



## National Equestrian Survey 2006

### RESEARCH REPORT

COMMISSIONED BY:-

**British Equestrian Trade Association**

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## 1.0 INTRODUCTION

In 1995 British Equestrian Trade Association (BETA) conducted the first independent study of equestrianism in Great Britain, which was then updated and expanded upon in 1999. These reports determined the number of riders, horse owners and horses owned amongst the general public and also examined the professional sector in detail. In addition, information was gathered on areas such as riding habits, expenditure, equestrian publications and business characteristics.

BETA represents nearly 800 companies active in supplying goods or services to the equestrian community. Its membership comprises primarily retailers, manufacturers and wholesalers but also counts among its members businesses from the tourism, education, publishing, charity and insurance sectors. As well as providing a range of benefits to members typical of trade associations, BETA represents members' interests and lobbys on issues of importance to them and the environment in which they operate. BETA also actively promotes riding as a leisure activity

BETA recognise the importance of this research and so have opted to update the study, commissioning Swift Research to carry out the study. Our objectives were primarily to determine the number of riders/drivers of horses and ponies and to estimate the number of horses in Great Britain. As such, this study forms part 1 of a 2-part research project, with further research looking to determine the expenditure on equestrianism and delve further into the professional sector.

It was noted in the 1999 research report that equestrianism as an activity is difficult to measure accurately. These complications are still relevant and are repeated in brief here:

- Ø Equestrianism attracts a small proportion of the population who are spread throughout the country, meaning that those involved in the relevant activities are difficult to target.
- Ø People who ride, drive or are responsible for the daily upkeep of a horse or pony do not necessarily own the animals they use. In addition, some who own horses and ponies do not ride them. This makes the estimation of the number of horses in Great Britain difficult to measure.
- Ø Equestrian professionals often keep horses for a variety of reasons; riding schools, livery yards, training and breeding. Horses can be owned by the establishment and also kept on behalf of their owners.

**Note 1:** the word "riding" will be used to report on both riding and driving, unless otherwise stated.

**Note 2:** the word "horse(s)" will be used when referring to both horses and ponies, unless otherwise stated.



## 2.0 AIMS & OBJECTIVES

The primary objective of the research was to provide a snap shot of the current level of involvement in equestrian activities, in addition, to focus on horse owners and riders to investigate in more detail views and current practices of the equestrian population.

Findings of this research will be used to:

- Estimate the number of riders and drivers in the country and the number of horses.
- Establish a profile of riders.
- Estimate the number of households involved in equestrian activities.
- Establish barriers to riding/driving.

BETA will be using these findings in stage two of the research to build a picture of the nature of equestrianism in Great Britain and calculate the total contribution that the equestrian industry makes to the economy. With this data BETA and indeed the rest of the industry will be better able to lobby more effectively on issues of significance or at times of crises. In addition it provides an invaluable reference and resource to those considering venturing into business in the equestrian industry.

## 3.0 METHODOLOGY

An omnibus survey was chosen to carry out this piece of research as it is a cost effective way to target a large representative sample of the population. It was conducted on a weekly basis by telephone over a period of five weeks. This methodology was used as it ensured that respondents in more rural areas were contacted as well as those residing in urban areas.

A computer generated random digit telephone sample was used as it eliminated ex-directory bias. However, some bias will remain as an increasing number of people rely on mobile phones and are not contactable on land lines. Quotas (by sex, age, class and region) were set during interviewing to ensure that the sample was representative, whilst any sample profile imbalances were corrected at the analysis stage through weighting.

Approximately 1,000 interviews were conducted per week over five weeks to reach the total of 5,078 households; compared with a sample of 3,500 households in the 1999 study. The results from this round of research show that the number of riders has increased by around 44% on those reported in 1999. Whilst we believe that there has indeed been growth in the number of riders and horses since that time, the growth could also be partly attributed to the increased sample size and thus improved robustness of data.

The sample used for the research was representative of the GB population. Thus, we were able to use the response rates from our study and apply them to total GB household and population figures. In this way we were able to estimate the incidence of equestrian activities in the country. The figures for total GB households and total GB population were obtained via the Office of National Statistics; we took the total GB households to be 25.06m and the total population figures as 58.45m people for 2005.



#### 4.0 EXECUTIVE SUMMARY

A total of 5,078 interviews were conducted with members of the general public. The sample was representative of the GB population in terms of sex, age, social grade and the region in which they live.

The most popular equestrian activity was watching horse racing on TV, with 25% of households containing one person who had done this in the last 12 months. 18% of households contained at least one person who watched other equestrian events on TV.

11% of households questioned contained at least one person who had ridden in the last 12 months. If we take the total GB household figure to be 25.06m households as estimated by The Office of National Statistics, this 11% equates to 2.8m GB households where someone has ridden in the last year.

4.3m people have ridden in the last twelve months. The Office of National Statistics estimates GB population to be approximately 58.5m people. This would mean that 7% of total GB population is estimated to have ridden at least once in the last year.

49% of those riding in the last 12 months either ride or drive regularly (once a month or more), which equates to 2.1m people in GB. However, the vast majority of these people ride as there are **only** 11,000 people in GB who just drive a horse.

13% of households (3.3m GB households) contained at least one person had ridden a horse at one time but had since given up. Around one fifth of these (19%) said they had "lost interest or did not enjoy it". Other reasons included "haven't got the time" (13%), "too expensive" (12%) or "nowhere nearby to go horse riding" (10%).

Of the 3.3m households where someone has ridden regularly but has now stopped, 1.2m (35%) have someone who is interested in starting to ride again. The main reason why they had not taken up the activity again was "haven't got the time" (36%) followed by "too expensive" (21%) and "nowhere nearby to go horse riding" (10%).

19.3m GB households (77%) did not have anyone in their household that was currently riding or had ridden at some time in the past. These were asked why they have never ridden. The most frequent response (41%, or 8m households) was "no interest". Other responses included "never had the opportunity" (11%) and "too expensive" (11%).

1m GB households (4%) contain at least one person who is responsible for the daily upkeep of a horse, be that in a professional capacity or not. Of these, 721,500 were not professionally involved in the daily upkeep of the horse.

The 721,500 households with responsibility for the daily upkeep of a horse are responsible for 1.2m horses, an increase of 20% on 1999 figures.