

# **Equestrian Tourism**

## **Market Research And “Know Your Market” Profile**

**Scottish Tourist Board**

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## 1. INTRODUCTION

Horse riding, whether for relaxation, fitness, or competition, has been a long established leisure activity. However, as the holiday industry has matured in the last 20 years, countries and indeed companies have been more keenly watching for consumer trends they can develop to improve their tourism product or sales.

Activity holidays are one such area of growth. Consumers no longer simply seek sun, sea and sand when on holiday, but often wish to pursue other activities. These may be activities that they participate in at home, or have no previous experience of whatsoever. The most popular of these activities are walking, cycling, fishing, water sports (such as scuba diving), boating and sailing, climbing, horse riding, field sports (hunting and shooting), and snow sports (skiing and snowboarding). These activities have been listed roughly in order of their popularity, measured by their consumer penetration levels in the UK.

Scotland is particularly suited to many of the activities listed above by virtue of the scenery and landscape possessed by the country. Also, the relatively low population density makes outdoor activities in Scotland particularly desirable. This is certainly the case for equestrian tourism which appears to be well suited to Scotland. Consequently, the potential of developing the product there (as it has been in Ireland) is promising.

## 2. SECTOR OVERVIEW

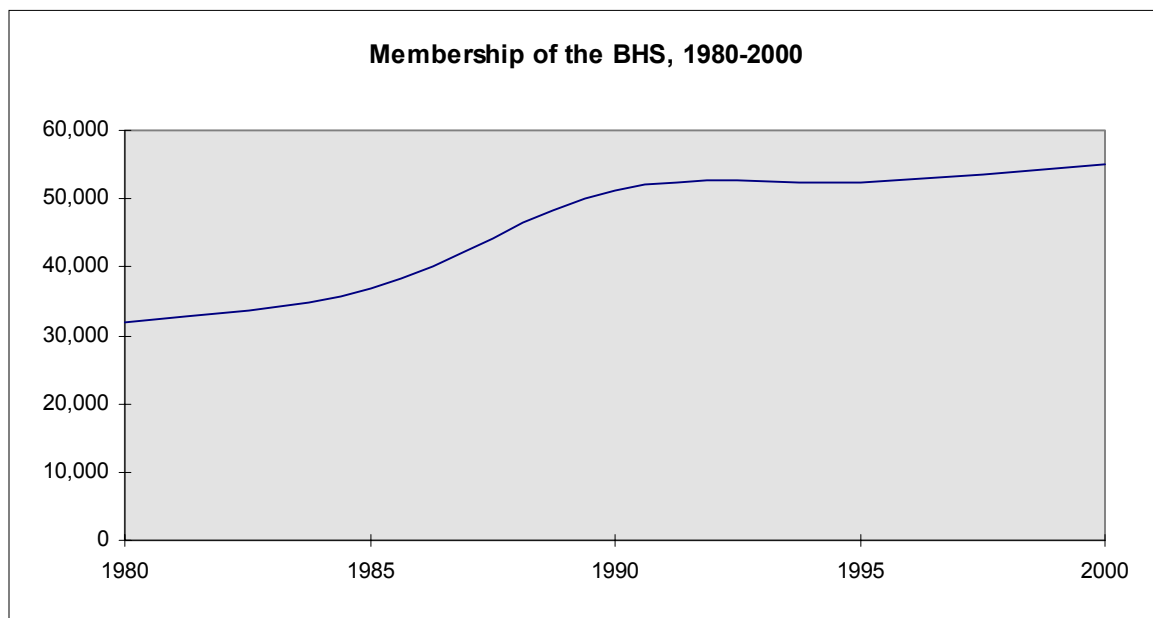
### 2.1 Definition and Background

Horse riding covers a number of recreational and sporting activities, including pony trekking, hacking, trail riding, horse trials and carriage driving. People taking part in any of these activities outside of their usual environment are said to be participating in equestrian tourism

### 2.2 Market Size

The British Horse Society (BHS) estimates that there are 550,000 horses in the UK (80,000 in Scotland), roughly one for every 10 people. Membership of the BHS currently stands at 55,000, and has shown considerable growth over the last 20 years, as shown in Figure 2.1

**Figure 2.1 Membership of the BHS, 1980-2000**



*Source: British Horse Society*

Horse riders generally have a bias towards the 15-24 and 35-44 age groups, in particular those families with at least one child. The AB socio-demographic groups also tend to have a high representation.

Less than one in five of riding households own their own horse or pony, the majority of horse-riders borrow horses or hire them from riding stables. It is estimated that horse riding has an adult penetration of around two to three percent (around 1.2 to 1.4 million adults). However, this underestimates demand because of children's involvement. The British Equestrian Trade Association (BETA) estimates that two million people ride on a

regular basis, with 20 percent riding three or more times a week. It is worth noting that there is a sharp contrast between those enjoying the occasional ride on holiday and horse-owners for whom riding, and care of the animals, is a lifestyle preoccupation.

Of the estimated two million riders in the UK, there are around 300,000 in Scotland. Around one million women over 16 years of age ride, and this makes up the largest demographic grouping. Up to 300,000 males over 16 years also ride, and an estimated 700,000 children make up the remainder.

**Table 2.1 Participation of UK Population in Horse Riding**

Demographic Grouping	Number of Horse Riding Participants
Women (16 years and over)	1,000,000
Men (16 years and over)	300,000
Children (up to 16 years)	700,000

*Source: Mintel/Consultants' estimates*

### 2.3 Market Profile

Whilst horse riders are much more likely to be women than men, there has been considerable growth of the number of male riders participating in the activity during the 1990s. Older riders (mainly 45+) have also increased their participation in horse riding over the last decade, although statistics also show a slight decline in participation of children. Overall, riding is starting to broaden its appeal to the public, and more people are taking up riding or riding again later in life, having given up several years previously.

Further research has been undertaken on the female adult segment, and this shows that pre-family working women are the most likely to ride, followed by working empty nesters. Both these segments are females who are likely to have higher than average disposable income and also time. Mothers, either at home or working, are less likely to participate in horse riding than those women who are either pre or post-family.

**Table 2.2 Participation of Women in Horse Riding**

Market Segment	Adult Population Participating in Horse Riding on a Regular Basis (%)
All Women	4
Pre-Family Working Women	10
Working Mothers	6
Stay-at-home Mothers	3
Working Empty Nesters	7

*Source: British Market Research Bureau/Mintel*

Whilst there is no equivalent detailed analysis for men, it is known that around one percent of male adults participate in horse riding on a regular basis, although this rises to two percent for family men with children between 5 and 9 years.

### 3. RIDING HOLIDAYS

#### 3.1 Market Size

A relatively high proportion of adults have experience (possibly childhood experience) of horse riding or pony trekking holidays, and a similarly large number express a continuing interest in them, especially women. However, research suggests that this enthusiasm does not generate significant demand, and it is estimated that horse riding and pony trekking holidays account for only 350,000 domestic holidays (British people holidaying in the UK) each year.

In addition to forming the main focus of the holiday, riding is also carried out as a holiday activity on a more casual basis. It is estimated that between one and two percent of activity holidays involve riding at some point – a similar figure to golf. Horse riding is also more likely to form part of the holiday experience in Scotland and Wales.

#### 3.2 Types of Riding Holiday

Generally speaking, horse-riding holidays can be broken down into the following broad categories:

- Riding as an ancillary holiday activity: this type of activity is not central to the holiday experience. It normally takes the form of a pony trek that can be completed as an hour or half-day ride. Ideal for beginners.
- Pony trekking holidays: most popular form of equestrian tourism where the activity forms the main purpose of the holiday and probably accounts for 90 to 95 percent of the market. Trekking establishments are predominantly based in Wales and Scotland which both have a well-established activity holiday market.
- Trail riding: this activity is for the experienced rider, the travelling distance is considerably increased as the ride is conducted at a very brisk pace. It takes the form of circular rides returning back to the initial starting point or distance rides where the group rides from one destination to the other staying in different accommodation.
- Specialist holidays: a variety of courses for adult enthusiasts, for people wanting to learn to ride from scratch, to acquire an instructor's certificate, or to perfect dressage technique.

#### 3.3 Growth Potential

Research shows that there is considerable latent interest in riding holidays. In a survey carried out by Mintel market research in 1998, it was found that horse riding was the seventh most popular activity carried out on an activity holiday, coming below cycling but above golf. However, in terms of activity holidays that people **would** like to pursue in the future, horse riding was ranked fifth.

This can be backed up with research from the British Equestrian Trade Association who found that five percent (2.6 million) of the non-riders in the UK are keen to take up riding, showing significant potential for the activity.

More recent research by Mintel in 2000 combined responses from consumers who were asked if they had ever participated in a particular activity holiday or were interested in taking a particular activity holiday of some sort in the future. This provided a “maximum potential” level for each type of activity that could be undertaken whilst on holiday. It showed that horse riding or pony trekking was the third most popular single activity with 54 percent (roughly 25.5 million adults).

**Table 3.1 Activity Holidays Adults have Taken or are Interested in Taking**

Activity	Taken or Interested In (%)
Any Activity Holiday	52
Water Sports	61
Golf	59
Horse Riding/Pony Trekking	54
Snow Sports	51
Walking, Rambling or Hiking	48
Air Sports	44
Cycling	39

*Source: Mintel*

In a separate survey, Mintel studied the type of activity holiday consumers are most interested in, and found that 12 percent of the UK adult population declared an interest in taking horse riding/pony trekking holidays, which equates to a market size of almost 6 million people. Of these, the family market segment was the most interested, with 19 percent of all respondents. Clearly, horse riding/pony trekking holidays tend to appeal most to those consumers with families, although there is also strong interest in the pre-family segment.

**Table 3.2 Interest in Horse Riding/Pony Trekking by Market Segment**

Market Segment	Percentage Interested in Horse Riding/Pony Trekking Holidays	Estimated Volume of UK Adults (millions)
All	12	5.9
Pre-Family	15	1.5
Family	19	2.6
Empty Nesters/No Family	13	1.2
Post Family	4	0.6

*Source: British Market Research Bureau/Mintel*

Comparison of Tables 3.1 and 3.2 above indicates that a large number of people have, at some time, taken a horse riding holiday of some sort. They show that 25.5 million adults have taken or are interested in such a holiday, compared to 5.9 million simply being interested.

## 4. SECTOR TRENDS AND DEVELOPMENTS

### 4.1 Competitions

There is evidence of a growing number of people competing in horse related competitions. Horse trials (dressage, show jumping and cross-country) tend to take place as one-day or three-day events. Three-day events typically take place over Friday, Saturday and Sunday. The growth rate in people participating in horse trials is estimated to be between three and five percent per annum over the last five years, and this has been boosted by a new entry level being introduced for horse trials allowing novices to participate in the sport.

The British Horse Trials Association has around 8,000 members and is involved in organising around 170 events throughout the UK each year; of these, 18 are in Scotland. On average there are 350 to 400 participants at each event, with these numbers increasing through attendance of helpers and supporters. The horse trials at Thirlestane Castle and Blair Castle can attract as many as 12,000 people.

Another popular event is the more recently introduced sport of Le TREC. Le TREC is short for Technique De Randonnee Equestre De Competition and it is perhaps best described as a form of orienteering on horseback. It involves a knowledge of terrain, and an understanding of map reading is an important feature of the sport. Le TREC is designed to test a horse/rider combination through a whole range of activities, combining elements of trail riding with cross country jumping and flatwork.

Le TREC is becoming a highly popular sport, and competitions tend to be held over two or three days, and consequently, as with horse trials, riders, supporters and horses all require accommodation and related facilities. Interest in the sport in Scotland has also been boosted by the current world Le TREC champion, who is Scottish.

The first Le TREC competition in Scotland took place in 1998, and the Scottish and British championships took place there in 2000. The British championship moves around the British Isles and is in Wales in 2001. However the Scottish championship, sponsored in 2001 by the Bank of Scotland, will take place near Lanark.

### 4.2 Trade Fairs and Horse Shows

Equitana is the world's biggest and most significant trade fair for the equestrian sector. Being a highly focused industry fair, a wide range of companies and organisations participate to generate business selling holidays, merchandise, and a wide range of other equestrian related products and services. The Equitana trade fair takes place in Essen, Germany every other year (this year: 3-11 March), and also Kentucky, USA. In Essen the show covers 16 exhibition halls and a total area of 48,000m<sup>2</sup>, with one whole hall dedicated to riding holidays. Around 300,000 people are expected to visit the fair in 2001. However, there are other, albeit slightly smaller fairs, in other European countries including France, Spain, and Italy.

It appears that trade fairs such as Equitana are one of the most direct ways to raise the profile of an equestrian tourism product and also to initiate sales of equestrian holidays. Bord Failte regularly participate at Equitana to promote their horse-riding tourism product. Further research would be necessary to evaluate the benefits of such an event over other marketing methods.

In addition to the trade fairs, horse shows such as Olympia and Badminton also attract large numbers of people (around 300,000 people attend the Badminton Horse Trials each year) with an interest in horse riding. Agricultural shows, such as the Royal Show at Stoneleigh are also popular with horse riders and offer a very targeted market. Bord Failte, the Northern Ireland Tourist Board, and other tourist boards such as the Finnish Tourist Board have a regular presence at the large trade fairs and horse shows.

#### **4.3 Product Development in Scotland**

The Buccleuch Country Ride is a three to four day horse-ride on bridleways, private tracks, open country and quiet country roads in the Scottish Borders. The trail has been open for five years and attracts around 100 riders a year. Whilst this number is relatively small, there is considerable potential for further interest in this ride, and also developing other circuits in Scotland as these trails have considerable benefits to the rural economies. The relatively low numbers of riders using the Buccleuch Country Trail can most probably be attributed to the small amount of marketing and promotion that has so far been attributed to it.

It is thought that the Buccleuch Country Ride, on which riders generally bring their own horses, has a two to three hour catchment area. Accommodation en-route is horse-friendly in so far as there are stables in which horses can spend the night. It has been noted that stables need to be of a good quality to attract riders. The main stumbling block with regards to opening up more trails is access.

The Draft Land Reform Bill, which should go through Scottish Parliament later this year, will enable everyone to have right of access over land and water with responsibility. This should broaden the scope for developing further trails in Scotland, although it is likely that it will take some time for the local authorities to put in core path networks. Another development worth noting is the “Paths-for-All” initiative in which BHS is a partner. The aim is to provide path networks around local communities in Scotland. This is to facilitate walkers and cyclists as well as horse riders.

Both the Land Reform Bill and “Paths-for-All” should improve access and variation of routes available for riders, which can only be positive for the promotion and development of horse riding in Scotland.

#### **4.4 Product Development Overseas**

There has been an increase in the number of companies offering horse-riding holidays overseas over the last few years. In some respects, this has had an effect on the

domestic market as holidays in France, Germany and Italy have attracted UK consumers with products and prices that compete closely with those in Britain. Now, many Eastern European countries, such as Slovenia, are offering additional competition and lower prices than many western European countries can match.

The growth in interest of riding holidays has encouraged some operators to branch out to countries outside of Europe, and now it is not unusual to find horse riding holidays in Africa, Asia, and America. The following table lists the main operators based in the UK.

Company	Selection of Countries Offered
Equitour	Botswana, Chile, Mongolia, Italy
Foxcroft Travel	Ireland, New Mexico, France
In The Saddle	Jordan, India, Argentina, Iceland
Ride World Wide	France, Kenya, Romania
Unicorn Trails	Wales, Malawi, Australia
Inntravel	Portugal, Spain, Italy, France

Whilst Inntravel include two UK destinations in their brochure, the Yorkshire Dales and Castle Howard, most of the other operators focus purely on overseas destinations. Generally these operators believe that the domestic market likes to book direct with the supplier, and therefore there is no demand for a domestic package. However, cost, transport, quality of accommodation, and quality of horses are other factors that these operators consider before including a riding centre in their brochures.

It is likely that cost is one of the most important of these factors. Prices for a week riding in Slovenia (including flights) are comparable to the same type of holiday in the Yorkshire Dales (comparing prices from the Inntravel and Slovenia Pursuits brochures). This makes it very difficult for operators to sell the domestic product. Consequently, it is increasingly important to differentiate products on quality rather than price.

## 5. GUIDELINES FOR THE DEVELOPMENT OF THE SECTOR

The following bullet points provide guidelines for the promotion and development of the equestrian tourism sector in Scotland. Whilst not intended to be complete, they do highlight the most salient points that have arisen from the research into the sector.

- There is a need to facilitate the link between the consumer and the supplier. It is important that the whole package is offered to the overseas tourist; that is the horse riding element, accommodation, any additional side tours, and possibly even the flights. At present the product is sold in a very piecemeal fashion with visitors having to book all or most of the elements of the holiday separately.
- Consumers these days, especially those from overseas, are looking for a comfortable seamless package. They want to be looked after; they do not want to paddle around in the mud; they do not want to undertake any chores; they want accommodation, food and drink organised and provided for. Within the equestrian tourism sector it is considered that Scotland is better than both England and Wales in this regard.
- It is essential to improve the availability of information on riding. Use of the Internet is imperative with regards to this, but also paper-based literature should be developed for the different types of horse riding available: competitions, trail riding, trekking, etc. Also, information should also be readily available on the products riders are likely to use when in Scotland, such as suitable accommodation, attractions, transport etc. It should be remembered that riders will often bring with them partners or family members who are not riders and will be looking for other activities to participate in whilst visiting Scotland.
- Information should be available in several languages, in particular English, French, German, and Spanish. This should be the case for both printed literature and information available on the Internet. There is a substantial market within Europe for riders who take equestrian holidays, and whilst most European countries have good equestrian products themselves, there may be scope for attracting French, German, Austrian, Spanish and other western European riders to Scotland. Also, several European countries are already trying to attract the Eastern European markets, and Scotland could do the same. However, there are already several established equestrian markets. When Bord Failte (Irish Tourist Board) undertook a study of the equestrian tourism segment in 1999, they identified the British, French, German, Italian and American markets are the ones with most immediate potential however this has not yet been realised in a growth in numbers of visitors.
- There are several markets that are likely to increase their interest in equestrian tourism over the next decade. However, young professionals looking for a long weekend break are likely to be one of the most significant for Scotland.

- The development of further trails such as the Buccleuch Country Ride should be sought, so to broaden the appeal for riding in Scotland. Also, suitable accommodation for both the horse and rider needs to be developed and promoted so that riders know where they can stay, and consequently they can plan their routes accordingly.
- Presence at trade fairs such as Equitana, and horse shows such as Olympia, are essential to raise the profile of the sector in Scotland. Even if the Scottish Tourist Board do not attend, it would be beneficial to have representation from the trade – such as some of the horse riding centres in Scotland. Alternatively, some of the larger operators such as In The Saddle, who are regulars at these fairs and shows, offer the facility of racking other company or tourist board brochures on their stand for a small fee.
- With regards to printed media, Horse and Hound (circulation 70,000 each week) run holiday features twice a year and Horse and Rider (circulation 60,000 each month) include more regular holiday features. The Daily Telegraph is the best domestic newspaper for coverage of horse riding holidays, and typically features such articles two or three times a year.
- The development of riding in Scotland will, to some extent, be controlled by the private sector and their involvement in offering an attractive horse riding product. It is therefore favourable to attract specialist operators in the sector, such as Inntravel, by offering them an attractive product that is perceived to provide added value to the consumer. The product does not have to be cheap; so long as it offers something that other destinations cannot match it will have the potential to be successful.

# **Appendix**

## **Know Your Market – Equestrian Tourism**

## **KNOW YOUR MARKET: Equestrian Tourism**

### **What is Equestrian Tourism?**

Equestrian tourism covers a number of recreational and sporting activities, including pony trekking, hacking, trail riding, horse trials and carriage driving. People taking part in any of these activities outside of their usual environment are said to be participating in equestrian tourism.

### **How big is the market?**

Horse riding holidays in the UK by British residents accounted for around 350,000 trips in 2000. Approximately 200,000 of these were short breaks (four or less nights) and 150,000 were long holidays (over four nights). Of these it is estimated that around half were in Scotland. Overall, it is estimated that there are around two million people in the UK who ride on a regular basis (at least once a week). There are approximately 80,000 horses in Scotland, and the horse ownership to population ratio is only bettered in the whole of the UK by the south east of England.

### **What is the growth potential?**

Riding is starting to broaden its appeal to the public, and more people are taking up riding or riding again in later life, having given up several years previously. Whilst horse riders are much more likely to be women than men, there has been considerable growth of the number of male riders participating in the activity during the 1990s. Older riders (mainly 45+) have also increased their participation in horse riding over the last decade, although statistics also show a slight decline in participation of children.

### **Who takes riding holidays?**

Interest in riding holidays varies depending on the lifestage of the consumer. Those with families are the most likely to take a riding holiday, followed by pre-family consumers. It is estimated that around six million people in the UK are interested in taking a riding holiday in the future, which shows considerable potential.

### **How can riders be attracted?**

There is growing participation in competitions such as horse trials and Le TREC. Attracting these events to Scotland will also attract riders and spectators. Information on the equestrian tourism product should be developed and made more widely available in several European languages. The distribution of literature at trade fairs, horse shows, and via the Internet would assist those looking into riding in Scotland.

**How should the product develop in the future?**

The development of more trails, such as the Buccleuch Country Ride, would enhance the reputation of Scotland as a first-class ride destination. Also, suitable accommodation for both the horse and rider needs to be developed and promoted so that riders know where they can stay, and consequently allow them to plan their routes accordingly.

## **What is Equestrian Tourism?**

Equestrian tourism covers a number of recreational and sporting activities, including pony trekking, hacking, trail riding, horse trials and carriage driving. However, generally speaking, horse-riding holidays can be broken down into the following four broad categories:

### **Casual Riding Holidays**

Riding as an ancillary holiday activity: this type of activity is not central to the holiday experience. It normally takes the form of a pony trek that can be completed as an hour or half-day ride. Ideal for beginners.

### **Pony Trekking**

These holidays are most popular form of equestrian tourism where the activity forms the main purpose of the holiday and probably accounts for 90 to 95 percent of the market. Trekking establishments are predominantly based in Wales and Scotland which both have a well-established activity holiday market.

### **Trail Riding**

This activity is for the experienced rider, the travelling distance is considerably increased as the ride is conducted at a very brisk pace. It takes the form of circular rides returning back to the initial starting point or distance rides where the group rides from one destination to the other staying in different accommodation.

### **Specialist Riding**

Specialist holidays include a variety of courses for adult enthusiasts, for people wanting to learn to ride from scratch, to acquire an instructor's certificate, or to perfect dressage technique.

### **How big is the market?**

Horse riding holidays in the UK by British residents accounted for around 350,000 trips in 2000. Approximately 200,000 of these were short breaks (four or less nights) and 150,000 were long holidays (over four nights). Of these it is estimated that around half were in Scotland. In total, there are around two million people in the UK who ride on a regular basis, with half of these being woman, and the other half being men and children.

In addition to forming the main focus of the holiday, riding is also carried out as a holiday activity on a more casual basis. It is estimated that between one and two percent of activity holidays involve riding at some point – that is around 200,000 domestic holidays. Horse riding is also more likely to form part of the holiday experience in Scotland and Wales than in England.

There appears to be significant potential for the expansion of the segment. Market research indicates that 2.6 million non-riders would like to start riding, and around 6 million people are interested in taking a riding holiday.

### **What is the growth potential?**

It is anticipated that activity holidays will continue to show considerable growth in popularity over the coming decade. Consumers no longer simply seek sun, sea and sand when on holiday, but often wish to pursue other activities. These may be activities that they participate in at home, or have no previous experience of whatsoever. The most popular of these activities are walking, cycling, fishing, water sports (such as scuba diving), boating and sailing, climbing, horse riding, field sports (hunting and shooting), and snow sports (skiing and snowboarding). These activities have been listed roughly in order of their popularity, measured by their consumer penetration levels in the UK.

Riding is starting to broaden its appeal to the public, and more people are taking up riding or riding again in later life, having given up several years previously. Research shows that there is considerable potential for the sector, with large numbers of people declaring a desire to take a horse riding holiday. The challenge for all those in the industry is to convert these desires into holiday bookings.

**Who takes riding holidays?**

Horse riders generally have a bias towards the 15-24 and 35-44 age groups, in particular those families with at least one child. The AB socio-demographic groups also tend to have a high representation. It therefore follows that interest in riding holidays varies depending on the lifestage of the consumer. Those with families are the most likely to take a riding holiday, followed by pre-family consumers.

Whilst pre and post-family working women are the most likely to participate in riding as an activity, it is those with a family who are most likely to actually go on a riding holiday.

Although there are a wide range of markets that are likely to increase their interest in equestrian tourism over the next decade, young professionals looking for a long weekend break are likely to be one of the most significant markets for Scotland.

## **How can riders be attracted?**

### **Competitions**

There is evidence of a growing number of people competing in horse related competitions. The growth rate in people participating in horse trials is estimated to be between three and five percent per annum over the last five years, and this has been boosted by a new entry level being introduced for horse trials allowing novices to participate in the sport.

Another popular event is the more recently introduced sport of Le TREC. Le TREC competitions tend to be over two or three days, and consequently, as with horse trials, riders, supporters and horses all require accommodation and related facilities. Interest in the sport in Scotland has also been boosted by the current world Le TREC champion, who is Scottish. The Scottish championship, sponsored in 2001 by the Bank of Scotland, will take place near Lanark.

### **Trade Fairs and Horse Shows**

Equitana is the world's biggest and most significant trade fair for the equestrian sector. In Europe, the show takes place every other year in Essen, Germany. Around 300,000 people are expected to visit the fair in 2001. It appears that trade fairs such as Equitana are one of the most direct ways to raise the profile of an equestrian tourism product and also to initiate sales of equestrian holidays.

In addition to the trade fairs, horse shows such as Olympia and Badminton also attract large numbers of people (around 300,000 people attend the Badminton Horse Trials each year) with an interest in horse riding. Agricultural shows, such as the Royal Show at Stoneleigh are also popular with horse riders and offer a very targeted market.

### **Packaging the Product**

It is necessary to facilitate the link between the consumer and the supplier by offering a complete package to the overseas tourist; that is the horse riding element, accommodation, any additional side tours, and possibly even the flights. At present the product is sold in a very piecemeal fashion with visitors having to book all or most of the elements of the holiday separately.

Consumers these days, especially those from overseas, are looking for a comfortable seamless package. They want to be looked after; they do not want to paddle around in the mud; they do not want to undertake any chores; they want accommodation, food and drink organised and provided for.

### Information Availability

There is a necessity to improve the availability of information on riding. Use of the Internet is imperative with regards to this, but also paper based literature should be developed for the different types of horse riding available: competitions, trail riding, trekking, etc. Also, information should also be readily available on the products riders are likely to use when in Scotland, such as suitable accommodation, attractions, transport etc. It should be remembered that riders will often bring with them partners or family members who are not riders and will be looking for other activities to participate in whilst visiting Scotland. Information should be available in several languages, in particular English, French, German, and Spanish.

With regards to printed media, Horse and Hound (<http://www.horseandhound.co.uk>, circulation 70,000 each week) run holiday features twice a year and Horse and Rider ([http://www.equestrian.co.uk/horse\\_and\\_rider](http://www.equestrian.co.uk/horse_and_rider), circulation 60,000 each month) include more regular holiday features. The Daily Telegraph (<http://www.telegraph.co.uk>) is the best domestic newspaper for horse riding holidays, and typically features such articles two or three times a year.

## **How should the product develop in the future?**

### **Trails and Path Networks**

The development of more trails, such as the Buccleuch Country Ride, would enhance the reputation of Scotland as a first-class ride destination. The relatively low numbers of riders using the Buccleuch Country Trail can most probably be attributed to the small amount of marketing and promotion that has so far been attributed to it. It is thought that the Buccleuch Country Ride, on which riders generally bring their own horses, has a two to three hour catchment area – this could and should be improved upon given the unique and stunning scenery on the trail.

The Draft Land Reform Bill should broaden the scope for developing more trails in Scotland, although it is likely that it will take some time for the local authorities to put in core path networks.

### **Competition from Overseas**

There has been an increase in the number of companies offering horse-riding holidays overseas over the last few years. In some respects, this has had an effect on the domestic market as holidays in France, Germany and Italy have attracted UK consumers with products and prices that compete closely with those in Britain. Now, many Eastern European countries, such as Slovenia, are offering additional competition and lower prices than many western European countries can match.

Most operators focus purely on overseas destinations. Generally these operators believe that the domestic market likes to book directly with the supplier, and therefore there is no demand for a domestic package. However where domestic destinations are considered, cost, transport, quality of accommodation, and quality of horses are the other factors that operators consider before including a riding centre in their brochures.

### **Build a Unique Product**

The development of riding in Scotland will, to some extent, be determined by the private sector and their involvement in offering an attractive horse-riding product. It is therefore favourable to attract operators in the sector, such as Inntavel, by offering them an attractive product that is perceived to provide added value to the consumer. The product does not have to be cheap; so long as it offers something that other destinations cannot match it will have the potential to succeed.

## Useful Contacts

**Scottish Tourist Board** – <http://www.visitscotland.com>

Official website for tourism in Scotland.

**British Tourist Authority** – <http://www.visitbritain.com/uk/activities>

Activity holidays section of the BTA website – very little information on horse riding.

**Irish Tourist Board** – <http://www.equestrian.travel.ie>

Irish Tourist Board equestrian tourism web site.

**Scottish Activity Holidays Association** – <http://www.activity-scotland.co.uk>

**British Endurance Riding Association** – <http://www.british-endurance.co.uk>

Governing body for endurance riding in the UK.

**British Equestrian Federation** – <http://www.bef.org.uk>

Governing body of equestrian sport in Great Britain.

**British Equestrian Trade Association** – <http://www.beta-uk.org>

Trade association of professional companies serving the equestrian industry, the individual rider and its members.

**British Horse Driving Trials Association** – <http://www.horsedrivingtrials.co.uk>

Official association of horse driving trials in the UK.

**British Horse Society** – <http://www.bhs.org.uk>

The BHS is the UK's largest and most influential equestrian organisation.

**British Horse Society: Scottish Branch** - <http://www.bhsscotland.org.uk>

**British Horse Trials Association** – <http://www.bhta.co.uk>

Official British governing organisation for horse trials.

**British Show Jumping Association** – <http://www.bsja.co.uk>

The BSJA is the governing body of show jumping in Great Britain.

**Federation Equestre Internationale** – <http://www.horsepoint.org>

The FEI is the authority for all international events in dressage, jumping, eventing, driving, endurance riding and vaulting.

**Pony Club** – <http://www.pony-club.org.uk>

The Pony Club is an international organisation for those interested in ponies and riding.

**Scottish Championship Horse Trials** – <http://www.lauder.bordernet.co.uk/horsetrials/>**Scottish Equestrian Federation** – <http://www.houstonhousehorsetrials.co.uk/sea/>

Recognised by Sportscotland as being the representative body for all equestrian interests in Scotland.

**The Equestrian** – <http://www.equestrian.co.uk>

The Equestrian website for information on competitions and equestrian news.

**The Trekking and Riding Society of Scotland**– <http://www.ridinginscotland.com>

Dedicated to setting and maintaining the highest standards in recreational riding.