

Towards a reconstitution of riders' paths and a typology of riding school's clients



Céline VIAL, Camille ESLAN, Sandrine COSTA, Pascaline ROLLET

Context and research question



A MASSIVE DEVELOPMENT of horse riding in France:

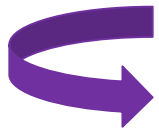
3rd federal sport (628 262 members*) - 1st nature sport - 1st female sport

BUT:

- Since 2012: FFE memberships (-13 %*) after 70 years of continuous progression
- High customer turnover: every year 30% of first-time members and 10% of practitioners switch riding schools

WHILE:

- Offer mainly focuses on competition in riding schools**
 - Transformation and diversification of rider's demand
- } Lack of knowledge/studies concerning this market



Adaptation of the offer to the demand ? -> need to understand riders' motivations and profiles

* Source : FFE 2018

**Source : REFerences – IFCE 2017



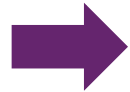
Methodology



Target: non-owner riders using or having used riding schools

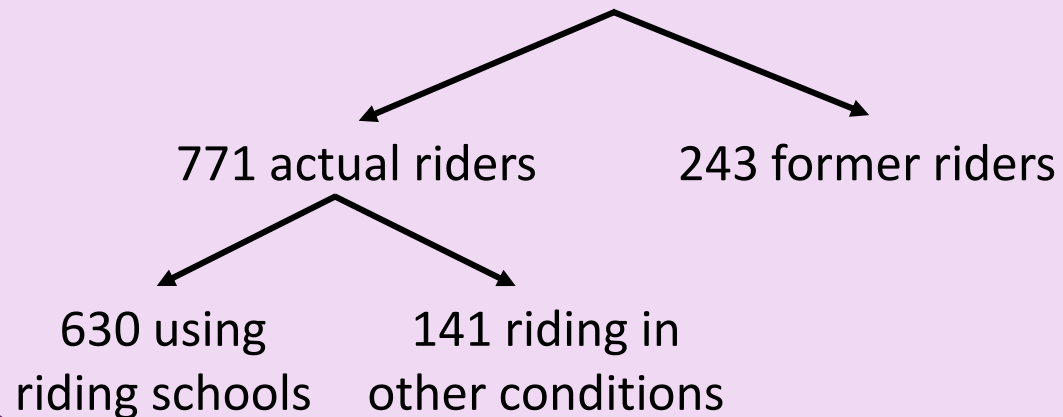
Exploratory qualitative survey:

- Semi-directive interviews
- 30 respondents
- 10 various structures
- Hérault : urban, suburban and rural areas



Quantitative survey:

- Whole of France
- Online
- Focus: paths, practices, wishes
- Respondents aged 15 years old and over



Data processing:

- Use of R software
- Descriptive statistics and cross tables with significance tests
- Hierarchical classification for typology

Horse riding beginning



Horse-human relationship

Almost all (former-)riders (>90%) came to horse riding being firstly motivated by the bond with the horse



The riding school

Almost all riders started horse riding in a riding school (>95%)

All of them have used at least one riding school along their path

They have used more or less riding schools along their path (from 1 to 20)



Initial choice criteria of a riding school

The most important:

- Progression
- Staff friendliness
- Proximity
- Having fun

Important:

- Horse well-being
- Number of riders per lesson
- Learning about the horse and its environment
- Infrastructure quality
- Prices

In the riding school



OFFER: very standard around Olympic disciplines (91%) and competition (87%)



DEMAND:

Most desired activities for a regular practice:

1. Olympic disciplines



Interest declines with age
Not for 20% of former-riders

2. Groundwork



Most do not receive these teachings

3. Taking care of a horse






4. Outdoor activities

Occasionally: appetite for diversity (general desire to practice all disciplines: average of 6, median of 8)




















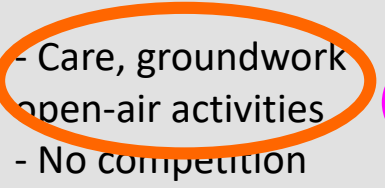
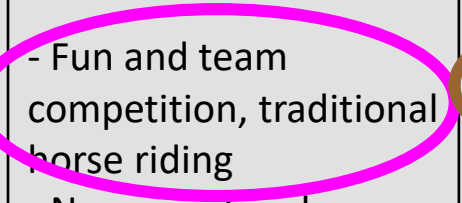
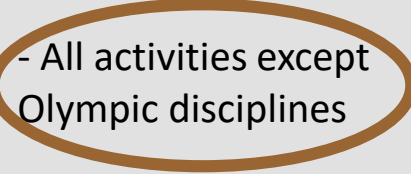
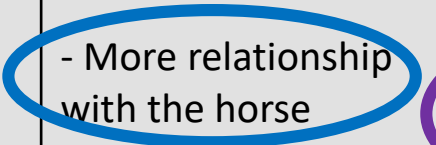
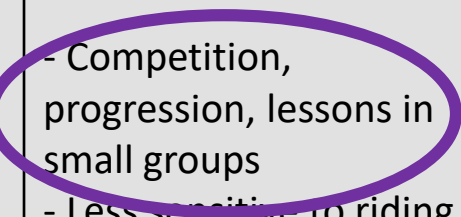

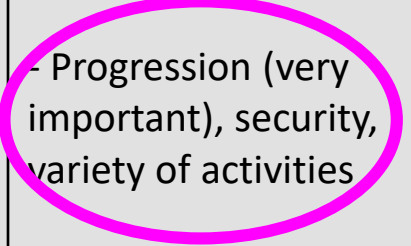

Focus on competition:

- Interest declines with age
- Not for 30% of current riders
- Not for 50% of former-riders

Current riders' typology

	Group 1  "Low requirement FFE model" 45% - Nb: 257	Group 2  "Standard FFE competitors" 30% - Nb: 169	Group 3  "Close to horse and nature" 16% - Nb: 93	Group 4  "Diversified competitors" 7% - Nb: 38	Group 5  "Innovative" 2% - Nb: 14
Age	- Older (average: 30 y.o., from 15 to 77)	- Younger (average: 25 y.o., from 15 to 56)	- Younger (average: 25 y.o., from 15 to 72)	- Older (average: 32 y.o., from 15 to 58)	- Younger (average: 24 y.o., from 15 to 46)
Horse riding experience	- All levels, 13 years practice	- High experienced (high levels, 14 years practice)	- All levels, 11 years practice	- Relatively experienced (medium levels, 15 years practice)	- Less experienced (low levels, 9 years practice)
Desired or not activities	- All activities except care and groundwork	- Competition and Olympic disciplines	- Care, groundwork open-air activities - No competition	- Fun and team competition, traditional horse riding - No groundwork	- All activities except Olympic disciplines
Expectations	- More relationship with the horse - Less sensitive to riding school proximity	- Competition, progression, lessons in small groups - Less sensitive to riding school proximity	- Staff and cavalry stability (very important), having fun, horse well-being, instructor friendliness	- Progression (very important), security, variety of activities	- Progression - Less sensitive to riding school proximity

Current riders' typology

	 <p>Group 1 "Low requirement FFE model" 45% - Nb: 257</p>	 <p>Group 2 "Standard FFE competitors" 30% - Nb: 169</p>	 <p>Group 3 "Close to horse and nature" 16% - Nb: 93</p>	 <p>Group 4 "Diversified competitors" 7% - Nb: 38</p>	 <p>Group 5 "Innovative" 2% - Nb: 14</p>
Age	- Older (average: 30 y.o., from 15 to 77) 	- Younger (average: 25 y.o., from 15 to 56) 	- Younger (average: 25 y.o., from 15 to 72) 	- Older (average: 32 y.o., from 15 to 58) 	- Younger (average: 24 y.o., from 15 to 46) 
Horse riding experience	- All levels, 13 years practice  	- High experienced (high levels, 14 years practice) 	- All levels, 11 years practice  	- Relatively experienced (medium levels, 15 years practice) 	- Less experienced (low levels, 9 years practice) 
Desired or not activities	- All activities except care and groundwork 	- Competition and Olympic disciplines 	- Care, groundwork open-air activities - No competition 	- Fun and team competition, traditional horse riding - No groundwork 	- All activities except Olympic disciplines 
Expectations	- More relationship with the horse - Less sensitive to riding school proximity 	- Competition, progression, lessons in small groups - Less sensitive to riding school proximity 	- Staff and cavalry stability (very important), having fun, horse well-being, instructor friendliness 	- Progression (very important), security, variety of activities 	- Progression - Less sensitive to riding school proximity 

After the riding school?

Reasons for living:

- 1/3: Moving house, structure closure
- 1/3: Teaching
- 1/10: Cavalry
- 1/10: Offer

Riding school

Livery yard/stable
Often linked to the purchase of a horse

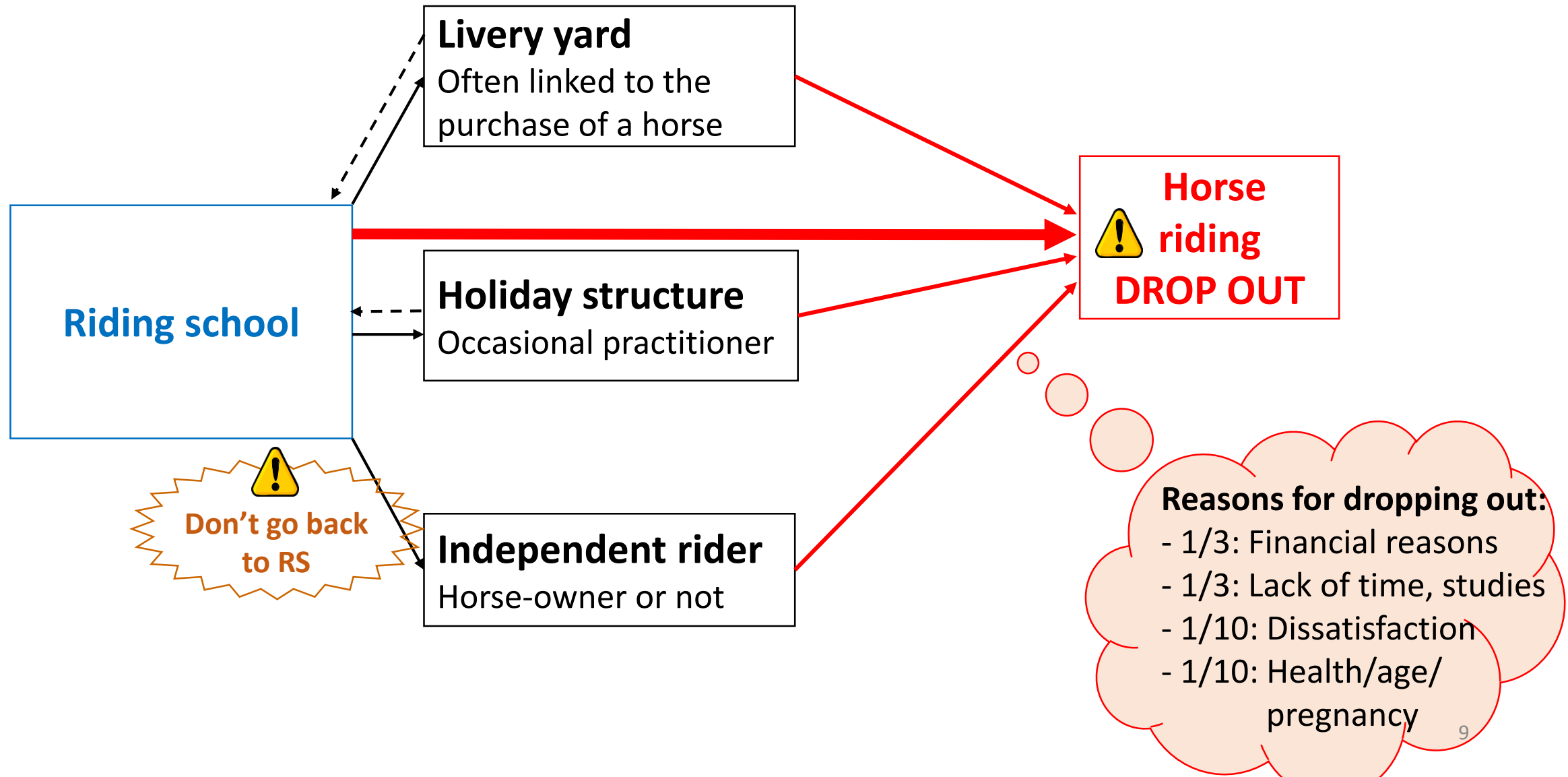
Holiday structure
Occasional practitioner

Independent rider
Horse-owner or not

Don't go back to RS



After the riding school?



Conclusion: some key points to adapt to the new demand

RIDING INSTRUCTOR KEY ROLE
Friendliness, skills, pedagogy, progression, security

Redesigning the offer

- ⇒ *Retract standard offer: Olymp. disc., exams and competition for everybody*
- ⇒ *Diversify the disciplinary offer on an ad hoc basis*
- ⇒ *Creativity / innovation / new products / personalization*
- ⇒ *Price range*
- ⇒ *Better take into account riders' desire for a relationship with a horse*
- ⇒ *Consider group of friends in the practice*
- ⇒ *Club life: fun events for everybody*

TARGET its market to ADAPT THE OFFER

Infrastructures - hospitality (also for parents)

Cavalry

- ⇒ *Choice, diversity, training*
- ⇒ *Well-being, maintenance*

Communication

- ⇒ *Better recruit*

PRIORITY LEVERS

OTHERS LEVERS

What you must remember



- Varied and non-linear riders' paths
- Importance of riding schools in riders' paths (compulsory step)
- Former-riders = potential clients for riding schools
- Key role of the riding instructor
- Possibility for riding schools to better use riders' request to bond with the horse
- A need to diversify the disciplinary offer to break standards
- Better target its customers to adapt the different components of the offer



Thank you!

Contact: celine.vial@inra.fr