

STATE OF THE NATION 2024





INTRODUCTION

The State of the Nation 2024 report provides a comprehensive overview of the equestrian sector, reflecting on the achievements and challenges of 2023, areas of progression and development in 2024, and outlining future directions for research and industry insights for 2025. This report covers research conducted by British Equestrian (BEF), member bodies, other equestrian organisations as well as statistics from the wider sport and health sectors to identify trends, track progress and indicate the key issues facing the sector.

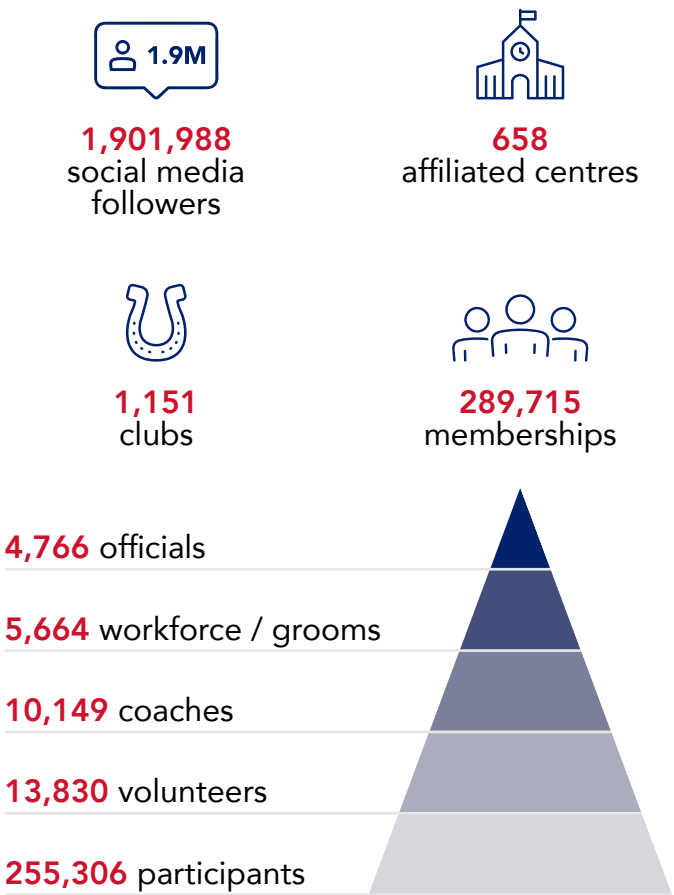
Our 2023 State of the Nation report was the first of its kind, and focused on collecting data and research to understand the equestrian industry. It investigated the sector’s scale, economic impact and the challenges the industry faced. It touched upon the positive effects of equestrian activities and summarised the socio-economic context amidst the rising cost of living crisis. National surveys on adult and children’s participation, as well as comparisons with other sports, were presented to identify trends.

There were positive trends with rising participation levels, as we started to see progress back to pre-covid levels. However, many horse owners and equestrian business owners were feeling the pinch of the cost-of-living crisis, which could risk impacting equine welfare.

Riding establishments also faced significant pressures with high operating costs and staff shortages, however many centres are demonstrating resilience by exploring a wider range of activities to offer off the horse. The number of riding schools decreasing meant it was important to provide more support, particularly around fundraising, business development and staff management.

The identified gaps for future research were; articulating the social value of equestrian activities, further in-depth mapping of riding schools, investigating how we can help the workforce issue, continuing efforts to diversify the equestrian industry and monitoring how the cost of living and financial pressures will continue to impact the industry.

The annual Key Performance Indicators (KPIs) on federation memberships are collected between December and January. These statistics indicate the growth, patterns and trends in memberships across the federation. These figures do not represent individuals but memberships as we are aware individuals may have multiple memberships within the federation. The summary findings are:



In line with our **Horses for All Strategy** we are looking at further improving our data capture and therefore the understanding of our audience by collecting more information on ethnicity, diversity and inclusion data. This will enable us to provide a better experience to all Federation members, ensuring needs are catered for and opportunities are targeted towards the right groups.

Social media engagement has also seen a 13% rise with followers, signalling a heightened online interest and engagement in equestrian activities.

BEF Environmental Sustainability Report

Our environmental sustainability report, conducted by White Griffin, emphasises an urgent need improve environmental sustainability within the equestrian industry, highlighting risks, challenges, and opportunities. Extensive research, including surveys, interviews, and industry analysis, has established an environmental baseline and tailored recommendations.

Equestrian sport, due to its reliance on natural resources and rural landscapes, faces significant environmental impacts arising from climate change, biodiversity loss, reduced availability of water and soil degradation. With the changing climate, we are facing challenges such as extreme weather and increased equine bio-security risks, as well the likelihood of regulatory changes at government level and increasing stakeholder expectations. Key risks identified include equine welfare, operational disruptions, increased financial costs, legal



compliance pressures, and reputational concerns tied to environmental and social responsibility.

The recommendations call for an industry-wide approach focusing on shared goals, knowledge exchange, and resource optimisation. Immediate actions include setting sustainability goals, educating stakeholders, and tool creation such as the carbon calculator and event guidelines. These can be monitored by an environmental board and annual sustainability assessments.

This research and the recent environmental sustainability strategy will help safeguard the future of equestrian sports by embedding environmental sustainability into wider initiatives like horse welfare and social responsibility. By building this resilience we can attract new partnerships and support, holistically enhancing equestrian's public image, through leading the way on important global challenges.

BEF Riding School Audit

In January 2024 we commissioned Critical Research to conduct an audit of UK riding schools. The project has updated our database to deliver a better understanding of UK riding schools, both affiliated and unaffiliated to the members of the federation. The idea for this project was an outcome of previous Health of Riding Establishments research where we received less than 5% response rate from unaffiliated riding schools. This highlighted the need to gain a better understanding of the grassroots segment of our industry. This audit and the database have now given us a benchmark and a contact base to engage with riding schools in a way we have never been able to before. This will boost our efficiency when conducting future surveys and research, subsequently being able to support the sector effectively and build on collaborative opportunities.

The audit was conducted in two stages, an initial desk research stage, followed by a fieldwork stage which consisted of 10-minute telephone interviews between February and April. The fieldwork team successfully interviewed 530 (52%) of 1028 identified riding schools across the UK. This sample was an accurate geographical split of the UK; therefore, the findings give us a representational benchmark for UK riding schools.

Findings revealed several trends and challenges faced by riding schools on a scale we have never had before, which are essential for understanding the state of equestrian facilities and services.

- Majority of riding schools are sole traders
- Most riding schools have fewer than 20 horses
- Majority employ between one and five paid staff
- Most tend to have five or fewer volunteers
- Smaller riding schools with fewer horses and customers use a higher proportion of volunteers, whereas larger schools use more paid employees
- 57% of riding schools have both an interest and the capacity to develop and grow
- UK riding schools have an average of 94 customers per week
- Minimum age to ride is between three and five years old
- Average carriage weight is 85kg, with larger riding schools tending to have a larger maximum weight
- 58% of riding school have wheelchair accessible toilets
- Group lessons are on average £10 cheaper than private lessons
- Lesson prices range from as low as £10 to £120
- 84% of riding schools offer stable management sessions.

Since the creation of the new riding school dataset, it has supported several projects including the "Safe to Play" campaign for safeguarding, it's also helped us to integrate our facilities into government datasets such as Sport England's new Moving Communities dataset, enhancing the visibility and support for the equestrian industry in the wider sport sector.

The data provided by riding schools has also improved the find a centre tool on our website through updating the tool with over 500 riding schools. This tool is open to the public to use, increasing access to equestrian activities through one central hub.

We have further developed the dataset into a facility database to begin to develop more strands such as competition and training venues, therapy and learning centres, livery yards and more.

BEF Social Value: Call for Evidence

We commissioned Sport and Recreation Alliance and Sports Industry Research Centre at Sheffield Hallam University to conduct a literature review to assess the social value of equestrian activities in the UK. This research explored the physical and mental health benefits, subjective wellbeing, individual development, and social and community development associated with equestrianism. Using a quick Scoping review methodology, the review encompassed 290 relevant studies from both academic and grey literature. Findings show that while equestrianism offers significant benefits across various social domains, most studies focus on physical and mental health, with fewer addressing other outcomes.



1. PHYSICAL AND MENTAL HEALTH

Equestrian activities, especially equine-assisted services, are highly associated with improvements in motor function, mental health, and physical fitness. Horse riding can enhance motor skills, cardiovascular health, and reduce chronic pain, especially in therapeutic contexts like hippotherapy. Equine-assisted services has promising effects for people with PTSD, anxiety and depression, particularly for veterans and children with disabilities. However, there are risks including injury and exposure to respiratory pathogens, highlighting the importance of safety measures and equipment.

2. SUBJECTIVE WELLBEING

Equestrian activities contribute to improved quality of life, stress reduction, increased life satisfaction and improved overall happiness. Horse ownership has been found to play a unique role in providing emotional satisfaction and social support.

3. INDIVIDUAL DEVELOPMENT

Equestrianism positively effects personal development, including enhanced self-esteem, confidence and prosocial behaviours. For young people, equine activities were linked to improved school performance, social skills, and reduced behavioural issues. Equine-assisted services were also found to be effective in fostering job-related skills and enhancing employability, especially in marginalised groups and individuals with mental health conditions.

4. SOCIAL AND COMMUNITY

DEVELOPMENT

Although the least amount of research was found for social and community development, it's been evidenced that equestrian activities support social trust, communication, and community connections. The benefits identified included improved social skills, reduced loneliness, and strengthened social bonds, especially among participants in therapeutic riding programs. However, the limited volume and quality of studies in this area suggest a need for more robust research to quantify these outcomes.

This literature review underscores the unique social value of equestrian activities, particularly for individuals with additional needs. However, gaps in empirical evidence, especially around individual development, subjective wellbeing, and social and community outcomes, indicate a need for further quality research. Such research could enable a more comprehensive understanding of the social return on investment in equestrian activity and quantify its financial impact.

These findings will help us measure our industry's impact on people's lives across the UK, ensuring our contributions to society within the wider context such as public health and wellbeing is recognised. The social value project in it's entirety, once both stages are complete, will help us better advocate for the unique benefits of equestrian activity with hopes of helping the resilience of the sector through recognition and championing of our potential.

National Equine Welfare Council: Cost-of-Living Impact

In January a follow-up survey conducted by National Equine Welfare Council (NEWC) members, aimed to assess ongoing financial pressures faced by horse owners and their effects on horse health and welfare. Additional demographic questions were added to the 2024 survey for respondents to disclose their employment status and annual income to help tailor support. Over 6,000 horse owners participated, demonstrating continued engagement with issues impacting horse care.

The results mirrored those of the 2023 survey, revealing that owners are still making significant sacrifices in other areas of their lives to maintain the standards of their horses. The key findings:

- Horse owners face rising costs, impacting even those with full-time jobs and above-average salaries
- There is a need for additional support for horse care amid escalating expenses
- While most plan to maintain ownership, financial pressures may lead to selling, sharing, surrendering, or euthanising horses
- Key concerns include the rising costs of veterinary care, emergency services, and feed
- Owners worry about the long-term effects of increasing costs on their horses' well-being.

NEWC also ran a tailored version of the survey to find out how the continuing cost of living crisis is affecting charities and equestrian rescue centres. It revealed a rise in operating costs against a fall in donations, with more welfare enquiries pointing at an increasing number of horses that will require their care. Through collaborating and working with the equestrian community with research the community is given a platform and a voice, identifying the

challenges and encouraging a collective effort to ensure the welfare of horse, owner and riders are put first.

Equestrian Employers Association: Low Pay Commission

The Equestrian Employers Association (EEA) provided insight into industry wages and labour challenges for the Low Pay Commission (LPC) National Minimum Wage (NMW) consultation to ensure that the equestrian industry's concerns are adequately represented in discussions about minimum wage policy.

EEA conducted a survey that included a range of disciplines. Riding schools represented 40% of responses, followed by dressage (25%), show jumping (16%), and eventing (12%). Most employers surveyed were based in England, with a wide range of business sizes, from single-staff operations to those with 70 employees.

Whilst 70% of staff are reported to be paid at NMW, the EEA acknowledges that this figure may not reflect the industry broadly, as compliance appears lower among grooms, with estimates around 40%. The EEA acknowledges that non-compliance with the NMW is a significant issue in the equestrian industry. Common causes of non-compliance include unpaid overtime and misclassifying employees as self-employed. Some employers mistakenly believe they are compliant by incorporating training or livery into salary packages, which is illegal.

To address these issues, the EEA is focused on education and collaboration with other industry bodies and HMRC to ensure that employers who seek assistance in correcting mistakes will not face penalties. The goal is to help employers comply with NMW regulations and foster a better working environment in the equestrian industry.

British Grooms Association: The impact of poor employment practices on the mental health and wellbeing of grooms

The British Grooms Association (BGA) conducted a survey highlighting the impact of poor employment practices on the mental health and well-being of grooms. The survey found widespread issues such as high levels of anxiety (65%), depression (55%), and emotional distress, with 43% of respondents experiencing workplace bullying and 8% facing sexual harassment. Employment rights violations were also prevalent, with 64% lacking formal contracts, 46% being paid below the National Minimum Wage, and many not receiving payslips or pensions.

The survey revealed systemic issues in the equestrian industry, including financial insecurity, excessive workloads, unsafe working conditions, and a lack of professional recognition. Many grooms experience burnout, emotional abuse, and toxic workplace cultures, contributing to high turnover and poor mental health.

Despite these negative findings, the survey also identified examples of good employment practices that positively impacted employee wellbeing and job satisfaction, suggesting that improving workplace conditions could lead to better retention rates.

These findings will help to direct support for grooms and employers, as well as contributing to shaping the federation-wide workforce project, planned to begin in 2025.

World Horse Welfare: UK Citizen Attitudes Towards UK Equestrian Sport

World Horse Welfare commissioned Voconiq to explore the UK public perception of equestrian sports. The focus of the report was on factors that drive trust and acceptance which are vital for maintaining the industry's social license to operate. Key drivers of trust include, procedural fairness, transparency about injuries and strong regulations. Public trust also hinges on the perceived social value of equestrian sports, views on ethical breeding, and environmental concerns. Whilst trust levels in equestrian sports are moderate, there is potential for improvement through enhanced transparency and inclusivity in practices.

The report highlights the cultural significance of equestrian sports, fostering community connections, but identifies barriers to participation, such as high costs and elitism. Public concern about horse welfare is prominent, with many seeking a holistic approach to wellbeing, which includes quality of life and positive experiences. Areas of discomfort include the use of whips, long transport times, and welfare in competitive contexts.

The research indicates a desire for increased accessibility and diversity in equestrian sports. Most respondents to the survey support measures to ensure the mental and physical wellbeing of horses and controversial issues like euthanasia have significant opposition, particularly outside cases involving untreatable injuries.

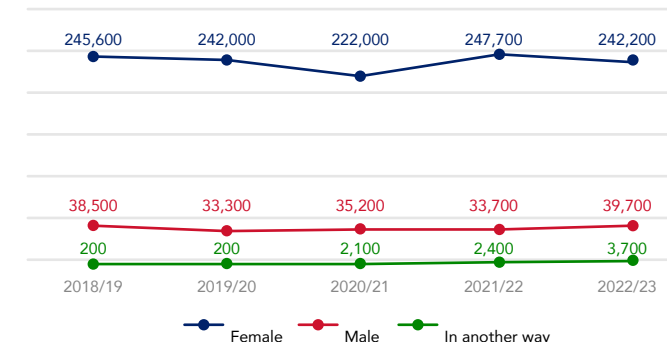
Overall, the report suggests that building trust requires transparent and fair practices in welfare and regulation. The equestrian industry could align with public expectations by enhancing welfare standards, fostering community engagement, and prioritising safety in all aspects of the sport. This can help to guide our strategic efforts and responsibilities to the equestrian community through better advocacy and public representation.

SPORT SECTOR RESEARCH

Data from Sport England's Active Lives survey highlights participation trends across different sports to help understand how people engage with sport and physical activity. The surveys collect data on the engagement in, and attitudes to sport and physical activity, and can be broken down by several demographics.

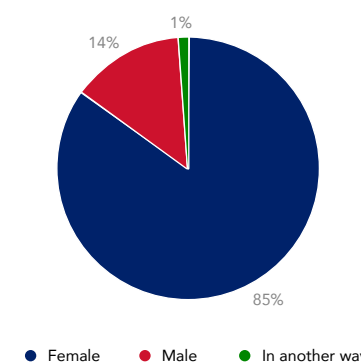
Active Lives Survey highlights on equestrian activities:

Adult participation by gender



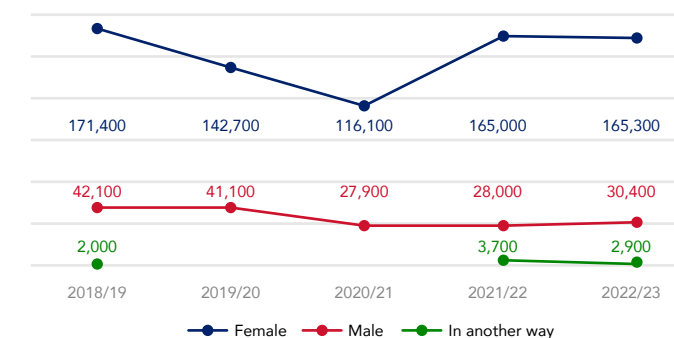
- 285,600 adults participated in equestrian activity at least twice a month in 2022/2023 compared to 283,800 in 2021/22.

Gender split of adult participants 2022/23



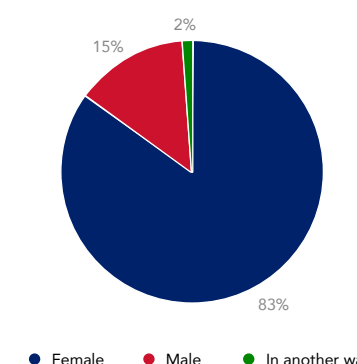
Active Live Children and Young People Survey highlights:

Children and young people participating by gender



- 198,700 children and young people participate in horse riding once a week or more in 2022/23 compared to 197,300 in 2021/22.

Gender split of children and young participants 2022/23



- 13,000 children and young people receiving free school meals (years 7-11) participate in horse riding once a week or more
- 23,600 children and young people with a disability or a long-term health condition participate in equestrian activity once a week or more.



Sport England also published their **Social Value report** in October which estimates community sports generated over £107 billion in social value in 2022/23. This value reflects the personal wellbeing benefits from physical activity and cost savings to public services, especially healthcare. The report emphasises the importance of social value calculations for community sport, much of which is self-organised or volunteer-led, with its impact largely seen in improved physical and mental health.

In addition to the social benefits, the sport and physical activity sector also makes a substantial contribution with an overall value of £99.6 billion in 2021. This **economic analysis** provided by the Department for Culture, Media and Sport (DCMS) complements Sport England's social value research, both of which are essential for informed policy decisions and demonstrating how sport and physical activity improves lives and contributes to the nation's economy.

Sporting Equal's annual **Race Representation Index** also brought attention to diversity and inclusion within sports. The 2023 index had a 92% response rate from National Governing Bodies (NGBs) in England. The data gathered from NGBs on their governance, leadership, coaches, athletes and officials was analysed against the Census 2021 ethnic representation statistic of 18.3%.

BEF submitted evidence on governance, leadership and athletes, receiving a Grade E and placing 40th out of 58 NGBs. Data for the 2024 index has been collected, where BEF will submit data on governance, leadership, athletes and coaches, where we hope to improve our score through improved data capture. By participating in these sport sector initiatives, we are holding ourselves accountable but also highlighting how our work has an impact beyond our equestrian community, uniting us more with other sports to create more opportunities.

HEALTH AND WELLBEING TRENDS

Wider health research from 2023 to 2024 showed emerging trends in physical and mental health conditions:

- The number of children in England needing treatment for mental health problems has risen 39% in a year (NHS Digital, 2023)
- The happiness and confidence of 16-25 year-olds has flatlined at an all-time low in fourteen-year history of research, with young people most unhappy about their money and mental health (Prince's Trust, 2023).
- 43% of disabled people feel they have the chance to be as active as they desire, compared to 69% of non-disabled people. Disabled women are more likely to feel the disparity in perceived opportunity compared to disabled men (39% vs 48%, Activity Alliance, 2024)
- Over 1/3 of adults are not meeting the Chief Medical Officer's minimum requirements for physical activity, lagging the rest of Europe in 11th out of 15 nations.
- Almost 1/3 of children and young people are inactive – 12.4 million adults and 2.3 million children and young people undertake less than 30 minutes of activity a week (Sport England 2022)
- Physical inactivity is associated with 1 in 6 deaths in the UK (NHS 2023).

Many of the benefits associated with equestrian activities identified in the social value research could help tackle some of these emerging trends. This supports ongoing initiatives to promote the equestrian industry's positive impact on public health.



FUTURE RESEARCH AND INSIGHTS

Reflecting on the 2023 State of the Nation report we have made good progress on several areas previously identified as gaps in our knowledge. The research and insights in this report have highlighted:

ENVIRONMENTAL SUSTAINABILITY

- Environmental factors are intertwined with the financial resilience and public perception of the equestrian sector. Our environmental sustainability strategy has worked to define our next steps, and it is now our place to continue to monitor our progress to develop a more resilient industry.

GROWTH AND DEVELOPMENT OF RIDING SCHOOLS

- Riding schools have shown a potential for growth and development, warranting focused support.

SOCIAL VALUE OF EQUESTRIANISM

- Equestrian activities have been found to contribute social value with unique benefits not found in other activities.

ECONOMIC PRESSURES

- The ongoing economic strain and the newly announced budget could affect participation and financial sustainability, particularly for riding schools and small businesses.

DECLINING MENTAL HEALTH IN THE UK

- Rising concerns about children's mental health nationally paired with the evidenced benefits of equestrian activities provides an opportunity for the equestrian sector to play a role in tackling these national issues.

Despite some of these landmark insights achieved, inevitably they have also led onto further questions and highlighted persistent gaps in our knowledge:

WORKFORCE CHALLENGES

- There continues to be a pressing need to address workforce challenges, ensuring staff, coaches and business owners are supported and retained in the industry.

SUPPORT FOR RIDING SCHOOLS

- What specific resources and support do riding schools require to develop and grow effectively?

CALCULATING THE SOCIAL VALUE OF EQUESTRIANISM

- What is the quantifiable monetary social value of equestrian activities in the UK?

LOCAL COMMUNITY ENGAGEMENT

- How can we harness and promote the benefits of equestrian activities within local communities?

UNDERSTANDING EQUESTRIAN POPULATIONS

- More research is needed to fill the gaps to understand the impact of equestrian activities on specific populations and the broader social and community development benefits.

SOCIAL LICENSE

- What steps can be taken to address public concerns around the sector's social license.

The current planned priority research areas for 2025 include:

- **Social Value:** The calculation - Expanding and quantifying the benefits identified in the call for evidence into a monetary figure.
- **Workforce development** - Addressing issues related to the health and sustainability of the equestrian sector. The new steering group will work to identify the next steps aligning with our [Diversity and Inclusion Action Plan](#).
- **Equine welfare** – Our equine welfare steering group will continue to ensure welfare improvements are a priority, in turn strengthening public engagement with the sector.
- **Health of Riding Establishments** – Ongoing research to identify patterns and trends affecting different riding establishments.

These areas have the potential to strengthen the position of the equestrian industry but addressing challenges and leveraging opportunities for sustainable growth and community impact.



CONCLUSION

The State of the Nation 2024 report offers valuable insight into the equestrian industry's current landscape, progress and challenges. There is both resilience and challenges faced by riding schools, horse owners, and equestrian businesses amidst a backdrop of economic pressures. The increase in participation rates and federation memberships signals a positive trend, yet the ongoing cost-of-living crisis and environmental impact poses significant threats to equine welfare and the sustainability of riding establishments. Enhanced data capture can facilitate deeper understanding of our audience, and a collective approach towards shared challenges is essential for maximum impact.

Valuable data collected through our Riding School Audit and other initiatives has revealed trends that require attention to guide future support and research efforts. Meanwhile, the social value literature review indicates the multifaceted benefit of equestrian activities, particularly in promoting physical and mental wellbeing, fostering community connections, and enhancing personal development.

As we move forward, it's imperative to address the identified gaps in knowledge and support systems, particularly concerning workforce challenges and the financial sustainability of the sector. Ongoing research into the social value of equestrian activities will be crucial in articulating the sector's value to broader health and community objectives.

The projects that have been most successful in achieving impact have had a focus on clearly defined problems and, therefore, produced actionable insights to alleviate these issues. We must place greater emphasis on a structured approach to change, starting with identifying core problems and gathering evidence. By focusing on the areas outlined above, we can fortify the equestrian industry and enhance its positive impact on society. The insights gained in 2024 will serve as a foundation for strategic initiatives in the years to come, ensuring that the equestrian sector continues to thrive and evolve.





Abbey Park
Stareton, Kenilworth
Warwickshire
CV8 2RH

T: 02476 698871
E: info@bef.co.uk
britishequestrian.org.uk

All rights reserved. All images copyright to British Equestrian and Jon Stroud Media. No unauthorised reproduction permitted.