



SELF-ORGANIZED EQUESTRIAN USERS: TOWARDS SERVICES ADAPTED TO THE DEMAND

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What is self-organization?

Not to delegate to others what you can do or learn how to do yourself

↪ In sport: autonomous practitioners outside institutions

↪ In the equestrian field: riders, owners or keepers of equines who self-organize to manage their equines independently of any professional equestrian structure

- Grouped together or not
- Individuals or families
- Keeping equines for no economic gain



A research program on equestrian self-organization

Issues:

- A growing phenomena
- Little is known about these consumers
- Institutional detachment
- Lack of trust regarding professionals
- Risks concerning safety, health, welfare, environmental practices...
- Economic stakes
- ...



A **research program** to analyze self-organized equestrian user characteristics, reasons for self-organization, practices, needs, relations with professionals... and to propose an adapted service offering



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First results: a potential market

- ✓ 90% of self organized users **need services**
- ✓ 93% of professionals would be interested in developing an **offer** of services towards self-organized customers

! Few professionals currently propose services to these customers

! A **gap** between the offer and the demand

➤ Online surveys among 337 self organized users and 233 managers of professional equestrian structures

➤ **Aim:** compare the demand of these consumers (and their willingness to pay) with the interest of professionals in offering these services, and at what prices



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4 main categories of services

Equestrian practices

Of interest for 76% of professional structures

Searched by 34% of self-organized users

- Coaching with an independant teacher (28%)
- Information on track marking (15%)
- Guided hiking (14%)
- Horse training (12%)

Agricultural services

Of interest for 10% of professional structures

Searched by 45% of self-organized users

- Plot maintenance (39%)
- Agricultural machinery renting (31%)
- Hay production (26%)
- Training about plot management (26%)

Daily care and management of equines

Of interest for 34% of professional structures

Searched by 43% of self-organized users

- Supervision (36%)
- Daily care (31%)
- First-aid training (17%) and other trainings
- Short-term livery services (12%)

Rental of specific infrastructures

Of interest for 62% of professional structures

Searched by 47% of self-organized users

- Indoor and outdoor schooling arenas (42%)
- Outdoor schooling fields (32%)
- Transportation equipment (28%)
- Storage areas (26%)

Exemples of services matching supply to demand

	Demand of self-organized users	Current offer in professional structures	Exemples of services
Equestrian practices	Monthly budget = 91€ for 2 sessions	1h teaching with an independent coach = 20 to 40 €	1 day hiking in group: 100€/pers Lesson with an independent teacher: 30€/h
Infrastructures	Monthly budget = 65€ for 5 utilisations	2h renting of training arena = 25 to 56€	2h renting of a training arena: 30€
Daily care and management	Monthly budget = 120€ for 6 services	2h supervision/home care = 58 to 99€	Supervision/care = 20€ for 1h/day
Agricultural services	Annual budget = 493€ for 3 services	Little offered	1 day training about plot management = 150€/pers

Conclusion

A potential market to develop

Specific needs from self-organized users

Professionals ready to develop an offer

Services to adapt to the needs



Relevance to develop this market to better
support self-organized users

Thank you for your attention !

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75th EAAP Annual Meeting
1/5 September 2024 - Florence, Italy

