WESTERN CONSUMER INTELLIGENCE
by Lauren Oakes · Private Research

Equestrian Luxury Market

The $12B premium equestrian economy and what's driving its 14% CAGR.

CATEGORY Sector Deep Dive
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Executive Summary

The premium equestrian sector has quietly compounded at 14% annually for the last six years, outpacing the broader luxury goods market. The driver is a generational shift: equestrian sport is becoming a primary signal of discretion and discernment for HNW households.

Key Findings

— Average annual spend per active luxury equestrian household: $84K.

— Cutting and reining have become the fastest-growing disciplines among HNW participants.

— Equipment, training, hospitality, and travel each represent $1B+ subcategories.

Strategic Implications

— Brands should think in calendars, not campaigns — the equestrian year drives spending cycles.

— Discipline-specific positioning outperforms generic 'equestrian lifestyle' marketing.

— Youth pipeline investments yield 12-year lifetime returns.

Market Opportunities

— Premium training facilities with hospitality residencies.

— Insurance and concierge services for HNW equine owners.

— Discipline-specific apparel and tack with luxury craftsmanship.