



# Research highlights: National survey of UK citizen attitudes towards UK equestrian sport industries

December 2024



# Overview

As leading organisations in horse sport and leisure in Britain, we commissioned independent research in June 2024 to understand the current state of public sentiment towards equestrianism in the UK and the drivers behind public trust and acceptance of our activities. This is a summary of the results of [the full report](#).

## Why did we do this?

Public scrutiny of horse sports and leisure has grown substantially in recent years, with a focus on various topics such as the ethics of using horses, effects on the environment, and the role of horses within the social context of the UK. An understanding of public attitudes towards horse welfare, in particular, is crucial to help the industry to move forward. This summary and the full report contribute to that understanding, and the insights that they provide will inform our plans to strengthen our 'social licence' – a concept that describes the extent to which the public trusts and accepts equestrianism.

## Who did it?

The organisations involved in this project are: the Racing Foundation; Godolphin; British Dressage; British Equestrian; British Equine Veterinary Association; British Eventing; British Horseracing Authority; British Horse Society; British Showjumping; Great British Racing; Horse Welfare Board; Hurlingham Polo Association; and The Pony Club UK. The research was facilitated by World Horse Welfare and conducted by engagement science specialists, Voconiq.

## What did we do?

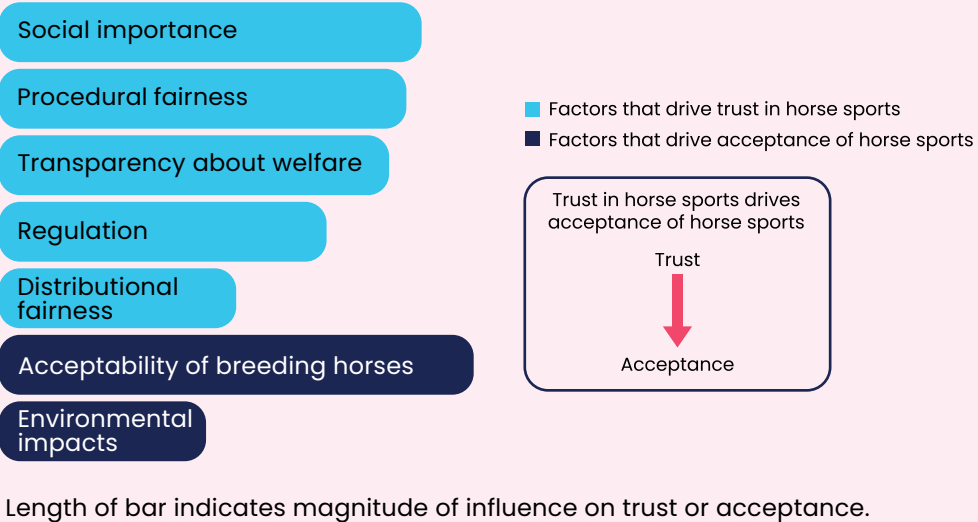
Survey responses were collected from over 5,000 members of the UK public aged 18 years or over in April of 2024. The survey respondents were representative of UK society in terms of gender, age, and geographical region (see appendix for more details).



Respondents were asked questions that related to a broad set of topics and issues related to horse sports in the UK. Their responses were analysed using a sophisticated statistical technique that results in generation of a 'path model'. This model, which is reproduced in the figure at the top of the next page, shows the main factors that influence public trust and acceptance, as well as their relative influence. In this way, the model provides a 'recipe' for improving public acceptance of equestrianism by implementing strategies for action that prioritise the most influential drivers of trust and acceptance.

# Key findings

## What factors influence trust and acceptance of equestrian sport and leisure among the UK public?

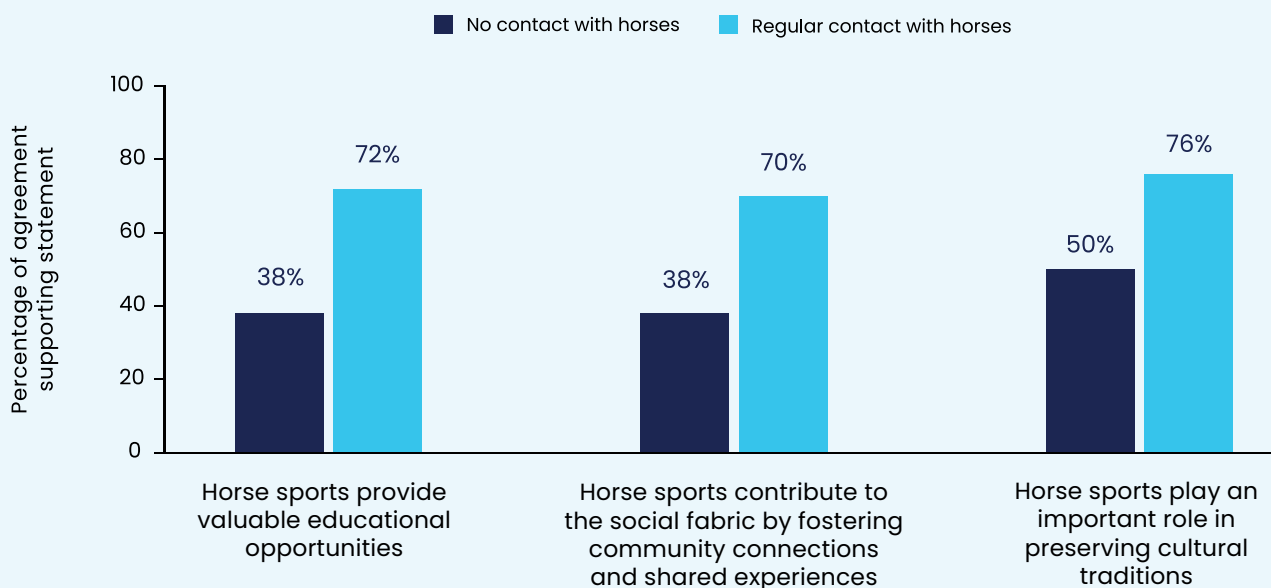


**Procedural fairness** reflects the extent to which the public feels as if horse sport listens to and respects their concerns. It is related to the industry's overall responsiveness and willingness to change its practices in response to those concerns.

**Distributional fairness** reflects the extent to which public feels that they receive a fair share of the benefits that horse sport generates.

This representation of the path model shows the main factors that drive trust and acceptance of equestrianism in the UK. It is generally easier to influence those factors that drive trust (lighter blue bars) than those that drive acceptance independent of trust (darker blue bars). For this reason, the recommendations at the end of the report focus primarily on the drivers of trust.

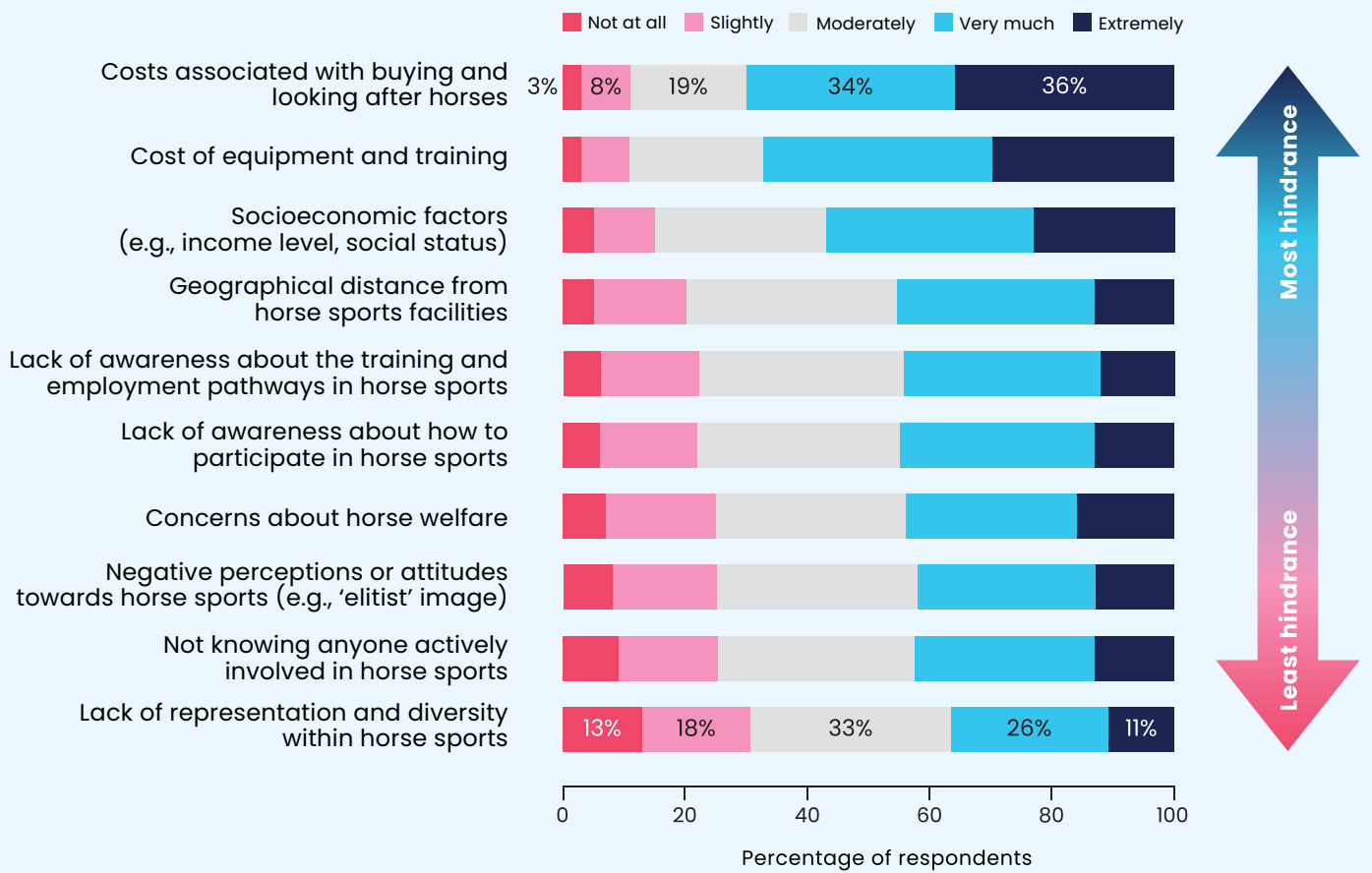
## Those who interact with horses on a regular basis are more supportive of horse sports' contribution to the social fabric of the UK than those who have never had any contact with horses



Percentage of agreement with cultural importance statements, comparing those that have never had contact with horses with those that interact with horses regularly.

A key takeaway from this work is the power of any form of contact with horses to provide people with a more positive view of equestrianism.

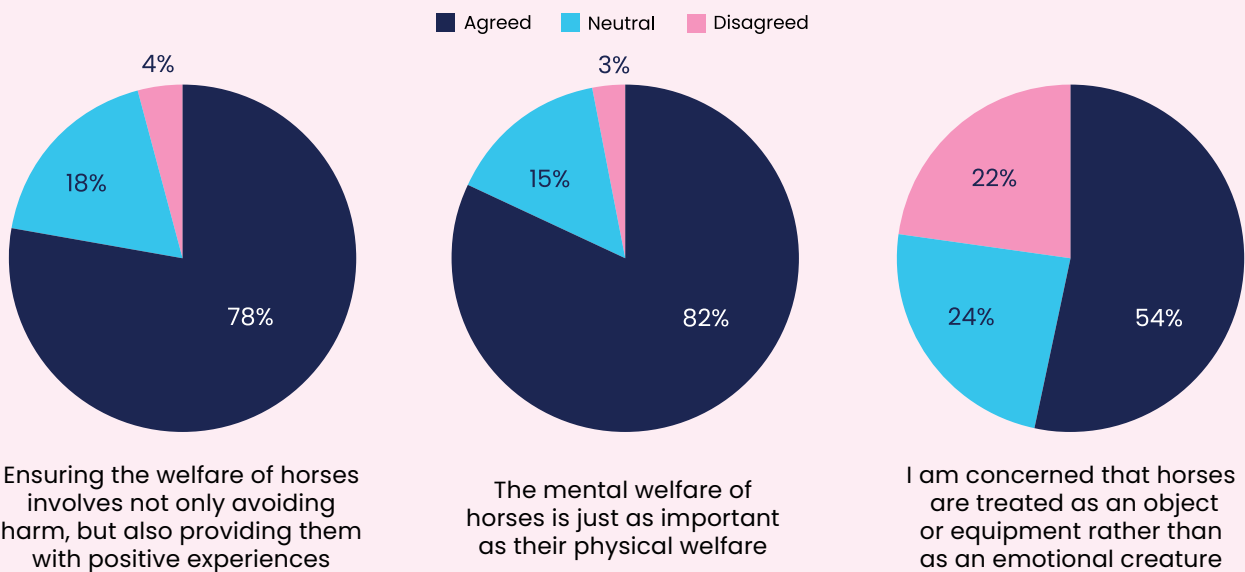
## Financial cost is the most significant factor hindering participation in horse sports



Distribution of scores on factors hindering access to horse sports in the UK.

A substantial number of participants agreed that costs prevent access to horse sports more than any other potential inhibitors, while lack of access, awareness, and concerns about welfare and elitism are also factors.

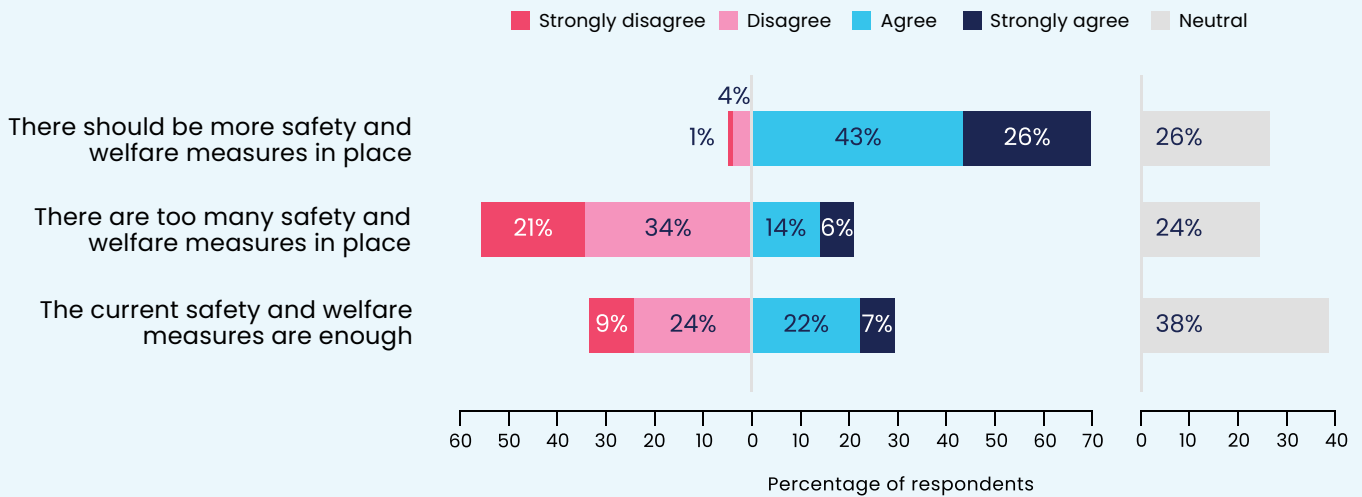
## The public believes that providing horses with good welfare is important



Proportion of answers (agree, neutral, disagree) with statements related to horse welfare in the UK.

More than three-quarters of respondents felt that horses should have the opportunity to enjoy positive experiences and that their mental wellbeing is as important as their physical welfare. Other data show that less than half of the respondents believed that, currently, horses enjoy being used in sports.

## The UK public has concerns about the equine safety and welfare protections currently in place in horse sport

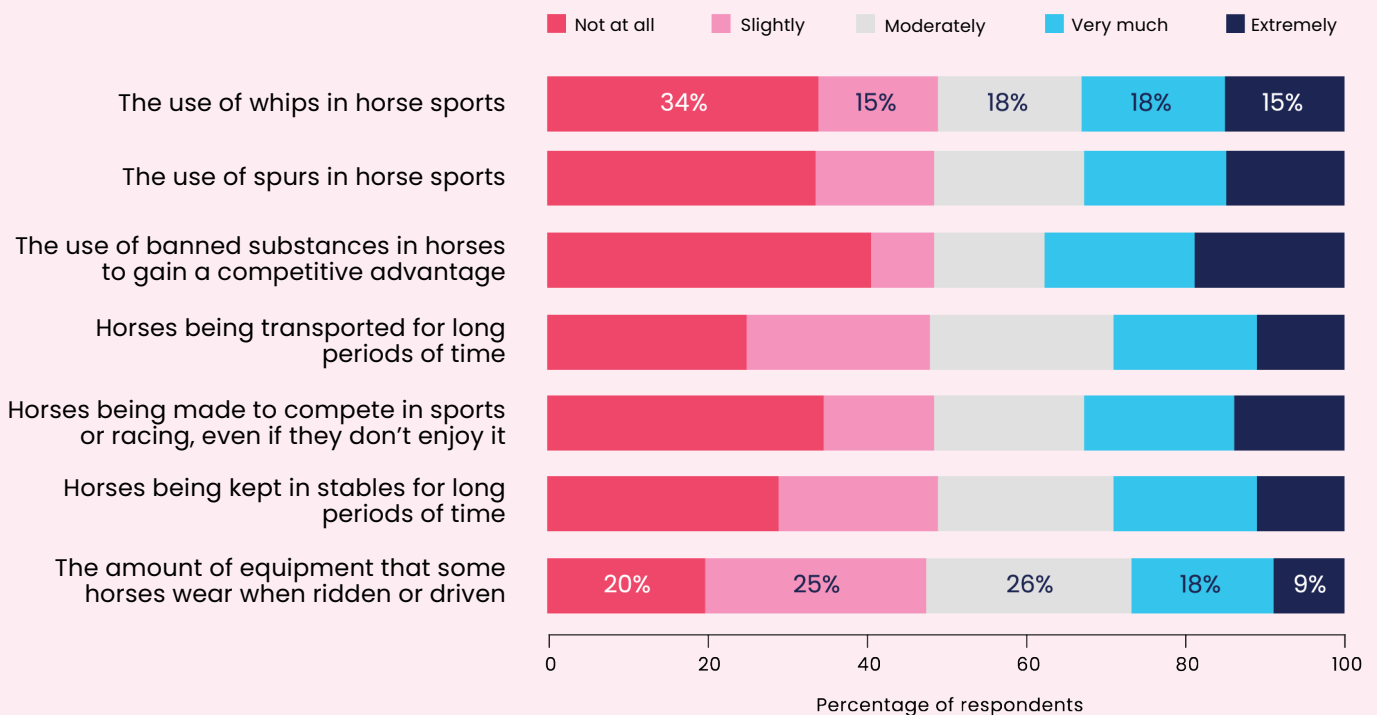


Distribution of scores on safety and welfare measures in UK horse sports.



Over three-quarters of the public felt that horse sports should prioritise making competitions safer for horses, even if this meant sacrificing some of the traditional difficulty or challenge of the sport. This is reflected in their responses to questions about horse sports' current safety measures, as shown in the figure above.

## The UK public questions the acceptability of many common horse sport practices

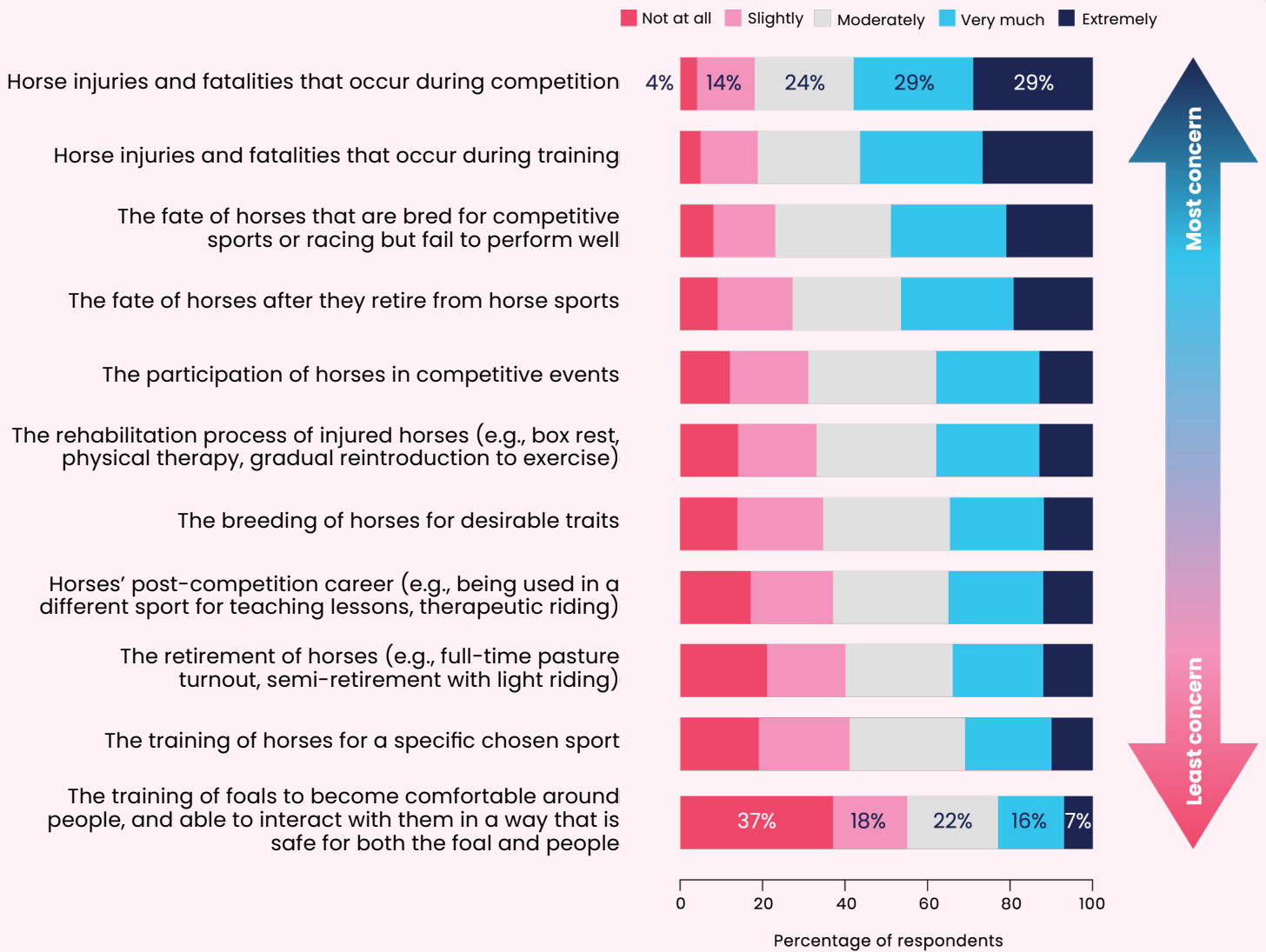


Distribution of scores of acceptability on various factors regarding horse sports.



A range of practices that are regarded as standard across much of the equestrian industry, including the use of whips and spurs and prolonged stabling and transport, were deemed 'not at all' or only 'slightly' acceptable by almost half of respondents.

## The UK public's welfare concerns span multiple uses of horses and all life stages



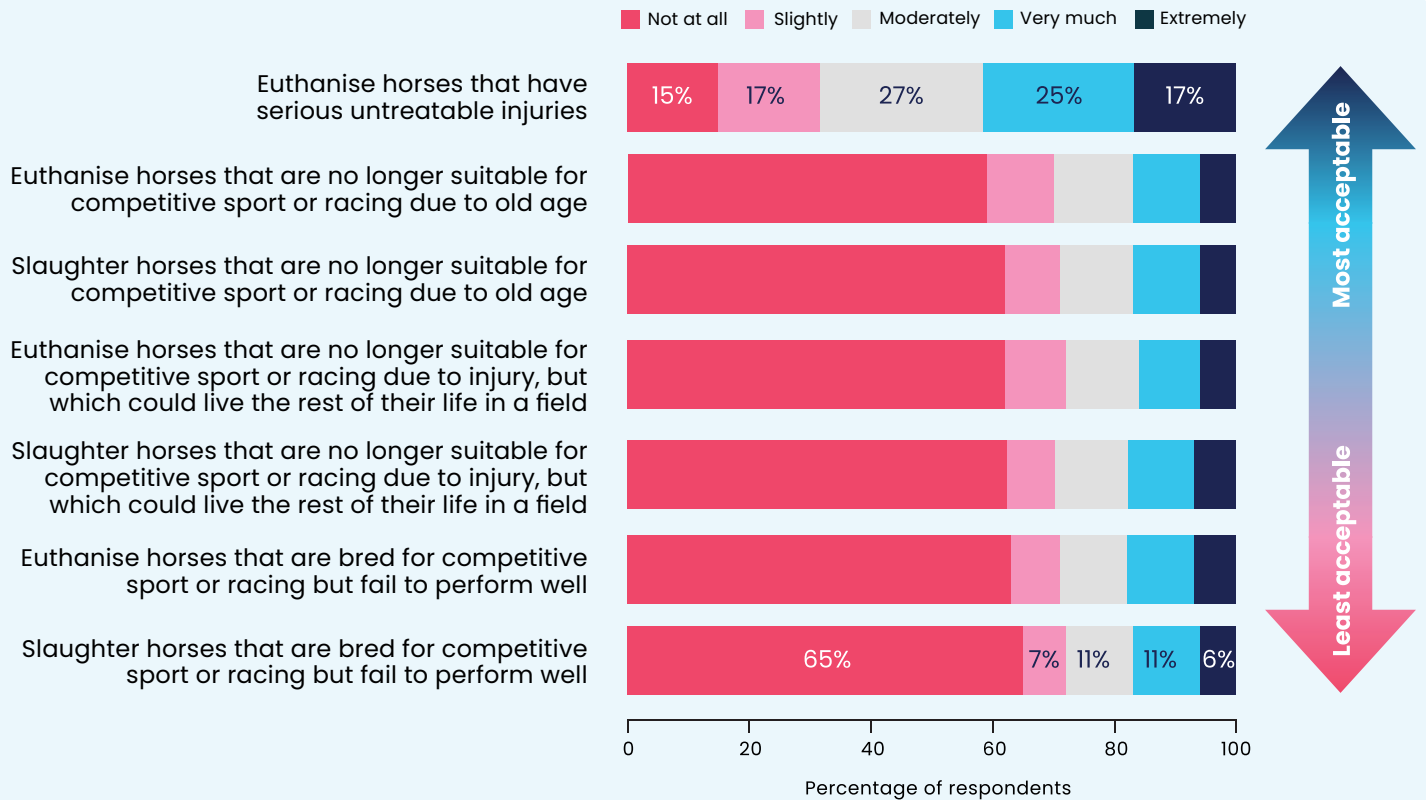
Distribution of scores on the level of concern for the lives of horses in the UK.



When respondents were asked about their level of concern surrounding a range of issues, those that worried them the most were injuries or fatalities that occur during competition or training, the fate of horses that are bred for competitive sports but fail to perform well, and the post-competition fate of sport horses.



## The UK public has strong views about end-of life-options for sport horses

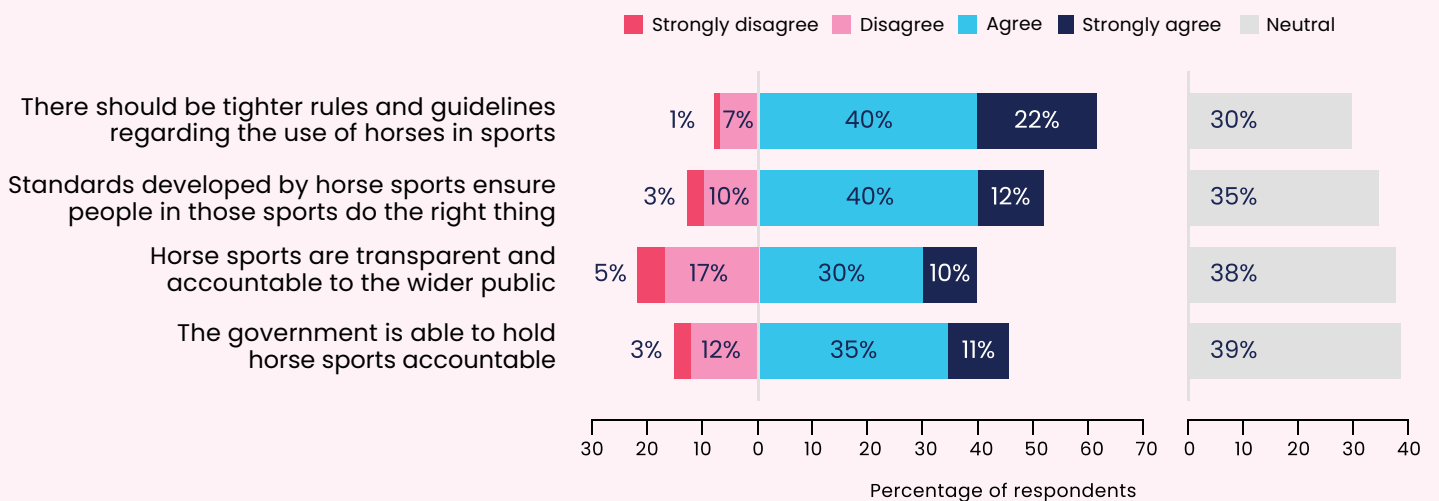


Distribution of scores on the acceptability to the UK public of euthanasia and slaughter in a range of circumstances.



The only circumstance in which the majority of respondents felt that ending a horse's life prematurely was acceptable was if the horse had sustained serious untreatable injuries. In all the other scenarios presented, they found both euthanasia and slaughter overwhelmingly unacceptable.

## The UK public generally has confidence in the welfare standards developed by horse sports



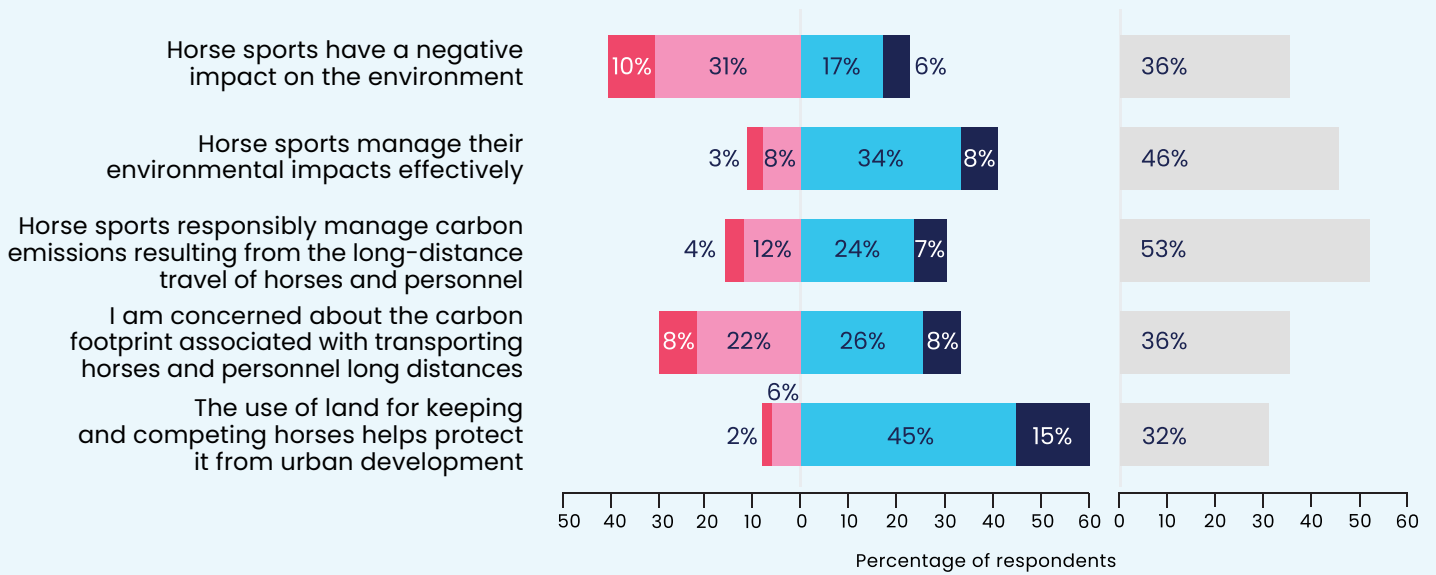
Distribution of scores on regulation and transparency questions regarding horse sports in the UK.



Although a majority of respondents felt that the standards developed by horse sports ensure that people 'do the right thing', a higher proportion felt that rules and guidelines should be tighter. However, the high percentage of neutral responses is of note: this shows that there is widespread uncertainty or lack of knowledge on these topics and indicates that there is an opportunity to inform the public about the measures that are currently in place to regulate welfare.

# The UK public is currently fairly positive about the environmental impacts of horse sport

Strongly disagree Disagree Agree Strongly agree Neutral



Distribution of scores on statements about the environmental impacts of horse sports in the UK.

Respondents were generally fairly positive about the environmental impacts of equestrianism. However, the high percentage of neutral responses indicates that, as for regulation, there may be an opportunity to increase public knowledge in this area.





# Recommendations

**This research has resulted in the following recommendations for action – actions that apply to all sectors of the equestrian industry but that should be interpreted and enacted by each sector within their own context.**

- 1** Demonstrate competence, humanity, and integrity in all policy choices, investment decision-making, and communication efforts. This will help to maintain the trust that is fundamental for public acceptance.
- 2** Take ownership of accountability by increasing transparency, standardising and enforcing rules and regulations, educating stakeholders, and investing in research. This will help equestrianism to retain control of its own future.
- 3** Embrace (controlled) vulnerability by publishing the results of regular independent audits of equine safety and welfare practices. This will increase confidence in governance and demonstrate transparency and trustworthiness.
- 4** Develop a transparent, empathetic, and proactive narrative around horse injuries and fatalities that highlights ongoing efforts to protect horse welfare and does not attempt to hide uncomfortable truths. This will mitigate negative perceptions and foster a more positive relationship with the public.
- 5** Align welfare practices with the values and expectations of different demographic groups (especially younger generations), invest in and showcase ongoing welfare improvements, and demonstrate responsiveness to community concerns. This will enhance the industry's reputation and improve public acceptance.
- 6** Emphasise – in creative ways – the social value and economic benefits of horse sports to the British public. This will address the most important driver of public trust.
- 7** Actively engage with those who do not hold a strong view on equestrianism and expose them to contact with horses with the aim of turning uncertainty into informed support.
- 8** Promote stories that break down perceptions of elitism, focussing on initiatives that make equestrianism more accessible and considering how the entirety of equestrianism – from elite sports to leisure riding – could be presented within a single cohesive narrative. This will help to change how the public perceives equestrian activities.
- 9** Integrate the report's recommendations into internal reports and communications and frame them culturally and socially within the context of each sport. This will encourage buy-in from stakeholders and ensure a cohesive approach to implementing changes.
- 10** Develop public awareness about our ethical responsibilities towards horses, including the role of responsible breeding practices, the humane way in which horses are managed, and the necessity for euthanasia in some contexts. This will help the community to connect and empathise with the realities and complexities of the horse world and understand the decisions and challenges involved, including the necessity for euthanasia in some contexts.
- 11** Develop a clear communication plan that balances publication of summary reports with internal use of more detailed data to inform sector-wide actions and decisions. This will demonstrate a commitment to transparency, accountability, and continuous improvement and enhance public trust.

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Share insights and data with stakeholders, including through the presentation of research findings at key internal meetings and public conferences. This will help the industry to become accustomed to the feeling of vulnerability that comes from transparency (which ultimately builds trust), gather feedback from stakeholders and the public, and build a collaborative approach to addressing challenges.

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Engage with trusted groups such as equine veterinarians and independent welfare organisations. This will promote public understanding and trust.

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Conduct further research into public attitudes to enable the industry to address public concerns through targeted policies and practices and remain aligned with evolving public sentiment. By focusing on transparency, engagement, environment, welfare, and inclusivity, the industry can foster greater trust and acceptance, ensuring a sustainable and thriving future for horse sports in the UK.

## The future

The participating organisations in Britain's horse sector welcome this insight and will be working together and individually to take these recommendations forward. We recognise that the way forward is about actions, not just words and that, above all, competence, humanity, and integrity will be our lodestars in how we demonstrate our responsible and ethical involvement of horses in sport and leisure.

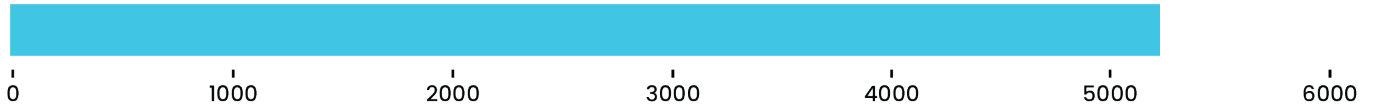


# Appendix: Demographics of the survey respondent population

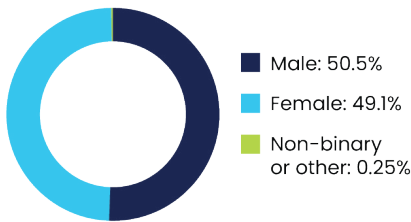
## Demographics

### Total participants

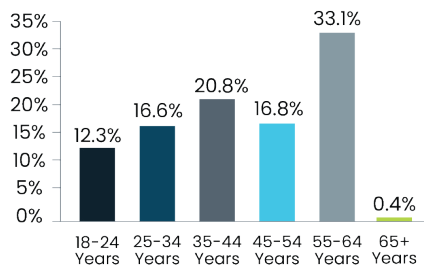
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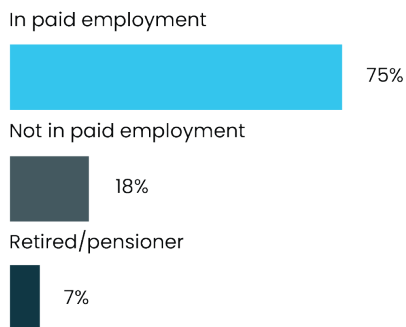
### Gender



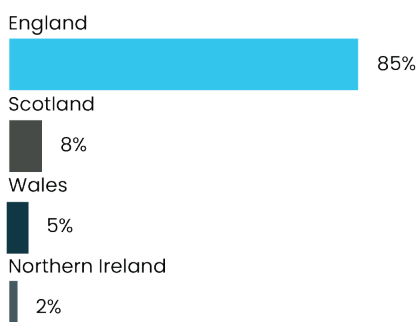
### Age



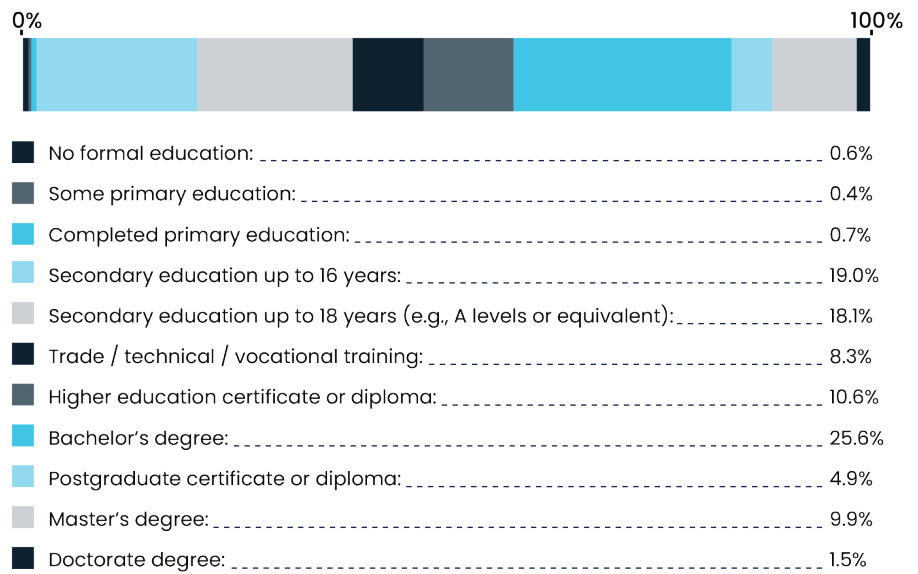
### Employment status



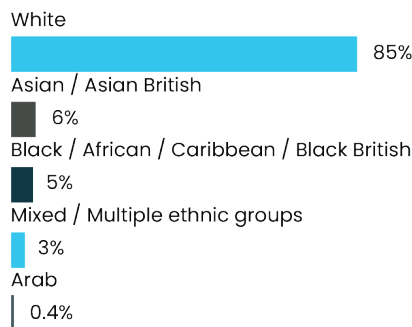
### Country in the UK



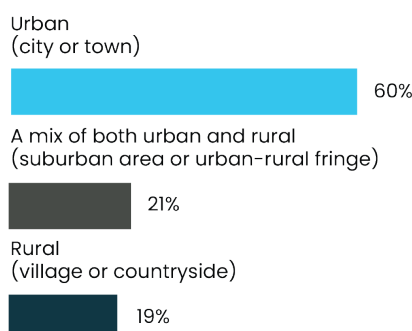
### Education



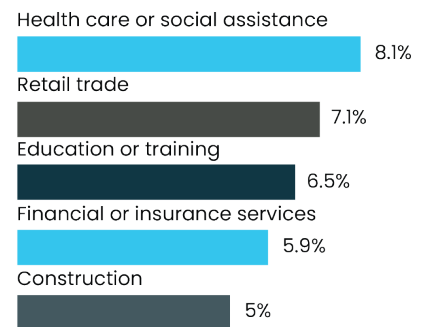
### Ethnic group



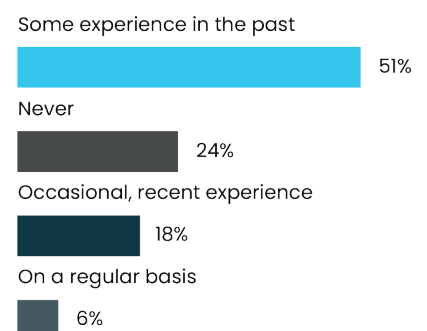
### Area in the UK (Residential environment)



### Industry of work



### Experience interacting with horses





**WorldHorseWelfare**

A research project coordinated  
by World Horse Welfare