

## MINUTES

### EEBA Expert Panel market research – meeting (virtual) 11 July 2022

<b>Participants:</b>	EEBA office	Anna Lena Grytz Lene Traxel
	participants	Arnd Wiegler (EQUIVA GmbH) Claire Williams (British Equestrian Trade Association) Becky James (Haygain LTD) Ina Rüb (German Horse Industry Consulting GmbH) Julius Krawczyk (Boehringer Ingelheim Vetmedica GmbH)

#### Summary:

- Problems: Getting the right information, availability of scientific information and data, no constant research and the age of studies
- In every country the same problem (big gap between number of horses, number of dates and information)
- Option: To collect data and studies from every member → Problem: Is it allowed?
- Other options: Buy information and share it with all members, asking students to do their bachelor/ master thesis about a specific topic, research together with other clusters, own market research (in long term)
- First steps: Mailing about asking people about their information / studies and collect them
- Next meeting: end of September

#### In detail:

**Anna Lena Grytz** introduces the reasons for choosing this topic and the necessity of today's meeting.

"I had a lot of calls and chats with different members and potential members about which issues they consider to be a good one for EEBA as an association. One of them, highlighted very often, was market research and availability of market data.

For nearly every company, may it be smaller (especially start-ups) or bigger ones it is a continuous issue to get the right information and market data for discussions with their bank, investors and potential partners. I also made the experience during my previous job at Equitana, which belongs to a huge global company, that it was often difficult to provide relevant information for business planning to the headquarter. The other part is availability of rather scientific information and data from research.

I would like to use today's meeting to have a general understanding of what are your expectations about this working group, to understand your point of view, where we are now, availability of data in different regions and where we want to be in the midterm view of time and also to figure out which could be quick wins, we could use on a short time view to get this started."

**Julius Krawczyk** introduces his company Boehringer Ingelheim and explains his point of view.

“Even I'm working in a quite big company (60.000 employees) we have big problems to get real data about horse owners and vets (being our most important clients). We're just allowed to sell product to vets and not to horse owners directly. So, when we are talking to horse owners, we're not allowed to talk about our products. When talking to them, we want to create awareness about diseases and teach people. In the end we need the data from both groups. How many vets do we have? How do they buy? What do they buy? What do they prefer? Considering horse owners, we would like to have exact data about horse owners and horses and the status quo of horse owner's knowledge. Even for us as a big company it is difficult to get good data about the equine industry.

When we are doing research, we either ask a few partner companies or we do the research by ourselves. We are also screening publications and studies. But I would love if we (as EEBA working group) would end up with a general tool for this. I think it would be a good goal for the future doing our own research, bundling our power and get all the information we are looking for.”

**Anna Lena Grytz** asks about the availability of data between different countries.

**Julius Krawczyk** replies that it's nearly the same in every country. “Within Europe, the German market with about 1.3 million horses, is one of the biggest businesses for our company. Germany is followed by France and a bit of UK, but the problems are the same. In the US it's a little bit different because they are living in their own world. They have about 10 million horses. One could think they are more specialized in this as they also have much more companies in the equestrian sector. But looking into details there is a big gap as well for available data & information, considering the number of horses and companies...”

**Becky James** continues.

“We generally use individual university student type studies or anything that's available. BETA does surveys that we use the information from. We are trying to standardise things around forage and understand what people are actually doing in in the real world.”

**Claire Williams** explains the UK perspective.

"Research is really important to us. In the UK we always used to class ourselves as a similar size as Germany in terms of market size. In comparison, in absolute figures, we have most horses and the most riders and so BETA is an organisation that has been doing market research since the mid-90s.

We produce the only independent source of information in Europe about the market in terms of number of riders, number of horses, expenditure, spending behaviour as well as riding behaviour. As well as other spending behaviour in riding behaviour. We do this every 4 to 5 years and it costs a lot of money. Other wonder whether it's worth it but it is truly appreciated by both members and non-members and that's why we do it. Because we are the only independent source we can then delve into more data if needed to do.

We also have a research panel that we set up about 8 years ago. It is an independent research panel of users, end users, riders and owners, which we use where we need a faster turnaround of surveys. We make it available through members and non-members. We run that all online and via (it is the one time

in my life when I say thank God for) social media. We use that for our own users when we need to do a quick survey. During COVID we did regular surveys about rider behaviour and rider spending habits. And then we also use it for others that we work with, like our own federation when they need to know certain things. Whether it's people's attitude towards riding, whether their view to sport or leisure activity, which is our ongoing issue here. Or when we have things we need to find out very specific. So, it it's a useful tool for us.

We also expanded that, working with our research company. We started the steps of developing a similar tool for at least now France and Germany.”

**Anna Lena Grytz** talks about a chat with Pôle Hippolia and that they have a tool as well and that they were talking about quite big participant numbers of outreach and asks Claire Williams about their outreach.

**Claire Williams** answers that the panel has 5000 members in it, but it depends on the topic because they have a characteristic for the panel and they can target something. She explains that there is a German panel as well.

**Ina Rüb** responds that this is the German Horse Future Panel but they are doing more commercial surveys and companies can order their surveys.

**Claire Williams:**

“When we're talking about medical research, what are we talking about? Is it rather economic or is it scientific - they are quite different? I know Becky does a lot of university scientific base surveys. There's a demand for both.”

**Claire Williams** explains how difficult it is to get information of the other markets and that you need yourself grasping at things that came out 20 years ago.

**Ina Rüb** introduces her company GHI and why she is looking for studies and market data. She also mentions an US study about the European market which was quite interesting.

**Anna Lena Grytz** notes that in some countries market research is carried out from time to time, but that there is little constant monitoring of the market. She points out that all market data and studies collected by EEBA so far will be linked and available on the EEBA website. At the same time, it calls on members to share available information with EEBA and the other members.

**Arnd Wiegler** introduces his company and future ideas. They want to expand Equiva internationally and tried to figure out some data. But it was very disappointing for them to find only studies from 2009 / 2010 and some German studies like the one of BSI or Ipsos, which gave interesting insights for customers, but not for a real picture of international markets. He notes that Equiva is very interested in getting more insights and suggests, as a starting base, to share all markets insights amongst the members.

“I think that we have quite good insights at the German and Austrian markets since we have market leadership and specialised retail. We know customers, we have a good database of our own customers. 85% of the customers have their own customer card. So, we get their information, but we would like to know more and be more specific into the single areas. I hope that we can find a good way of working together and make this more transparent.”

**Ina Rüb** raises the concern that everyone has their own customer database, but it will probably be difficult to share this information for data protection reasons.

**Claire Williams** suggests building an own EEBA survey database.

**Anna Lena Grytz** emphasises the potential of what lies within the reach of all members combined.

"We have the possibility to conduct smaller surveys on behalf of or for the members. If someone needs specific information or wants to look at an issue in more detail, we can conduct these surveys. These results would then only be shared internally. At the same time, we would like to build the structure for large, international surveys. We all need to be aware of how much potential lies in the reach of all our members."

She explains what problems there were with the first public EEBA survey. Although the questions were quite interesting, the coverage and feedback were rather mediocre. She attributes this, among other things, to the fact that the survey was only played out via social media, where the EEBA's reach is not yet particularly high and needs to be continuously built up. "The algorithms of Facebook & Co are not very interested in us yet...".

**Ina Rüb** suggests that instead of sharing personal data, which is problematic for reasons previously mentioned, the available market information should be compiled centrally to gain a more comprehensive overall picture.

**Anna Lena Grytz** agrees that this would help a lot.

**Arnd Wiegler** likes this idea and mentions that there is also the option for EEBA to buy some and make it available to members.

"Getting an overview of what's available in the first stage would be an easy one. I can send you everything that we have, at least from the title and where it comes from. Then we can figure out if it is free accessible or not."

**Anna Lena Grytz** confirms that EEBA will create a special area for all these information / studies at the intranet of the EEBA website. She asks if anybody has any experience with market studies offered by Asian market research providers, which are usually sold for some thousands of euros.

**Julius Krawczyk** confirms that the global arm of his company has bought data from a well-known US provider before. However, the information content was low as far as the equine sector is concerned.

**Anna Lena Grytz** states that in the medium to long term, her goal for the EEBA is to conduct a Europe-wide market study and thus create a basis for information and data to be obtained across countries according to a uniform standard. This type of project is of course very costly, but the association could seek EU funding for this in the future.

**Ina Rüb** points out that the EU currently only gives funding to international clusters. As an individual company, you don't have a chance. She emphasises that it would be good to get the Swedes on board in addition to the national/regional clusters that are already members, because there is a lot of expertise in trotting there - in contrast to Germany.

**Anna Lena Grytz** lists the first steps:

- collect everything everyone has available and share it (as far as possible)
- find out how to consolidate information
- figure out which kind of information is missing in detail, which kind of figures/statistics/date do members need?

It is agreed that the age of available information does not matter for the time being and that everything that can be obtained will be collected first.

**Anna Lena Grytz** asks Becky about her experience with universities running studies for them

**Becky James** responds that they usually do this on a small scale with very specific questions.

“The universities are normally looking for projects for students to do. So, I would say it's quite easy to find somebody to do it. Obviously, it can vary how well it will be executed. So, we've had some studies done very well, and then some that actually haven't been all that useful.”

**Ina Rüb** mentions that accessibility of university studies in Germany is poor.

**Julius Krawczyk** responds that University studies in Germany must be published, but only few institutions provide them online or digital. Therefore, the problem is how to know about them and where to find them.

**Anna Lena Grytz** gives a short insight about her conversation on this topic with Prof. Dr. Dirk Winter. He also has an interest in making valuable information from the universities more easily accessible. They discussed how to establish a share point for the exchange between industry and science. This question will be the subject of another expert panel, "Science & Research".

She concludes that

- the next step will be a mailing to all members requesting them to share existing information with the association.

Finally, all participants agree that

- the next meeting of the Expert Panel should be held by the end of September.