

TOURISM SOUTH EAST

A STRATEGY FOR EQUESTRIAN TOURISM IN THE SOUTH EAST: A SUMMARY

1. The brief

In the summer 2003, The Tourism Company was commissioned by Tourism South East (TSE) and Rural Ways to "scope the equestrian tourism sector" through relevant research, highlight opportunities and "draft a plan setting out a realistic three year programme for the development of the South East Region's sustainable equestrian tourism".

"The overall aim of this study has been: "to significantly enhance the economic contribution of the equestrian sector in the South East Region by developing its tourism potential whilst ensuring the sustainability of any future equestrian tourism enterprises."

Funding for the project was obtained from SEEDA, TSE's Interreg IIIA 'Well Being Tourism Project', TSE's Defra funded Rural ways Programme and Surrey County Council.

2. Methodology

The consultants have undertaken a series of research projects including:

- A review of all existing research and information sources;
- A mail shot to all local authorities in the Region to elicit information about, and views on, equestrian tourism;

- Researching various sources to draw up a picture of the equestrian tourism product in the Region;
- A questionnaire survey of identified equestrian tourism operators in the Region;
- A telephone survey of potential consumers to elicit levels of demand for, and views on, short breaks based on equestrian activity, particularly in the South East region;
- A telephone survey of equestrian tour operators.
- Eight case studies were chosen to help analyse key issues and explore opportunities in more detail. The case studies (in separate appendix) are:
 - Escorted trail riding in Cumbria
 - An equestrian trail, the Mary Townley Loop
 - Regional marketing, Wales
 - Hotel racing packages
 - 'Randonee a Cheval'
 - 'Hacking with a Difference'
 - Le Trec
 - Carriage driving in Devon

The consultants have consulted a wide range of interested parties including the British Horse Society (BHS) and British Horseracing Board (BHB) and undertaken selected site visits around the Region. The research has involved two stakeholder workshops.

Strategy for equestrian tourism in the South East





3. Report format

The strategy report starts by setting out the key findings of the six individual research elements. (Full details of the research can be found in the separate appendices.) This research review is followed by a summary of Key Issues and the SWOT analysis. The final section of the report consists of the overall Strategy and detailed Action Plan.

4. The strategy

The strategic priorities are defined as:

- To raise the profile of the South East as a focus for equestrian tourism, reinforcing TSE's objective of making the Region a 'must-visit' destination, supported by cross promotion and targeted marketing;
- To maximise the sustainable potential of the additional, high value niche markets offered by equestrian tourism in the South East;
- To create new product and marketing links and packages between good quality equestrian and tourism products and services for the benefit of both sectors; and
- To integrate relevant initiatives for, and highlight the mutual benefits of, equestrianism and tourism development.

Primary target markets are:

- Groups of friends/young professionals going racing or riding on second holidays/ short breaks/incentives;
- Racehorse owners groups/enthusiasts (and partners);
- ABC1 horse owners in South West, Midlands and East;
- Individuals/couples/groups with or without their horses;
- Groups and individuals seeking to compete and/or learn specialist activities.

Secondary target markets are:

- Families on second holidays/short breaks;
- Groups of children;
- Those already on holiday in the area;
- Corporate business;
- Day visitors.

5. The Action Plan

The three year Action Plan includes a range of initiatives/projects grouped together as potential responses to six strategic objectives.



Table 1: Summary of projects

Objective 1: To marshal information on equestrian tourism for visitors

Project 1.	Create database listings of equestrian tourism resources
Project 2.	Make listings available on web
Project 3.	Create a series of equestrian tourism brochures

Objective 2: To develop riding holidays and equestrian events

Project 4.	Develop riding holiday packages
Project 5.	Commission specialist agency to develop packaged product
Project 6.	Develop and package riding events
Project 7.	Develop the strategic riding trail infrastructure
Project 8.	Investigate the feasibility of a major indoor equestrian centre

Objective 3: To develop racing short breaks

Project 9.	Create racing short break packages
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Objective 4: To market riding holidays and events

Project 10. A mix of tactical marketing initiatives

Project 11. Cross marketing riding events

Objective 5: To market racing short breaks

Project 12. Marketing 'Racing Away in the SE' packages

Objective 6: To support further development/promotion of equestrian tourism (*some generic projects*)

Project 13. Raise the profile of equestrian tourism

Project 14. Market research on equestrian tourism

Project 15. Quality enhancement schemes for operators

Project 16. Equestrian development plans for various 'hot-spots'

Project 17. Create a regional 'Festival of the Horse'

These initiatives are considered in detail in the main report with an indication of priority, the potential lead agency, order-of-magnitude budget and other relevant partners.



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