

Country Check (6): **Austria**

Olympus in the Alps



Austria - a nation of skiers? Yes, certainly! But is it also a horse country? You bet! The Olympus of classical riding - The Spanish Riding School and its studs - is visited by about 400,000 people from all over the world every year. Visiting Vienna, many of the tourists also have themselves driven through the narrow streets of the capital city in one of the numerous famous carriages and pairs. Austrian's vaulters are among the best in the world.

The Haflinger horse was exported from Austria into the whole world. And the Noriker horse is an equine national treasure. Last, not least: the biggest equestrian specialist shop in Europe is located - where? In Austria!

In part 6 of our "Country Check" series we are drawing a portrait of Austria and its equestrian trade sector.



Our horses carry a friendly image of Austria into the world," says Herbert Gugganig, Federal Chairman of the association of Rural Riders and Drivers. And Dietrich Sifkovits, Secretary General of the Austrian Horse Sports Association (OEPS), adds: "Historically, Austria has always been a country of equestrianism. Moving around with a horse is common and feasible, as a leisure sport and even without the aspect of competition riding. In general, riding outdoors is possible in many areas without hindrance. Visitors from abroad often praise and envy the responsible parties for that."

LANDLOCKED COUNTRY WITH MANY NEIGHBOURS

The Republic of Austria is a landlocked country in Central Europe and has a total of eight neighbouring countries: Germany, the Czech Republic, Slovakia, Hungary, Slovenia, Italy, Switzerland and Lichtenstein (clockwise). There are about 8.7 million people living in Austria - that is four million people less than in Bavaria. For further comparison: the neighbouring Southern German federal state is only slightly smaller than the whole of the Austrian Republic in terms of surface area. The latter is divided into nine federal states - Burgenland, Carinthia, Lower Austria, Upper Austria, Salzburg, Styria, Tyrol, Vorarlberg and Vienna.

62 per cent of the area of the Austrian state are alpine high mountains. Only 32 per cent of the land area are lower than 500 metres above sea level. At 3798 metres, the Großglockner in the High Tauern area is the highest mountain in the country. There are almost 1000 three-thousand-metre-peaks in Austria, secondary peaks included. While the average amount of fresh snow is about 3.3 metres per year, the Sonnblick mountain at 3,100 metres counts as much as 22 metres in the annual average!

CAPITAL VIENNA

With 1.8 million inhabitants, Vienna is clearly the most populous city as well as the capital. Graz (283,000 inhabitants), the second largest city, has more than 1.5 million inhabitants less than Vienna.

Vienna is in a constant battle with Hamburg about which one is the second largest city in the German-speaking area. In the Vienna metropolitan area live around 2.6 million people - that is more than one quarter of the total population. Around 1910, Vienna was the fifth largest city in the world, counting more than two million inhabitants. With more than five million tourists from abroad every year, the capital is among the ten most visited cities in Europe.



ECONOMIC POWER OF TOURISM

Tourism is one of the most important branches of economic activity in Austria. The trading/restaurant/hotel sector accounted for 17.3 per cent of the gross domestic product in 2014. In 2016, the number of overnight stays reached 140.85 million, exceeding the 140 million mark for the first time. In the same year, tourism accounted for 19.7 billion euros direct added value. That is 5.6 per cent of the gross domestic product. The share of German tourists staying overnight was 37.4 per cent in 2016. Accordingly, Germany is the most important partner in tourism as well. In 2016, the total number of guests



from Germany was almost 13 million - an increase of 845,318 guests. According to an advertising company, Tyrol was particularly popular, accounting for 46 per cent of all overnight stays, followed by Salzburg (20.5 per cent) and Vorarlberg (9.7 per cent). According to the Austrian tourist experts, one reason for the increase is that Austria attends upon the desire of many Germans for nature and serenity.

The umbrella association for all equestrians in the country is the Austrian Equestrian Federation (Österreichischer Pferdesportverband, OEPS) with over 20 divisions. In 2016, it counted 47,771 members in 1371 associations/clubs. Its origins date back to the year 1872. Back then, the "Society for the awarding of well-trained Campagne Horses in Vienna" was founded. In 1883, the association became the "Austrian Campagne Riding Society", which joined the FEI in 1928. During the reorganisation of equestrian sports in Austria in 1962, the Campagne Riding Society - which still exists today - brought forth the Austrian Equestrian Federation ("Bundesfachverband für Reiten und Fahren") as it is today.

MEMBERSHIP GROWTH IN EQUESTRIANISM

The OEPS is the ninth largest sports association in Austria in terms of membership behind football, tennis, skiing, ice stock sport, golf, gymnastics, climbing and swimming. In the past 20 years, the association recorded a relatively strong growth. Counting 36,094 members in 1996, it had experienced an increase of 11,000 by the year 2016. "We consider these positive figures as a confirmation of our joint way in Austria," OEPS Secretary Gene-

SIGLHORSE - RASSELBANDE CONQUERS THE SHOPS

The majority of horse-people are women and girls. Siglhorse-Pferdefutter is a young feed branch addressing exactly this target group. Unique packaging and striking marketing bring fresh momentum to the world of feed.



"Of course we are horse feeding experts and are very serious about the quality of our feed and the advice we offer," the company explains. "But above all we understand the relationship our customers have with their horses and speak their language. This makes Siglhorse-Pferdefutter more than just the sum of its ingredients or a list of substances."

In addition to a wide range of muesli, pellets and supplements, there is also a smart line of treats: "Siglhorse Rasselbande" stands out with its striking design concept. For this concept, seven distinctive types of horse have been developed that can be found in every stable (coward, diva & macho, lazybones, cheeky monkey, hero, cuddler, sunshine). This results in funny, semi-personalized products that are an eye-catcher in every shop.

Info: www.siglhorse.com, www.siglhorse-rasselbande.com bzw. www.facebook.com/Siglhorse



Prince Eugene equestrian monument in Vienna, dating back to 1865

ral Sifkovits explains to Reitsport BRANCHE. "We as an association rely on service and synergies. Our success is primarily due to the tireless efforts of our countless honorary functionaries who gratuitously commit themselves to equestrian sports every day."

Eva Morawetz, editor-in-chief of "Pferderevue", the only printed equestrian magazine in the country, sees the reason for the increase in members in a decades-long continuous development. "Since the 1970s, the equestrian sport, which had been demilitarised after the Second World War, has developed more and more into a leisure sport," she comments the developments in Austria. "The horse was also largely replaced as a working animal in agriculture in the 20th century, but in the past 30 to 40 years it has increasingly found a new role in society." A "leisure partner and living creature which, thanks to its social and physical properties which include the ability to carry people, provides valuable services in a therapeutic context, as well, and is highly appreciated," the equestrian journalist explains. "Dealing with horses is experienced as rewarding and supportive on various levels, in sports as well as in the field of personal development; that is why equestrianism in Austria has become very diverse and keeps adding new facets, particularly in the leisure riding area."

AUSTRIANS LOVE HORSES

According to the OEPS, the association represents the interests of 13,000 competition riders as well as 34,000 leisure riders. In Austria, a total of about 400,000 people ride, drive or have to do with horses, according to an older study. "More than 80 per cent of Austrians have a positive relationship to horses," explains "Pferd Austria", a platform founded by ten partners in 2004 to strengthen the importance of the horse as an economic and leisure factor in Austria.

With 15,084 members, the umbrella association's strongest representation is in the largest federal state - in Lower Austria. In 2015, there were a total of 102,860 show participations in dressage (32,635), show jumping (68,313) and eventing (1,912). The number of clubs is also on the increase: in 1996, there were 722 clubs; in 2016, numbers had risen to 1371.

Much the same applies to the number of horses: 20 years ago, 8,355 competition horses were registered, in 2015 there were 12,905. After the Second World War (1938: 250,000 horses) the number of horses had declined sharply. With only 39,000 horses left in Austria in 1973, there are about 120,000 to 130,000 horses kept in about 25,000 yards (mostly farms) today, according to official figures. "Today, the horse is a partner for sport and especially leisure activities," Herbert Gugganig said on the occasion of the 6th Austrian symposium on the horse in March 2017.



Noriker, the traditional heavy horse of the mountains

HORSES CREATE JOBS

"Horses secure many of our jobs," Dr. Andrea Holzleithner, managing director at "Pferd Austria", writes. The horse as a tourism and leisure factor not only accounts for 1.1 billion euros in added value, it also generates a production worth up to 2.1 billion euros in Austria's economy. According to figures of the Industrial Scientific Institute from 2011, this includes about 0.83 billion euros in tourism and 1.27 billion euros in leisure effects. "This means that, on average, every horse accounts for a production worth up to 17,400 euros."

In the tourism and leisure sector alone, horses provide for up to 23,000 jobs, according to this study. "It takes about five horses to create a job." According to guild information, there was a total of 326 licensed farriers in Austria (May 2016), for example, 100 of which are based in Lower Austria. "Thanks to the



"The Austrian market is less influenced by competition riding than the German one."

Frank Schmeckenbecher, Managing Director Krämer

positive development of the horse sector, old professions could be maintained, but new professions such as the equestrian therapist could be created, as well." Accordingly, Austria played a leading role in the development of therapeutic vaulting.

PURE TRADITION - THE SPANISH RIDING SCHOOL

The Spanish Riding School, on the other hand, can look back on more than 450 years of history. Thus, it is the oldest riding school in the world, maintaining the art of classical equitation in the Renaissance tradition of the haute école for centuries. Every year, around 400,000 people visit the Riding School and its studs inhabited by several hundred Lipizzaner horses. According to figures from 2015, the business created a turnover of around 11 million euros. Since 2015, the Riding School has been part of the intangible cultural heritage of the Unesco. "This status is an important appreciation and recognition of our cultural diversity," the former culture secretary Josef Ostermayer (SPÖ) commented in 2015.



A step ahead of the trend



The brand new Covalliero collection has just arrived! Discover our trendy and good value riding wear - now available in equestrian shops.

Country comparison:



	Austria	Germany
Square kilometres	83.871	357.340
Inhabitants	8.7 million	82.2 million
Largest population group	25 to 54 years (42.7 %)	25 to 54 years (41,4 %)
Number of births	9.5	8,5
Population growth	0,5 per cent	0,4 per cent
Gross domestic product	39,110 Euro	37.000 Euro
Unemployment rate	5.7 per cent	4,7 per cent
Utilised agricultural area	2.7 million hectares (37.7%)	16,7 million hectares (47,9%)
Largest city in terms of inhabitants	Vienna (1.8 million)	Berlin (3,5 Millionen)
Number of large cities (more than 100,000 inhabitants)	5	77
Umbrella association	Österreichischer Pferdesportverband/OEPS	Deutsche Reiterliche Vereinigung/FN
(members)	(47,771)	(697.126)
Number of riders	0.35 million	1,7 million
FEI tournaments	160	331
Number of competition horses	12.905	147.000
Total number of horses	0.12 million	1,1 million
Equestrian trade fairs	-	spoga horse, Köln
Main equestrian fair	Pferd Wels, Wels; Apropos Pferd, Wiener Neustadt	Equitana, Essen
Number of equestrian magazines	1	more than 60
Number of equestrian specialist shops	more than 100	more than 1.500

Sources: OEPS, FN, FEI, GTAI, estimates

However, Austria also has a horse breeding history beyond the world-famous Lipizzaners. With a stock of 4000 registered broodmares and 100 stallions, the country is the most important centre of Haflinger breeding in the world. Popular all-round, multi-purpose and junior horses, Haflingers were originally based in the Sarntal Alps in present-day South Tyrol. Besides, Austria is the largest closed breeding region for the Noriker - a medium-heavy, broad heavy horse from the mountains with a large variety of colours - counting 4700 registered broodmares and 200 stallions. Austrian warmblood horses - the ancestors of which were considered the world's best military horses during the Dual Monarchy - are very successful in international equestrian sports these days. The breeding population of Shagya Arabs - the horse of the officers of the Austro-Hungarian Monarchy par excellence - currently includes 220 mares and 50 stallions.



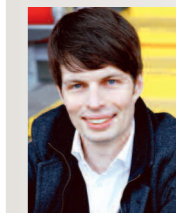
there were numerous small and very small equestrian shops in Vienna, but no clear market leader. This made things easier for us," Krämer managing director Frank Schmeckenbecher explains.

Equiva and Loesdau, with stores in Innsbruck, Wels, St. Pölten, Vienna, Theresienfeld, Klagenfurt (Equiva) and Traiskirchen near Vienna (Loesdau) operate large equestri-

an stores in Austria, as well. However, the largest equestrian trade business in Europe, according to its own account, with a total area of 5000 square metres and a business area of 2800 square metres does not belong to one of the German giants. It is Reitsport Zwerlin in Graz.

"2008 was the first time we claimed to be Europe's largest equestrian specialist shop," Markus Zwerlin says. "In 2012, we extended our sales area to 1800 square metres." So far, no competitor had come up with reporting a bigger sales area, the managing director of the record store says: "Since I like to use every opportunity to visit my colleagues I can say that I haven't found a bigger shop yet. Various manufacturers have confirmed that, too."

OUR AUTHOR



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Your criticism and suggestions are most welcome.

FOR CHAMPS – EQUESTRIAN AND SPORTSWEAR GMBH



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FOR CHAMPS offers a unique, diverse portfolio of designer products for riders and horses and also includes the "après sport" area. Natural materials and newly developed high-tech textiles are processed. Elegance, glamour and cheeky ideas - every line has its own significant appearance. FOR CHAMPS prêt à porter collections are strictly limited. Half and fully tailored products complement the selection options at FOR CHAMPS and guarantee a perfect aesthetic appearance. For young riders, our "NICE&New" (N&N) brand rounds off our range. Awards: At the Equitana 2015, our horse products were elected among the top six market developments. They are developed in cooperation

with professional riders, veterinary surgeons and designers. ENJOY THE WINNING FEELING

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EQUESTRIAN RETAILING - AS IN GERMANY, ONLY SMALLER

According to insider estimates, there are currently a total of about 100 equestrian retail businesses in Austria. This includes many small individual entrepreneurs and some traditional businesses like Reitsport Zwerlin, Reiterstadel or the specialist shop of Johann Trieb, for example, some of which have been in business for decades. Overall, the equestrian retail sector in Austria is very similar to the German one. "Only much smaller," managing director Markus Zwerlin says. "As we have a close cooperation in the Euroriding network, we can make straight comparisons. Everything is the same - customer wishes, product range, even the services are almost the same."

Frank Schmeckenbecher has noticed a difference to the German market, though. "The Austrian market is less influenced by competition riding than the German one," says the managing director of Krämer, the second-largest chain in Austria with four mega-stores in Linz, Vienna, Eibesbrunn and Graz. On its opening in 2007, the Vienna store was Krämer's first mega-store outside Germany. "Back in the years 2005, 2007,

HOLU HORSE AUSTRIA - SPECIALIST FOR LAMB-SKIN SADDLES AND SADDLE PADS



Quality from experience: the Austrian company has processed lamb-skin since 1870. This wealth of experience is used to produce innovative equestrian articles. "Lamb-skin with its inimitable characteristics is the basis of our products," Holu Horse owner Karl Holubovsky explains.

The portfolio includes lamb-skin saddles, saddle seats, saddle pads, saddle cloths, Western pads, lamb-skin girth covers, bandages and protective boots. The individual adjustment and production possibilities as well as the special anti-slip cover of the saddle are the special features of the Holu Horse products. Further details such as the 30-mm thick lamb-skin, cut to 10 mm in the vertebral area, which enforces the therapeutic effect of a saddle pad in the sensitive vertebral area and thus provides for a better fit, account for the high quality made in Austria.



Advantages for retailers include that every single product is hand-made at Holu Horse's, which means that individual wishes can be taken into account.

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