



STATE OF THE NATION 2025

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# INTRODUCTION

The British Equestrian State of the Nation 2025 report marks the third edition, offering an insightful overview of the UK equestrian sector, and wider sporting and education landscape. Building on progress of previous years, it reflects on the key achievements and challenges of 2024, highlights major developments shaping the sector in 2025 and sets the stage for future research and industry priorities in 2026.

In 2025, we published our [new five-year strategy](#), setting out clear priorities to take us into 2030. Data and insight are embedded within the strategy and identified as a key enabler of progress. By using evidence at the centre of our decision-making, we can better understand and respond to the needs of our community whilst ensuring we deliver meaningful impact for horses, people and the wider equestrian landscape.

This report is produced by British Equestrian in collaboration with our

member bodies, while also reflecting on findings from a wide network of equestrian and sport organisations to draw on the latest research and statistics from sport, health and education sectors.

This year's report is evidence that equestrianism has reached a pivotal moment, with participation and social impact evidence on the rise – equestrian activities deliver significant health, wellbeing and inclusion benefits, whilst reaching groups often underrepresented in other sports. But it also highlights real pressures, with rising costs and fewer local facilities restricting growth and accessibility, as well as increasing welfare and social licence scrutiny.

The message is clear – equestrianism matters more than ever, but protecting its future will require care, investment and clear evidence of the positive impact horses have on people's lives.



# A LOOK BACK AT 2024

The 2024 State of the Nation report provided a data-driven review of the UK equestrian sector, capturing the achievements and ongoing challenges of the year whilst setting the foundation for future work. We recorded positive signs of growth, with rising membership and engagement levels demonstrating the sector's resilience despite the sustained workforce and cost-of-living pressures affecting horse owners and riding establishments.

A major milestone was the publication of the first stage of our social value research, which provided robust evidence that equestrianism contributes to physical and mental health, subjective wellbeing, individual development and community impact.

Alongside this, [World Horse Welfare's study with Voconiq](#) into public perceptions offered essential insight into how equestrianism is viewed by UK citizens was released. It highlighted

that while trust in equestrian sport was moderate, findings called for greater transparency, inclusivity and affordability, with emphasis on the need for the sector to more clearly demonstrate its social value.

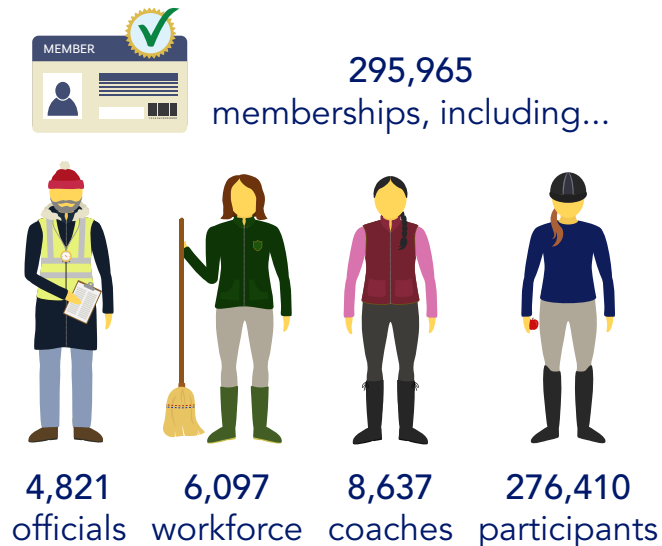
Overall, the 2024 report concluded that, although the equestrian industry showed signs of growth and strong public-potential, ongoing work was required to improve data collection and strengthen sector-wide collaboration to address financial and welfare pressures as we moved into 2025 and beyond.



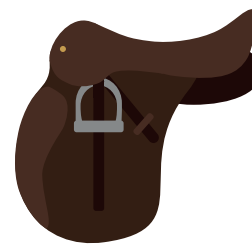
# THE EQUESTRIAN RESEARCH AND INSIGHT LANDSCAPE

The annual key performance indicators (KPIs) for federation memberships were collected between December 2024 and January 2025. These figures represent the number of individual memberships across the federation, including people, riding schools and clubs.

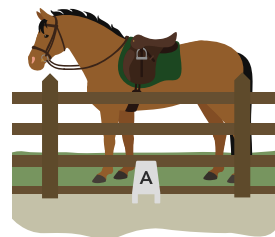
Headline results from the data collection:



**40,473**  
volunteers



**1,042**  
clubs



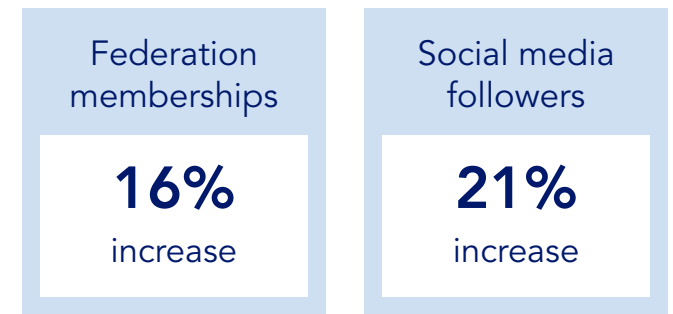
**716**  
affiliated  
riding schools



**2,303,451**  
social media  
followers

Overall, federation memberships increased by 16%, driven partly by improved data capture and a significant 21% rise in social media followers.

While the sector continues to experience a gradual decline in the number of clubs, riding schools and coach memberships in recent years, there is a consistent upward trend in participants and workforce/ groom memberships in the same period.



## SPORT ENGLAND ACTIVE LIVES DATA

According to Sport England's Active Lives data, in the 2023–2024 academic year, around 177,400 children rode horses at least once a week and the adult data finds that 740,700 adults reported riding at least once a year, with 273,400 riding at least once a month. Participation rates are high for women, who make up 85% of riders, while 18% have a disability or long-term health condition, and 14% come from lower socio-economic groups.

## RIDING FOR THE DISABLED ASSOCIATION IMPACT REPORT

The Riding for the Disabled Association (RDA) published their [2025 impact report](#) on how its programmes deliver life-changing benefits for disabled children and adults in the UK. The findings confirm that RDA participation significantly improves wellbeing, with participants reporting that they feel calmer, more confident, more emotionally resilient and better able to cope with everyday challenges. These improvements exceed the national averages for disabled

people, highlighting RDA's unique role in providing opportunities that many cannot access through traditional sport or physical activity.

The report also evidences powerful benefits for volunteers. In addition to supporting their communities, volunteers reported reduced loneliness, improved mental and physical health, and increased confidence in their skills, demonstrating the impact of RDA activities extends beyond the participants. Furthermore, it found the positive impacts on participants extended to the whole family through creating space, connection and calmness in family life. It also found positive effects on a participant's engagement with education through opportunities such as the RDA Proficiency Tests.

Overall, the evaluation provides compelling proof of RDA's measurable and lasting impact, showcasing how horses transform lives through supporting personal growth, community connection and improved wellbeing for thousands of disabled people and volunteers who support them.

## KEY OUTCOMES

Improved mental wellbeing

**95%**

of participants feel calm and focused during sessions

More connected

**82%**

of participants feel more connected with others

Increased self-esteem, confidence and independence

**90%**

of participants feel more confident in themselves

More physically active and increased physical ability

**88%**

have better posture, balance and co-ordination

## THE EUROPEAN EQUINE SECTOR LOOKING FORWARD TOWARDS 2040

A [foresight study](#) by the European Horse Network – a non-profit network uniting 34 stakeholders across the European equine sector – explored four scenario-based thought experiments using sustainability and social licence as the key drivers:

- A new place for horses – horses are fully integrated in sustainable agriculture and society, underpinned by welfare standards that secure the industry's social license to operate.
- Horses must fight for their status – economic and environmental pressures dominate policy and public priorities, to the detriment of equestrian activities and access.
- The horse comes last – criticism of the industry increases, alongside rising ownership costs and growing restrictions on transport and activity.
- Horses for the happy few – equestrianism becomes an exclusive activity for wealthy elites subject to high levels of public criticism.

The analysis highlights both risks to the long-term viability of the sector and opportunities to build a more resilient, socially accepted future where horses remain a valued part of the European landscape. It identifies growing pressure on social acceptance of equestrianism, with concerns about welfare, inclusivity and elitist perceptions shaping several scenarios. It warns of a potential increased concentration of ownership, with rising costs and land pressures weakening smaller, community-based operations while strengthening larger commercial enterprises. In addition, a changing skills landscape will put greater reliance on advanced technical and scientific expertise.

Overall, the study emphasises the need for coordinated long-term action within the sector and in partnership with others. Priorities include strengthening political advocacy, investing in infrastructure, embracing new technologies and ensuring financial sustainability. These findings provide a valuable framework for the equestrian sector as it works to protect social licence, broaden participation, and secure its future.





## HORSE SENSE: A GOOD LIFE FOR HORSES THROUGH STRENGTHENING THE HORSE-HUMAN RELATIONSHIP

The RSPCA's new report, [Horse Sense: A Good Life for Horses Through Strengthening the Horse–Human Relationship](#), revealed widespread welfare issues across the UK's equine sector. Commissioned with researchers from the University of Bristol, University College Dublin and Human Behaviour Change for Life, the report explored the deep-rooted causes of the “horse crisis”, including overbreeding, abandonment and neglect. Findings suggest that many leisure and competition horses still don't have their key welfare needs met.

Key problems identified include inadequate facilities that limit turnout, grazing and social interaction, meaning many horses are being denied the [“Three Fs”](#): [forage, friends and freedom](#). The report also highlights gaps in owner knowledge and practical skills where many owners lack understanding of equine behaviour, pain, stress and overall quality of life.

To tackle these issues, the RSPCA calls for action on multiple fronts including stronger legislation (including licensing of livery yards, rescue centres and sanctuaries), better education for horse owners, and raising practical equine care skills through colleges and equestrian organisations. The report argues that improving horse welfare will require collective effort from government, equine charities, owners and the broader equestrian community.

The British Equestrian five-year strategy places the commitment to the guardianship of the horse as our guiding principle. We're working with member bodies, such as World Horse Welfare, to ensure a collective commitment to improving welfare knowledge and understanding and the ethical use of horses in sport.

# THE POWER OF HORSES

## THE POWER OF HORSES: EQUESTRIANISM'S SOCIAL VALUE

In last year's report, we covered the first stage of our social value project and signposted to how we would then move on to calculate the value. This year we successfully completed the second stage and published the overview report [The Power of Horses](#), which includes the WELLBY calculation of equestrianism. This is the most comprehensive social value study of equestrianism in the UK covering the research conducted by the Sports Industry Research Centre (Sheffield Hallam University), Sport and Recreation Alliance and State of Life, evidencing that equestrian activity has an estimated £1.2 billion in annual social value through its positive impact on wellbeing.

We evidenced that equestrianism is far more than a sport – it can be a lifelong, inclusive and therapeutic activity that delivers wide-ranging benefits across

society, whether you ride, volunteer or engage in off-horse activities. Riding schools were evidenced to generate an average of £292,000 each in social value per year, making them not only crucial grassroots facilities but vital community assets.

Findings also show that equestrianism engages audiences often under-represented in other sports, with strong representation of women and girls, and people with a disability or long-term health condition, while also having a higher representation of lower-socio economic background groups compared to traditional sports.

These insights demonstrate the unique capacity of horses to offer physical, emotional, developmental and social benefits, positioning our sector to play a key role in achieving national health, wellbeing and inclusion goals, aligning with wider government priorities such as social cohesion, education and health.

Equestrian's  
social value

**£1.2  
BILLION**

Social value of  
riding schools

**£292K  
PER YEAR**

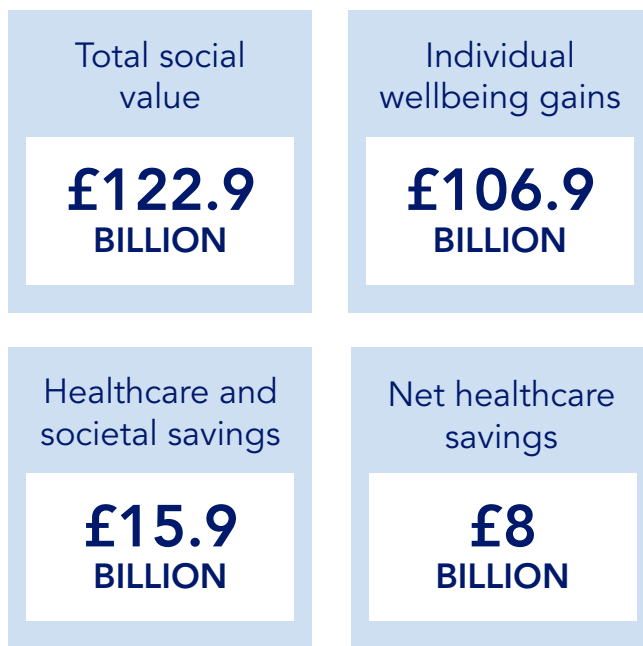


## SPORT ENGLAND'S SOCIAL VALUE

Sport England's second year of social value analysis provides an updated picture of the social and economic value generated by community sport and physical activity in England.

The 2023/24 model estimates that activity delivered £122.9 billion in total social value, comprising £106.9 billion in individual wellbeing gains and £15.9 billion in healthcare and broader societal savings. Preventative impacts include the avoidance of over 3.3 million cases of chronic health conditions and net healthcare savings valued at £8 billion. Importantly, the report also quantifies a £19.6 billion annual cost associated with inactivity inequalities, highlighting the scale of unrealised value that could be unlocked by reaching underrepresented and least-active groups.

For the equestrian sector, this analysis provides a clear national context for understanding the contribution we make to society. Equestrianism already engages several groups identified as priorities



within Sport England's data, including women and girls, disabled people, and older adults, as well as individuals seeking lower-impact or non-competitive forms of activity. The findings reinforce the relevance of equestrian facilities and equine assisted services as local providers of both participation opportunities and preventative health benefits, aligning with national policy ambitions to increase activity levels, reduce inequalities and support long-term health outcomes.

The scale of social value identified by Sport England also underscores the importance of equestrianism's ability to deliver benefits that extend beyond physical activity alone. Evidence from our own social value in The Power of Horses aligns with the Sport England model and demonstrates that equestrian activity contributes to physical and mental health, subjective wellbeing, individual development and community development. Aligning equestrian measures with this national model offers future opportunities to quantify and articulate its impact more consistently.

Overall, Sport England's findings contribute to a growing evidence base that places equestrianism within the wider ecosystem of sport and physical activities capable of supporting population-level wellbeing, reducing preventable health conditions and strengthening community resilience. As the sector continues to broaden participation and increase accessibility, the alignment with national social-value frameworks provides a valuable foundation for future partnerships, investment and policy engagement.

# SPORTS INDUSTRY INSIGHTS

## YOUTH SPORTS TRUST ANNUAL REPORT

The 2025 Youth Sport Trust annual report paints a concerning picture of declining physical activity among young people, with only 48% meeting the recommended 60 minutes of daily exercise. Inequalities are widening, particularly for girls, disabled pupils and those from lower-affluence backgrounds, who face the greatest barriers to participation. Schools are struggling to provide high-quality physical education due to limited resources and cancelled lessons, reducing opportunities at a time when diverse and engaging activity options are most needed.

The report emphasises that enjoyment, belonging and emotional connection are critical drivers of sustained participation, with young people who enjoy physical education reporting significantly better wellbeing.

It calls for a more inclusive approach to physical activity in education that offers non-traditional, confidence-building pathways and stronger partnerships between schools and community providers. Without urgent action, the current system risks failing those who would benefit most from being active.

## YOUTH SPORTS TRUST CLASS OF 2035 REPORT

The Youth Sports Trust also published their [Class of 2035 report](#) which warns that, unless urgent action is taken, current trends in children's inactivity will lead to serious consequences by 2035: a generation facing poorer health, lower wellbeing and diminished life chances. Despite most children wanting to be more active with 89% saying they enjoy taking part in sport or activity and 75% believe children should get at least the UK-recommended 60 minutes of daily activity, physical activity levels have stagnated, many physical education





lessons have been cancelled and digital distractions commonplace.

If nothing changes, by 2035 up to one-third of children may get less than 30 minutes exercise a day, nearly half may spend over three hours a day on screens for entertainment. Childhood obesity and Type 2 diabetes diagnoses are projected to rise, and mental health disorders among young people could increase.

The report emphasises that these risks are not evenly distributed: children with disabilities, with lower socio-economic status, or in under-resourced schools are likely to be hit hardest highlighting the urgent need for investment in sport, PE and inclusive opportunities now.

## **PLAY, MOVE, BELONG: ACTIVE FUTURES FOR YOUNG DISABLED PEOPLE**

The [Play, Move, Belong report](#) from Activity Alliance found that young disabled people in the UK remain significantly less active than their non-disabled peers, with only around 3 in 10

meeting daily physical activity guidelines. Many want to be more active, but face a range of barriers including low confidence, worries about belonging, lack of accessible opportunities, and limited support in schools or local communities.

Participation gaps are particularly pronounced for children with multiple disadvantages, highlighting deep inequalities in access to sport and physical activity. The research also shows that when inclusive opportunities are provided, whether in schools or community settings, young disabled people benefit not only physically, but socially and emotionally, building confidence and a sense of connection. To unlock these benefits, systemic support is needed: inclusive school physical education, trained coaches, affordable and accessible programmes, and safe, welcoming spaces to be active. Addressing these barriers can create meaningful social value, improving wellbeing, educational engagement and participation for an often-missed population, while contributing to a more inclusive and connected society.

# WIDER CHALLENGES FACING SOCIETY

Across the UK, a range of social challenges continue to affect people's health, education, safety and connection to their communities. Life expectancy remains high, however, people are spending fewer years in good health than before the pandemic ([Office for National Statistics, 2023](#)). This means many people are living longer but with more illness raising questions about the need for preventative health and accessibility of supportive services.

In education, school absence continues to be a major issue. Absence levels remain higher than before the pandemic, especially in secondary schools, with disadvantaged pupils being three times more likely to miss school regularly ([FFT Education Datalab, 2025](#)). Pupils with education, health and care plans are also more likely to experience more absence ([The Education Hub, 2025](#)). Missing school affects pupils learning and is linked to poorer long-term outcomes, including lower future earnings.

The [Crime Survey for England and Wales](#) recorded around 9.4 million crimes in April 2024-March 2025. An increase of 7% on the previous year but remaining 18% lower than in 2017. Some high-harm offences, such as knife crime, are still increasing, raising concerns for community safety.

Social cohesion trends are a mixed with government data suggesting trust in others is increasing however, willingness to help and volunteering were on a downward trend in Office of National Statistics data.

Overall, these trends highlight both challenges and opportunities for interventions and community programmes. Declining health and rising school absence underline the need for accessible and inclusive ways to support physical and mental wellbeing from an early age. Increases in certain crimes reinforce the value of safe, structured activities for young people. Whilst falling

community participation suggests a growing role for initiatives that build trust, belonging, connection and positive social networks. These wider trends help explain why sport, and in our instance, equestrian activities, can make such a meaningful contribution to the nation's health, safety and wellbeing.

# OPPORTUNITIES FOR EQUESTRIANISM

National evidence shows that being active supports better health, improved school performance, stronger communities and reduced crime. With increasing health problems, high levels of school absence and weakening social cohesion, there is a clear need for activities that help people move more, feel connected and build confidence. Research from the Youth Sport Trust highlights that many young people, particularly girls, disabled children and those facing multiple disadvantages, are not being reached by traditional sports and need activities that feel enjoyable, welcoming and focused on personal development rather than competition.

This presents a significant opportunity for the equestrian sector, as equestrian activities offer physical, emotional and social benefits relevant to national priorities. The sector already engages groups that other sports struggle to reach, including women, disabled riders and those from lower socio-economic

backgrounds, demonstrating how the sector could help reduce inequalities and support wellbeing. Equestrianism also aligns with the growing need to keep older adults active into later life because the diverse activities such as riding, carriage driving, volunteering and off the horse activities can contribute meaningful, moderate, outdoor activities aligned with national prevention and social prescribing goals.

The European Horse Network's foresight work provides important context for the UK, warning of potential risks such as reduced social licence, increased elitism and pressures on land, workforce and community riding schools. By championing the sector's inclusivity, whilst investing in education, embracing sustainability and technology and protecting the grassroots foundations of the industry, the UK can help ensure horses remain relevant, valued and visible within society.

Current insight highlights a powerful opportunity for the equestrian sector to play a bigger role in supporting national priorities. Next steps could be to leverage our unique benefits through improved partnerships with schools, healthcare providers and local authorities across the federation and identify the gaps in our knowledge and data.

Looking ahead, the sector must balance these opportunities with practical challenges. Ongoing pressures such as cost-of-living impacts, rising operational expenses, and uncertain future budgets create a risk that venues and grassroots facilities may close, which could limit access and reduce the ability to deliver these benefits. Protecting the sector's infrastructure, workforce, and community-based operations is therefore essential, meaning we need better knowledge and insight on how to support these areas to ensure activities can continue to reach those who need it most.

# CONCLUSION

This report reinforces a pivotal moment for the UK equestrian sector. The evidence presented throughout this edition demonstrates not only the sector's resilience and capacity for growth, but its increasing relevance to some of the nation's most pressing social challenges. From improving physical and mental health, supporting disabled people, and reducing social isolation, to offering meaningful engagement for young people who are not served by traditional sports, equestrian activity has proven itself a uniquely valuable asset within the wider ecosystem of sport, community services and public health.

At the same time, the report makes clear that this potential cannot be realised without sustained investment, greater collaboration and continued improvements in data collection and analysis. Pressures on infrastructure, rising operational costs, and challenges related to welfare, public perception and social licence threaten to limit progress if left

unaddressed. Insights from across Europe further highlight a future in which the equestrian sector must demonstrate its value, inclusivity and ethical foundation if it is to remain embedded in society, accessible to communities, and relevant for future generations.

Our next phase requires the sector to fully harness the power of evidence, align with national policy priorities, and deepen partnerships across education, health and local delivery systems. By doing so, we can protect the foundations of the equestrian landscape, expand participation and ensure the social, economic and wellbeing benefits of equestrianism are recognised, measured and championed.

With a clear purpose, a growing body of robust insight, and a shared commitment across stakeholders, the sector is well positioned to shape a more inclusive, sustainable and socially valuable future.



# READ THE REPORTS



**PLAY, MOVE, BELONG – THE ACTIVITY ALLIANCE**



**FORESIGHT STUDY – EUROPEAN HORSE NETWORK**



**IMPACT REPORT – RDA**



**HORSE SENSE – RSPCA**



**THE POWER OF HORSES – BRITISH EQUESTRIAN**



**CLASS OF 2035 – THE YOUTH SPORT TRUST**



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