BRITISH EVENTING

A COMMERCIAL CONTENT GUIDE TO EVENTING IN THE UK

BRITISH EVENTING
The ultimate equestrian challenge

TWO CIRCLES
DATA DRIVEN SPORT


L200

CONTENTS

EVENTING IN THE UK OFFERS BRANDS A VERY DIFFERENT MARKETING PLATFORM

BE takes care of the sport on behalf of its sponsors, the events, fans, riders, owners, volunteers and stable staff. Growth is significant with an average membership increase of **8.2%** pa in the past five years.

TWO CIRCLES DATA DRIVEN SPORT

In 2017 Two Circles, the data-driven sports marketing agency that specialises in audience insight, was appointed to conduct the most comprehensive survey ever undertaken in the sport.

Two Circles analysed **69,230** ticket purchasers, **352,200** tickets, **9,373** of the BE Membership, **460,000** digital users and a marketable database of **3,733**.

BE affiliates **119** venues and **171** outdoor fixtures. In support of the Two Circles work, BE surveyed a representative sample of **84** of these venues (70%), for additional commercial insights.

Why?
To provide credible proof of the unique value eventing can offer brands across international and domestic markets.

THE FINDINGS

“Eventing is a unique fish in a big pond”

Source: Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

OUR UNIVERSE IS BIG

Eventing appeals to an audience of 5.8m with an affinity for horses.

Eventing is for people who enjoy the outdoors, the countryside and riding.

It's Triathlon for horse and rider - the ultimate equestrian challenge.

It's a 'cross over' sport, featuring three Olympic tests; Dressage, Show Jumping and Cross Country.

The UK is the largest global market for International Events and **World Ranking Riders**.

Eventing in the UK boasts two Rolex Grand Slam events that also feature in the **UK's Top 10** best attended sports events.**

Total UK audience*
Engage in equestrianism

5.8M

3.1M

Who used to ride*
Still have an affinity and want to return at some point

2.7M

Who ride each year*
0.29m weekly
1m regularly
1.4m occasionally

* Source '15 Two Circles BETA National Equestrian Survey excludes Horse Racing
** Source: Deloitte Sports Business Group 2016

BRITISH TEAMS HAVE A HIGH SUCCESS RATE AT INTERNATIONAL LEVEL

British Eventing teams have accumilated over 120 medals at international level since 2000.

30

medals at senior championship level

10

of which are gold

82

medals at youth team level

OVER 1M PEOPLE ATTEND EVENTING ANNUALLY IN THE UK

Annual attendees (all types) all UK events

1.082M*

62% As spectators only **

13% As spectators or volunteers**

8.5% As spectators or owners**

7% As spectators or competitors **

9.5% Other, e.g. grooms **

For the largest group, the Event fans, one of the main attractions is the cross country;
The 'skill and thrill', the excitement and the bravery of horse and rider which is an unrivalled combination in equestrianism**

For fans, it's also about;
- a day out in the country
- walking the dog
- spending time with friends and family
- stunning venues - from palaces and castles to country houses and estates.

And finally there's the shopping experience
This is where eventing fans spend **33%**** of their time on event.

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* 2017 BE survey of affiliated events
** Two Circles; The BE Universe - Fans, Fields and the Future July 2017

UK EVENTING AUDIENCES ARE DISTINCTIVE

Their behaviour unlocks significant value potential for brands and businesses.

Affluent and Female
BE purchasers are predominantly female (75%) and affluent, with 53% from the most upmarket household classifications.

Passionate and Engaged
78% of fans say their No. 1 motivation for attending is their love of the sport, scoring it 8.7 out of 10 (UK sport average is 7.9).

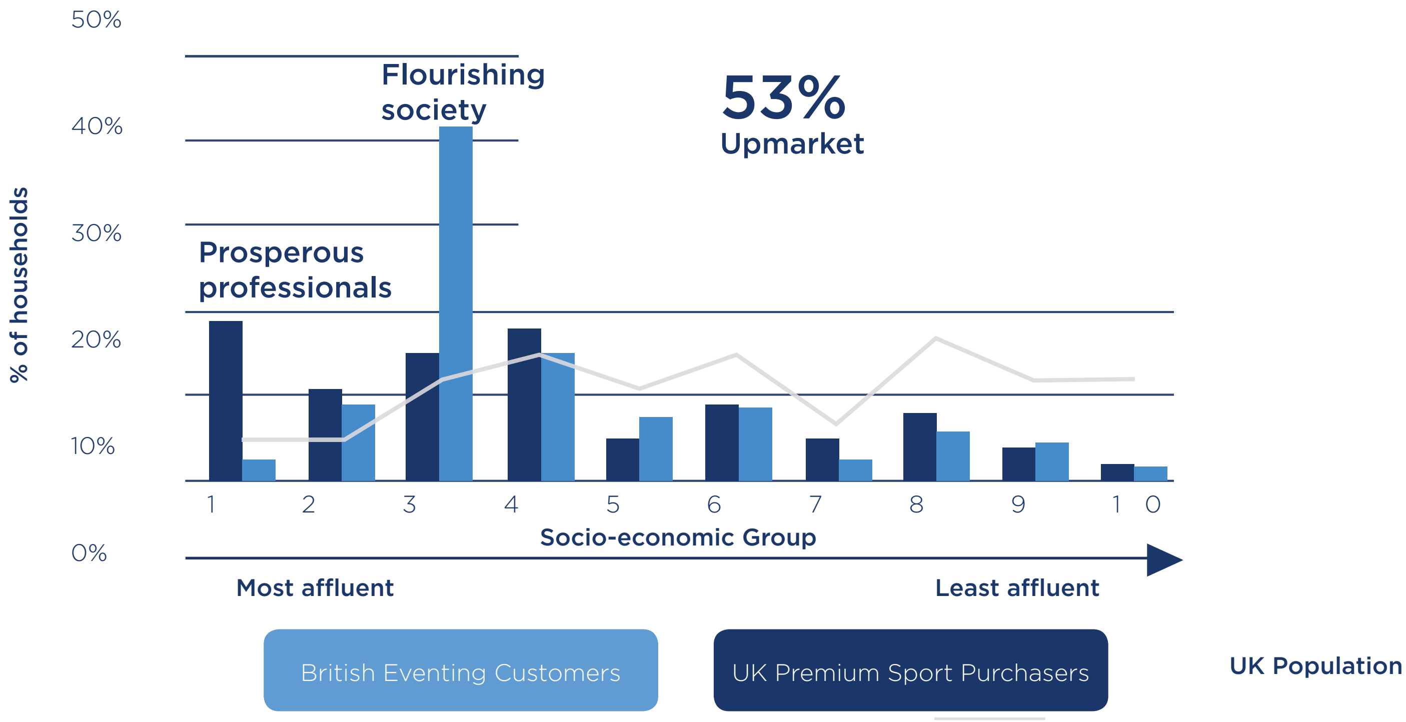
Brand Disposed
53% of fans have a more favourable opinion of brands partnering the sport with 36% more likely to buy sponsors' brands and services.

Clear on Brand Choices
Beyond equestrian goods and services, eventing audiences choose brands that offer 'affordable luxury' and 'functional quality'.

Source Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

UK EVENTING AUDIENCES ARE FLOURISHING

They represent 53% of all upmarket socio economic groups.



Premium sports (e.g. tennis/rugby) index heavily in socio-economic Groups 1 and 2, and meet the average for 3. However equestrianism and eventing in particular are the only sports across the UK portfolio that overindex in Group 3.

Source: Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

THE AUDIENCE IS MAINLY RURAL AND AFFLUENT

As these socio-economic sub group profiles show.

UPPER CRUST

Wealthy mixed households living in rural communities. They travel more, own more cars per household and spend more on high quality electronics than the UK average.

14% BE Customers **Vs** **0.7%** of UK households

ENTERPRISING HOUSEHOLDS

Young and mature couples in large rural dwellings. They live in large houses, with gardens, travel abroad and have a bigger proportion of directors than the UK average.

12% of BE customers **Vs** **1.3%** of UK households

FAST TRACK SOPHISTICATES

Wealthy older families in spacious suburban and rural detached and semis. They live in very large houses, travel abroad and have a bigger proportion of directors than the UK average.

9% of BE customers **Vs** **1.7%** of UK households

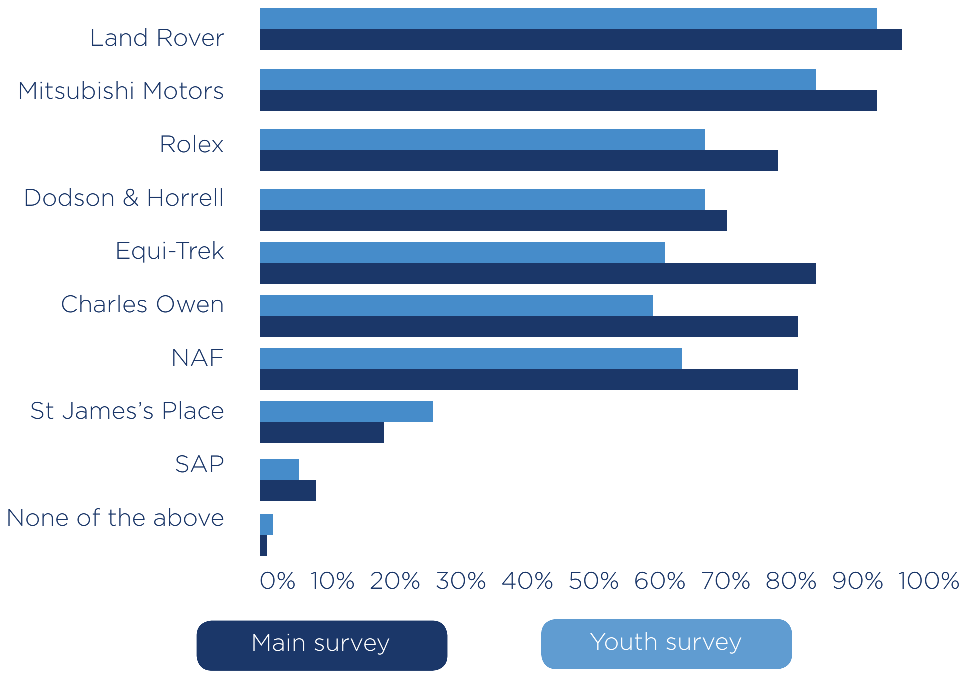
Source: Two Circles; The BE Universe - Fans, Fields and the Future - July 2017 - Top three socio-economic groups


RIDE WORLD WIDE
ARIAT
CHARLES OWEN
TOILETS
silver editions
Ice Cream

THEY MAKE THEIR CHOICES CLEAR

Eventing audiences are consistent about sponsor recognition and suitability.

AWARENESS OF SPONSORS IN EVENTING



Q. Which of the following brands have you noticed while attending eventing?

3733 responses

235 responses

Source Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

OUR AUDIENCES' SPEND AGAINST THEIR PASSION

52%
of fans go to 2-3 events pa while a further 22% go to 4 or more.**

70%
of fans attend events with their family and/ or friends.**

4,550+*
trade stands to visit at BE Events during the year*

£525
is the average annual spend on tickets, mileage, and travel by a CORE purchaser going twice pa and buying 4.6 tickets per event.**

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* 2017 BE survey of affiliated events
**Source: Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

50%
of attendees place huge importance on trade stands as part of their event day experience**

140 miles
is the average return distance travelled by our fans going to an event.**

38%
expect to spend £150+ in the trade stands with 40% spending £50-£150**

£4.3bn
Estimate of gross spending in the sector in 2015* - 34% of Equestrian items purchased at trade stands**

* Calculation of all spending in the sector, which reflects sales and production of related goods and services.
**Source: 2015 Two Circles BETA National Equestrian Survey - Excludes Horse Racing

WHAT MAKES EVENTING STAND OUT?

EXCITEMENT

Over 80% of fans rate excitement and the nature of the competition as the most important values of the sport.

ACCESSIBILITY

With competition built around horses of different standards, beginners can regularly compete against Olympic champions.

DIVERSITY

Equestrian is the most notable equal opportunity sport, with men and women always in direct competition with each other. Around 50% of the world's top 30 Event riders are female*.

Did you know?

1.7 million
cross country fences were jumped in 2017

*Correct as of August 1st 2017

Source: Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

HIGH PROFILE VENUES

From National Trust, UNESCO World and English Heritage sites to Castles, Palaces and Country Houses and Estates.

INTERNATIONAL EVENTS

No fewer than 33 venues host 76 international classes each year.

GLOBAL TALENT

Nearly 45%* of the world's top 50 riders are UK based, many of them current or former Olympic, World and European medallists.

Did you know?

£

£30.00 m+
BE event turnover pa

*Correct as of August 1st 2017

OUR AUDIENCES ARE EXTREMELY LOYAL AND MORE ENGAGED

Just look at eventing's Net Promoter Score (NPS) of +62, that's above the UK sporting average and Netflix!

+62

Net Promoter Score
Attenders are highly likely to recommend eventing to others.

53% put their likelihood of recommending attendance at 10, the scale being 1 none, 10 very likely.

5.22

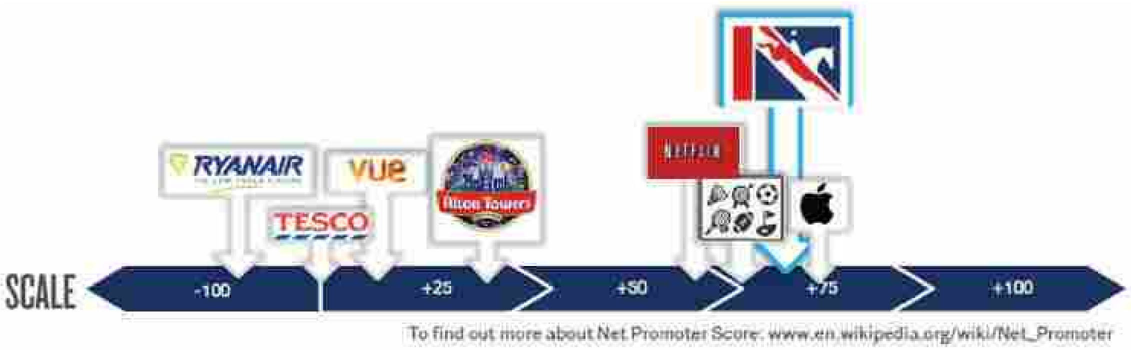
Average pages per British Eventing.com session vs sporting average of 3.6.

4'20''

Average duration of a British Eventing.com session vs. UK sporting average of 2'11''.

78%

of visitors to British Eventing.com are returning visitors.



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Source: Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

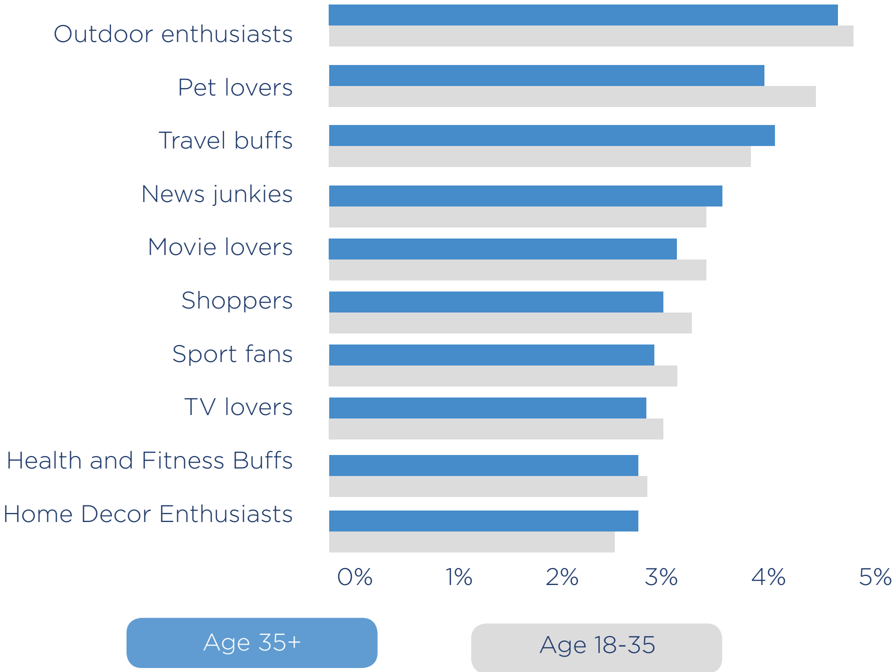

EQUILINE

WHAT DOES TOMORROW'S AUDIENCE LOOK LIKE?

They're a lot like today's

- Two Circles used two age groups, 18-24 and 35+ to evaluate different habits and priorities.

- Interest in eventing is sustained across the generations and both age groups have similar interests, priorities and brand awareness.



95%
of fans from both age groups say they're sure to keep coming to events in the future.

Did you know?

48,591
event volunteers pa

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Source: Two Circles; The BE Universe - Fans, Fields and the Future - July 2017

EVENTING FEATURES TWO OF THE UK'S TOP SPORTING OCCASIONS

Badminton and Burghley both feature in the top 10 list of best attended UK sports events*

In these Events, the UK has two of the three coveted Rolex Grand Slams, the third being Kentucky (USA).

Rank	Sport	Event	Attendance	Duration
1	Tennis	Wimbledon	494	14
2	Motorsport	Formula 1 (Silverstone)	327	3
3	Horse Racing	Royal Ascot	295	5
4	Horse Racing	Cheltenham Festival	261	4
5	Tennis	ATP World Tour Finals	252	8
6	Golf	The Open	173	8
7	Equestrian	Badminton Horse Trials	160	5
8	Motorsport	MotoGP (Silverstone)	156	3
9	Equestrian	Burghley Horse Trials	155	4
10	Horse Racing	Epsom Derby Festival	154	2

*Source: Deloitte Sports Business Group 2016

OUR TOP EVENTS DELIVER GREAT REACH AND ROI

As these combined media highlights for Badminton and Burghley show*

Four day attendance
344,000 people

Total number of shops
1,100

BBC 2 peak: **1.4 m**
Red Button: **0.58 m**
iPlayer: **0.175 m**

Total event week video views (Facebook/ YouTube): **3.628m**

Facebook owned channels
Post reach: **7.973m**

No. of UK and global radio feature downloads:
612

Domestic Radio Audience reach
61.951m

Owned channels
Impressions: **2.125m**
Followers: **63,163**

On and offline Press Coverage reach**
121.9 m

*Based on 2017 Badminton and 2017 Burghley Statistics - **Excludes broadcast, social media, media partnerships or influencer engagement.


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EVENTING OFFERS MULTIPLE WAYS TO ENGAGE WITH ITS AUDIENCES

With compelling **CONTENT** and multi channel **DISTRIBUTION**, driving real brand **ATTENTION**

Choice
From grassroots to elite, events to series, individual riders to teams.

Scope
From partnerships across the sport, support for specific events, series, leagues, individual classes and fences, the ways in which brands can get involved are comprehensive.

Global to local reach
From international and national, to regional and local, reach can be tailored to all commercial needs.

Frequency
From 'one off' events to season-long multi event solutions.

Duration
From short term tactical to longer term strategic investments.

Focus
Custom built and flexible brand solutions.

Activation
Content Creation, Digital Distribution, Global TV, Experiential, PR, Promotion, e-CRM and Hospitality.


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WORKING COLLABORATIVELY AS A SPORT

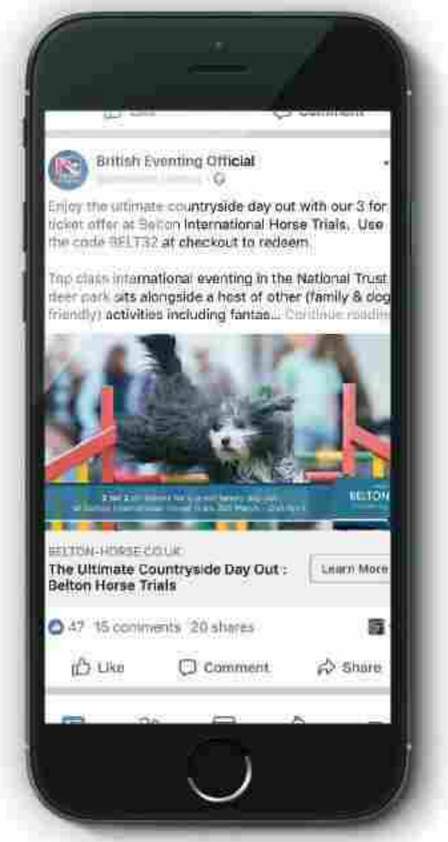
British Eventing's commercial role is that of an ENABLER.

- Whether working directly with British Eventing or individually with our events, we all work together for the benefit of our commercial partners.
- As UK media rights holder for the sport, our focus is on providing a consolidated marketing platform for brands to leverage.
- We look to help events and commercial partners co-oporatively;

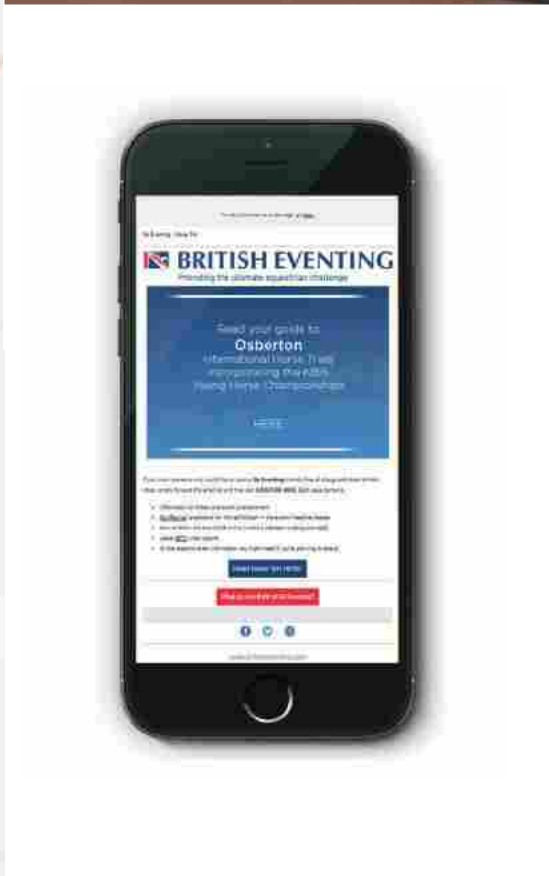
  Providing introductory links and relationship management for commercial partners and event rights holders etc.

  Custom building sponsorships to match commercial briefs and budgets, using new or existing assets from the sport.

  Project managing and activating where, and if required.




WHAT'S ON AND WHERE TO WATCH
42.1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Osberton
International Horse Trials
incorporating the BBS
Young Horse Championships
HERE


GO EVENTING
Your eventing guide for 2017
The Festival of British Eventing
Presented by
The British Equestrian Trade Association (BETA)
4th - 6th August

PLEASE CONTACT

For all enquires to British Eventing please contact;

Clare Walkeden
Email: Clare.walkeden@britisheventing.com
Mob: 07920 400988

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