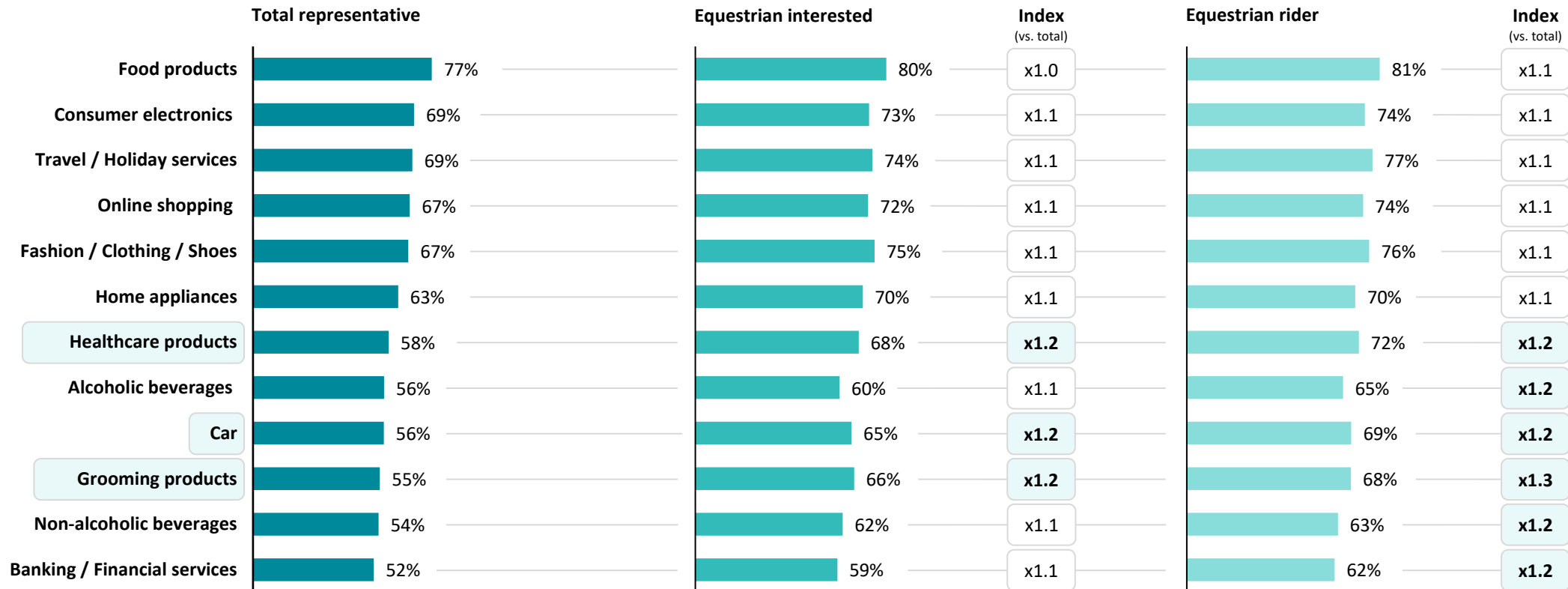


Global Equestrian Research, September 2023
 Countries: Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA
 Base: National representative sample, 1,000 respondents per market; equestrian interested n=2,166; equestrian rider n=2,170
 Question: To what extent do you agree with the following statements about sponsors?
 Scale: 5-point-likert-scale, 1 = not agree at all – 5 = totally agree

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Equestrian interested and riders have a higher interest than the general population for many branches – for example for healthcare ...

Branch Affinity (1/2)



Global Equestrian Research, September 2023

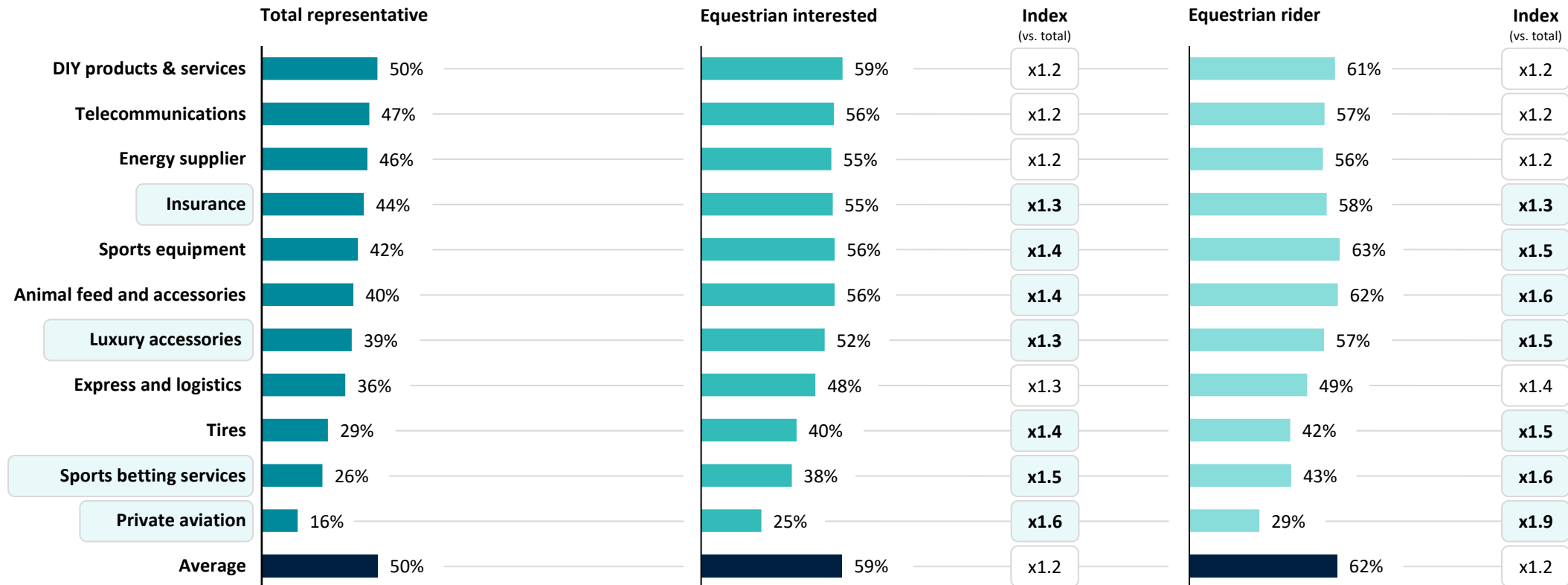
Countries: Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA

Base: Total = national representative sample, 1,000 respondents per market; equestrian interested (top-3-box) in national representative and boost sample (n=4,000), equestrian rider in national representative and boost sample (n=2,170)

Question: Are you interested in the products / services from any of the following categories? In other words, do you inform yourself about such products / services?

... and for insurance, animal feed, luxury accessories, tires, sports betting, and private aviation

Branch Affinity (2/2)



Global Equestrian Research, September 2023

Countries: Belgium, France, Germany, Ireland, Netherlands, Sweden, UK, USA

Base: Total = national representative sample, 1,000 respondents per market; equestrian interested (top-3-box) in national representative and boost sample (n=4,000), equestrian rider in national representative and boost sample (n=2,170)

Question: Are you interested in the products / services from any of the following categories? In other words, do you inform yourself about such products / services?

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