



Participation in Equestrian Activities in Scotland

Scottish Equestrian Association
March 2009



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Background, Objectives and Methodology



Background

- » The Scottish Equestrian Association (SEA) can currently identify the profile of participants in equestrian activities amongst the UK population from a 2003 survey commissioned by BEF, DEFRA and Government.
- » The SEA now need to identify the profile specifically within Scotland; the existing report cannot be re-analysed by region, therefore this new survey has been commissioned.

Objectives

- » Identify, of those who take part in equestrian activities in Scotland, which types of equestrian activities are undertaken, how often, the profile of participants (age, gender etc) and associated equestrian expenditures.

Methodology

- » A survey questionnaire was designed in conjunction with the SEA to meet the research objectives.
- » An online version of the questionnaire was created for respondents to fill in via the SEA website and mailouts; completions were forwarded directly to Sports Marketing Surveys.

Research Details



- » **Research Focus:** Profile of participants in equestrian activities in Scotland

- » **Fieldwork:** Online Survey

- » **Sample:** Participants in equestrian activities in Scotland

- » **Base:** 617

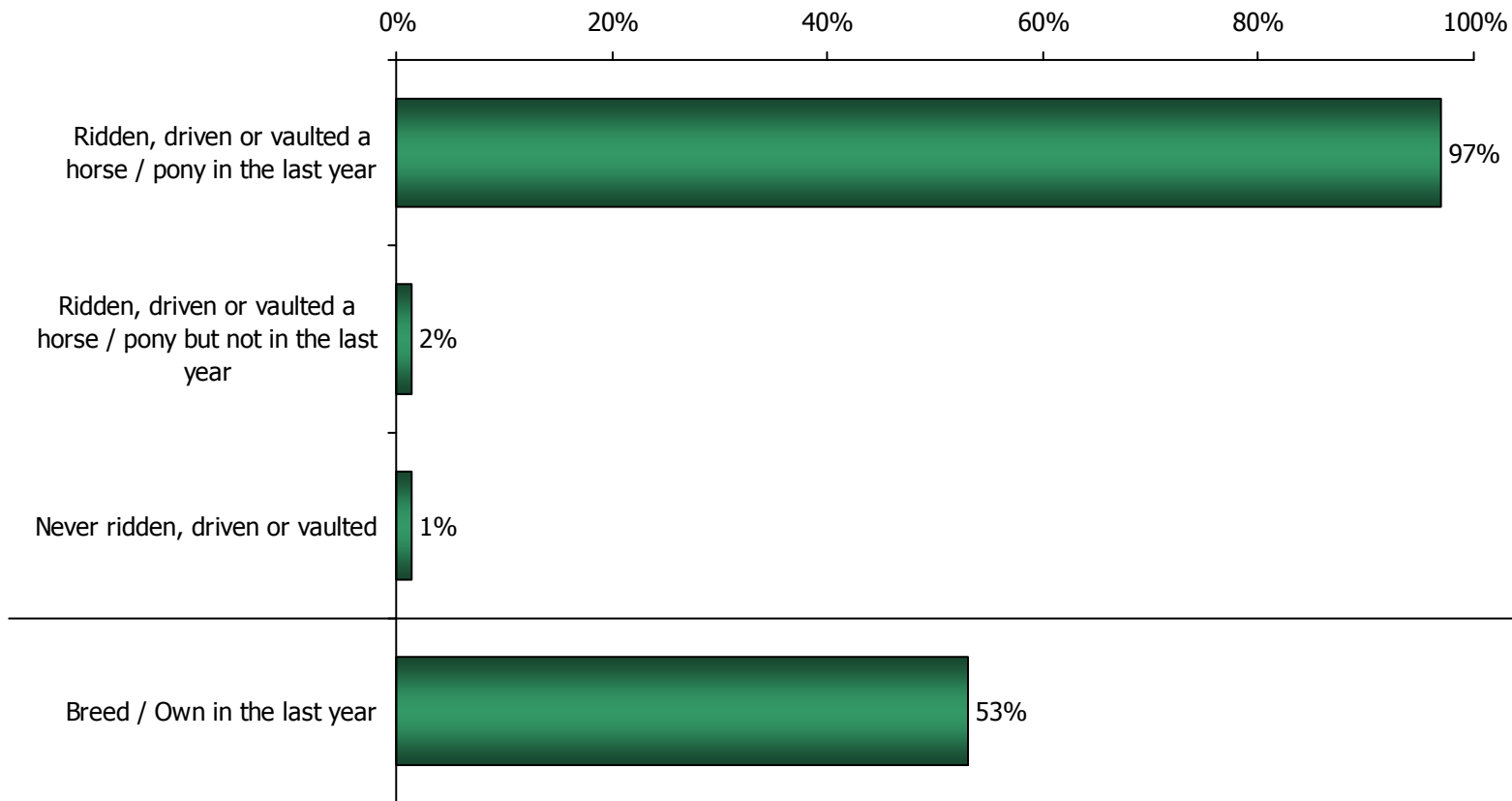
- » **Analysis:** Appropriate breaks shown where necessary

Executive Summary



- » Almost the entire sample had ridden, driven or vaulted in the last year (97%).
- » Frequency of participation was high; three-quarters of the respondents rode, drove or vaulted at least 3 days a week.
- » The majority of respondents owned a horse (89%), and of those, most were the only owner (81%).
- » Two-thirds of respondents kept their horse(s) at home.
- » Of those who did not currently own a horse, three-quarters had owned a horse in the past.
- » More than four-fifths (87%) of the respondents actively had riding lessons.
- » The majority were responsible for the daily upkeep of a horse or pony (86%).
- » Most respondents had started riding under the age of 16 (85%).

Equestrian Involvement

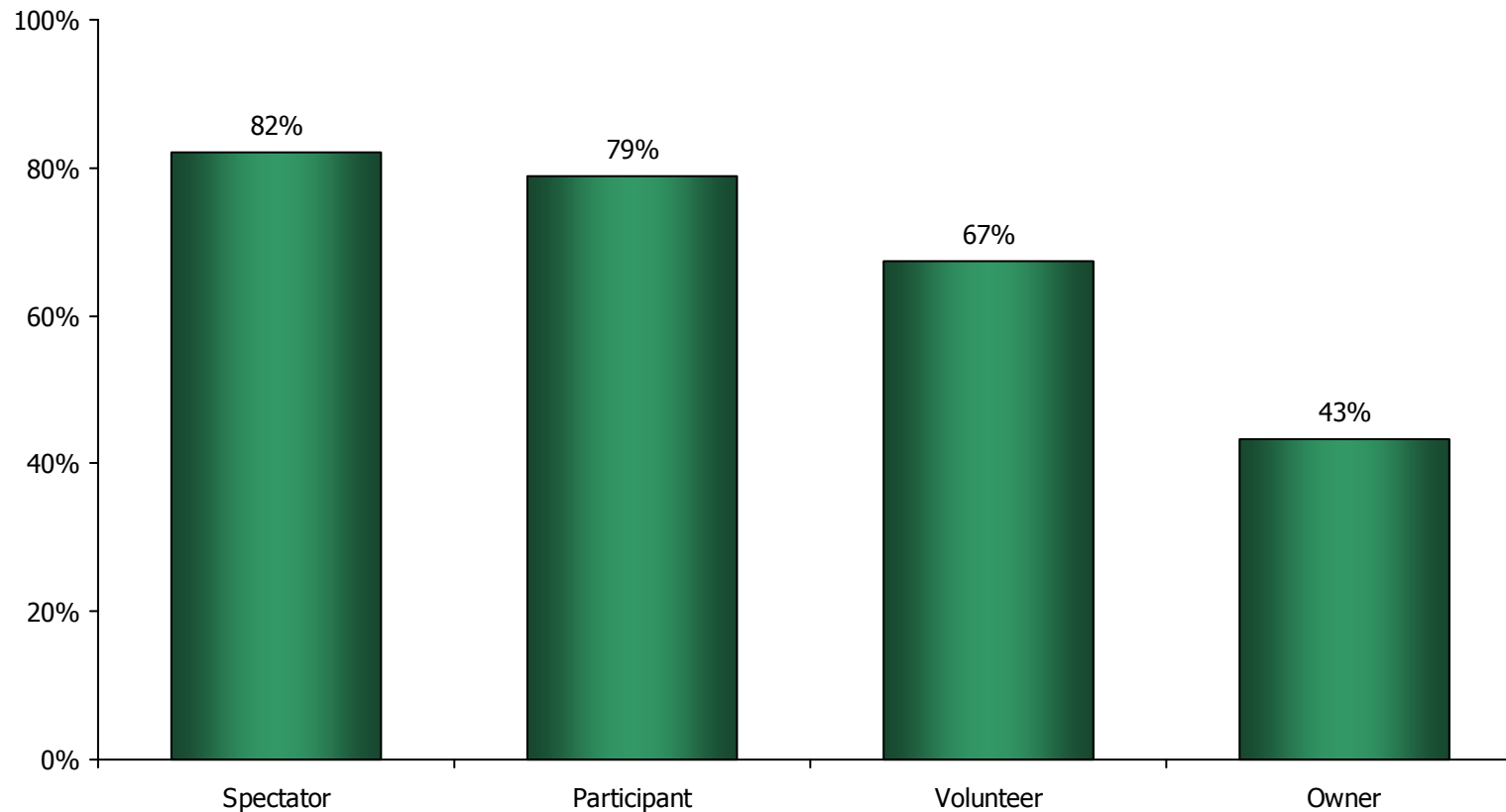


Base: 583

The vast majority of those having bred / owned a horse in the last year had also ridden in the last year (97%).

Q. Have you or members of your household been involved in equestrian sport?

Equestrian Attendance

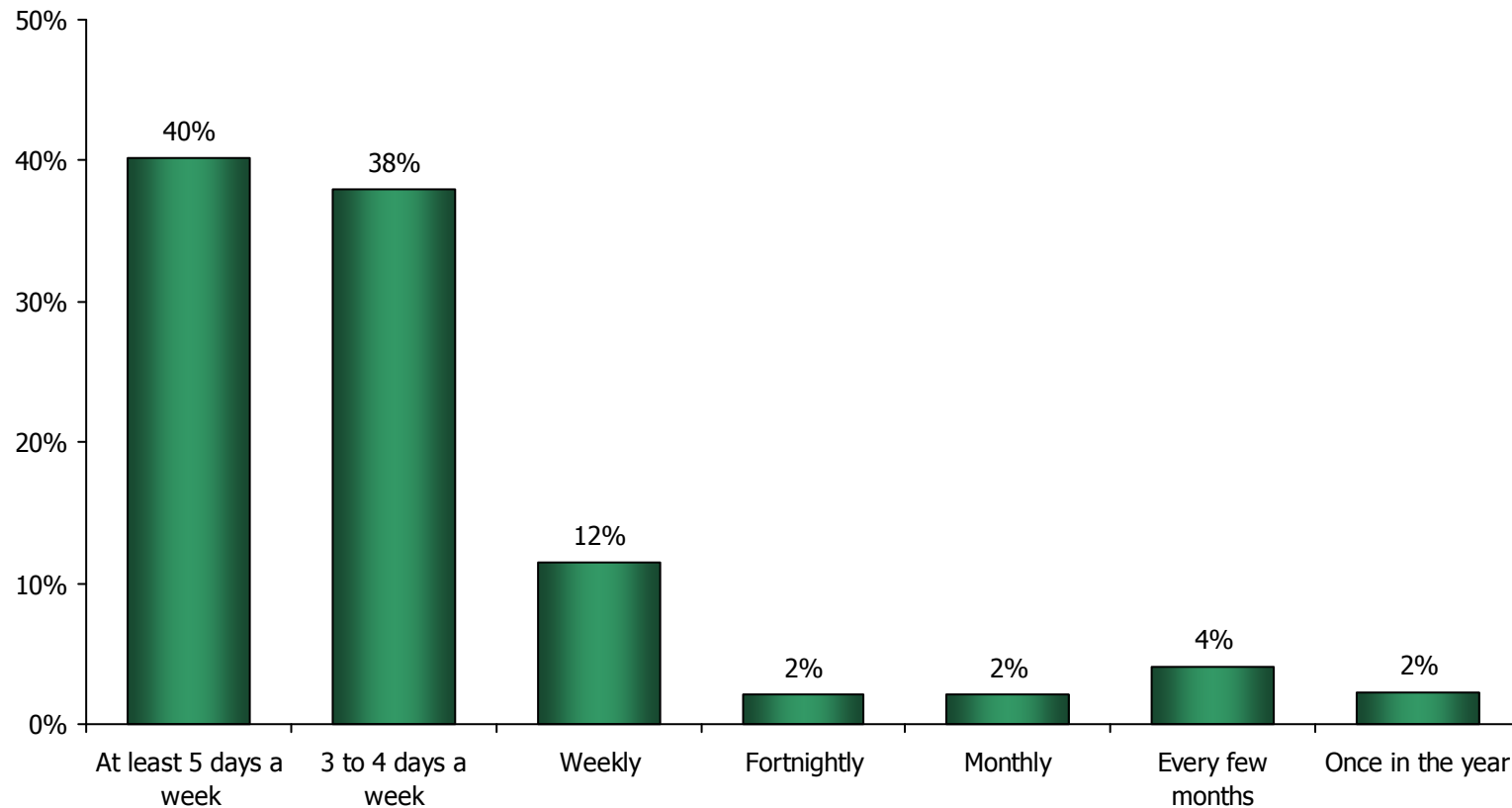


Base: 601

Only 3% of the sample had not attended an event as either a spectator, participant, volunteer or owner.

Q. Have you attended a horse event in the last year as a participant, spectator, volunteer or owner?

Frequency of Participation

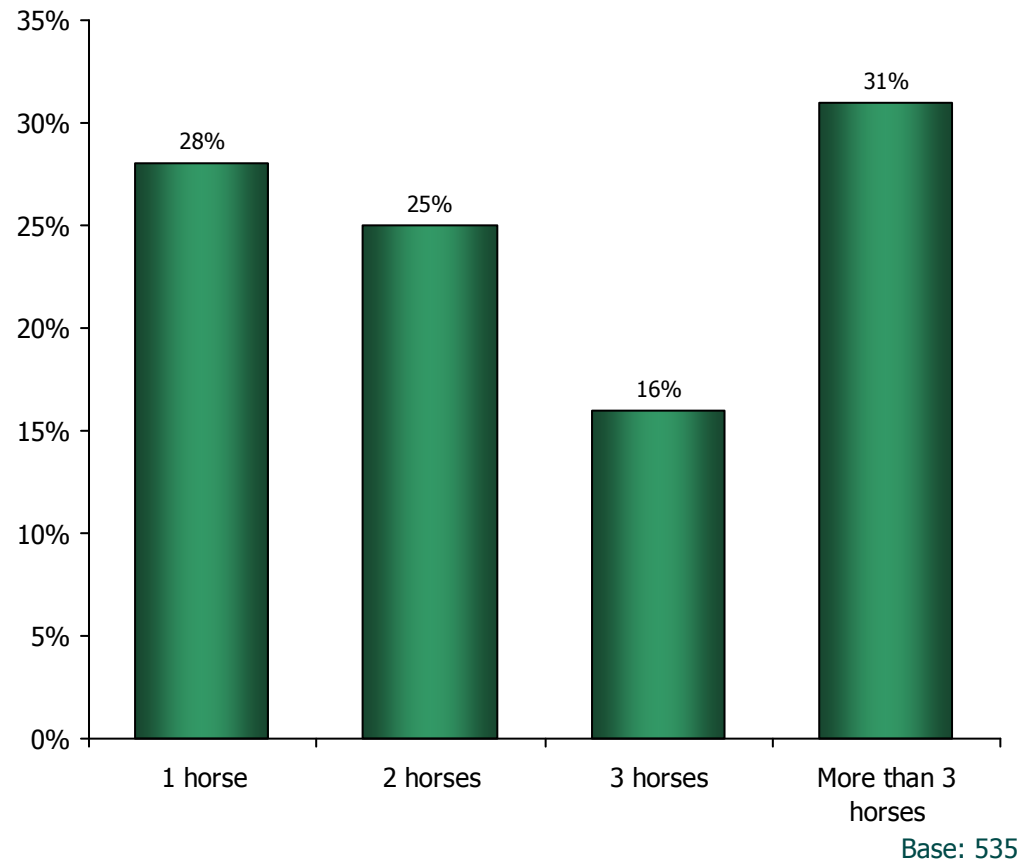
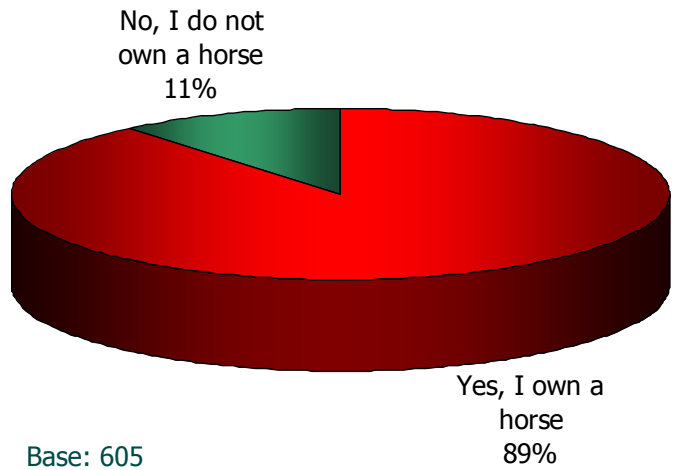


Base: 585

Over three-quarters of respondents rode, drove or vaulted at least 3 days a week.

Q. Approximately how many times ridden, driven or vaulted in the last year?

Horse Ownership (i)

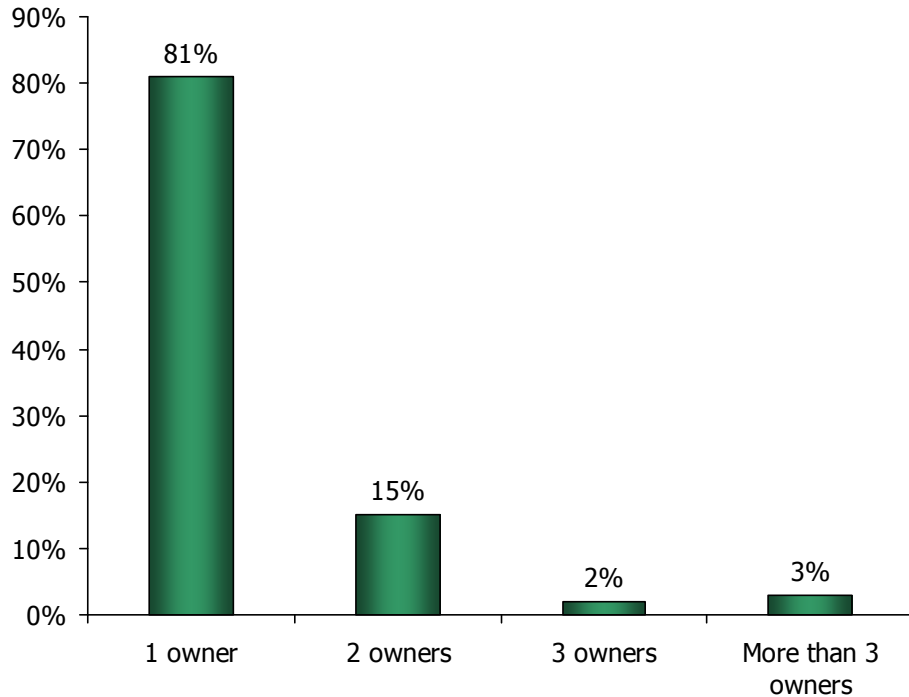


Of those owning more than 3 horses, 95% had attended a horse event in the last year as an owner.

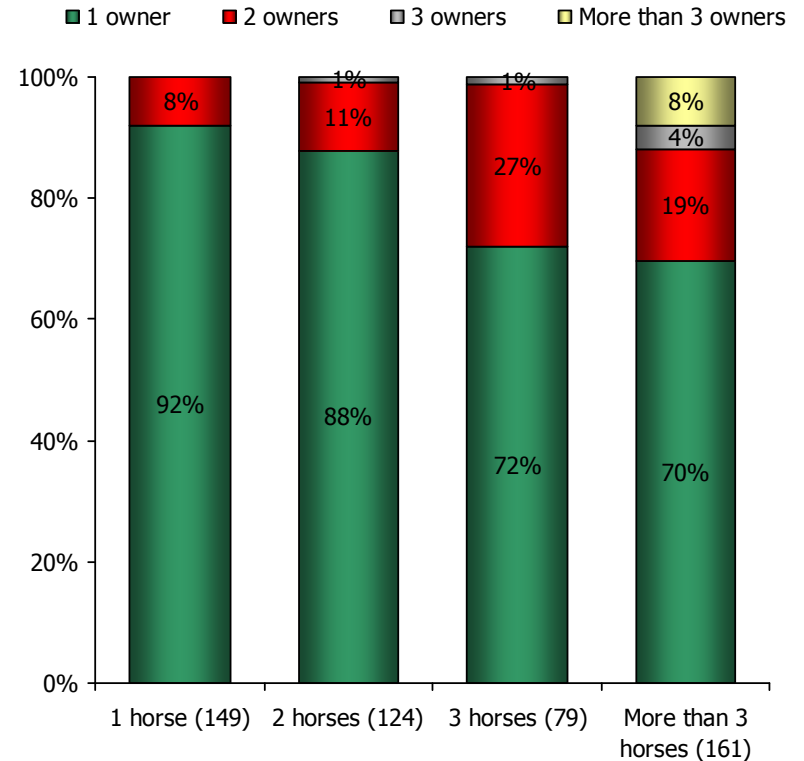
Q. Do you currently own a horse?
Q. How many horses do you own? [Asked only to those who own a horse]

Horse Ownership (ii)

(Asked only to those who own a horse)



Base: 514



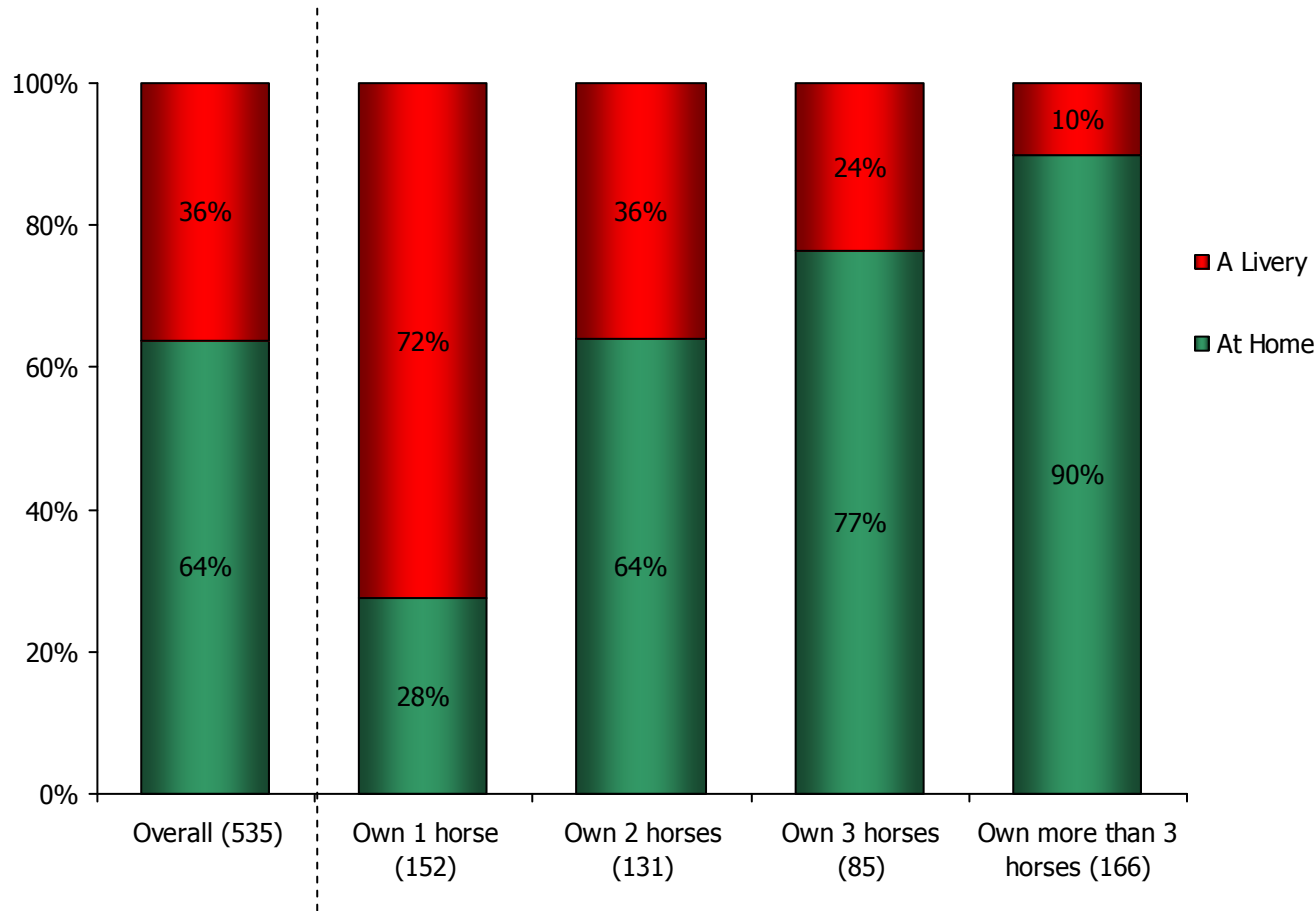
Base shown in brackets

Respondents owning more than one horse, were more likely to own a horse(s) with multiple owners.

Q. How many owners do your horses have?
BREAK BY Q. How many horses do you own?

Location of Stabling

(Asked only to those who own a horse)



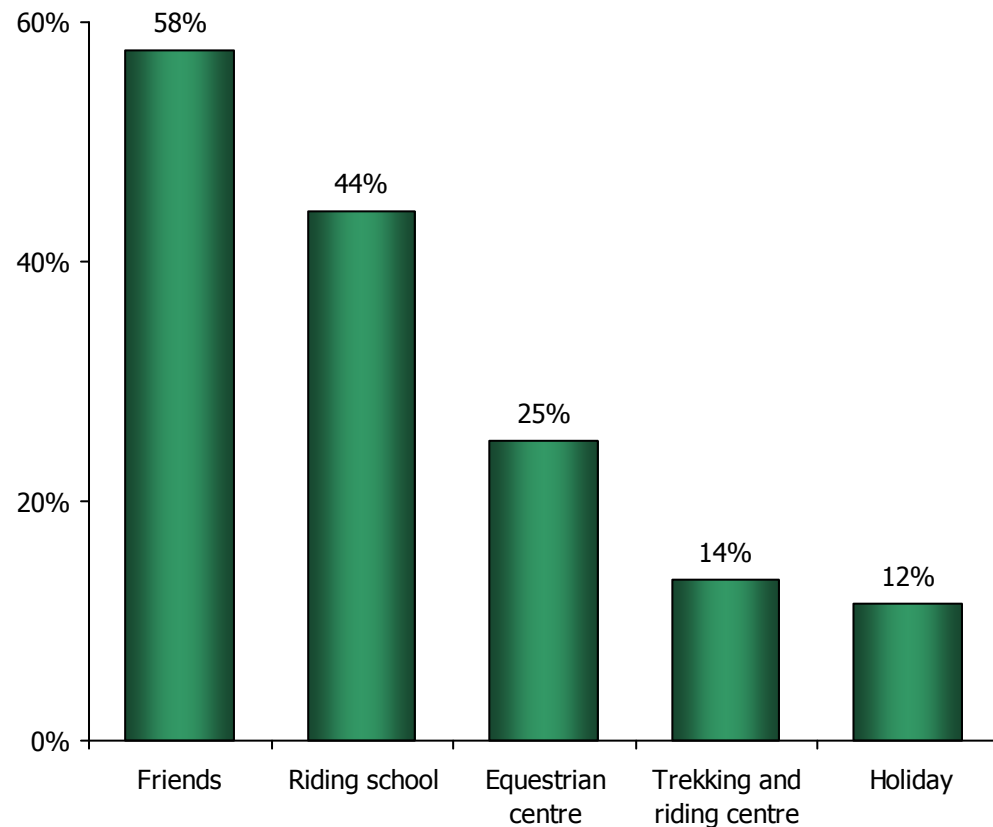
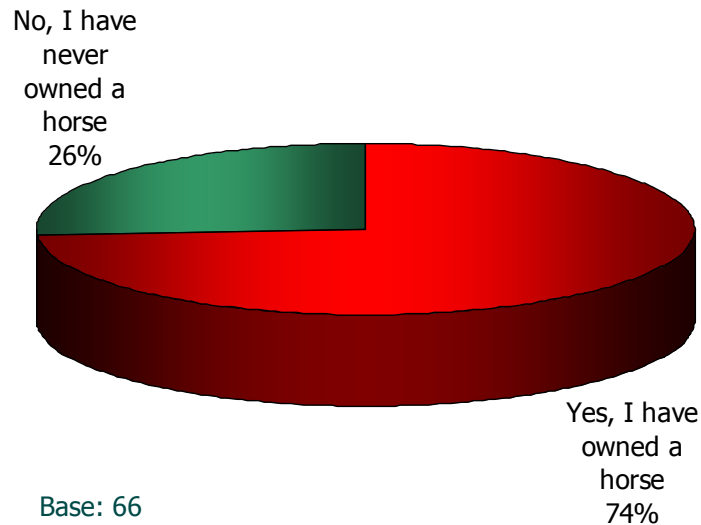
- Overall, of those owning horses, two-thirds (64%) kept them at home.
- Those owning one horse were far more likely to keep their horse at a livery; the more horses a respondent owned, the more likely they were to keep their horses at home.

Base shown in brackets

*Q. Where do you keep your horses?
BREAK BY Q. How many horses do you own?*

Non-Owner Riding

(Asked only to those who do not own a horse)

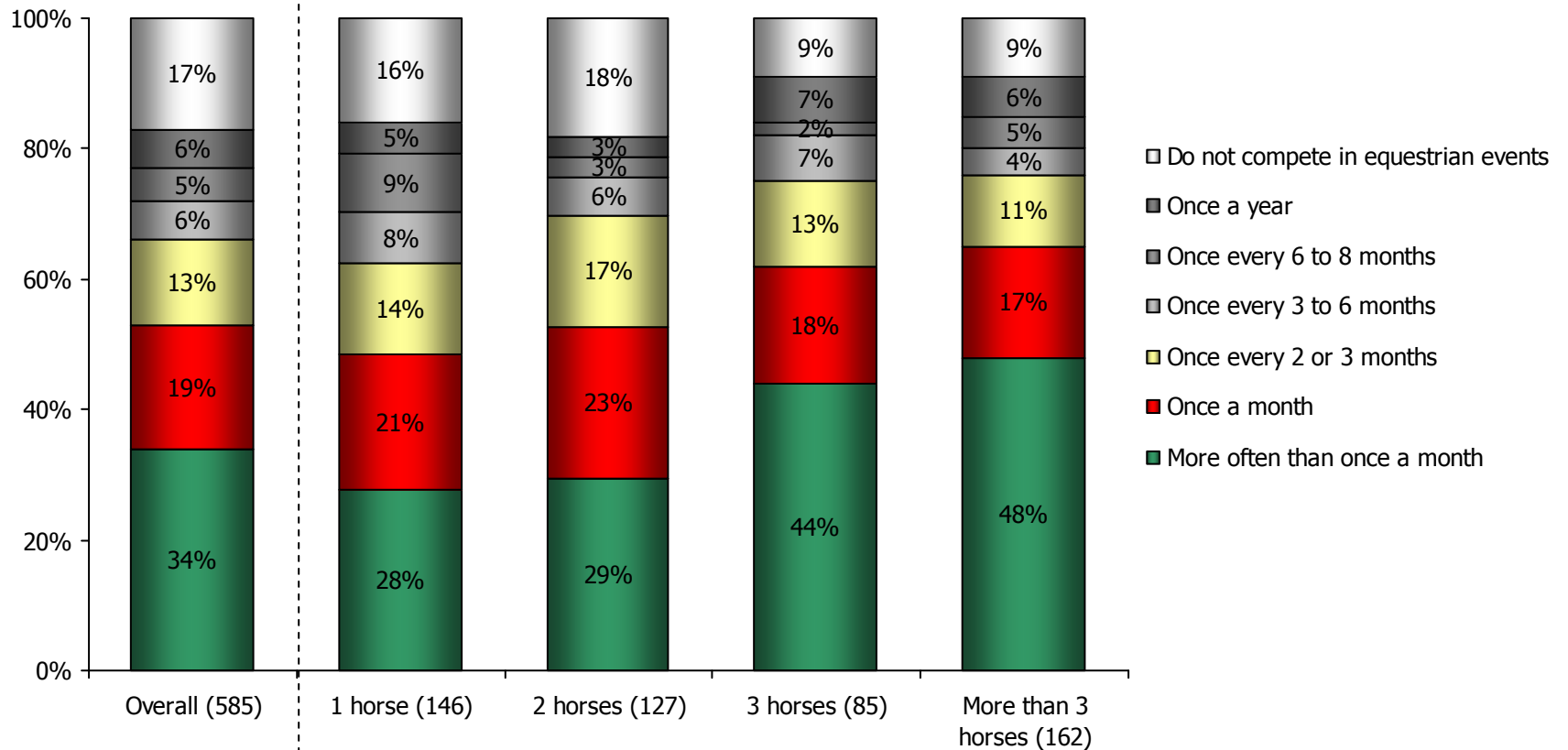


CAUTION, Low Base: 52

Riding a horse belonging to a friend was the most likely way a non-owner would ride.

Q. Have you ever owned a horse?
Q. If you do not own a horse where do you ride?

Frequency of Event Participation

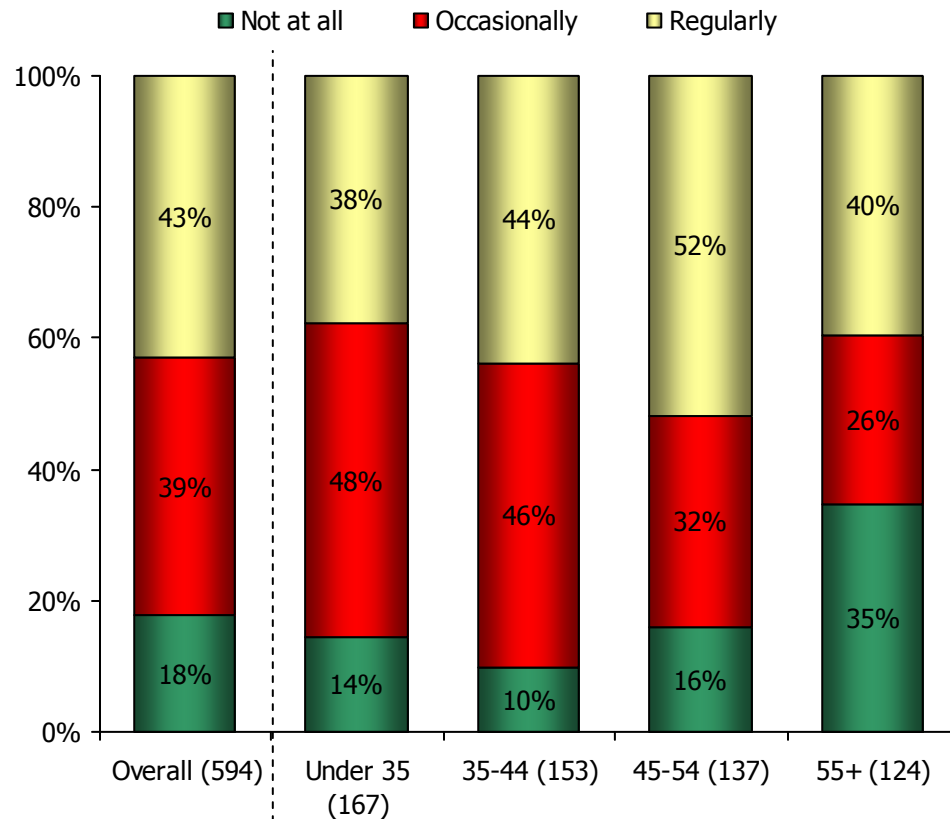


Base shown in brackets

Respondents owning more horses were more likely to compete on a more regular basis.

*Q. Approximately how often, if ever do you compete in equestrian events?
BREAK BY Q. How many horses do you own?*

Riding Lessons



- 90% had individual lessons
- 37% had group lessons

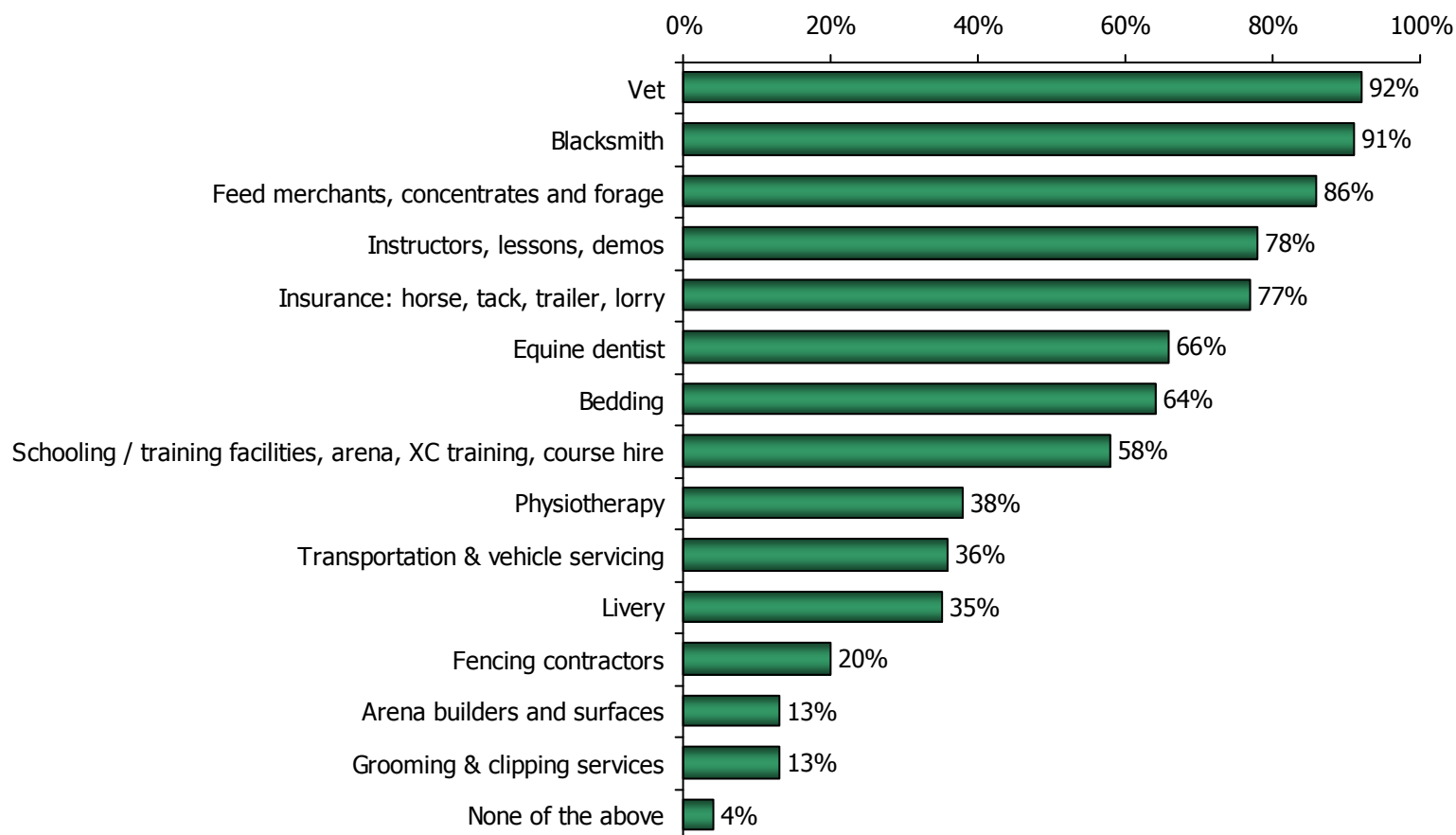
Base: 485

Base shown in brackets

Over the age of 35, the older a respondents was, the less likely they were to have lessons.

Q. Do you have lessons?
Q. Are your lessons....?

Use of Professional Services

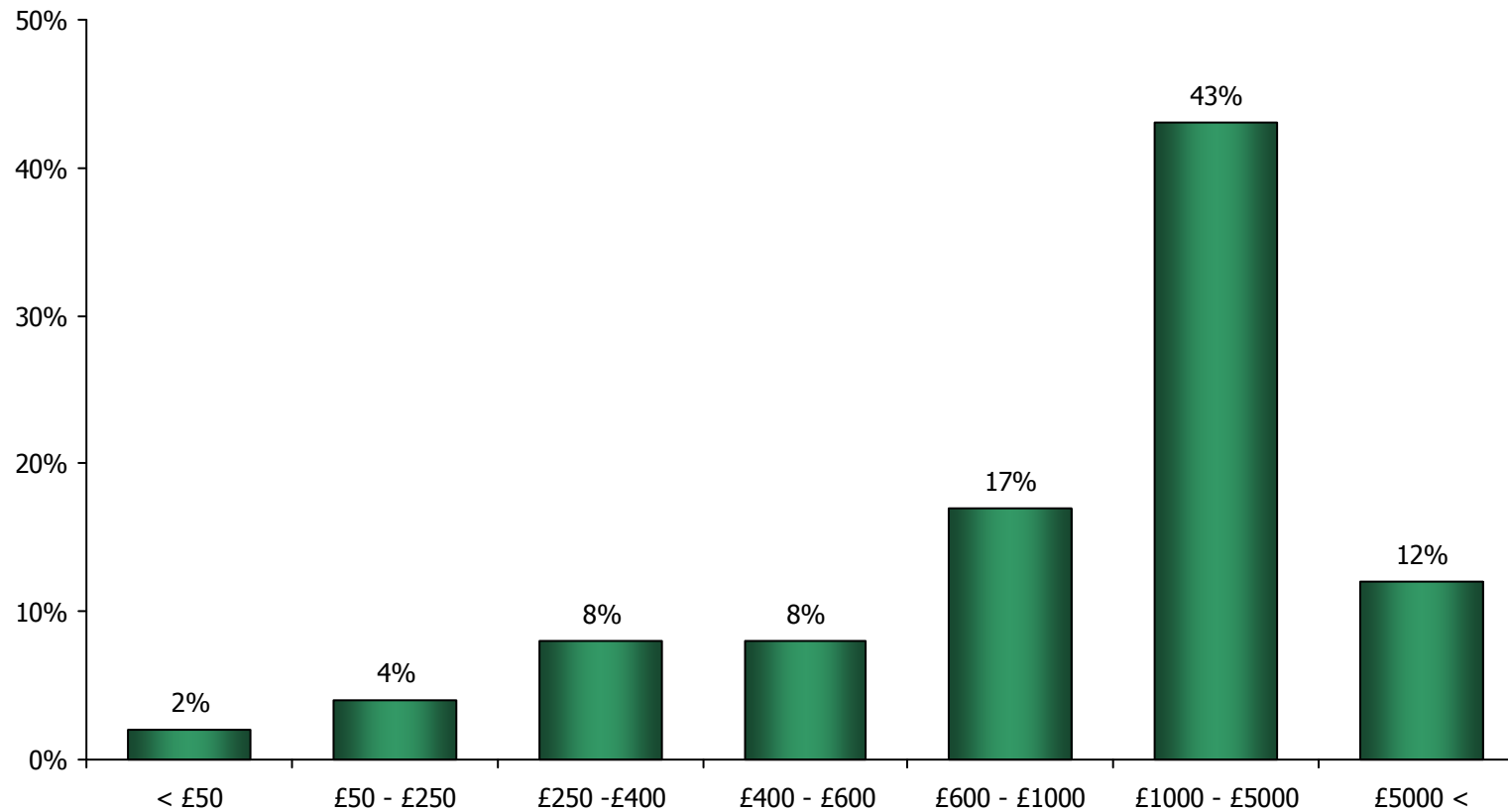


Base: 602

On average, respondents used 7-8 professional services.

Q. Which of the following professional services do you use in association with horses?

Annual Spend on Services

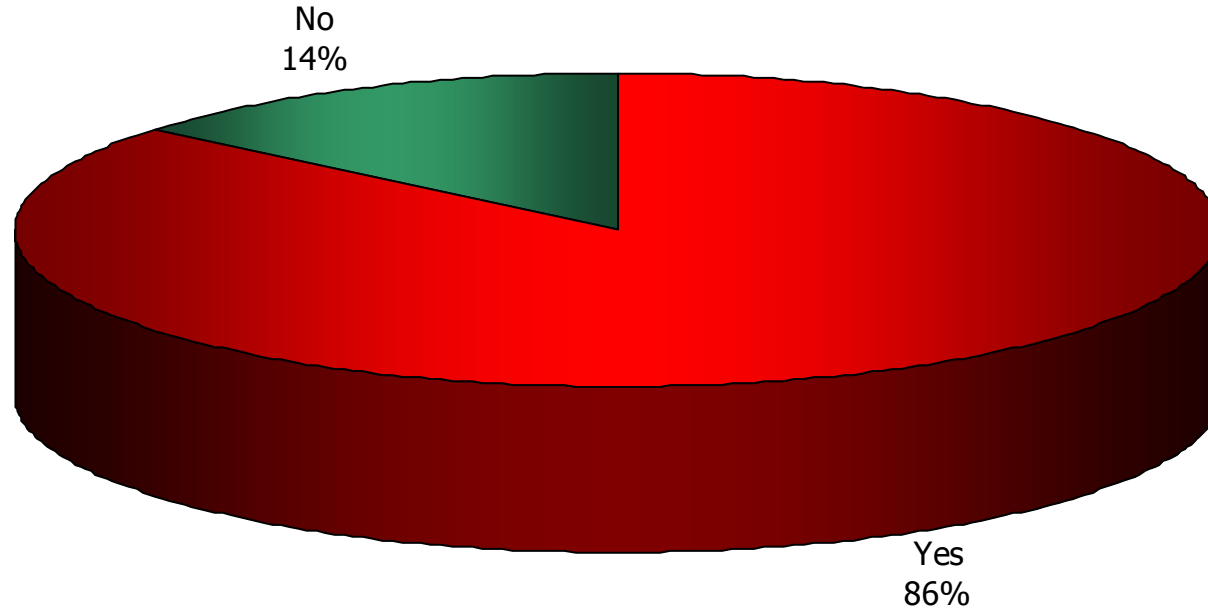


Base: 617 **7% did not reply**

Just over two-fifths of respondents spent between £1000 and £5000 using professional services.

Q. Please estimate your annual spend on the use of professional services.

Daily Upkeep

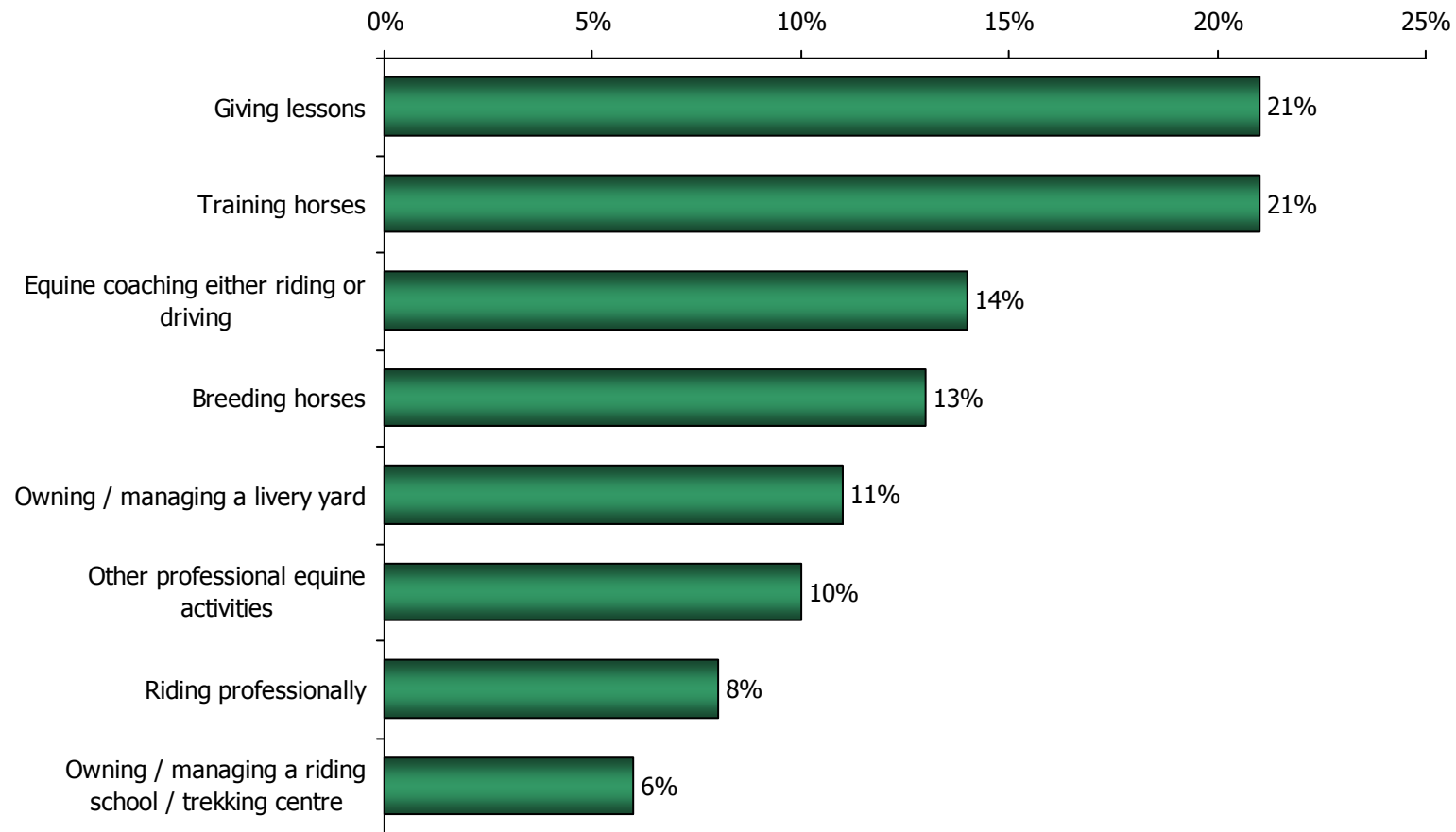


Base: 600

The vast majority of respondents were responsible for the daily upkeep of a horse or pony.

Q. Are you responsible for the daily upkeep of a horse or pony?

Professional Involvement

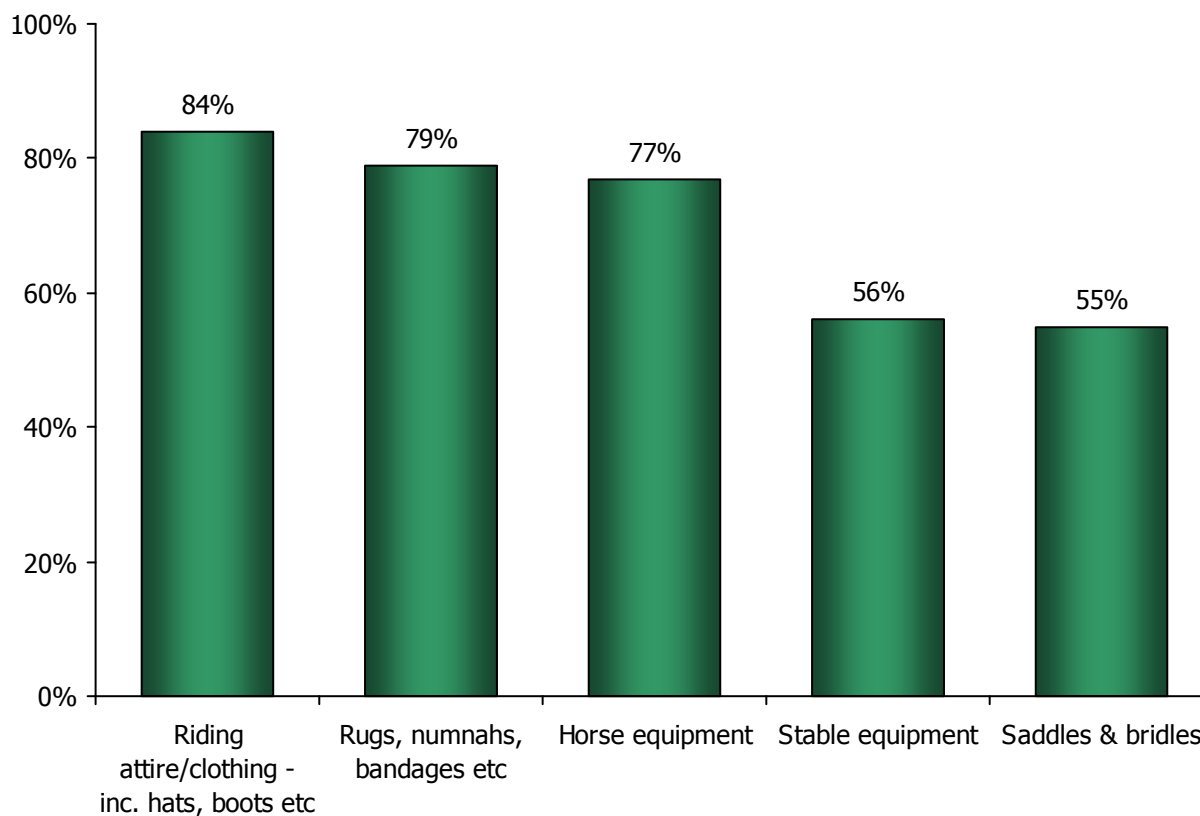


Base: 560

Over half the respondents (58%) had no professional involvement in any of the listed services themselves, nor did anyone in their household.

Q. Are you or any member of your household professionally involved in:

Equestrian Equipment

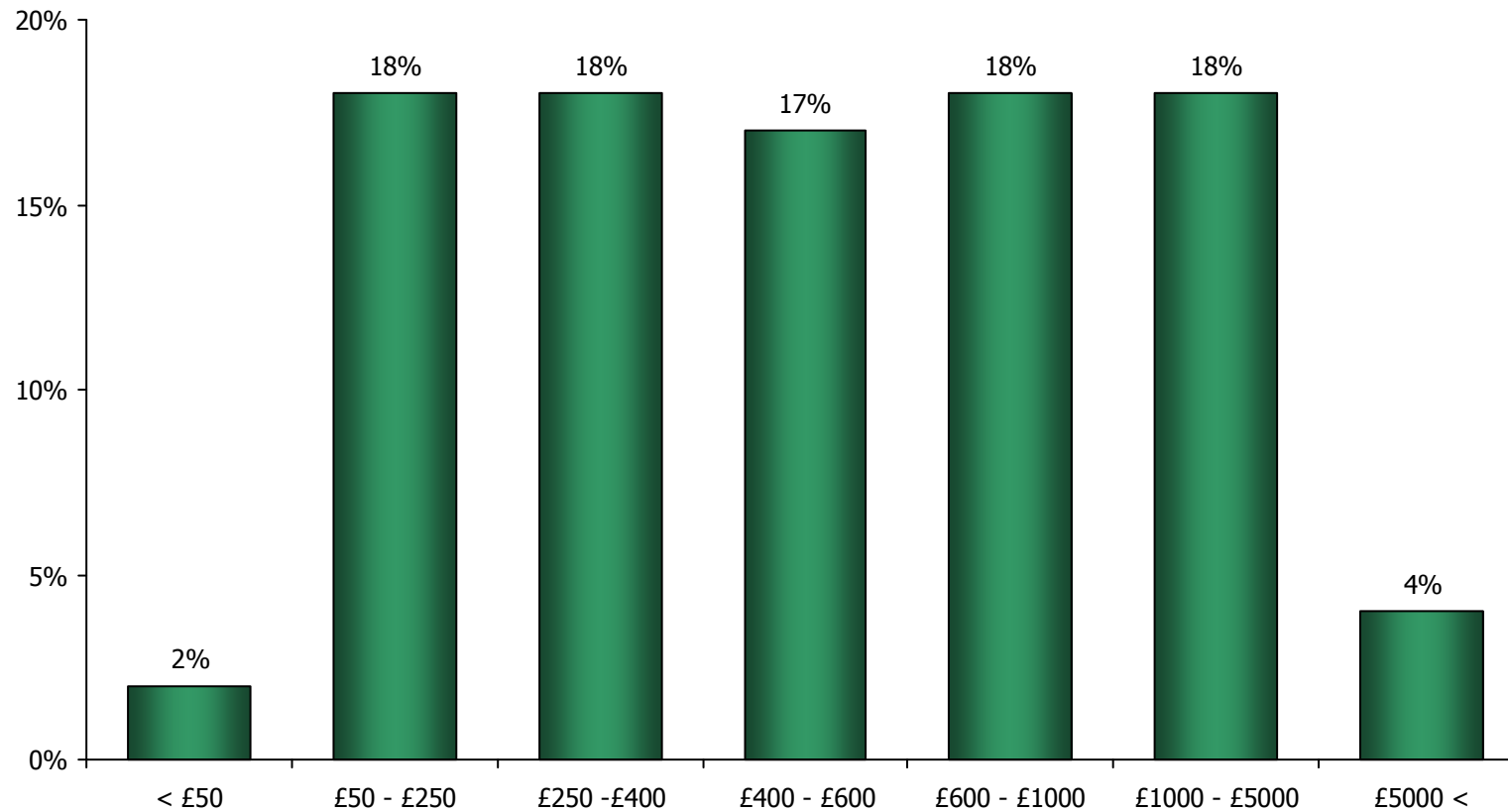


- On average, respondents had purchased items from 3-4 classification groups.
- 7% had not replied; suggesting no purchases.

Base: 617

Q. Which of the following equipment have you purchased within the last 12 months?

Annual Spend on Equipment



Base: 617 **6% did not reply**

The annual spend on equipment was grouped fairly evenly between £50 and £5000. Understandably, respondents spend on equipment increased the more horses they owned.

Q. Please estimate your annual spend on equipment.

Affiliations / Involvement (i)



(Ordered by member numbers)	Member	Participate / Volunteer	Competitor	Registered Horse
British Horse Society	44%	10%	10%	1%
British Riding Clubs	40%	22%	25%	4%
Scottish Equestrian Association	25%	7%	5%	1%
Scottish Endurance Riding Club	14%	14%	15%	12%
British Eventing	12%	11%	12%	9%
Other Unaffiliated Clubs/Comps	8%	11%	11%	2%
British Dressage	8%	6%	10%	5%
British Show Jumping Association	7%	5%	9%	5%
The Pony Club	6%	14%	4%	2%
SEA Affiliated Clubs	4%	4%	3%	0%
Scottish Countryside Alliance	4%	2%	0%	0%
Lessons	3%	34%	10%	0%
Hunting	2%	10%	2%	0%
Riding for the Disabled Association	2%	12%	0%	0%
Scottish Carriage Driving Association	2%	2%	1%	0%
Scottish Equestrian Vaulting	2%	2%	1%	0%

Base: 617

Q. In which of the following are you a participant or volunteer / competitor / member / hold multiple memberships (e.g. member of more than one riding club) / have horse(s) registered with / no. of horses registered?

Affiliations / Involvement (ii)



(Ordered by member numbers)	Member	Participate / Volunteer	Competitor	Registered Horse
Trekking & Riding Society of Scotland	2%	2%	0%	0%
Leisure riding / hacking	2%	33%	8%	1%
British Show Pony Society	2%	2%	3%	2%
JumpCross	2%	2%	4%	0%
Association of British Riding Schools	1%	2%	1%	0%
Le Trec	1%	7%	7%	1%
Scottish Equine Breeders Association	1%	1%	0%	0%
Scottish Racing	1%	2%	0%	0%
Western Riding Scotland	1%	1%	1%	0%
Mounted Games Association	0%	0%	0%	0%
British Equestrian Trade Association	0%	0%	0%	0%
Polo	0%	2%	0%	0%
Riding holiday	0%	8%	1%	0%
Scottish Harness Racing Clubs	0%	0%	0%	0%
UK Polocrosse Association	0%	0%	0%	0%
British Grooms Association	0%	0%	0%	0%

Base: 617

Q. In which of the following are you a participant or volunteer / competitor / member / hold multiple memberships (e.g. member of more than one riding club) / have horse(s) registered with / no. of horses registered?

Affiliations / Involvement: Memberships & Registered Horses (i)



	No. with Mem'ship(s)	Average Mem'ships	Max. Mem'ships	No. with Reg. Horse(s)	Average Reg. Horses	Max. Reg. Horses
British Horse Society	273	1.1	4	8	3.3	17
British Riding Clubs	246	1.2	11	23	1.3	4
Scottish Equestrian Association	155	1.1	5	8	1.0	1
Scottish Endurance Riding Club	85	1.1	3	75	1.7	8
British Eventing	71	1.2	3	53	1.5	6
Other Unaffiliated Clubs/Comps	51	1.5	4	12	2.0	7
British Dressage	48	1.2	6	30	1.4	3
British Show Jumping Association	42	1.3	4	31	3.0	25
The Pony Club	39	1.3	3	10	1.6	3
SEA Affiliated Clubs	25	1.2	3	2	1.5	2
Scottish Countryside Alliance	25	1.2	2	0		
Lessons	16	1.0	1	3	3.3	4
Hunting	15	1.2	3	1	1.0	1
Riding for the Disabled Association	14	1.1	2	3	3.7	9

Base: 617

No respondents in the sample had membership(s) or registered horses with either "UK Polocrosse Association" or "British Grooms Association".

Q. In which of the following are you a participant or volunteer / competitor / member / hold multiple memberships (e.g. member of more than one riding club) / have horse(s) registered with / no. of horses registered?

Affiliations / Involvement: Memberships & Registered Horses (ii)

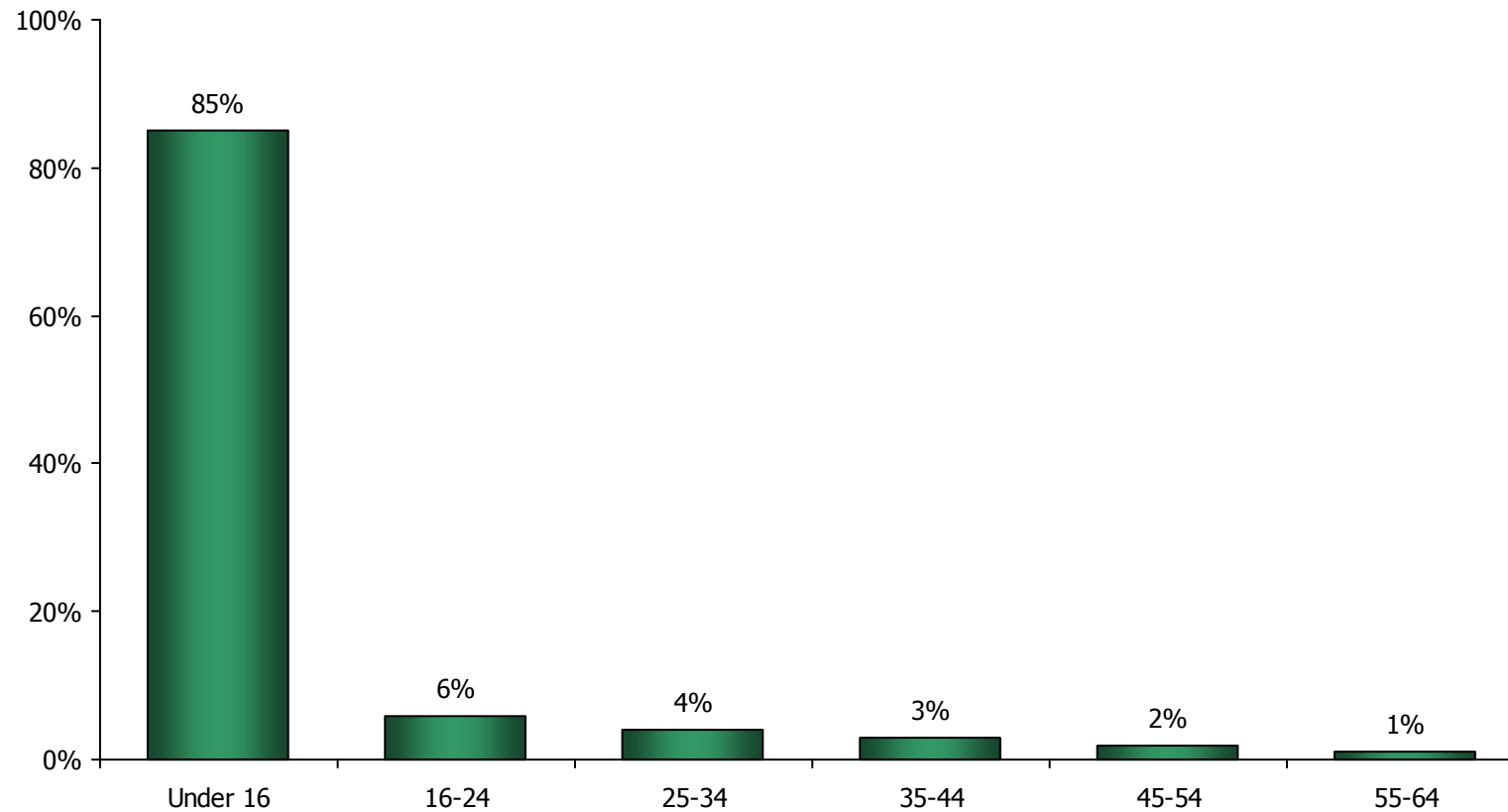


	No. with Mem'ship(s)	Average Mem'ships	Max. Mem'ships	No. with Reg. Horse(s)	Average Reg. Horses	Max. Reg. Horses
Scottish Carriage Driving Association	13	1.5	6	0		
Scottish Equestrian Vaulting	13	1.4	3	2	2.0	3
Trekking & Riding Society of Scotland	13	1.0	1	1	1.0	1
Leisure riding / hacking	13	1.1	3	6	2.2	4
British Show Pony Society	11	1.5	2	10	2.5	6
JumpCross	10	1.1	2	3	2.0	3
Association of British Riding Schools	9	1.0	1	0		
Le Trec	8	1.0	1	5	1.0	1
Scottish Equine Breeders Association	7	1.1	2	1	1.0	1
Scottish Racing	5	1.6	4	2	3.5	6
Western Riding Scotland	4	1.0	1	2	1.0	1
Mounted Games Association	3	1.0	1	1	1.0	1
British Equestrian Trade Association	2	1.0	1	0		
Polo	2	1.0	1	1	1.0	1
Riding holiday	2	1.5	2	0		
Scottish Harness Racing Clubs	1	1.0	1	3	1.7	3

Base: 617

Q. In which of the following are you a participant or volunteer / competitor / member / hold multiple memberships (e.g. member of more than one riding club) / have horse(s) registered with / no. of horses registered?

Age of Participation

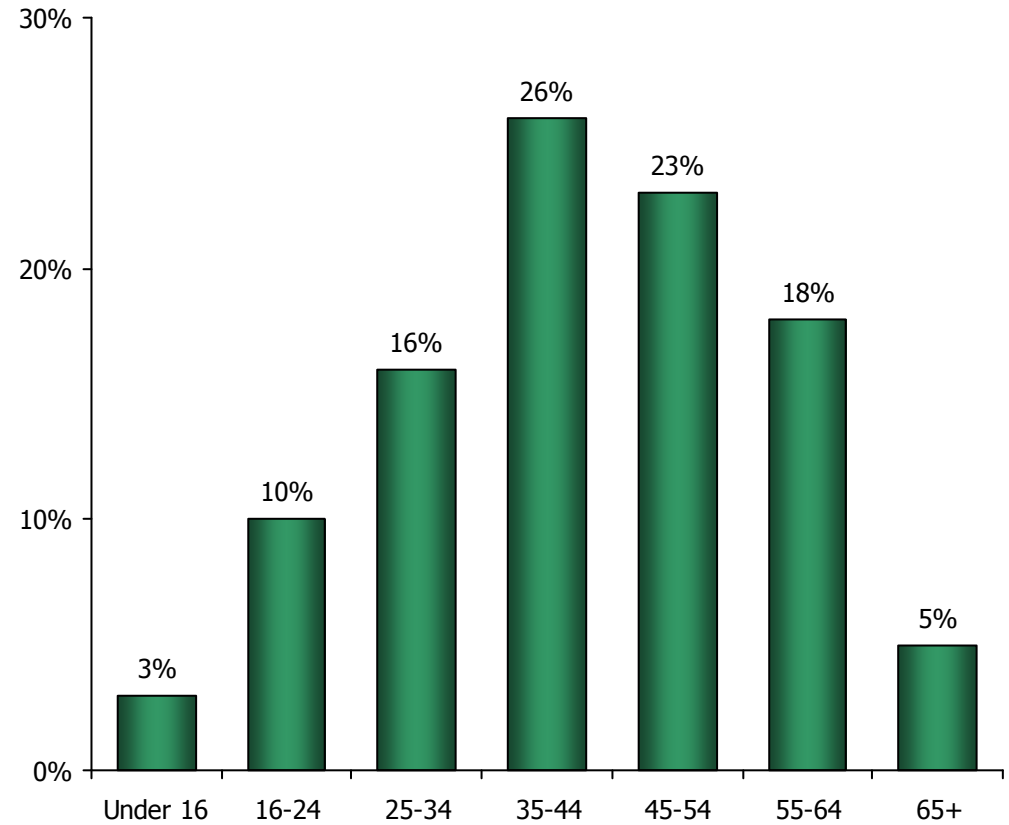
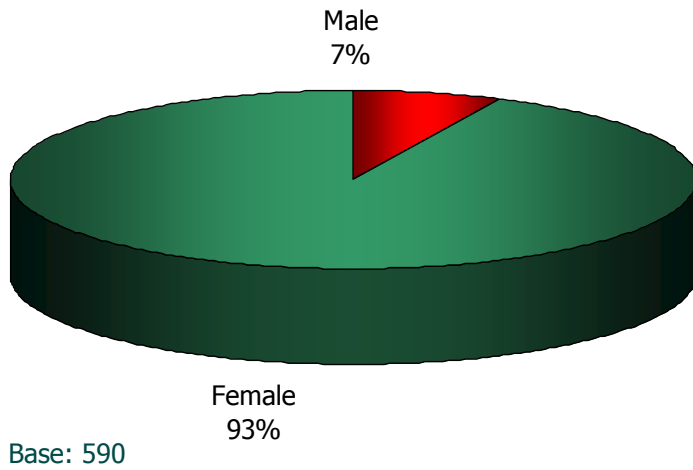


Base: 593

The vast majority of respondents started riding, driving or vaulting under the age of 16.

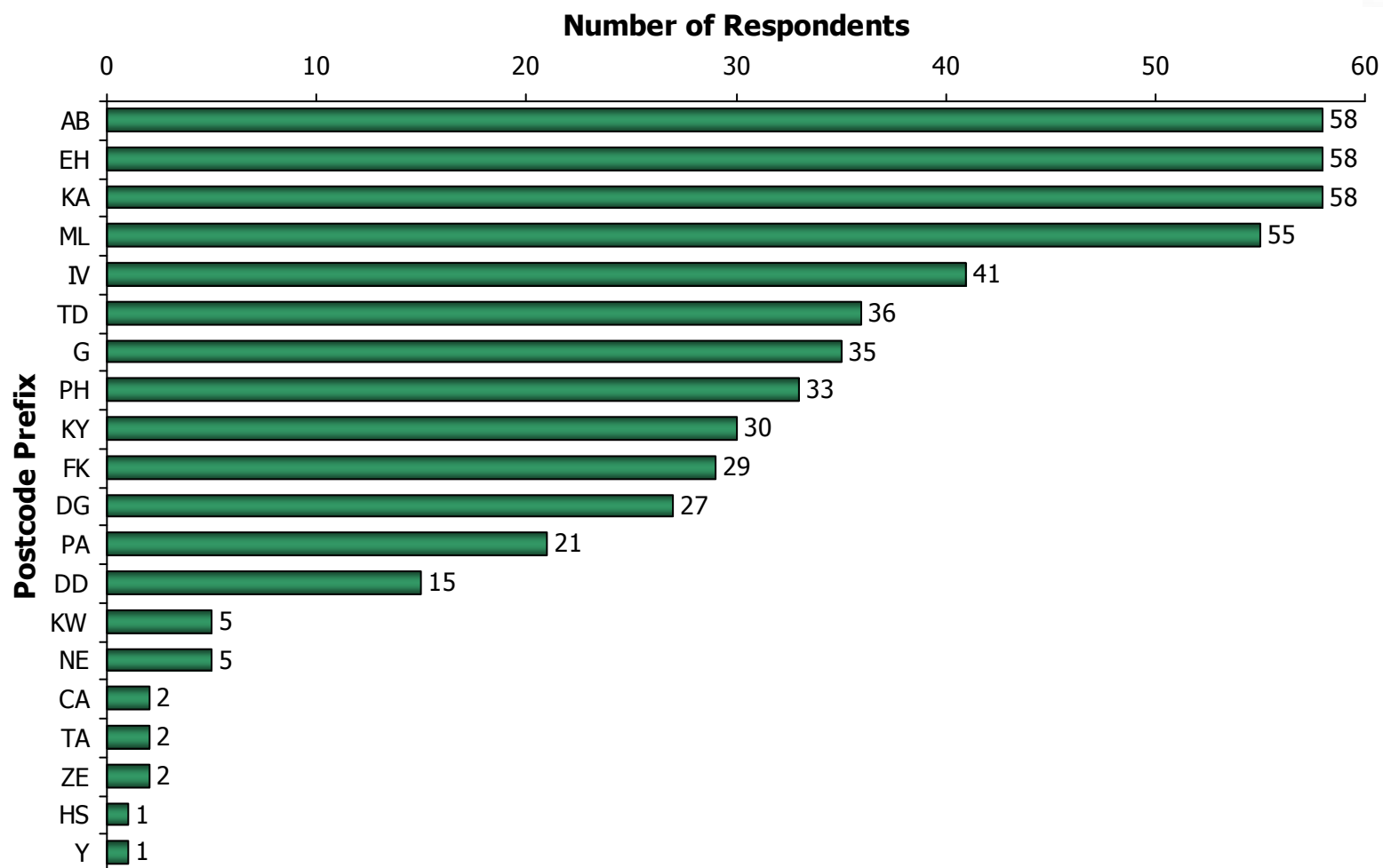
Q. At what age did you start riding, driving or vaulting?

Sample Demographics



Q. Which of the following age groups are you in?
Q. Are you male or female?

What is your post code?



Q. What is your post code?

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