

EEF Survey 2015



EEF SURVEY 2015

Introduction

- Since 2011, EEF Surveys are conducted
- First time in 2014, 63 % response rate was achieved.
- During the year, efforts towards data validity.
- Contacts with: NFs, EHN and World Horse Welfare.
- The original questionnaire shortened to 6 pages and new questions from World Horse Welfare added.

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Introduction

Acceptance of EEF Survey 2014 by Authorities :

- a) Referenced in the latest research paper by World Horse Welfare and Eurogroup for Animals. «Removing the Blinkers- The Health and Welfare of European Equidae in 2015. »
- b) Invitation to EEF and presentation of EEF figures at EHN MEP Meeting in Brussels.
- c) Invitation to EEF and Presentation of EEF figures at World Horse Conference in Caen
- d) Next invitation 21 October- EHN General Assembly



Survey Response Information :

National Federations

1	ALBANIA
2	AUSTRIA
3	BULGARIA
4	CROATIA
5	CZECH REPUBLIC
6	DENMARK
7	SPAIN
8	FINLAND
9	FRANCE

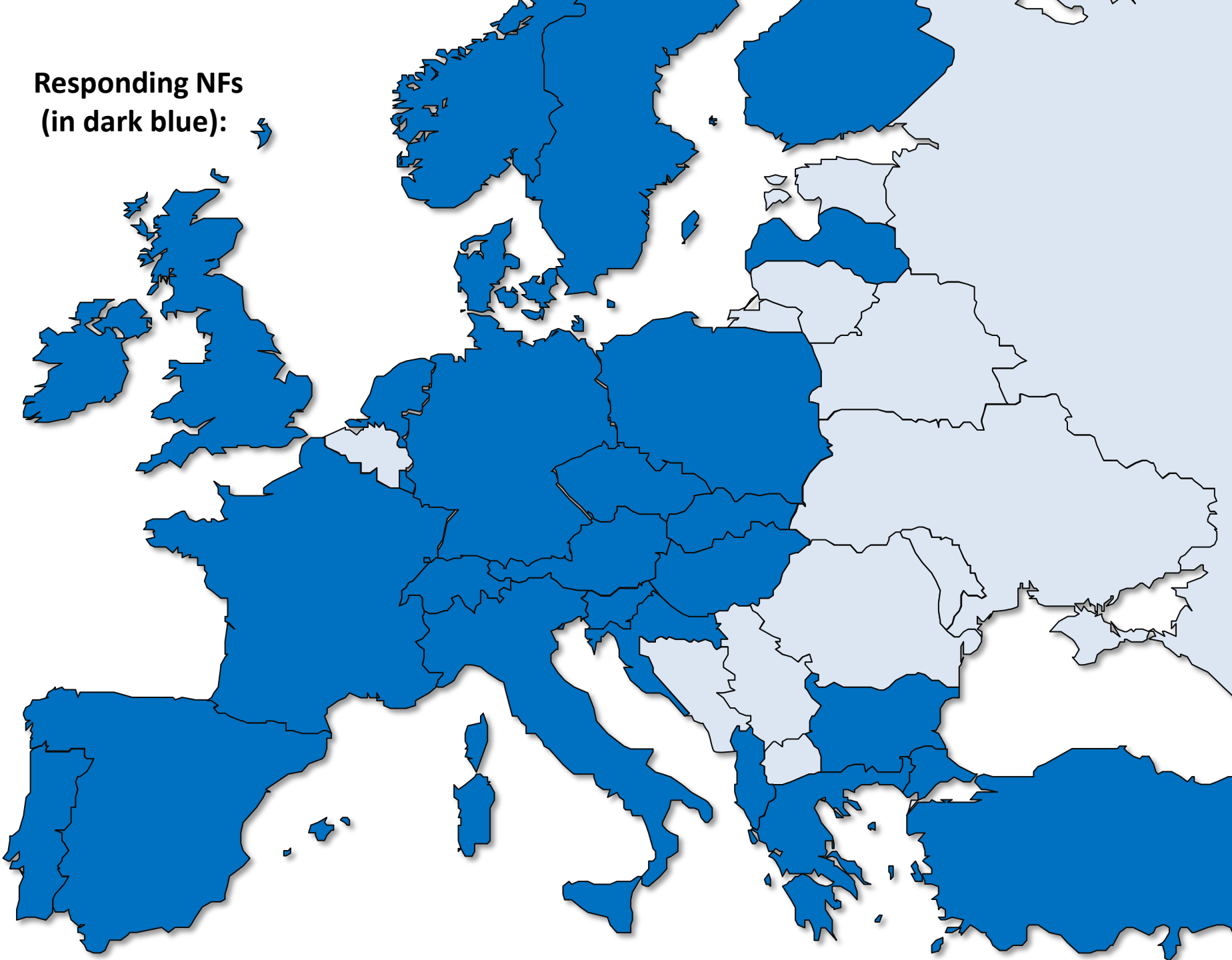
10	GREAT BRITAIN
11	GREECE
12	HUNGARY
13	IRELAND
14	GERMANY
15	ITALY
16	ISRAEL
17	LATVIA
18	MONACO

19	NETHERLANDS
20	NORWAY
21	POLAND
22	PORTUGAL
23	SWITZERLAND
24	SLOVAKIA
25	SLOVENIA
26	SWEDEN
27	TURKEY

Response Rate: 68 % of all EEF Members, 75 % of EU Members States

(Non-EU NFs in the study : Switzerland, Monaco, Turkey, Albania, Israel, Norway)

**Responding NFs
(in dark blue):**



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1- Financial Standing of National Federations :

- In your Budget
- What is the Percentage of Government Support, Sponsorships, Activity Income ?



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1- Financial Standing of National Federations :

- Government Support (incl. NOC support)
 - Highest NF percentage: 80 %
 - Lowest NF percentage: 0 %
 - Mean : 27 %



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1- Financial Standing of National Federations :

- Sponsorships
 - Highest NF percentage: 100 %
 - Lowest NF percentage: 0 %
 - Mean : 13 %



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1- Financial Standing of National Federations :

- Activity Income (fee, license, registration, etc)
 - Highest NF percentage: 90 %
 - Lowest NF percentage: 0 %
 - Mean : 45 %

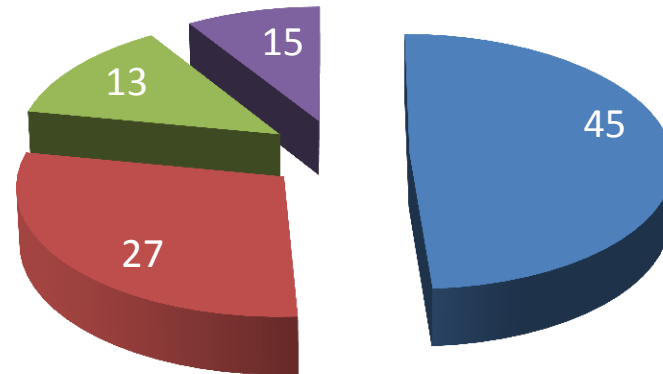


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So What Is an Average Financial Structure for a European NF ?

- Activity Inc. 45 %
- Government Support 27 %
- Sponsorship Inc. 13 %
- Other 15 %



- Activity Income
- Ministry/Government Support
- Sponsorship Income
- Other



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2- Number of Full Time (or equivalent) Employees in NFs:

- Highest NF: 135
- Lowest NF : 0
- Mean : 23 (2013 data: 24)



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3- Registration of Persons in the European NFs:

PERSON	2013	2014
Athlete	1,257,874	1,282,896
Coach	102,930	100,463
Official	28,195	28,807
Personal Members	495,527	465,213
Corp. Members (Sponsor or other)	1,041	873
TOTAL	1,885,567	1,878,252
Clubs, stables, riding schools, centres	27,079	27,143



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Registered Athletes at the FEI 2013-2015 Evolution *

Top 10 Nations

Rank	NF	2013	2015	% Change
1	FRA	13,358	15,883	19
2	GER	7,941	9,355	18
3	USA	6,808	7,734	14
4	ITA	6,180	7,311	18
5	GBR	5,398	6,337	17
6	AUS	2,832	3,177	12
7	BEL	2,439	2,928	20
8	ESP	2,399	2,908	21
9	NED	1,999	2,430	22
10	AUT	2,040	2,266	11

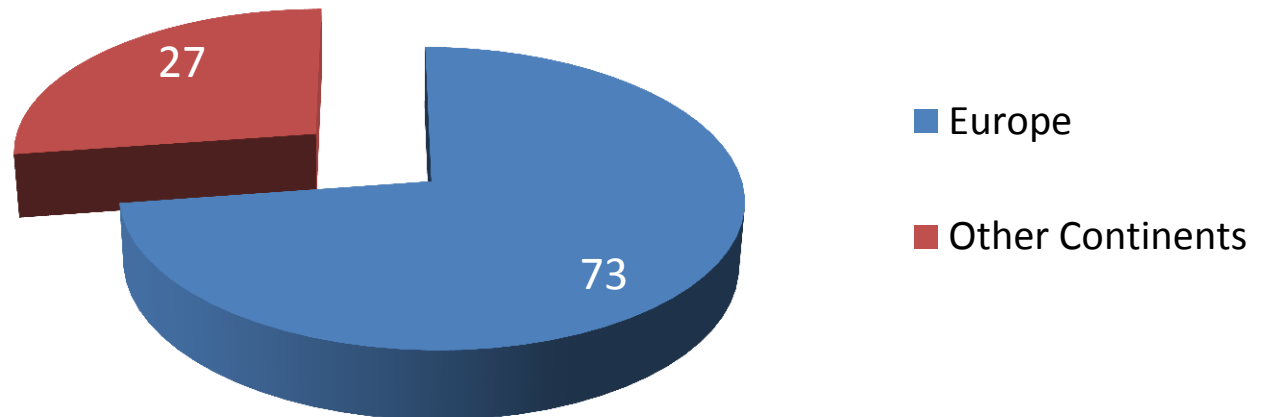
* FEI Data Base as of 26/11/2013 and 11/10/2015 respectively. In 2015 top 10 constitutes 57 % of all reg.

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4- Registered Horses at the FEI - Continental Comparison

	Registered Horses	Percentage
Europe	223,151	73
Other Continents	83,789	27
Total	306,940	



* FEI Data Base as of 11/10/2015

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Registered Horses at the FEI 2013-2015 Evolution *

Top 10 Nations

Rank	NF	2013	2015	% Change
1	GER	35,966	40,897	14
2	FRA	32,592	38,857	19
3	GBR	18,177	21,207	17
4	USA	17,837	20,299	14
5	ITA	17,166	19,319	13
6	BEL	14,900	17,521	18
7	SUI	11,601	13,025	12
8	NED	10,806	12,640	17
9	UAE	8,826	11,756	33
10	ESP	8,146	9,799	20

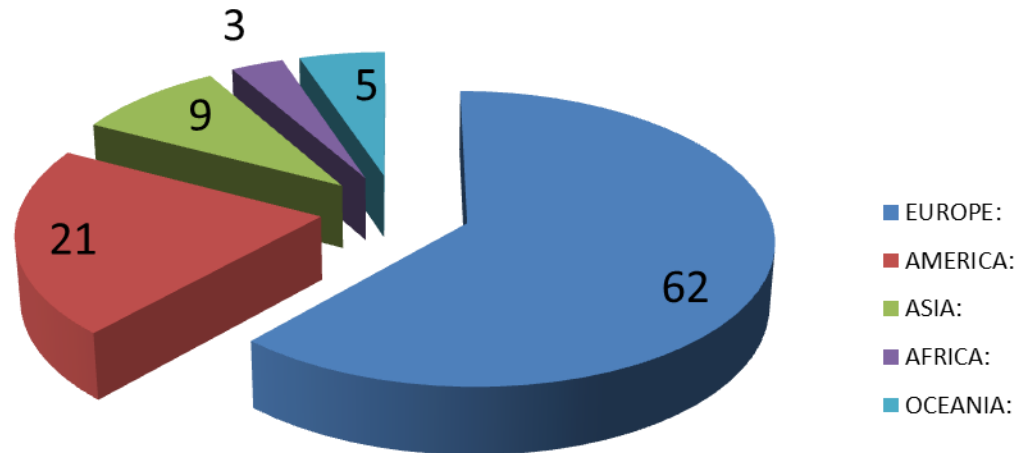
* FEI Data Base as of 26/11/2013 and 11/10/2015 respectively. In 2015 top 10 constitutes 67 % of all reg.

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5- Number of Events* at the FEI in 2014

EUROPE:	829
AMERICA:	284
ASIA:	122
AFRICA:	43
OCEANIA:	70
TOTAL :	1,348



* That event weekend is counted as one

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Number of Events* at the FEI - Evolution last 3 years

	2012	2013	2014
EUROPE:	782	788	829
AMERICA:	239	266	284
ASIA:	116	128	122
AFRICA:	48	52	43
OCEANIA:	72	77	70
TOTAL :	1,257	1,311	1,348

* That event weekend is counted as one

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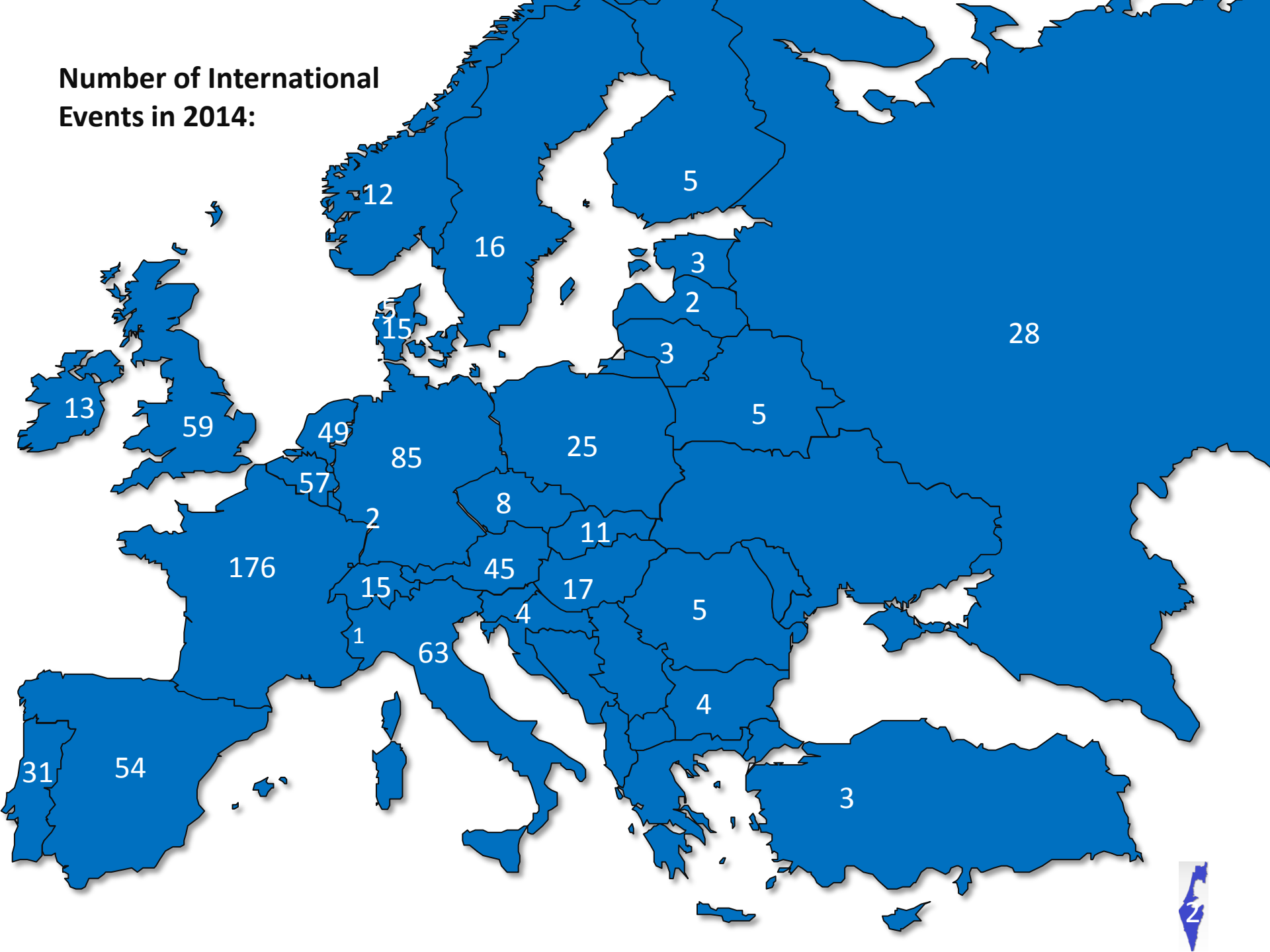


International Events in Europe by Country 2013-2014 :

Rank	NF	2013	2014
1	FRA	169	176
2	GER	89	85
3	ITA	66	63
4	GBR	54	59
5	BEL	47	57
6	ESP	47	54
7	NED	46	49
8	AUT	45	45
9	POR	33	31
10	RUS	25	28
11	POL	25	25
12	HUN	15	17
13	SWE	14	16
14	SUI	15	15
14	DEN	14	15
16	IRL	10	13
17	NOR	9	12
18	SVK	11	10

Rank	NF	2013	2014
19	CZE	8	8
20	AZE	3	6
21	ROU	3	5
21	FIN	5	5
23	BUL	4	4
23	SLO	5	4
25	LTU	4	3
25	BLR	5	3
25	EST	4	3
25	TUR	3	3
29	LUX	2	2
29	SMR	2	2
29	LAT	1	2
29	ISR	0	2
33	MON	1	1
34	GEO	1	1
35	UKR	4	0

Number of International Events in 2014:



6- Economic Size of the Equestrian Sport



- How to define ?
- We would like to know the total economic magnitude of the horse sport
- How to measure ?



Economic Size of the Equestrian Sport



- For this, NFs require an outsource help from research institutes or professional auditing companies.
- Also a matter of financial consequences.
- However, in order to justify our sports standing, EEF and all NFs must strive towards this common goal.



Economic Size of the Equestrian Sport



EUROPE IN FIGURES 2015

- | | |
|--|---------------------|
| - Total Economic Magnitude only in these 27 Countries: | 48 Billion € |
| - EU Member States only (21 NFs among respondees) | 46 Billion € |
| - Estimate Europe Total (excluding racing, trotting) : | 55 Billion € |
| - Directly registered persons in the sport in 27 countries : | 1,8 Million |
| - Estimated number of persons engaged with horses: | 5,5 Million |
| - Directly registered horses by NFs in 27 countries: | 2,9 Million |
| - Estimated total equidae in 27 countries: | 5,9 Million |
| - Number of full-time (equivalent) employments : | 747,000 jobs |



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7- What Are the Challenges That Your Federation Face Today ?

In terms of frequency

1. Financial challenges
2. Attracting new riders to horse sport. Decrease of numbers
3. Entry difficulties at FEI events. Art 249.8 (Invitations to CSIOs)
4. Decrease of volunteers
5. Animal Welfare
6. Education/Training (athlete ,coach, judge...)
7. Border difficulties
8. VAT rate in EU



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Through this survey data and the EEF Strategic Plan, the EEF Board will continue its efforts to further developing and promoting the equestrian sport throughout the continent.





Thank You

