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1. HORSE INDUSTRY

The horse industry in the European Union is of economic importance to all countries. The European Union today consists of 27 member states and the total number of horses in the region is estimated to exceed 5 million. In the past horses were vital in industry, agriculture, transport and the military. Horses today can represent a leisure or sporting activity, a way of life, a working companion or food.

Horses in Europe represent a part of our common history. In different parts of Europe different breeds have evolved depending on environmental conditions and the intended use of the breed. In modern time, the national borders between the European countries have become less important also in the horse world. At least on the surface we are homogenous as you can see the same type of horse activities and breeds represented all over the continent. However, while there are similarities there are also many differences, including favourite choice of horse sports, how the betting on horses is organized and the degree of state involvement in the horse industry. Thus the horse industry of Europe is more varied than maybe expected at a first glance. Germany and Great Britain have the largest horse populations in the European Union. However, Sweden has the highest number of horses per capita, and Belgium and the Netherlands the highest density of horses per 1,000 ha land.

The number of horses per capita has remained relatively constant in Europe during the past decade. Even though the exact numbers of horse related enterprises are yet not available in National statistics, an impression from questionnaires for this report is that the diversity of horse related enterprises has increased over time. In the future there will most likely be a trend towards further diversification into new markets in the horse industry. The business innovations and opportunities in terms of provided services and equipment for horse owners as well as for horses seem vast. The economic importance of the horse is not expected to diminish in the future.

One small part of this horse industry is the horse riding. 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.
2. WHAT’S HORSE RIDING

Equestrian tourism emerged in the 1950s in Europe, and especially in France, at a time when machines were taking over from animal-drawn vehicles. Since then it has moved from being a potentially pleasant activity to become a very concrete reality and one of the surest ways of developing horse riding.

In the space of forty years, and in a society where more and more time is being devoted to leisure, equestrian tourism has gone from being a marginal and little-thought-of activity, to today becoming undoubtedly the best means of gaining and retaining the interest of the largest number of horse riders and attracting the general public through the values that are linked to it.

Equestrian tourism’s main motivation is the equestrian activity itself. Only a few active leisure equestrian disciplines are offered as package. Generally speaking, horse-riding holidays can be broken down into the following broad:

- Based rides - These are rides where you return to a central base each day.
- Trail rides - In trail rides you camp or stay at different locations each night.
- Beginners - Riding holidays suitable for beginners.
- Riding Holiday Weekends - Short stay holiday destinations.
- Dressage - Practice your dressage whilst away.
- Show Jumping & Cross Country - Improve your jumping at these destinations.
- Family friendly holidays - Holidays for the entire family.
- Western - Practice being a cowboy or cowgirl.
- Safari - See the big game on horseback.
- Tuition - Take lessons whilst on holiday.
- Disabled Riders - Riding holidays for disabled riders.
3. HORSE RIDING SITUATION IN EUROPE

Horseback riding is a very popular leisure activity, especially among children and young adults in developed countries. This way you can find such significant data such as the 2.4 million practitioners in Britain and 760,000 in Germany.

Some sources suggest that there could be around 20 million equestrian leisure riders in developed countries, many of which have their own horses, either in facilities owned or in private schools.

The two major global sources of emission of equestrian tourism are Europe and the United States. There are 6.4 million riders for leisure in the EU, representing approximately 2% of the total EU.

In view of the above, countries such as France and Hungary have recognized the economic potential of equestrian tourism and government agencies promote this segment of the tourism market and provide it with higher standards (Association of Hungarian Equestrian Tourism and National Committee for Equestrian Tourism France).

France is the biggest horse riding country in Europe, with more than 400,000 practitioners and over 17,000 kilometres of marked trails, although the country making more trips abroad for equestrian motivations is Germany following by UK.

3.1. HORSE RIDING SITUATION IN EUQUUS TERRITORIES

Nowadays, there are few studies on the international situation of equestrian tourism, but it is essential to know the overall situation of EUquus countries, to carry out a general approach of the horse riding situation in Europe.

3.1.1. Horse riding in Barcelona Province (Spain)

The Province of Barcelona has enough natural resources and infrastructure for developing an attractive equestrian tourism product. This product currently has a basic degree of development, reducing its interest for selling the product by tour operators. It has a few promotion by the government. This stage of development defines our product as uncompetitive respect other Spanish destinations. No defined representative to develop equestrian tourism products.

In Barcelona, there’s a large network of equestrian centers (75), 46 of which do ride activities, and 21 equestrian tourism routes. The equestrian of mountain areas are more specialized in offering routes but the main concentration of the equestrian centers is in the metropolitan areas (high population).

Barcelona province has one equestrian route approved by the RFEH. Most are concentrated in Andalusia and Valencia. And even though the AMAC (Associació de Marxes a Cavall de Catalunya) created some itineraries in the Barcelona area, they are not signposted and not commercialised by any tour operator or travel agency. There’s an equestrian tourism product created by the initiative of 6 equestrian centres using rural accommodation, but, in total, there are only 8 established routes, with a duration of 2 days each, except “Royal Path”, that is the only horse riding trail with a duration of 7 days.
Few companies are selling equestrian tourism products in Barcelona Province. And, we can see that on the websites, equestrian tourism is always classified like an active tourism and adapt hiking and cycling trails for the transit of horses.

### 3.1.2. Horse riding in Croatia

Horse tourism in Croatia is relatively small, but all statistical indicators in the last years point out on continuous progress and increase of interest in dealing with horses. The data also points out that all parts and activities exist, as in modern, big and economically developed horse industries, so without any hesitation; it can be talked about Croatian Horse Industry, and consequently Croatian Horse Tourism.

Horse Tourism in Croatia is still at the beginning of development in the Republic of Croatia, and there is no organized structure of its performance, the methodology of this first phase of research was based on gathering data about organizing and numerical indicators of development of Horse Tourism, and its economic impact on total state of Croatian tourism.

### 3.1.3. Horse riding in Dordogne (France)

In France, the number of horse-riders and members has increased over the years. It has doubled in fifteen years, up from 4113 in 1990 to 6625 in 2007 and over 10000 in 2014. The French National Horse-riding Committee of the French Horse-Riding Federation Works with 90 000 members in 2014 (against 20 000 in 1950) and with over a million riders. It represents 2500 horse-riding centres and riders’ associations. It cooperates closely with its regional branches which are the Regional and Local Horse-riding Holidays Committees. Horse-riding also boasts some beautiful achievements being the first female sport and the third Olympic sport.

Riding centers are key players in the development of horse riding holidays. The number of horse riding establishments run by professionals is increasing, up from 4113 in 1990 to 6625 in 2007 and reaching more than 8000 in 2014.

Many projects have been launched in France in Brittany, the Drome and Jura over the last ten years. The central region is also active in this trend. It is also the case for the Dordogne area which counts over 187 miles of paths. Actually, the Dordogne ranks first in horse-riding holidays under the label « Welcome to the farm » which gathers over twenty concerns. The Dordogne also ranks first domestic destination in rural tourism.

### 3.1.4. Horse riding in Hungary

Hungary is one of the pioneers of the European Equestrian Tourism. Several thousand foreign tourists visited specific equestrian programmes already in the 1960’s and 1970’s. At the same times, some hundred thousands of holiday tourists visited equestrian shows and programs organised in different areas of our country.

The riding on a horseback is less preferable as leisure time activity between Hungarian populations, excepting hiking such leisure time activities like golf, fishing, hunting, air sports are not so popular. According to research details nearly 60% of interviewed from 1300 person has never ridden a horse, those numbers who can ride on a horseback occasionally are under 10%.

However among Hungarian population the judgement of equestrian attitude are significantly positive, the facilities of Hungary are suitable as well. In contrast the personally attitudes are decreasingly favourable, the average positive judgement has not appeared in travelling motivations. According to
survey of M.Á.S.T. the equestrian tourism is the most preferable between populations who are active in economically, young, has high school graduation, lived in community. The equestrian tourism is the most popular between people of Middle-Transdanubia, the Northern Great Plain and the Southern Great Plain.

In Hungary from the beginning of the 1990’s equestrian enterprises (pensions, stables, specialized equestrian services) have been established. By now, Hungary has more than 400 equestrian enterprises, accounting total capital value of 20 billion HUF.

There are regional marginally in spite of colourful and varied equestrian programmes and events. We can find the most services in the Region of Budapest and The Hungarian Great Plain, but there are less in Region of Transdanubia, but the lasts are the Region of Lake Balaton and Eger in a point of services and there are fewer equestrian accommodations there too. The equestrian establishment and services are found all in Hungary. Unfortunately, we have to speak about some obstructive effects: there is lack of suitable professional and special knowledge for leading the equestrian enterprises, there are not enough riding trainers and teachers for suitable services, furthermore lack of foreign languages knowledge, there are not suitable horse stock, and assigned riding routes.

### 3.1.5. Horse riding in Menorca (Spain)

En Menorca is a traditional tourist destination. Its highlights are its magnificent beaches, exquisite gastronomy, a wide offer of sports to practise on the coast and inland… moreover it’s an equestrian tourism destination. The horse is a pillar of our culture and an element through which our history can be read and understood better.

Throughout the history, horses have had a tight bond with the people of Menorca. As early as the 14th century, horses were the main pillar of the defence system, associated to the Camí de Cavalls (Horse track) that ran all the way around the Island. Nowadays this track is an important resource for developing equestrian and active routes.

Horses are the main attraction in all traditional festivals that take place in summer around all towns in Menorca. every year, from June to September, horse riders and their horses revive a ritual that started at the beginning of the 14th century. You must take into account the importance of these festivals, to appreciate why the Menorcan horse must be of an autochthonous breed.

The Association of Horse breeding and Owners of Menorcan breed horses, works to foster and promote the Menorcan breed horse and every year arranges the morphological contest of this breed, which takes place in May at the Fair Premises in Es Mercadal.

Also Menorcan dressage plays an important part within the horse culture in Menorca, since it has its own horse riding style. This style of horse riding has its origins in the traditional fiestas, from which it takes its main elements and becomes a real show, and in the 1980’s, it was established as an official sporting event and competitions are arranged throughout the whole year.

A good way to get to know more about dressage and Menorcan horses is to attend one of the equestrian shows offered in Menorca. These equestrian shows, from the base of the Menorcan dressage with a suitable choreography, allow us to observe more about this style outside the racetrack.
Other activities that complement the equestrian activity in Menorca are the trotting races performed every week in the two tracks on the Island. The Equestrian Federation of the Balearic Islands has nine federated clubs, through which horseback riding is fostered arranging competitions according to the three most important styles: jumping of obstacles, classical dressage and Menorcan dressage.

Since the declaration of Menorca as a Biosphere Reserve and thanks to the efforts of the institutions to preserve the natural richness of our Island, Menorca still offers many unspoiled green areas to be discovered by visitors. Equestrian routes provides the chance to take an excursion around the rural tracks that have been recovered after many years and enjoy the magnificent landscape and views offered by this Island.

### 3.1.6. Horse riding in Salerno (Italy)

The territory was divided into 4 homogeneous areas and, for each one of them has been carried out a survey of operators really active, the proposed itineraries classified with respect to the difficulty of the services and packages offered, of accommodation and promotions. We focused also on the equestrian activities run by voluntary groups working in the social field, on farms in the area and on institutions and sporting events. The study revealed the existence of about 20 operators active in the equestrian sector, including voluntary associations. One of these operators also runs a travel agency specializing in the field.

We can conclude by saying that, despite the immense scenic, historical, archeological and natural beauty that characterize our province, equestrian tourism is still underdeveloped and deserves promotion actions at national and international level.

### 3.1.7. Horse riding in UK

There are over 18,000 active equestrian businesses in Great Britain, all in some way linked to or dependant on equestrianism. The majority are small or medium-sized enterprises many employing fewer than five people. Business activities range from tack shops to feed manufacturers, instructors to photographers, riding holidays to specialist recruitment companies. Improving the economic performance of these enterprises is important not just for the individuals directly involved - as customers, owners or employees but for the industry as a whole. A healthy and thriving equestrian business sector is vital to the continuing growth and development of equestrian sport, while the economic performance and even the survival of many equestrian businesses depends on a healthy market.

In the UK, there is a perception that riding and/or horse ownership is expensive, elitist and sometimes unwelcoming to newcomers. As far as the cost of learning to ride is concerned, the reality is that spending on riding lessons is broadly in line with spending on other leisure pursuits such as golf or tennis lessons, and that horse riding generally is no more expensive in the UK than many leisure activities. For most people, the riding school is their introduction to the horse industry. If this experience is good, a life-long involvement is born - a significant proportion of riders do not own horses, and rely on riding schools to continue in equestrianism. Riding schools can offer a wide range of activities, not just teaching. Often hacking and/or livery are offered from the same premises.

The significance and potential of the horse industry itself, and of the benefits it brings to the life of the nation, are only now being fully recognised. The industry in the UK makes a hugely important contribution to the economy, as well as to the social fabric of many communities. Given the geographical distribution of the industry, it is particularly (but not exclusively) important in rural areas.

So horse riding has now become an extremely popular activity for people of all ages in the UK. The most recent British Equestrian Trade Association (BETA) National Survey (2010-11) indicated that there is an increased
interest in riding for pleasure, schooling, riding lessons, competition, both affiliated and non affiliated and hunting. They issued some interesting statistics:-

The estimated horse population in the United Kingdom including professional and private is around 988,000.

3.5 million people (6% of the UK population) have ridden a horse at least once in the past 6 months. 1.6 million people ride at least once a month.

73% of riders are female, although there has been an increase in the number of male riders over the past 10 years. 48% of regular riders are aged 24 and under but there is a significant growth amongst those aged 45 and over.

A quarter of all UK riders are below 16 years old, 20% are above 45 years old.

99% ride all the year around increasing from a figure of 61% in 1995-6.

The main reason for stopping riding is that is too expensive whereas in 2005 it was because of a loss of interest.

In 2010 8% of riders were disabled so clearly there needs to be facilities available to cater for these riders.

Since 2005 all UK horses and donkeys are obliged to have a unique passport. Unlike the rest of the EU, the horse is not considered to be an agricultural animal because they are not considered to be a food animal. The British Horse Society protect and care for these animals. It is the largest and most important influential equestrian charity in the UK and possibly the world. They also promote the interests of 4.3 million people in the UK who ride or drive a carriage. Together with British Riding Clubs, they have over 111,000 members. They are very influential in promoting riding in the UK as well as protecting horse riders and they influence all aspects of equestrianism.

BHS have over 77,000 core BHS members, a further 34,000 members of affiliated Riding Clubs and the members of Affiliated Bridleways Associations, so they have a powerful voice with the government. They work tirelessly for every horse, rider and carriage driver, focusing on horse welfare, horse and rider safety, access and rights of way, education and examinations, and working with the proprietors of riding schools, livery yards and trekking centres to maintain the highest standards. They also work in partnership with many other organisations, not least the British Equestrian Federation, to promote the interests of all those who participate in equestrian activities.

BHS Approval means that a riding yard or establishment is insured for public liability and complies with the latest health and safety legislation. The establishments are regularly subject to unannounced annual inspections. There are over 1,000 BHS Approved Establishments in the UK, Ireland and worldwide, Establishments that offer horse riding holidays in the UK need BHS approval so the care of horses and safety of the rider is guaranteed and standards will be high.

Horse riding holidays are becoming increasingly popular but UK riders often prefer to ride overseas, partly because of the warmer weather and also because now holidays in Europe are economically viable with the low cost airlines providing cheap flights to the less expensive riding establishments particularly in Spain and Eastern Europe.

However, the UK has a diversity of landscape so enjoying the countryside on horseback is a great experience for those willing to risk the changeable UK weather. It means that most UK riding holidays will be taken in the summer months whereas it is possible to ride all year around in many European destinations. There are several National Parks with approved establishments that offer horseriding holidays.

Dartmoor:

Dartmoor ponies have roamed the moors for many centuries so this is an area conducive to horse riding holidays. There are many excellent riding stables and trekking centres that have horses to suit all ages and experience. Dartmoor comprises 368 square miles (954 sq km). Riders ride out on the open moor – provided that it is
Horse Riding in Europe

common land, along woodland trails and bridleways, or follow in the hoof prints of medieval traders along historic byways linking towns and villages.

Exmoor and the Quantock Hills:

The route from Exmoor National Park to picturesque villages at the foot of the Quantock Hills takes in the varied and inspiring landscapes of West Somerset and North Devon. There are peaceful open spaces, heather-clad moors, deep valleys, sparkling rivers and a dramatic coastline all dotted with pretty villages. With its long equine history, Exmoor having its own breed of pony is a great place to ride and explore the 267 square miles of stunning National Park landscape. The quiet and open network of bridleways and lanes offer some of the best riding in the UK, including some sections of coastal bridleway, along with beautiful open heather moorland and steeply wooded valleys. Within the National Park boundaries there are over 300 miles of bridleways, in fact over 60% of the public rights of way network has bridleway or higher rights, plus significant permissive access in addition to this.

The 33 mile Coleridge Way bridleway route also offers some wonderful riding from the Quantock Hills to Exmoor following in the footsteps of the romantic poet Samuel Coleridge. Horses and ponies can be hired, by the hour or longer, from one of the many riding schools or trekking centres. Some centres arrange special picnic or pub day rides, or week long holidays. Most centres offer some kind of tuition; this can vary from very basic to more advanced lessons depending on the rider's needs and ability. All breeds and sizes of horse and pony are normally available to cater for every type of rider from the beginner to the more accomplished rider.

South Downs Way:

The 160 km South Downs Way follows the old routes along the chalk escarpments and ridges of the South Downs in West Sussex. This route lets you ‘get away from it all’ without having to travel too far in this busy part of South East England. The undulating route provides a wonderful trip for long-distance riders as well as walkers. It also provides interesting day trips and short breaks.

Brecon Beacons, Wales:

The Brecon Beacons National Park is the perfect place for horse lovers offering spectacular scenery and a wealth of wildlife creating some of the best riding in Europe. There are thousands of hectares of hills, moors and fields, criss-crossed by ancient tracks and lanes. This creates the perfect riding environment, where it is possible to ride all day, sharing the views with just the soaring buzzards.

Cheviot Routes, Scotland:

Close to Edinburgh, Glasgow and Newcastle, the Cheviot Hills mark the border with Scotland; a wild, romantic landscape of rounded hills and valleys. Confident riders will enjoy hill routes in the Cheviot Hills, particularly in the Breamish Valley near Ingram and around Alwinton in the Upper Coquet Valley. If you are a beginner there are plenty of riding centres offering tuition.

Dorset:

From Studland Bay, with its beautiful beaches to the acres of heath land and forest, there are plenty of bridleways to explore in this gorgeous part of the South West of the UK. Studland Beach is famous for its stunning beach where from October to April riding is allowed at any time.

The Cotswolds, Severn Vale and Forest of Dean:

Numerous riding centres in this area cater for both the experienced and novice rider and take advantage of the many miles of public bridleways.
Cumbria and the Lake District:

The Lake District draws visitors from far and wide with its impressive mountains, fells and lakes, a landscape that has inspired many literary greats, such as William Wordsworth and Beatrix Potter. There are numerous affiliated riding centres offering horse riding.

New Forest:

The New Forest in Hampshire is a paradise for any horse and rider, offering some of the most unique riding experiences in the south of England. It is however this uniqueness that can take even the most experienced rider by surprise because there are about three thousand New Forest Ponies that roam freely here and which riders are bound to encounter. There are many establishments offering horse riding and horse riding holidays.

The National Bridleroute Network provides full regional listings of accessible riding routes in Britain. The British Horse Society also lists trails that give open access to some of the country’s most inspiring landscapes. So to sum it up, there are many opportunities in the UK for riders to take a horse-riding holiday.

Horse riding holidays in the UK really need BHS approval, therefore, the standards of horse care and safety will be very high compared to many establishments in other countries.

3.2. HORSE RIDING SITUATION OVERSEAS

Horse-riding holidays were born over a century ago in Europe and more particularly in France. It is synonymous with values, which are more and more sought-after and popular with a wider range of people: love for nature, for authenticity, for discovering new spots. Horse-riding holidays have developed over the last fifty years. It is a way of enjoying scenery from a different angle; offering a new tool for local development and tourism promotion. Some countries such as France, Spain, Canada and Great Britain have seized the opportunity as testified by the economic boom of rural areas.

In Europe, equestrian tourism source countries are Germany, UK, France, Belgium, the Netherlands and the Nordic countries. The countries of southern Europe, such as Portugal, Spain or Italy, even though their horse tradition, are incoming countries for horse riding activities. France is the European power in equestrian tourism, it is a source market, but it has also the best infrastructure for horse riding holidays.
4. HORSE RIDING MARKET IN EUROPE

4.1. SPECIALISED TOUROPERATORS AND TRAVEL AGENCIES

There has been an increase in the number of companies offering horse-riding holidays overseas over the last few years. 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 Europe:

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<td>Hidden Trails</td>
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</tr>
<tr>
<td>Russia</td>
<td>Atlantika Horse</td>
<td><a href="http://www.atlantika-horse.com">www.atlantika-horse.com</a></td>
</tr>
<tr>
<td>Russia</td>
<td>Euroburo</td>
<td><a href="http://www.euroburo.ru">www.euroburo.ru</a></td>
</tr>
<tr>
<td>Spain</td>
<td>Horse and Nature</td>
<td><a href="http://www.horseandnature.com">www.horseandnature.com</a></td>
</tr>
<tr>
<td>Spain</td>
<td>Trek and Ride</td>
<td><a href="http://www.trekandride.com">www.trekandride.com</a></td>
</tr>
<tr>
<td>Spain</td>
<td>Equitur</td>
<td><a href="http://www.equitur.net">www.equitur.net</a></td>
</tr>
<tr>
<td>Spain</td>
<td>Horse History</td>
<td><a href="http://www.horsehistory.es">www.horsehistory.es</a></td>
</tr>
</tbody>
</table>

We don’t know the total business volume of this tour operators, but in global, they are selling around 4,000 horse riding trips world wide. Europe is the continent with more riding trips, followed by Latin America and Africa.

### 4.2. Specialised Trade Fairs

Horse riding tourism can be promoted in specialised equestrian trade fairs or in active tourism fairs. 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 organisation 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 and also Kentucky, USA. In Essen the show covers 16 exhibition halls and a total area of 48,000m2, with one whole hall dedicated to riding holidays. However, there are other, albeit slightly smaller fairs, in other European countries including France, Spain, and Italy.
### 4.3. 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.

The profile of such tourists are generally medium-high class who buy packages through specialized operators, because they want professionals who speak their language. This tourist are looking especially for the authenticity of the territory and comfort rather than luxury. The age is from 25 to 70 years old.

<table>
<thead>
<tr>
<th>Trade Fair</th>
<th>Place</th>
<th>Type</th>
<th>Observations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiera Cavalli</td>
<td>Italy (Malpensa)</td>
<td>Equestrian</td>
<td>Around 70.000 visitors. Equestrian fair with horse shows programmed</td>
</tr>
<tr>
<td>Salon du Cheval</td>
<td>France (Paris)</td>
<td>Equestrian</td>
<td>Equestrian fair with horse shows programmed</td>
</tr>
<tr>
<td>Equus Catalonia</td>
<td>Spain (Barcelona)</td>
<td>Equestrian</td>
<td>Equestrian fair with horse shows programmed</td>
</tr>
<tr>
<td>SICAB</td>
<td>Spain (Sevilla)</td>
<td>Equestrian</td>
<td>Equestrian fair with horse shows programmed</td>
</tr>
<tr>
<td>Horse Event</td>
<td>Holland (Deurne)</td>
<td>Equestrian</td>
<td>Around 35.000 visitors</td>
</tr>
<tr>
<td>Equisur</td>
<td>Spain (Jerez)</td>
<td>Equestrian</td>
<td>Equestrian fair with horse shows programmed</td>
</tr>
<tr>
<td>Equitana</td>
<td>Deutschland (Essen)</td>
<td>Equestrian</td>
<td>Every two years. Around 300.000 visitors.</td>
</tr>
<tr>
<td>Hippologica</td>
<td>Deutschland (Berlin)</td>
<td>Equestrian</td>
<td>Combine shows, horse riding and sports</td>
</tr>
</tbody>
</table>
5. CONCLUSIONS AND FUTURE GUIDELINES

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

- 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.

- There is a substantial market within Europe for riders who take equestrian holidays and most European countries have good equestrian products themselves. The challenge is to create a European tourist flow motivated by equestrian tourism among European countries.

- It is necessary to facilitate the link between the consumer and the supplier by offering complete quality packages to the tourist; that is the horse riding element, accommodation, any additional side tours, and possibly even the flights.

- Europe has two competitors for horse riding holidays: Africa and South America. Usually, this trails or ridings are more expensive than European ones because of the cost of the flights. Nevertheless, the difference of the European horse ridings could be the high quality of them.

- The development of riding in Europe will be determined by the private sector (touristic and equestrian) and their involvement in offering an attractive horse-riding product. The added value of this product should be the emphasis given to the other elements of the European destinations as gastronomy, cultural values, wine tourism, beaches, and so own besides the own values of the equestrian product itself.

- It is essential to improve the availability of information on riding destinations. Use of the Internet is imperative concerning this. All the information should be available in different European languages.

- The promotion and commercialisation of horse riding in Europe will be determined by the public-private cooperation with the aim to develop competitiveness and sustainable European riding products.