

# The Power of Horses: Equestrianism's Social Value

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British  
Equestrian



# The Power of Horses: Equestrianism's Social Value

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# Setting the scene



## Setting the scene

The concept of 'social value' has increasingly gained traction across sport, health and policy sectors. As public policy increasingly focuses on wellbeing, inclusion, and preventative health, the conversation has shifted from asking how many people take part in sport, to understanding what impact participation has on individuals and society. This change has created new opportunities to speak directly to government departments beyond sport, such as health, education, social care and The Treasury, using language and evidence that resonates across sectors.

For a sport like equestrian, which may have previously felt overlooked in these wider discussions, this social value work presents a crucial step forward with a unified voice. Equestrianism engages hundreds of thousands of participants across the UK, and with the BETA National Equestrian Survey 2023<sup>1</sup> identifying the industry's economic value at £5 billion per year, it's both timely and necessary to acknowledge officially the variety, value and impact our industry brings.

Recent [research on the UK public's attitudes towards the equestrian sector](#)<sup>2</sup> highlighted the need for the industry to showcase its social value and economic contribution. Additionally, it underlined the need to engage with those who are undecided about equestrianism by sharing stories that challenge perceptions and presents the industry in a more accessible and unified way.

These insights have reinforced the need for an evidence-based approach to communicating the breadth of our impact, from elite sport to leisure riding, in a way that extends beyond our own community.

Recognising these needs, we commissioned the first-ever social value report for the equestrian sector in the UK. This is a landmark project that blends qualitative storytelling and quantitative measures, to capture both the lived experiences and the hard numbers that demonstrate our contribution to individual wellbeing and to society. For the first time, these insights have been brought together

in a single document, grounded in a robust literature review and supported by a HM Treasury aligned valuation. The result is a compelling evidence base showing that equestrian activity delivers profound physical, emotional and social benefits.

This project marks a beginning, a 'before and after' in how we understand and communicate the value of equestrian activity. We hope it becomes a unifying tool for the sector, helping us align our messaging, advocate more effectively and work in partnership with government and other sectors to ensure our value is fully recognised and supported. It's both a mirror and a megaphone; reflecting what we already know within our community and amplifying that message to the audiences who need to hear it most.

<sup>1</sup> VoconIQ, National survey of UK citizen attitudes towards UK equestrian sport industries, June 2024

<sup>2</sup> BETA, The National Equestrian Survey 2023



## The headlines

### Social and economic value



**£1.2bn** social value



**£292k** per riding school



**£5bn** economy contribution



**£500m** overseas trade

### Community and membership



**334k** members\*\*



**247k** participants +  
**40k** volunteers



**8.6k** coaches +  
**4.8k** officials



**1.9m** social followers

### Diversity and inclusion

**85%** of regular riders are female

Riders who have a disability or a long-term health condition **18%**

**30%** of riders are aged 55+

Lower socio-economic groups† **14%**

There is parity across equestrian sport with direct competition, equal prize money and total integration.

### Participation and people



**4.3m** people directly interested



**27m** have some level of interest



**178m** riding days each year



**850k** horses across  
**331k** UK households



**2nd largest** rural employer

### Challenges



**15%** drop in riding school numbers



**1.5m** fewer riding lessons

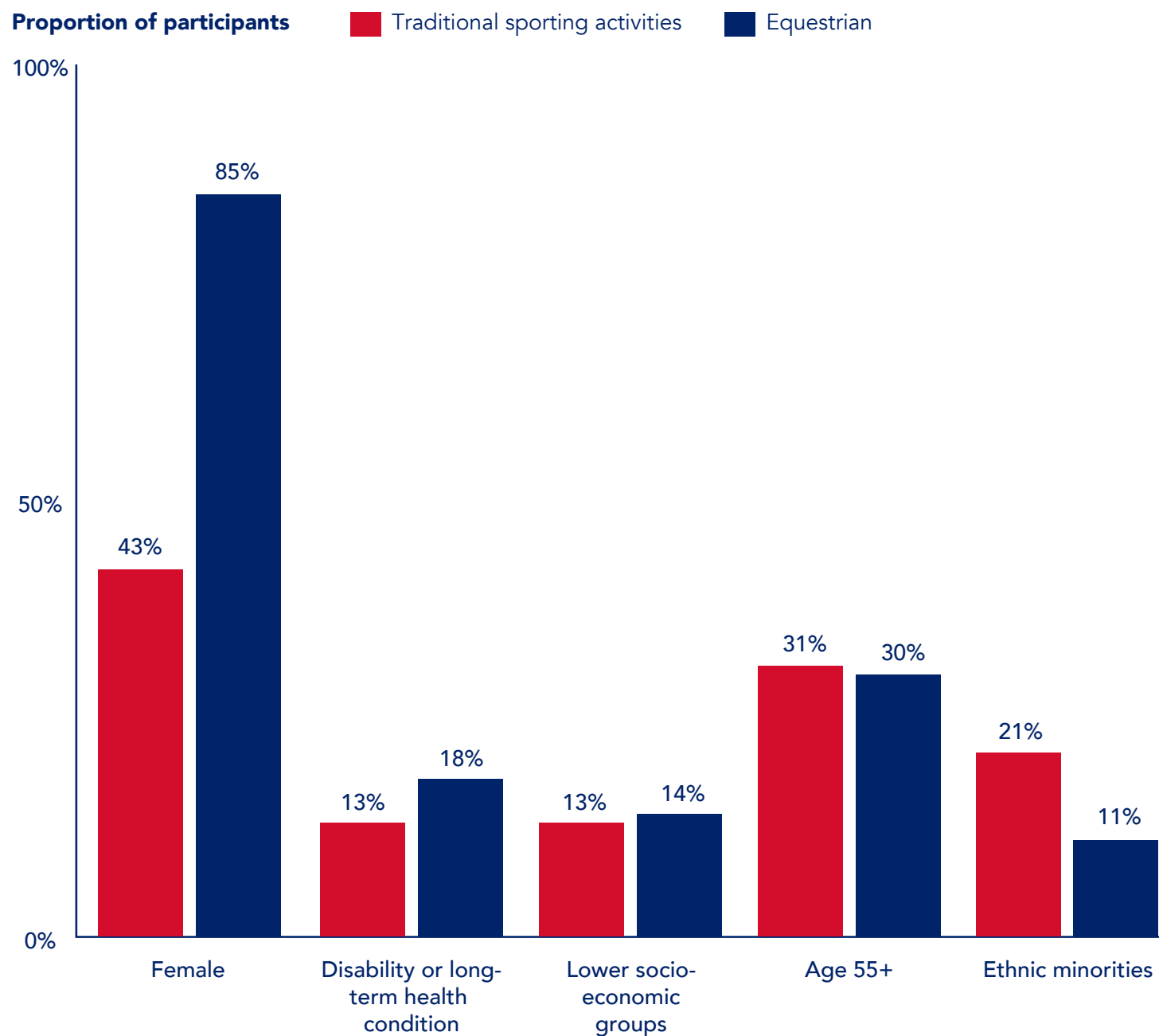
\* Riding regularly is defined as riding at least once a month for the last 12 months.

\*\* Updated interim membership figures gathered from member bodies specifically for this project

† Those in groups 6-8 according to the National Statistics Socio-economic Classification.



## The demographics of equestrian participants compared to traditional sporting activities



### 'Traditional Sporting Activities'

is the Broad Activity Category used by Sport England. It includes all sporting activities, excluding: walking, cycling, dance or fitness activities.

### Sources:

- BETA, The National Equestrian Survey 2023
- Social Value of Equestrian 2024
- The British Horse Council Manifesto 2023
- The British Equestrian State of the Nation Report 2024
- Sport England Active Lives Adult Survey (2022-2023)





# Introduction



# Introduction

Engaging in equestrian activity changes lives, generating at least £1.2 billion in social value each year. From improving physical and mental health to offering transformative lifelong skills and experiences, equestrian is more than a sport, it's a community that develops a sense of belonging and a powerful public asset.

To demonstrate these benefits, British Equestrian (BEF) undertook a landmark, two-stage project to assess, evidence and quantify the social value of equestrianism in the UK. This work combines an extensive review of existing research with cutting-edge economic modelling to quantify our contribution to public health and wellbeing, as well as community and individual development.

The findings are clear, equestrian activity generates £1.2 billion in social value through increases in life satisfaction and supporting public health. Further research and evidence demonstrate wider social value benefits such as community connection and individual growth. This research primarily focused on participation in activities within riding schools and

our federation member bodies and therefore does not include data on polo or racing. However, we are aware that there is significant overlap across the wider equestrian community, with many federation members also actively involved in both polo and racing activities.

At a time when the demand for preventative health and inclusive sport is at an all-time high, the equestrian industry offers a unique and largely untapped opportunity to meet national priorities.





# The social value of equestrianism

An industry that delivers:

**£1.2 billion**  
social value annually

- £292,000 average social value per riding school
- £2,000 per adult participant (twice monthly)
- £3,500 per young person (weekly participation)
- £2,100 per weekly volunteer
- £1,000 per monthly volunteer

And value in four key social value outcomes:

Improved physical  
and mental  
health



Enhanced life  
satisfaction and  
wellbeing



Support for  
individual  
development



Stronger  
community  
outcomes



## Equestrianism and the Get Active Strategy: a shared vision

British Equestrian's work is directly aligned with the government's [Get Active: A strategy for the future of sport and physical activity](#) document, which calls for sport and physical activity to support public health, tackle inequality and boost community resilience.

Our research supports this vision by providing robust monetised evidence of how equestrianism contributes to:

- Preventative healthcare and reduced NHS demand
- Inclusive access for women, older adults, disabled people and underserved communities
- Community wellbeing through volunteering and engagement
- Cross-sector integration with health, education and care.

Equestrianism is ideally positioned to be part of the Government's sport and physical activity ambitions, as it's an industry with already measurable impact and additional untapped potential.





## Our strategy

Part of [our strategy](#) is to advocate more effectively for the equestrian industry and this research is a vital step in achieving that. Our vision is of a vibrant and inclusive industry that is valued for its contribution to society. This project was not just about the numbers, it's about proving what we already know anecdotally and applying the evidence accordingly – that horses are beneficial and can help change lives.

The findings from this will help us deliver on our core priorities outlined below:

- **Enabling and supporting a vibrant and healthy equestrian sector** – Each riding school generates an average of £292,000 in annual social value and are central to the grassroots of our industry. This finding strengthens our call for investment in infrastructure, safety, accessibility and security for these riding schools.
- **Advocating and representing the sector** – We want to be recognised not just in the sport and physical activity sector but across government, health, education and beyond. This report gives us a common language to speak with decision-makers, framing equestrian not just as a sport but as a solution that contributes to national priorities, helping to tackle loneliness, improving mental health, empowering young people and strengthening communities.
- **Supporting sustainable and inclusive growth** – We already reach many groups that are underrepresented in other sports – women, older adults, rural communities and people with a disability or a long-term health condition. This project demonstrates our strengths and highlights opportunities to engage new communities and partners, setting a baseline for sustainable and inclusive development.





## Riding centres: Local hubs with a national value

With over 1,000 riding schools across the UK, these centres generate around 25% (£292,000 per riding school) of the sector's total social value. They're the heart of our grassroots where most participants first learn to ride, take part in off-the-horse activities and begin their equestrian journey. As local hubs for volunteering and community connection, riding schools are vital to the sustainability and health of our industry. They also play a central role in our Horses for All strategy, helping people from underrepresented groups and those who would not otherwise get the chance, to experience and enjoy horses.

Yet many of our riding schools are facing closure, despite enjoying high demand. The closure of a riding school means more than lost lessons, it represents the loss of:

- community connection
- improved physical and mental health
- wellbeing support
- lifelong learning
- local economic value.

**We must protect and invest in these essential community assets that boost wellbeing and create social inclusion.**





## Something for everyone: A world of possibilities in equestrianism

Whether you're on-the-horse or supporting from the ground, the equestrian industry has something for everyone.

On-the-horse, there's an exciting mix of sporting disciplines and leisure activities:

- Olympic and FEI disciplines like showjumping, dressage, eventing, endurance, carriage driving and vaulting
- Team-based sports such as horseball, mounted games and polocrosse
- Other growing activities and sports such as horseback archery, showing and reining.

We're also a powerful force for creating a sense of community and belonging. At the Riding for the Disabled Association (RDA), disabled participants experience transformative change in a space where they feel supported.

According to the [RDA's impact report](#):

- 90% of participants feel more confident in themselves
- 82% feel more connected to others
- 72% are better able to regulate their emotions
- 71% have improved their motor skills.<sup>3</sup>

The Pony Club nurtures early friendships and confidence in young riders. Providing opportunities for teamwork, responsibility and lifelong skills through sun, shared experiences.

Off-the-horse, activities in equine-assisted services can boost employability, wellbeing and pro-social behaviour, opening doors for people from all walks of life. [The British Horse Society's Changing Lives Through Horses programme](#) provides equine-assisted learning at 157 centres, helping 5–25-year-olds develop six key life skills (communication, confidence, teamwork, relationships, perseverance, responsibility).



<sup>3</sup>Riding for the Disabled Association, Impact Report 2025



In a safe, supportive environment led by qualified coaches, participants who feel excluded and disengaged from school, struggle to connect with others or face challenges due to neurodiversity or additional needs, can gain an education and Ofqual-accredited qualifications. Outcomes from the 2024/2025 cohort show:

- 68% improved in at least one key skill
- 74% have planned an onward pathway in education, training or employment.<sup>4</sup>

The equestrian industry is a major employer, second only to agriculture in rural areas with over 18,000 equestrian businesses and around 250,000 jobs directly and indirectly – including racing (British Horse Council Manifesto).

We're an industry that successfully reaches audiences that are often underrepresented in other areas:

- Women and girls (85% of participants)
- Older adults (30% are over 55+)
- Disabled people (18%)
- Lower socio-economic groups - those in groups 6-8 according to the National Statistics Socio-economic Classification (14%).<sup>5</sup>

These are also groups that typically experience greater gains in life satisfaction from participation, the per-person social value of equestrianism is likely to be higher than many other sports, yet our data maturity is not quite at the stage to demonstrate this point. This is a crucial finding when considering public investment or policy focus, as well as an area to unite internal focus on improving our data capture particularly around demographics.



<sup>4</sup> British Horse Society, [Changing Lives Through Horses](#) outcomes (2024/2025)

<sup>5</sup> Sport England [Active Lives Adult Survey](#) (2022-2023)





# The research



## The research

To truly understand the social value of equestrianism, we turned to robust, evidence-based research.

Stage one, delivered by the Sport and Recreation Alliance in partnership with the Sport Industry Research Centre at Sheffield Hallam University, conducted an in-depth review of 290 academic and grey literature sources, capturing proven evidence how equestrian activities demonstrate four of the governments social value outcomes.

In Stage two, we partnered with State of Life to quantify our WELLBY social value using the HM Treasury-approved methods, placing a monetary value on equestrianism's contribution to individual wellbeing and state savings to the NHS through improved health. The result being an annual social value of £1.2 billion, showing that we are not just a sport but also a powerful force for societal good.





## Stage one: The literature review

Before embarking on a detailed valuation of the social impact of equestrian activity in the UK, we commissioned a literature review to establish the existing evidence base. This work assessed the breadth and depth of research on the social outcomes associated with equestrianism. Using a Scoping Review methodology, the team identified and analysed 290 relevant studies from academic publications and grey literature.

The review explored four key domains of social value:

- **Physical and mental health**
- **Subjective wellbeing**
- **Individual development**
- **Social and community development**

The findings confirm that equestrianism delivers meaningful benefits across all four areas.

### **Physical and mental health**

Evidence strongly supports the role of equestrian activity - particularly equine-assisted services - in improving motor function, psychological wellbeing, and physical fitness. Activities such as therapeutic riding and hippotherapy have been shown to enhance cardiovascular health, coordination, and reduce chronic pain.

Importantly, these interventions also show promising outcomes not seen in other sports for people living with PTSD, anxiety, and depression, including veterans and children with disabilities. However, the review also notes associated risks, such as injury and respiratory exposure, underscoring the importance of appropriate safety practices.

### **Subjective wellbeing**

Participation in equestrian activities is linked to higher life satisfaction, stress reduction, and overall emotional wellbeing. Horse ownership, in particular, was found to offer unique benefits related to emotional support, routine, and companionship, often equating to significant quality-of-life improvements.

These findings align directly with the WELLBY valuation framework, which monetises improvements in life satisfaction, making this an especially relevant evidence base for the social value calculations undertaken in the wider project.



### Individual development

The literature identifies equestrian activity as a contributor to personal growth and development, especially among young people. Reported outcomes include increased self-esteem, confidence, improved behaviour, and stronger social skills. Equine-assisted learning and therapeutic programs also show positive effects on job readiness and employability—particularly among marginalised groups and individuals with mental health challenges.

### Social and community development

While fewer studies directly address this area, the review does highlight evidence that equestrianism supports social cohesion and community participation. Reported benefits include enhanced communication skills, stronger interpersonal relationships, and reduced loneliness—especially in structured therapeutic or volunteering contexts. However, the relative scarcity and variable quality of studies in this domain indicate a clear need for further, targeted research.

This literature review provided a foundational understanding of the many ways equestrian activities impact lives, particularly for individuals with additional or complex needs. It was also found that the benefits of equestrianism go beyond the national model with unique benefits for particular groups such as those with PTSD, or improvements to prosocial behaviour and education through alternative provision programmes that are not as common in other sports.

[Read the full report](#)





## Stage two: The calculation

In partnership with social value specialists State of Life, we have quantified the contribution of equestrian activities to individual wellbeing and wider society. Building on earlier qualitative insights, this second stage of our social value initiative provides robust, quantitative estimates using methods aligned with HM Treasury's Green Book guidance.

The study assessed three main forms of engagement:

- on-the-horse participation
- off-the-horse engagement
- volunteering.

These were valued in terms of primary wellbeing improvements and secondary health savings. Key findings include:

Activity	Primary value (annual WELLBY value per person)	Secondary value (annual wider value to society per person)
On-the-horse (adults)	£2,000	£150
On-the-horse (young people)	£3,500	
Off-the-horse	£2,000	Not applicable <sup>6</sup>
Volunteering (weekly)	£2,100	
Volunteering (monthly)	£1,000	

<sup>6</sup> Calculating the secondary benefit for young people and volunteers was not possible due to limited data.





Taken together, the total annual social value of equestrianism in the UK is estimated at **£1.2 billion**. Around a quarter of this is generated by riding schools, underlining their role as vital community hubs for wellbeing. With over 1,000 establishments nationwide, the average riding school contributes an estimated **£292,000 in annual social value**.

The sector is particularly important for engaging groups often underrepresented in wider sport and physical activity, including women and girls, older adults (55+), people with disabilities or long-term health conditions, and those from lower socio-economic backgrounds. These groups typically experience greater than average wellbeing gains, making equestrianism particularly valuable for public investment. However, participation among ethnically diverse communities remains low, highlighting a clear opportunity for more inclusive outreach and programming.

To ensure credible and conservative estimates, several factors were excluded from the analysis, including infrequent participants, children under seven, physical

health benefits of non-riding activities, the value of horse ownership, and comprehensive injury data. Additionally, this research primarily focused on activities within riding schools and federation member bodies, it does not include polo or racing-specific data, although there is significant overlap across the wider equestrian community.

As such, the reported £1.2 billion figure should be seen as a minimum estimate, supported by a transparent audit trail of evidence. Future research, including more consistent data collection and emerging tools such as child-WELLBY methodology, will further refine these findings.

#### Primary value method

The WELLBY (Wellbeing-Adjusted Life Year) framework used translates improvements in life satisfaction into a monetary value (£15,900 per WELLBY, 2024 prices). Using national datasets, including Sport England's Active Lives Survey, alongside federation data, researchers were able to quantify the specific effect of equestrian participation on wellbeing.

#### Secondary value method

Being active can help reduce the strain on the NHS and social care because it improves people's health. To estimate how equestrianism contributes to this a method similar to Sport England's Moving Communities programme was used. Since there isn't any data directly linking horse riding to specific health benefits, State of Life used a proxy approach. This meant they started with the general value of being active, estimated at £327 per person per year (in 2024 prices), and then worked out how much of that benefit can be attributed to equestrian activities.

Equestrian participants often take part in other sports as well, and about 55% of their activity is from non-equestrian activities. Therefore, only part of the general health benefit is assigned to equestrian activities.<sup>7</sup> This gives an estimated value of £150 per adult per year in reduced healthcare and social care costs.

[Read the full technical report](#)

<sup>7</sup> Sport England Adult Active Lives Data 2023-2024





# Conclusion



## Conclusion

### Equestrianism, a public good and a shared responsibility

Equestrianism isn't an activity just for the affluent or sporting elite. It's a national wellbeing resource with a measurable public value. It supports health. It fosters inclusion. It strengthens communities. It offers transformative experiences, especially for those who need them the most.

By combining the qualitative context from the literature with rigorous quantitative modelling, the overall project provides a comprehensive picture of equestrian's role in the UK.

Insights from the BETA National Equestrian Survey, which provides an economic value for the industry of £5 billion annually; coupled with these two stages enable us to advocate more effectively for our place in public policy, health, and funding decisions. The research offers both narrative and numerical evidence that equestrian activity is more than just recreational, it's a contributor to national wellbeing and a strategic asset for social development. As we continue to face external pressures,

particularly from the cost-of-living crisis and inflation impacting riding schools, having this evidence is a critical step toward long-term sustainability and recognition.

With clear alignment to [Get Active](#), robust support for our strategic goals and a growing multi-sourced evidence base of value, we are ready to work with government, health, education and community partners to ensure we can deliver for everyone.

This work provides compelling evidence that equestrian activity already generates significant, measurable and wide-reaching social value. We support physical and mental health, strengthen communities, develop individuals and improve wellbeing, especially for underserved or marginalised groups, contributing to national wellbeing and avoided public costs. We also know that we can achieve even more and look forward to unleashing the full potential of equestrian sport.







**What next? A call to action**



## What next? A call to action

This report is a turning point for equestrianism and the industry that lies behind it. It can act as both a mirror, reflecting what we already know about the life-changing impact of the equestrian industry and a megaphone, amplifying that message with robust, treasury-aligned evidence.

In a policy environment focused on impact, inclusion and value for money, we now have the data to demonstrate our worth. What is needed next is stronger advocacy, better infrastructure and more strategic support to ensure this value is protected, developed and multiplied for future generations.

### Recommendations for the sector

To improve our impact and the visibility of that impact, we must take several key actions.

#### What the industry must do:

- Improve and standardise our data collection and demographic tracking across equestrian member bodies
- Update national surveys to reflect individual-level wellbeing impacts
- Refine volunteer tracking and recognise off-the-horse roles
- Develop a riding school-specific valuation model to support the sustainability of our grassroots.

#### What policy makers can do:

- Strategic infrastructure and investment in riding schools and non-riding and therapeutic programmes
- Recognise and build stronger links between the equestrian industry and health, education and social care
- Integrate planning for the use of equestrian centres in social prescribing and community wellbeing.







# Glossary



# Glossary

**Equine assisted services (EAS)** - A broad term covering a range of learning and therapeutic equine-based interactions. This includes therapeutic riding, hippotherapy (horse-assisted physical therapy) and equine-assisted learning or psychotherapy, which use horses to support mental, emotional and social development.

**Grey literature** - Research and information produced outside of traditional academic publishing channels such as peer reviewed journals. It includes reports, theses, conference papers, policy documents and evaluations published by governments, charities or other organisations.

**Life satisfaction** - A commonly used measure of subjective wellbeing. Individuals rate their overall life satisfaction on a scale (typically from 0 to 10), which can then be used to evaluate the impact of activities or interventions on quality of life via 'before and after studies'.

**Off-the-horse activity** – Any purposefully designed, dismounted project, session, or programme delivered to clients,

participants or customers that involves interaction with equines in an equestrian environment. These activities are structured to engage people with horses from the ground, without riding, driving, vaulting or any form of mounted interaction.

This definition includes grooming, leading, observing horse behaviour, groundwork, stable management and equine assisted services. The use of mechanical horses is also considered off-the-horse, as these activities do not provide the same relational or responsive aspects of on-the-horse participation.

Off-the-horse activities, especially equine assisted services, tend to focus more on therapeutic, educational or personal development goals, and are designed to promote physical, emotional, cognitive or social benefits through safe, meaningful interaction with equines.

**On-the-horse activity** – Any form of equestrian participation that involves being mounted on an equine, whether for riding, driving or vaulting. These activities require

the participant to be physically on the horse (or, in the case of driving, actively piloting a horse-drawn vehicle).

This definition includes all ridden disciplines and mounted interactions including but not limited to; hacking, schooling, show jumping, dressage, eventing, carriage driving, therapeutic riding, hippotherapy (delivered by a qualified physiotherapist or occupational therapist) and equestrian vaulting. For reporting purposes, all showing activity is currently classified as on-the-horse, even though we acknowledge some individuals take part in-hand (BEF data does not yet differentiate at this level).

**Primary value** – The direct benefit and value to individuals of improved wellbeing.

**Regression** – A statistical method used to identify the relationship between a dependent variable (e.g. life satisfaction) and one or more independent variables (e.g. participation in equestrian activities). It helps isolate the effect of specific factors while controlling for others.



**Scoping review** – A scoping review is a type of research synthesis that maps the existing literature on a broad topic to identify key concepts, research gaps and types of evidence.

This mapping exercise involves systematically searching for, identifying and charting relevant literature to understand its characteristics, such as the volume of research, types of studies conducted, key concepts addressed and prevalent research gaps.

**Secondary value** – The wider value to society, including the state.

**Social value** – The broader value created by an activity beyond financial or economic measures. In this context, it refers to benefits such as improved mental health, increased life satisfaction, and stronger communities, which are increasingly being considered to be important in policy and funding decisions.

**Subjective wellbeing** – How an individual feels about their own life, including their overall happiness, life satisfaction and sense of purpose.

**WELLBY (Wellbeing-Adjusted Life Year)**

– A HM Treasury recognised metric used to quantify how much an activity improves life satisfaction. One WELLBY represents a one point increase in life satisfaction (on a 0–10 scale) for one person over one year. It enables the economic valuation of wellbeing improvements, similar to how Quality-Adjusted Life Years (QALYs) are used in healthcare.



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