VoconiQ
Engagement Science
Insights

National survey of UK citizen attitudes towards UK equestrian sport industries

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VOCONIQ, OUR STORY

Voconiq is an Australian data science company built on a platform of research developed by Australia's national science agency, CSIRO. The Voconiq founding team spent 11 years in CSIRO building this science platform, engaging over 70,000 community members in 14 countries to understand what leads to deeper trust between industries, companies and governments, and the communities they work alongside. Founded in 2019, Voconiq was created as a vehicle for delivering this science as a service globally. Voconiq is the home of Engagement Science and we are passionate about giving voice to communities large and local about the issues that matter to them and helping those that work alongside them to listen to community voices effectively.

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Introduction

Horse sports in the United Kingdom have a deep connection with the community, with millions of current or past riders, an industry worth billions of pounds to the economy, and almost a million horses across the country[1]. Public scrutiny of the social licence of horse sports and related activities has grown substantially in recent years, with a focus on the various factors such as the ethical use of horses, effects on the environment, and the role of horses in the social context of the United Kingdom. Increased media attention on isolated incidents, such as the poor horsemanship by modern pentathlon athletes at the 2020 Tokyo Olympics[2] or recent horse deaths at the Grand National[3], demonstrate increased concern about horse sports and related equine welfare concerns. Subsequent public debate has questioned the ethical implications and moral value of using horses in both competitive and non-competitive contexts.

An understanding of public attitudes towards horse welfare is crucial to help the industry to move forward. This report contributes to that understanding by summarising the results of comprehensive research into the current state of public sentiment towards horse sports in the UK.

It aims to provide industry stakeholders with a deeper understanding of the relationship between the UK public and horse sports, and the insights that it provides will inform discussions on how to address the social licence issues that are currently facing horse sports.

As horse sports continue to be a cherished part of UK society, it is imperative that the industry addresses these concerns proactively. By fostering transparency, ensuring procedural and distributional fairness, and building confidence in regulations, the industry can enhance trust and acceptance among the public. Additionally, addressing barriers to participation and environmental concerns will be vital in maintaining the strong relationship the public has with horse sports. Through these efforts, horse sports can continue to thrive, enriching the UK's social fabric while upholding the highest standards of horse welfare.

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[1]British Equestrian (2023). State of Nation Report 2023. https://www.britishequestrian.org.uk/assets/EXTRA_Docs/Short%20State%20of%20the%20Nation.pdf

[2]Sean Ingle (2021). Modern pentathlon votes to ditch horse riding after Tokyo Olympic turmoil. https://www.theguardian.com/sport/2021/nov/02/modern-pentathlon-votes-to-ditch-horse-riding-after-tokyo-olympic-turmoil

[3]PA Media. (2023). Calls for jump-racing ban after Grand National horse deaths. https://www.theguardian.com/sport/2023/apr/15/calls-for-jump-racing-ban-after-grand-national-horse-deaths

Overview of findings

This research seeks to understand not only what the public think about horse sports but also why they think as they do. The work centres on two key measures: acceptance and trust. Acceptance is a measure of how willing the public is to interact with the industry and it acts as a proxy for social licence to operate. Trust is a measure of the extent to which people believe that an organisation will do the right thing, and it is a major driver of acceptance. Together, these measurements and the factors that underpin them reflect what influences the relationship between the wider public and horse sports and provide a 'recipe' for strengthening social licence through action.

Trust in, and acceptance of, horse sports in the UK currently sits at a moderate level and this provides a solid foundation upon which the industry can build to improve its social licence to operate.

Drivers of trust and acceptance reflect what the public is concerned with the most when it comes to horse sports. This research has shown that the social importance of horse sports to society is the strongest driver of trust for the UK public. The greater the perception of the social value of horse sports by the public, the more likely they are to trust and accept them.

As expected, the general welfare of horses in the UK is also a concern for the public with the strongest welfare-related driver of trust being the level of transparency horse sports demonstrate around any injuries or deaths that occur during training or competition. The greater the extent to which the industry is seen to be transparent on these issues, the more the public will be inclined to trust and accept horse sports in the UK. This is further explained on page 21.

Procedural and distributional fairness are common drivers of trust and acceptance across a range of organisations, including within other animal welfare contexts such as Australia's rural industries. It is therefore not surprising that they are also important drivers of trust for UK horse sports. Procedural fairness is the extent to which the public feel as if horse sports in the UK listen to and respect their concerns, and it speaks to the industry's overall responsiveness and willingness to change its practices in response to those concerns. An industry's transparency is one of the attributes that influences procedural fairness.

Distributional fairness, on the other hand, relates to the extent to which the public feel as if they receive a fair share of the benefits that horse sports generate.

Regulation, which is another common driver of trust and acceptance within animal welfare contexts, is another important driver of trust in UK horse sports. When the public is confident that external regulation (e.g., through the government) or internal mechanisms (e.g., policies and procedures) ensure that horse sports do the right thing, they are more likely to trust and accept them.

In addition to the drivers of trust outlined above, acceptance of horse sports in the UK is directly influenced by the public's perception of breeding horses for sports. The more individuals feel as if it is appropriate that horses are bred for use in sports, the more they accept the industry.

The environmental impact of horse sports is the only negative driver of acceptance of horse sports in the UK. When anxiety over impacts on the environment increases, the public will be less likely to accept the industry.

Why trust and acceptance

Trust is a psychological state where individuals accept vulnerability and rely on favourable treatment from the other party. Trust sits at the core of the relationship between communities, stakeholders, and organisations or industries. Trust also acts as a vehicle that translates experience and expectations held by the community and stakeholders into acceptance of an industry, where acceptance acts as a proxy for social licence to operate. The strong positive relationship between community trust and acceptance of an industry, or set of industries, reveals that working to build trust reduces the risk of community rejection through loss of social licence.

Voconiq's research across multiple industries at local and national scales has demonstrated that building trust provides a range of practical benefits. When an organisation, industry or set of industries is trusted by its communities, they are more likely to be given a greater 'benefit of the doubt' for when things go wrong within an organisation. This 'benefit of the doubt' also applies to how communities then represent an organisation to other communities and stakeholders. Those external to the organisation are more likely to privately and publicly advocate for (and if necessary, defend) an organisation when trust is high. Support declines when trust is low and, in some cases, can lead stakeholders and communities to advocate or take action against an organisation.[4]

Where trust is high, organisational difficulties are more likely to be attributed to complexity of the operating environment, the scale of the task involved, or a well-intentioned mistake or accident. Where trust is lower, communities are more likely to interpret failures as being the result of neglect, ineptitude, malign intent, or an organisation whose values are out of step with the community's own.

Organisations that are trusted also have greater freedom to innovate, to introduce new ideas or change. Greater trust enables organisations to engage their community and stakeholders on more challenging issues with confidence that the relationship is robust and can handle potential strain.

Trust may therefore be seen as a resource from which organisations may draw in developing, deepening and protecting their social licence to operate. Trust is central to the story of social licence, and a key question in this type of research is therefore: what drives, improves or reduces trust in these relationships?

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[4]Moffat, K. and Zhang, A. (2014). The paths to social licence to operate: An integrative model explaining community acceptance of mining. Resources Policy 39, 61-70; Parsons, R. and Moffat, K. (2014) Constructing the Meaning of Social Licence. Social Epistemology 28(3-4), 340-363; Santiago, A. L., Demajorovic, J., Rossetto, D. E., and Luke, H. (2021). Understanding the fundamentals of the Social Licence to Operate: Its evolution, current state of development and future avenues for research. Resources Policy 70(4), 101941.

Research on institutional trust has shown that organisations that are trusted by their stakeholders and community are typically perceived to possess three key characteristics: competence, integrity and humanity:

- **Competence** refers to the organisation's ability to meet goals and responsibilities through the delivery of services, products or execution of its activities.

- **Integrity** refers to the extent to which an organisation consistently adheres to moral values and ethical principles, acts responsibly, fairly, honestly, and fulfils its promises.

- **Humanity** refers to the organisation's care and duty of care towards stakeholders (including animals, where relevant), ensuring harm is minimised and positive actions are normative.

When these three dimensions of trust are included in Voconiq research, the correlation between questions examining each dimension provides a reliable and sensitive measure of trust. We're able to identify in which domains of trust your organisation(s) is performing well, and which domains of trust provide opportunities to strengthen your relationship with the community.

The research process

Qualitative stakeholder interviews

To better understand the context of horse sports within the UK, this research began with a series of key stakeholder interviews. The main purpose of these interviews was to inform the design of the survey that comprised the main component of the research process. Topics, themes, and issue-framing that emerged from the interviews were used in developing a broad and sensitive survey instrument. These interviews were also used to inform survey data interpretation and the recommendations included in this report.

10 longform interviews with 12 participants were carried out remotely over Microsoft Teams, with interviewees based in the United Kingdom and interviewers located in Australia.

World Horse Welfare worked with funders and horse sport industry leaders to identify a range of interview participants that met criteria set by Voconiq. Key to this process was ensuring that they represented a broad range of industry perspectives and experiences across the variety of horse sports in the UK. Interview participants included:

- Horse sport organisation and regulator representatives.

- Accredited horse trainers.

- Equine veterinarians.

- Coaches and riders.

- Horse sport organisation executive leadership.

The interview framework (Appendix A) was developed by Voconiq's research and advisory teams in grouped questions around topics and themes that have been shown, in previous research,

to have the greatest potential impact on trust and acceptance of organisations and industries. Interview topics included:

- Understanding the interviewee's relationship with horse sports and the industry; their views on problems or challenges faced by the industry.

- Understanding how the interviewee thinks of horse welfare in the context of their specific horse sport industry.

- Questions related to the positive and negative impacts (both intended and unintended) of horse sports on its various communities.

- Questions related to strengthening the relationship between the interviewee's horse sport and their community.

Each interview concluded with seven quantitative questions in which interviewees were asked to provide a score on a 5-point Likert-type scale in response to statements about their respective horse sport. These questions replicated core measures used in the wider community survey.

Comprehensive notes were taken by interviewers during interviews, and these were then analysed using topic modelling analysis. Topic modelling is a statistical technique that uses machine learning to identify data that frequently occur together, and the frequency of the occurrence of these topics is then calculated. Once the broad topics were identified through this method, the underpinning themes, sentiment, and frequency of occurrence were also identified.

The insights provided through these interviews are provided in Key Stakeholder Interviews below.

Nationally representative survey

An online survey methodology was used to access the views of UK residents aged 18 years or over on a broad set of topics and issues related to UK horse sports. A research panel provider, Kantar, was used to collect the data. Research panels are frequently used in survey research to access a broad range of nationally representative groups within the population.

Participants were recruited from across England, Northern Ireland, Scotland, and Wales between 17 April and 29 April 2024. 5,239 surveys were included for analysis after data cleaning[5].

The survey instrument measured public sentiment on a range of topics that speak to understanding key aspects of the relationship between the public and horse sports, including[6]:

• The socio-cultural position of horse sports in the United Kingdom.

• Perceptions of horse welfare.

• Knowledge and information sources about horse sport industries.

• Environmental and economic impacts.

• Equity, diversity, and inclusivity of horse sports.

• Procedural (i.e., industry responsiveness) and distributional (i.e., a fair share of the benefits) fairness,

• Governance and regulation.

• Trust and acceptance of horse sports in the United Kingdom.

• Participant demographic characteristics.

Participants were also encouraged to make freeform comments at the end of the survey, and a selection of these comments is included throughout this report.

Before commencing the survey, all participants read information about the research project, its aims, and other information relevant to gaining informed consent to participate (e.g., funding sources, how participant data would be used and protected, and links to the privacy policies of Voconiq and World Horse Welfare). Participants were provided with the following industry definitions:

1. The term 'horse' covers both horses and ponies.

2. The term 'horse sports' covers a diverse range of activities involving horses and ponies. These include dressage, show jumping, eventing, polo, endurance riding, horse racing, showing, vaulting, carriage driving, Pony Club activities (young people engaging in a range of activities with horses), and recreational riding (riding for leisure, with no competitive element).

This report follows the above definitions when referring to horses, horse sports, and recreational riding.

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[5]Data cleaning' is conducted to ensure that the quality of data included in analyses is high. This involves screening and potential removal of surveys where, for example, participants answered the survey very quickly (i.e., in less than 5 minutes), in ways that indicate lack of attention to the content of questions, and extreme or consistent responding on survey questions (e.g., answering '1' to all questions). For more detail on what this involves, see Meade AW and Bartholomew C. (2012) Identifying careless responses in survey design. Psychological Methods, 17(3), 437-455. DOI: 10.1037/a0028085

[6]Most topics were measured using 5-point Likert type agreement scales, where 1 = Strongly disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly agree. When reporting, categories may be combined to express "agreement" (combining results of Agree and Strongly agree) and "disagreement" (combining results of Disagree and Strongly disagree)

Demographics

Total participants

5,239

0   1000   2000   3000   4000   5000   6000

Gender

- Male: 50.5%
- Female: 49.1%
- Non-binary or other: 0.25%

Education

0%   100%

- No formal education: - 0.6%
- Some primary education: - 0.4%
- Completed primary education: - - - - - - - - - - - - - - - - - - 0.7%
- Secondary education up to 16 years: - - - - - - - - - - - - - 19.0%
- Secondary education up to 18 years (e.g., A levels or equivalent): - - - - - 18.1%
- Trade / technical / vocational training: - - - - - - - - - - - - 8.3%
- Higher education certificate or diploma: - - - - - - - - - - - - 10.6%
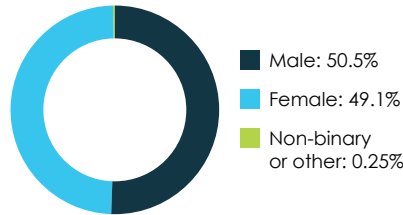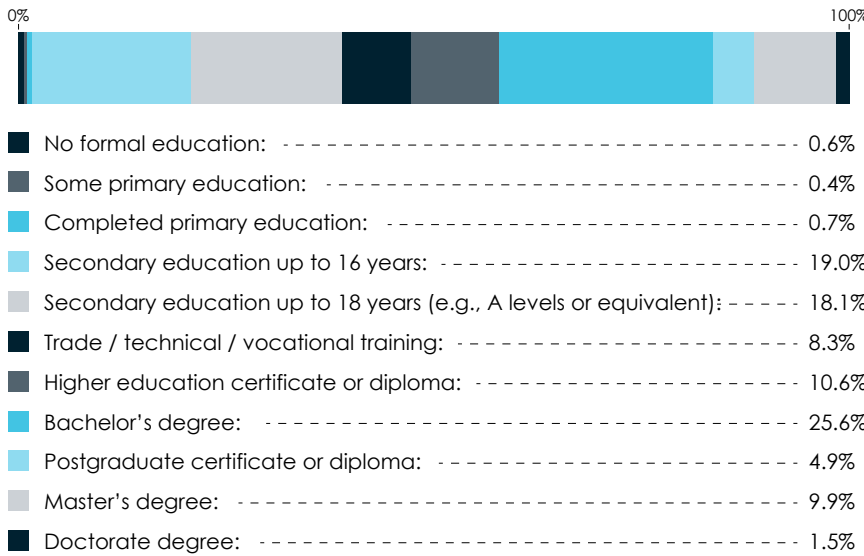- Bachelor's degree: - 25.6%
- Postgraduate certificate or diploma: - - - - - - - - - - - - - 4.9%
- Master's degree: - 9.9%
- Doctorate degree: - 1.5%

Age

Age group	Percentage
18-24 Years	12.3%
25-34 Years	16.6%
35-44 Years	20.8%
45-54 Years	16.8%
55-64 Years	33.1%
65+ Years	0.4%

Employment status

- In paid employment: 75%
- Not in paid employment: 18%
- Retired/pensioner: 7%

Ethnic group

- White: 85%
- Asian / Asian British: 6%
- Black / African / Caribbean / Black British: 5%
- Mixed / Multiple ethnic groups: 3%
- Arab: 0.4%

Industry of work

- Health care or social assistance: 8.1%
- Retail trade: 7.1%
- Education or training: 6.5%
- Financial or insurance services: 5.9%
- Construction: 5%

Country in the UK

- England: 85%
- Scotland: 8%
- Wales: 5%
- Northern Ireland: 2%

Area in the UK
(Residential environment)

- Urban (city or town): 60%
- A mix of both urban and rural (suburban area or urban-rural fringe): 21%
- Rural (village or countryside): 19%

Experience interacting with horses

- Some experience in the past: 51%
- Never: 24%
- Occasional, recent experience: 18%
- On a regular basis: 6%
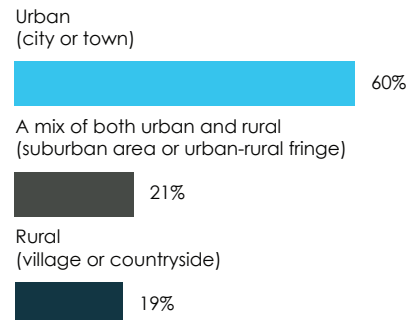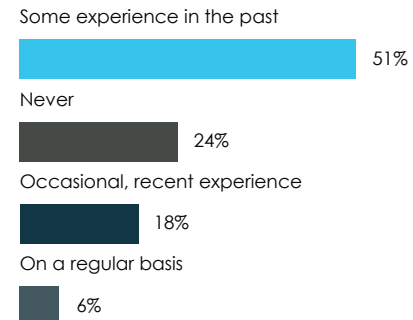
Key stakeholder interviews

Understanding the context of the horse sports industry in the UK is useful in designing effective and sensitive questions, and interpreting survey outcomes. This section outlines the results of topic modelling and data analysis of the key stakeholder interviews.

For the purposes of this report, each topic modelling outcome has been assigned a category for frequency (rate of occurrence: high, medium, or low), sentiment (attitude ascribed to the topic: positive, neutral, or negative) and risk (probability of impacting horse sports' social licence to operate: high, medium, or low). Topics are listed in descending order of frequency.

1. Equestrian club dynamics in the United Kingdom
Frequency: high; Sentiment: positive; Risk: low.

The most frequent topic to emerge from modelling was the horse club dynamics present in UK culture and society. Interviewees highlighted the sense of community that being involved in horse sports, clubs, and associated events provides. Active participation in club events and activities, coupled with the support offered by both club members and volunteers, was emphasised in a similar vein. The risk associated with this topic is low, as it relates to the established club culture. This robust sense of community provides an opportunity to strengthen engagement and support through extension to more members of the public in direct and less direct ways. This theme reflects the strength of club and/or sport identity among riders and others associated with these sports – a kind of internal value proposition that members of these groups wanted others within the community to see and understand.

> *Yeah, it's great to see so many familiar faces at the club events.*
> *– 2024 interview participant.*

2. Equine training and ethos
Frequency: high; Sentiment: neutral; Risk: medium.

This topic relates to the thought process behind training horses and their overall development. Interviewees noted that effective communication and understanding play a large role in the education of those who train horses, and that this is underscored by the varied approaches individuals may take towards training. Because of these varied approaches, the risk for this topic is rated as medium. Some interviewees expressed the opinion that there would always be a proportion of those involved with horses who would do the wrong thing as "we don't know what's going on behind closed doors." Reducing that risk could be achieved by improving training methodologies through shared knowledge, greater transparency within sports, and stronger governance mechanisms/institutions. The ability of horse sports to sanction their members was raised by interviewers in a number of discussions; interviewees generally expressed the opinion that this poses a challenge in sports that are international in nature, where stakeholders hold substantial power and influence, and where the governance mechanisms that are available in many other sports (e.g., rugby) are less prevalent or developed (as is the case in horse sports).

> *I think we need to rethink our approach to training the horses.*
> *– 2024 interview participant.*

3. Social impact of horse sports
Frequency: medium; Sentiment: positive; Risk: low.

This topic speaks to the wider sense of community that involvement in horse sports can bring, whether that is through riding or attending events as a spectator. Interviewees discussed how events like polo matches and race days contribute to public engagement with horse sports industries and foster social connections. However, these connections were quite limited overall, with barriers to entry for events for the general community that include cost, location, knowledge, and the culture of the sport itself. Utilising such events as a resource to promote industry inclusivity and diversity was viewed as a means for strengthening those community ties. There may be value in considering sports like polo in ways that are similar to other public interest sports that have high barriers to entry for mass participation (e.g., Grand Prix racing) where the elite nature of the sport at its highest level is a celebrated feature of the spectacle it provides.

Polo events really bring people together, it's a fantastic social scene.
– 2024 interview participant.

4. Public perception and horse welfare
Frequency: low; Sentiment: neutral; Risk: high.

The central theme of this topic is the UK public's perception of horse welfare and interviewees' direct experiences of that perception. Interviewees discussed how the public think about welfare issues in equestrianism, with some concerns about knowledge. There was a strong emphasis that a campaign of public education is needed to provide a fuller understanding and awareness of welfare in a horse sports context.

While there is an opportunity for public education in this space, the risk for this topic is high, given the propensity of industries that 'feel misunderstood' to 'tell their story harder' as the primary means for addressing public concerns. Where there is a misalignment of industry messaging and community need, there is substantial potential for welfare education to be misinterpreted and, if not carefully considered, to lead to greater controversy over industry practices.

We need to educate people about the welfare practices in our sport.
– 2024 interview participant.

5. Public discourse and horse sports
Frequency: low; Sentiment: neutral; Risk: medium.

Whereas Public Perception (Topic 4, above) focused on welfare, this topic relates to the public's opinions of horse sports in general. Interviewees discussed how the media concentrates its attention on welfare issues or incidents – oftentimes negatively and to the detriment of industry credibility – shaping public discourse of horse sports. The impact of this is seen to be exaggerated given the lack of other, more balanced portrayals of horse sports in mainstream media. How the media portrays horse sports and welfare issues and its subsequent influence on public opinion represents a medium level risk. Opportunity exists in promoting the industry effectively through shaping positive narratives of horse sports.

The media often overlooks the skill and dedication of equestrian athletes.
–2024 interview participant.

Quantitative measures

Interviewees were also asked a series of quantitative measures, based on questions validated through Voconiq's research on what impacts an organisation or industry's social licence to operate. The results of these quantitative measures are outlined below:

	Mean score
If there is an issue in the [horse sport] industry, they act quickly to address it.	4.0
The [horse sport] industry is prepared to change its practices in response to the concerns of community(ies).	4.1
The [horse sport] industry is transparent and accountable to the public.	3.6
Information about the [horse sport] industry is readily available.	3.7
Scoring: 1 = "strongly disagree" to 5 = "strongly agree"	
Please rate your overall experience when you have interacted with people involved in the [horse sport] industry	4.0
How would you rate the general public's view of your sport?	2.9
Scoring: 1 = "very negative" to 5 = "very positive"	
How much do you trust the [horse sport] industry to act responsibly?	3.6
Scoring: 1 = "not at all" to 5 = "extremely"	

Table 1: Quantitative question responses by mean score.

These industry insights provide valuable insight into what experts within the industry see as their current challenges, and how they feel their sport is perceived by the general public. Of most interest in the quantitative interviewee responses was the quite circumspective responses to questions about internal accountability, transparency, and trust in horse sport industries to act responsibly. These responses reflect some interviewees' concerns about the risk of substantive disruption should an issue arise in the public domain that becomes a lightning rod for public dissatisfaction.

When compared to the national survey response averages for the same questions, the internal groups scored higher on all measures, with the largest differences being on the first two (responsiveness) measures (difference of 0.7 and 0.8). Notably, information availability scores were the closest, with general public averaging at 3.6.

National survey results

Position of horse sports in the United Kingdom

Trust is a critical driver of acceptance of the horse sport industry and serves as a key medium for translating the public's expectations and experiences of horse sports industries into a robust level of social licence to operate. We start this report of findings from the national survey of community attitudes toward UK horse sports industries with these two key outcome measures.

Trust was assessed through three distinct questions that reflect the competence, humanity and integrity dimensions of trust, employing a Likert-type scale ranging from 1 (not at all) to 5 (extremely). Acceptance was measured using a single item, and the same response scale.

When participants were asked to rate the extent to which they trust horse sports to act responsibly, the mean score was 3.01. This is at the midpoint of the scale used, indicating that the horse sports industry in the UK has a solid foundation of trust with the community on which to build and strengthen the relationship. There is room, and a need, to improve this score over time to buffer horse sports in the UK from future potential headwinds.

Acceptance of horse sports sits at a similar level. Respondents gave a mean score of 3.19 on this measure, using the same response scale. We also asked respondents to rate the extent to which they reject horse sports,

with more than half (57%) indicating they disagreed with the statement. Again, this level of acceptance is solid with strong opportunity for improvement over time.

When asked to rate their level of trust in UK horse sports overall, the public trust the horse sports to act responsibly (integrity dimension), with 69% of respondents indicated 'moderate' to 'extreme' agreement compared to 31% who rated their level of trust as either 'not at all' or 'slightly'. Fewer community members were inclined to trust horse sports to value their community's needs and desires (humanity dimension), with 64% agreement. A higher proportion of respondents trust those involved in horse sports to be competent at what they do at 73% agreement (competence dimension).

> *In general I trust owners and trainers to look after horses well, given it is their livelihood. They have a greater understanding of their welfare needs than any outsiders.*
> *– 2024 survey participant*

We also examined trust in horse sports overall, and individually, relative to other actors, organisations and institutions using a separate measure.

In this measure, participants were simply asked to rate their level of trust in this fuller list of actors, providing a within-context benchmark for horse sports. On this measure, horse veterinarians were the most trusted group with a Mean (M) of 3.55, followed by animal welfare organisations (M=3.47; see Figure 1).

Looking across the horse sports examined, there is a clear pattern with horse sports involving jumping (e.g., horse racing over jumps, M=2.63) trusted less than horse sports that may be considered less risky for horses involved (e.g., Pony Club activities, M=3.15). Motorsports industries were included as a type of equivalent, non-animal related industry, with community members rating trust in this industry at an average of 2.67, considerably lower than horse sports in general (M=2.93). These scores are reflected in order from lowest to highest below in Figure 1.

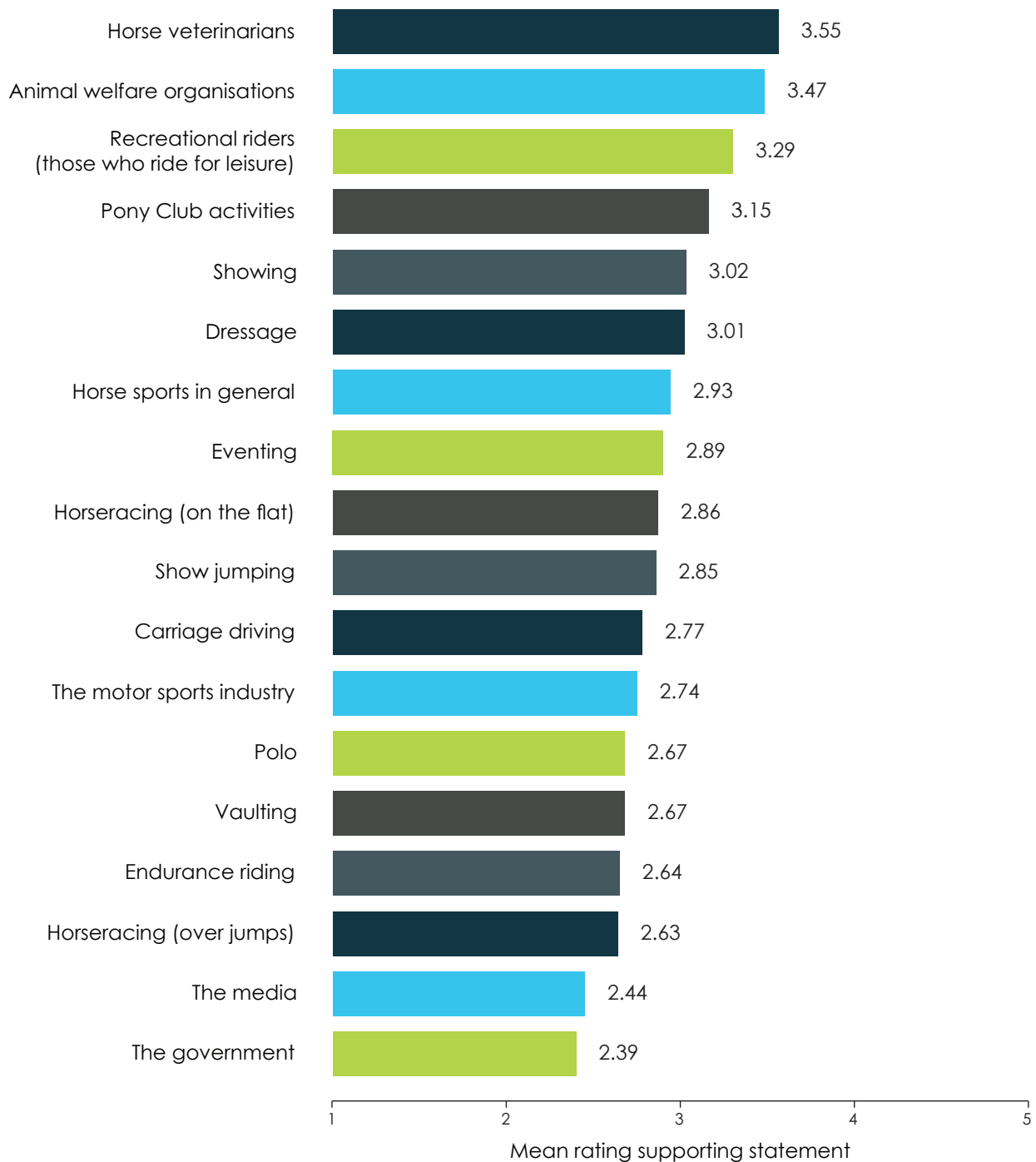| Category	Mean rating
Horse veterinarians	3.55
Animal welfare organisations	3.47
Recreational riders (those who ride for leisure)	3.29
Pony Club activities	3.15
Showing	3.02
Dressage	3.01
Horse sports in general	2.93
Eventing	2.89
Horseracing (on the flat)	2.86
Show jumping	2.85
Carriage driving	2.77
The motor sports industry	2.74
Polo	2.67
Vaulting	2.67
Endurance riding	2.64
Horseracing (over jumps)	2.63
The media	2.44
The government	2.39

Mean rating supporting statement

Figure 1: Mean scores in response to the question "To what extent do you trust..." individual horse sports industry groups in the UK (rating scale ranged from 1 to 5).

Building Trust

A key part of the Voconiq approach to social licence research is the use of advanced statistical techniques to go further than just understanding levels of trust in and acceptance of target industries, drilling down to an understanding of what drives trust and acceptance in these industries. This approach provides clear guidance on where to focus to reduce social risk through building stronger relationships with – in this case – the UK public. This is achieved by using path analysis to generate a 'path model' – an output that details the relative strengths of the main factors that influence the key outcome measures (in this case, trust and acceptance) and provides a 'recipe' for social licence. The results of the path analysis can be used to develop strategies for action that prioritise the most influential drivers of trust and acceptance over those that have less influence and provide guidance in times of acute challenge.

Key features of the model

Trust is central and drives acceptance
The model that Voconiq derived from the survey data is shown in Figure 2. As expected, trust sits centrally in the model as a key predictor of acceptance in UK horse sports. In this model, there are also direct drivers of acceptance that do not influence trust substantively. These drivers of acceptance are important but are less able to influence an industry or are more transactional in their nature. Given the utility of trust in relationships between community and industry, we emphasise trust drivers in our recommendations.

Social importance of horse sports
The more the UK public feel that horse sports are providing social value, the more inclined the community will be to trust and accept the industry.

This driver combines questions related to the collective social impact of the horse sports industry, industry's role in preserving cultural traditions, importance to way of life in the UK, and how horse sports contribute to the social fabric of society.

Procedural fairness
This relates to the extent to which members of the public feel as if horse sports are listening to and responding to their concerns. This driver combines questions that reflect community expectations of industry responsiveness, such as whether the industry acts quickly to address issues or is prepared to change its practices in response to concerns. The more responsive the industry is, the greater the level of public trust and acceptance.

Transparency regarding injuries and fatalities
This relates to the level of transparency the horse sports industry operates under regarding horse injuries and fatalities that occur during training, racing, and competitive sport. The more transparent community members feel horse sport industries are on these matters, the more they will trust them.

Regulation
This speaks to the level of confidence the public has in regulation and other governance mechanisms to ensure horse sports 'do the right thing'. The driver combines questions on standards developed internally by the industry, transparency and accountability to the wider public, and the degree to which the government can hold horse sports accountable. The higher the public's confidence in the regulatory framework underpinning horse sports, the more they will trust and accept the industry.

Distributional fairness
This relates to the extent to which community members feel that they receive a 'fair share of the benefits' that horse sports generate.

This driver combines questions that ask if participants feel as if they as individuals, and their community, receive a fair share, and if the social investment activities by horse sports have a positive impact on their community. The greater the extent to which they feel fairly treated, the higher will be their level of trust and acceptance. Often, drivers can interact with each other. For example, perceptions of distributional fairness can be impacted by the community's stance on regulation, as internal policies may determine the level of social investment.

Breeding of horses for sports
This directly influences the public's level of acceptance of horse sports (i.e., it does not influence acceptance via an effect on trust). Its inclusion in the path analysis shows that the more people feel it is okay that horses are being bred for sports, the more they accept the industry. Conversely, if there is increased scrutiny around the breeding of horses, acceptance will wane. This driver is based on the question 'I think it is acceptable for horses to be bred for sports' and the answers it elicits reflect the respondents' moral or ideological position. There is therefore limited scope for the industry to shift this driver of acceptance.

Environmental impacts
This speaks directly to the community's level of acceptance of the industry (i.e., as for breeding, it does not influence acceptance by influencing trust), with greater concern for the environmental impact of horse sports leading to lower levels of acceptance. This driver combines questions on the spaces and land that horse sports facilities use, water usage, waste management, and impact on the environment, as well as the carbon footprint associated with long distance travel.

It is important to note that the path model provides a clear understanding of what is important in predicting trust and acceptance, with the relative strength of each driver of trust and acceptance indicated by the numbers in the model.

A note on horse welfare
Horse welfare is clearly important to the community, with the extent to which the industry is transparent about injuries and fatalities being one of the most important drivers of trust.

If we consider the drivers that appear in the model, it is evident that equine welfare underpins several of them. For example, it is very likely that the welfare of horses is the primary consideration of community members when they judge how confident they are in the external and internal regulation of horse sports. Similarly, items used to measure industry responsiveness (procedural fairness) specifically relate to the extent to which horse sports listen to community concerns and act on them. For community members, the issues they expect horse sports to act on are very likely to include those related to welfare. This is supported by the responses to multiple welfare-related questions in the survey, and by a moderate positive correlation (0.54) between the procedural fairness and 'transparency about injuries and fatalities' scales. Good horse welfare should therefore be considered to be a precondition for community acceptance of horse sports.
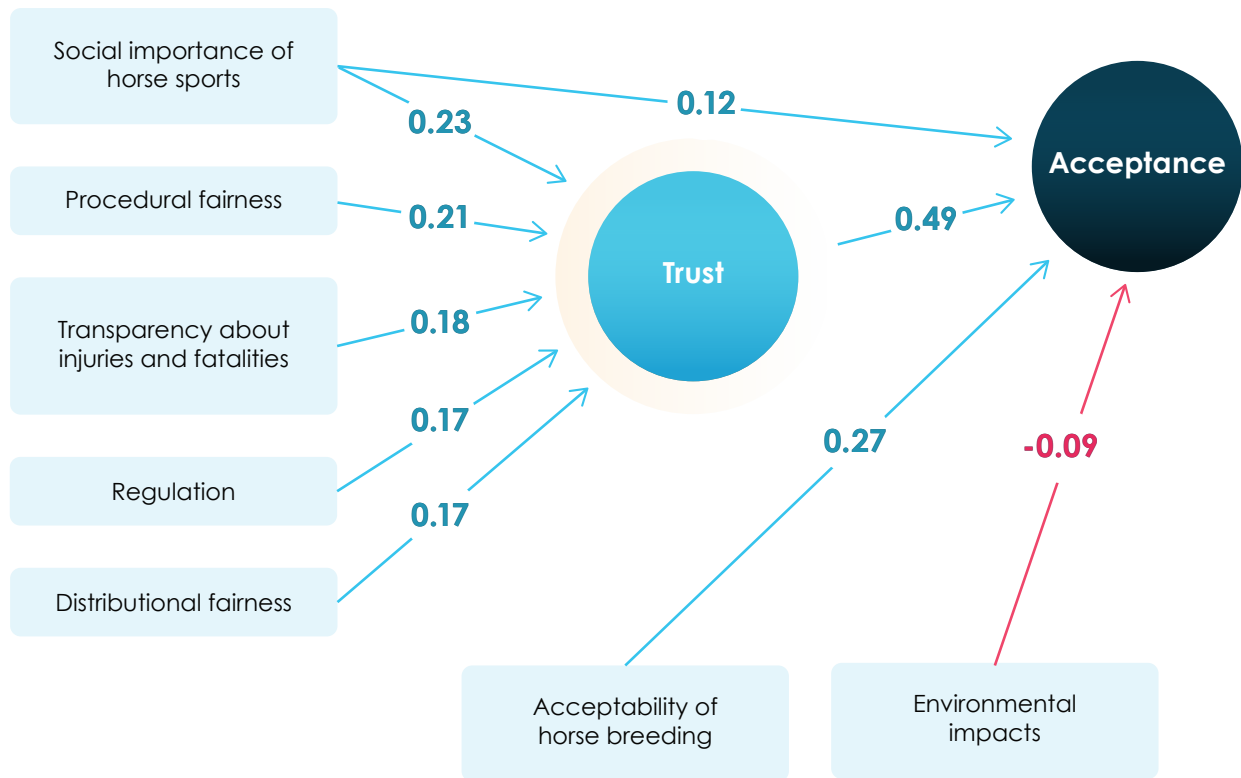
Figure 2: Drivers of trust and acceptance for horse sports in the UK, 2024.

How to read this path model

When reading the path model on this page, follow the arrows from left to right. The direction of the arrow indicates the direction of the relationship (e.g., trust leads to acceptance). The numbers on the arrows denote their importance in predicting the measure they point at; higher numbers represent stronger relationships. Blue lines represent positive relationships between measures (e.g., greater confidence in regulation leads to higher trust) and red lines represent negative relationships between measures (e.g., greater concern about environmental impacts leads to lower levels of acceptance).

More about path modeling

Path modelling is a statistical technique that is used to analyse the relationships between multiple variables and to explain how those variables are connected. Path modelling can also be used to test hypotheses about the relationships between variables, and to predict the value of one variable based on the values of other variables. In the context of horse sports in the UK, this report uses path modelling to understand the relationship between constructs (also known as drivers) such as 'procedural fairness' and 'horse sports are transparent about injuries and fatalities', or 'procedural fairness' and 'regulation'.

The path modelling in this report followed a five-step process:

1. Initially, feature engineering was used to pull out background characteristics of the data set such as any sub-groups identified through source-tracking or comments. This occurs when unique features of the data collection process are encoded into the data and are allowed to inform the modelling. Feature engineering is a process used to transform raw data into a more effective use of inputs for supervised machine learning.

2. Boutique smart clustering techniques were used to find patterns that indicate psychological constructs that unify individual questions. These constructs, alongside questions that stand on their own, became key predictors.

3. A machine-learning algorithm called 'random forests' was then used to find the top candidates for influencing trust and acceptance from among these key predictors. The machine uses complex mathematics to generate thousands of branching tree models that incorporate the psychological constructs identified in Step 2, as well as non-clustered questions and demographic data, to predict levels of trust and acceptance. We then aggregated the 'forest' of trees to understand which predictors were most important in the context of all others, allowing us to find unique predictive value.

4. The path model used in this report was created by putting these predictors in competition with each other and determining the top candidates for influencing trust and acceptance. We used automated pruning algorithms that iteratively removed the weakest connections, creating a new path model each time, until only paths of a certain strength remained. This gave every single predictor a chance of being included in the final path model. The final model includes standardised Beta coefficients (i.e., the numbers) that tell us the strength of each relationship relative to all other relationships in the model.

5. Finally, the machine-suggested model was reviewed by our expert analysts who used their domain-specific knowledge of social licence theory and experience with many similar datasets to refine it by considering factors such as direct predictors of acceptance, and the model's utility. This ensures that predictors in the model fit acceptably, and that the model is of maximal actionable value.

Drivers/constructs in the final model typically represent the most robust predictors of trust or acceptance for each concept. For instance, if 'water impacts' is a significant predictor of trust, it is unlikely that 'environmental impacts' will also be included in the model. This is because individuals concerned about water impacts are generally also concerned about overall environmental impacts, but it is the water impacts that are particularly crucial. In the current data set, this may usefully be related to the concept of horse welfare. It may seem surprising that 'equine welfare' does not appear in the model that resulted from this research whereas 'horse sports are transparent about injuries and fatalities' does. However, in the same way that 'water impacts' acts as a proxy for 'environmental impacts' in the example above, it is likely that the transparency driver is effectively acting as a proxy for the broader set of welfare questions. From a statistical standpoint, this would occur if 'transparency regarding horse injuries and death' accounted for greater variance in trust than all of the welfare-related questions as a group. Welfare questions may therefore be seen as a 'family' of items that should be regarded as important drivers of trust. However, the model shows that, among this family of items, transparency about injuries and fatalities is the item that best predicts community trust.

In the following sections, we will examine the second part of the story for UK horse sports: the level of community sentiment in each of these drivers at baseline and other features of the data. When taken together (i.e., factor identification and pathway strength), the data provide a recipe for improving social licence and a baseline level for the key model features (i.e., mean scores and distributions of responses for individual survey items within each model factor). These components of the story are related but distinct, and they serve different purposes for UK horse sports in strengthening its social licence to operate.

Social importance

The role of horse sports in UK society is the strongest driver of trust and acceptance in the industry[7]. The UK public recognise the social and cultural impact that horse sports play within the wider community, with 55% of respondents agreeing with the statement that horse sports are important to our way of life in the UK compared with 17% that disagreed (28% neutral). 60% of respondents agreed that horse sports play an important role in preserving cultural traditions (12% disagreed, 28% neutral).

> *Horse sports, particularly horse racing are an important lifeblood of many communities in the UK.*
> *– 2024 survey participant.*

Social impact value

Half of all participants agreed that horse sports contribute to the social fabric of the UK by fostering community connections and shared experiences (14% disagreed, 36% neutral).

This acknowledgement of social impact suggests that survey participants and the key stakeholders (i.e., the interviewees) are well aligned that involvement with horse sports creates a sense of community. Furthermore, when asked if horse sports provide valuable educational opportunities, 53% of participants agreed (14% disagreed, 33% neutral).

> *Horse sports are a great form of culture preservation and it should be promoted and supported by the government in ways that ensures growth and sustainability.*
> *– 2024 survey participant.*

Responses to these measures varied based on the participant's level of experience with horses and horse sports. Those who interacted with horses on a regular basis were overwhelmingly more positive about the social impacts, such as education, and the social importance of horse sports (Figure 3).
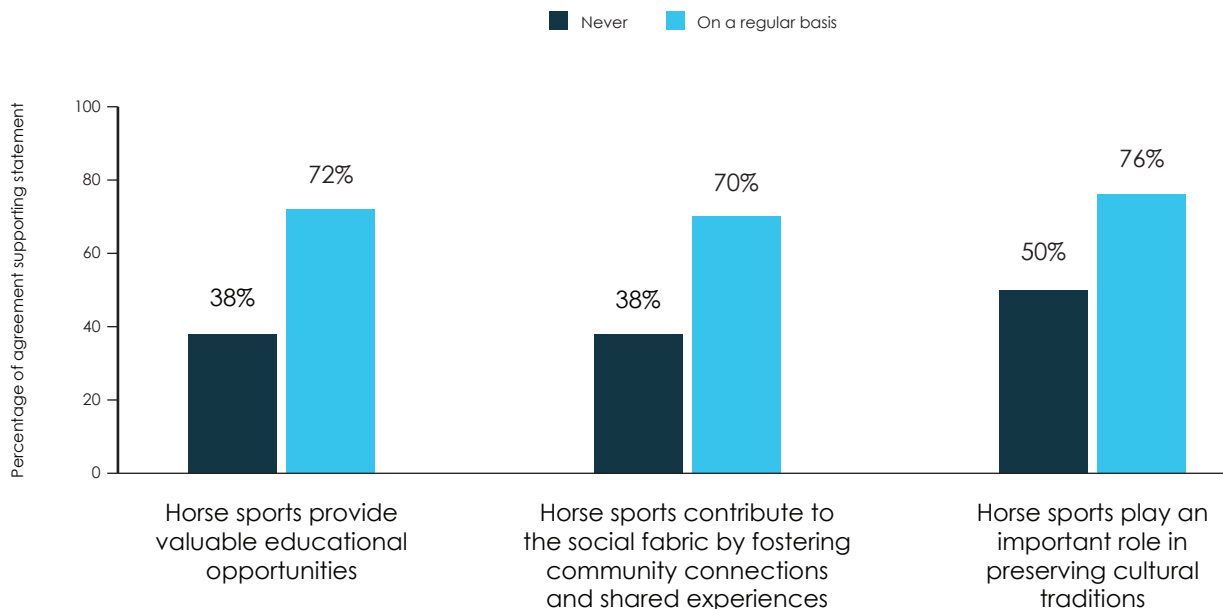

Figure 3: Percentage of agreement with social importance statements, comparing those that have never had contact with horses with those that interact with horses regularly.

[7]In this and subsequent sections responses were measured on a 5 point scale where 1 = "Strongly disagree", 3 = "Neutral", and 5 = "Strongly agree". For much of the data presented below, the "Strongly agree" and "Agree" categories were amalgamated and are presented as the percentage of respondents that agreed, and the "Strongly disagree" and "Disagree" categories were amalgamated and are presented as the percentage of respondents that disagreed.

In comparison, those who had never interacted with horses were less certain of the industry's social value. This is indicated by the high percentage of neutral responses from those who had never interacted with horses to the statements 'horse sports provide valuable educational opportunities' (41% neutral) and 'horse sports contribute to the social fabric by fostering community connections and shared experiences' (46% neutral). In a five point scale, high percentages of neutral (such as over 40% seen here), indicate opportunities to engage communities on these topics. Neutral respondents are often ones who are not informed enough to make a decision, don't care or are not engaged. By engaging with community in these areas, the horse sports industry has an opportunity to bridge this gap.

Awareness and accessibility

Awareness of horse sports in the public domain is high. Almost two thirds of participants (63%) agreed that horses significantly contribute to sport and recreation in the UK (10% disagreed, 27% neutral). When asked about the impact of successful performances by athletes within the industry, 63% agreed that those performances inspire people to pursue the sport (10% disagreed, 28% neutral), and 68% agreed that performances help to raise awareness and promote the sport (8% disagreed, 24% neutral).

Participants were also asked questions related to accessibility, inclusivity, and diversity of horse sports. Whilst 59% of respondents agreed or strongly agreed that horse sports are inclusive of all genders (13% disagreed, 27% neutral), there was an indication that there is more work to be done in this space with 57% agreeing that horse sports should do more to promote diversity and inclusion within the sport (10% disagreed, 33% neutral).

When asked if horse sports provide enough opportunities for participation and employment for people from diverse racial and ethnic backgrounds, 38% agreed and 27% disagreed. Only 11% of respondents disagreed with the statement that people from marginalised groups are under-represented in horse sports, in contrast to the 53% who agreed that they are.

> *If horse sports continue to be so expensive, they will never truly be accessible to all groups of people. Diversity also lags far behind other sports.*
> *- 2024 survey participant.*

More than half of the public (54%) disagreed with the statement 'horse sports are accessible and affordable for individuals from diverse socioeconomic backgrounds.' When asked about what factors hinder access to horse sports, a substantial number of participants agreed that the financial aspect of horse sports prevents access to a greater extent than other potential inhibitors (Figure 4, below). 89% of respondents agreed that 'costs associated with buying and looking after horses' impact accessibility, while 90% of respondents agreed that costs associated with equipment and training also contributed to inaccessibility. Other factors hindering access to horse sports are concerns for horse welfare (75% agreement) and negative perceptions or attitudes toward horse sports, for example, an 'elitist' image (75% agreement) (Figure 4).

> *Both my daughters did show jumping as children, it was very good for their confidence and sense of achievement, but soon became a money pit and had to be given up.*
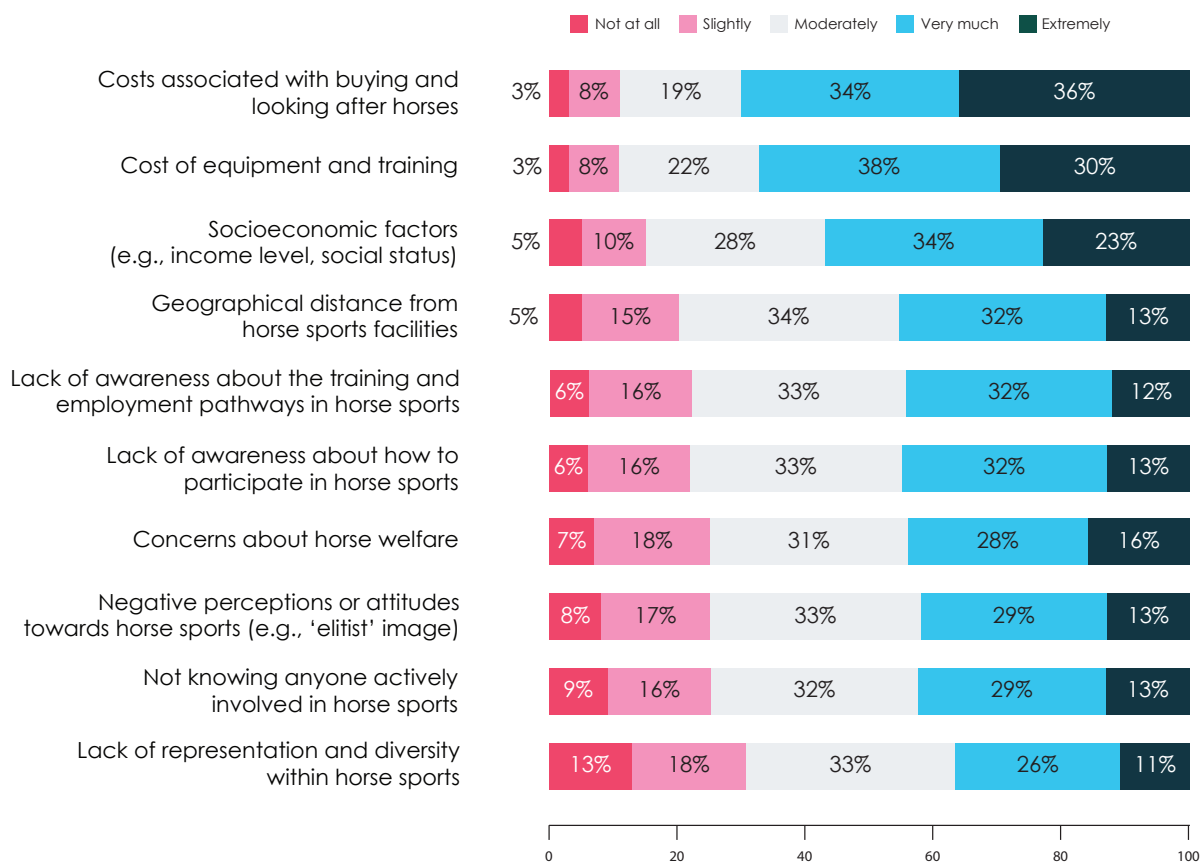> *– 2024 survey participant.*

Figure 4: Distribution of scores on factors hindering access to horse sports in the UK.

When asked if a 'lack of awareness about how to participate in horse sports' or a 'lack of awareness about the training and employment pathways in horse sports' was a factor hindering access, 78% of respondents indicated agreement with both items.

In summary

These data suggest that horse sports hold a prominent and important place in the cultural and social identity of the UK public. The benefits of horse sports are viewed as significantly positive by those members of the public who have had any kind of experience with horses, and especially among those for whom these experiences are a regular occurrence. This pattern is repeated in subsequent sections, and would appear to be a key mechanism for broadening the appeal and participation of members of the public in horse-related sports. However, sizeable proportions of the community indicated that all the nominated barriers to participation were relevant, with cost in its various forms the clear major inhibitor to greater uptake.

Welfare

The welfare of horses is of significant concern to industry professionals, riders, and the general public. For this reason, many of the questions featured in the survey focused on welfare-related topics. As a result, the survey outcomes provide a foundation for understanding how the community feels about the industry across a broad range of interaction points, many of them informed by horse welfare. These include the ethical treatment and use of horses, welfare safety and standards, welfare in the context of competitive and recreational riding, and sentiment towards euthanasia and slaughter of horses.

The survey results confirm that the public have a strong interest in animal wellbeing, with 58% of respondents agreeing that they are concerned about the welfare of horses used in sports. However, there is room to work with the community, who recognise that there is nuance to the welfare of horses in sport, with 65% agreeing that horse welfare is a complex issue. This story is told further when the community was asked about positive experiences, mental welfare, and the emotional treatment of horses, all of which were considered as highly important, with 75%, 82%, and 54%, respectively, agreeing with the statements shown in Figure 5. It is notable that just under two-thirds of respondents (64%) either agreed or strongly agreed that horses can live a good life when involved in sports, but less than half (46%) agreed or strongly agreed that they think horses enjoy being used in sports.

> *Horses bring grace, strength and partnership in sport, showcasing the beauty of human-equine collaboration. As such they should be treated with respect and highly valued.*
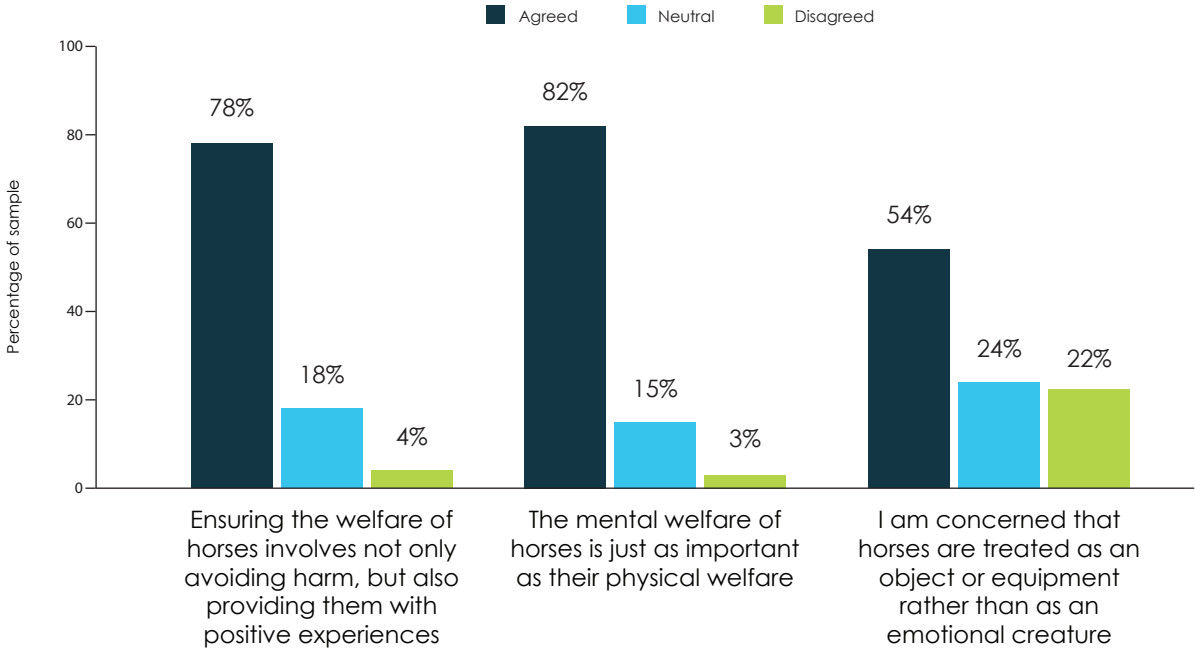> *– 2024 survey participant.*

Figure 5: Proportion of answers (agree, neutral, disagree) with statements related to horse welfare in the UK.

> *I think we need to become more forward thinking when it comes to animal welfare. In 2024, we need to take a serious and kind look if the conditions and treatment of horses is absolutely necessary if it could potentially cause any harm to them for the sake of sport.*
> *– 2024 survey participant.*

Over three-quarters of the public (76%) agreed that horse sports should prioritise making competitions safer for horses, even if it means sacrificing some of the traditional difficulty or challenge of the sport. This is reflected in responses to questions asked about safety measures of horse sports (Figure 6) as they currently are. Together, these responses show that the UK public are deeply concerned about both the welfare and safety of horses used in equestrian sports.

Legend: Strongly disagree | Disagree | Agree | Strongly agree | Neutral

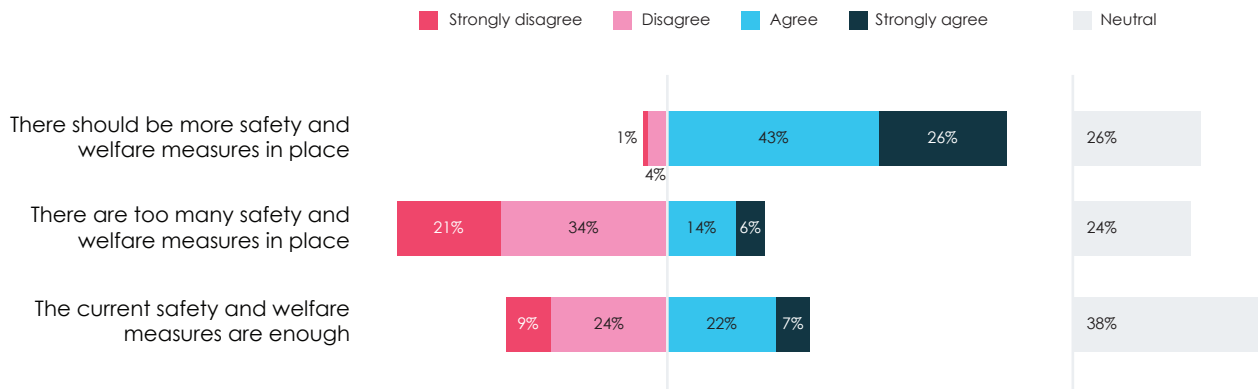|	Strongly disagree	Disagree	Agree	Strongly agree	Neutral
There should be more safety and welfare measures in place	1%	4%	43%	26%	26%
There are too many safety and welfare measures in place	21%	34%	14%	6%	24%
The current safety and welfare measures are enough	9%	24%	22%	7%	38%

Figure 6: Distribution of scores on safety and welfare measures in UK horse sports.

Community members were asked to rate the acceptability of various factors regarding horse sports. Figure 7 below illustrates that close to 50% of the community feel as if these factors are 'not at all' or 'slightly' acceptable across most dimensions. This highlights that the public is substantially concerned with the physical and mental health of horses used in sports.
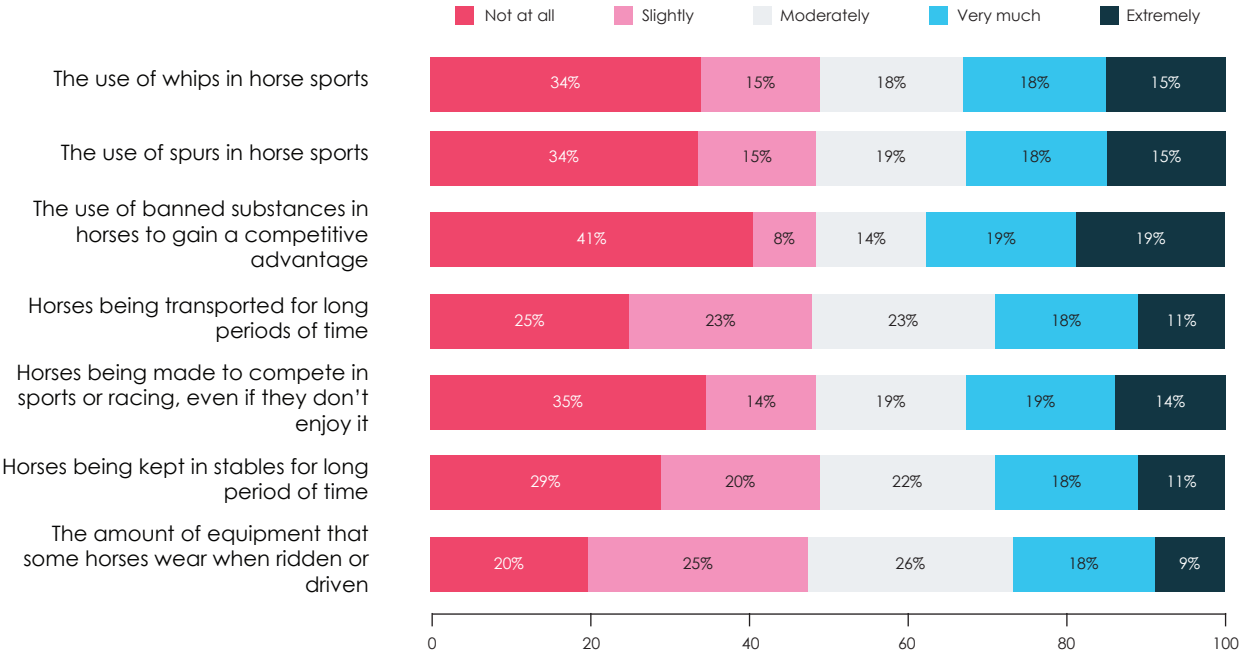
Legend: Not at all | Slightly | Moderately | Very much | Extremely

Factor	Not at all	Slightly	Moderately	Very much	Extremely
The use of whips in horse sports	34%	15%	18%	18%	15%
The use of spurs in horse sports	34%	15%	19%	18%	15%
The use of banned substances in horses to gain a competitive advantage	41%	8%	14%	19%	19%
Horses being transported for long periods of time	25%	23%	23%	18%	11%
Horses being made to compete in sports or racing, even if they don't enjoy it	35%	14%	19%	19%	14%
Horses being kept in stables for long period of time	29%	20%	22%	18%	11%
The amount of equipment that some horses wear when ridden or driven	20%	25%	26%	18%	9%

Figure 7: Distribution scores of acceptability on various factors regarding horse sports.

Distribution of scores on competitive and recreational use of horses

Welfare concerns exist across multiple uses of horses, from competitive sports to recreational, non-competitive riding, and at all life stages.

When asked to rate their level of concern for the participation of horses in competitive sports, only 12% of all respondents stated they were 'not at all' concerned. Overall, the public had a high level of concern for the lives of horses in competition (Figure 8). In particular, substantial percentages of respondents were 'very much' or 'extremely' worried about injuries or fatalities that may occur during competition (events in which horse and rider compete for a prize or renown; 58%) and training (the process by which horses are trained for competition; 57%), as well as the post-competition fate of sport horses (46%), the fate of horses that are bred for competitive sports but fail to perform well (49%), and those that require rehabilitation after injury (38%) (Figure 8, below).
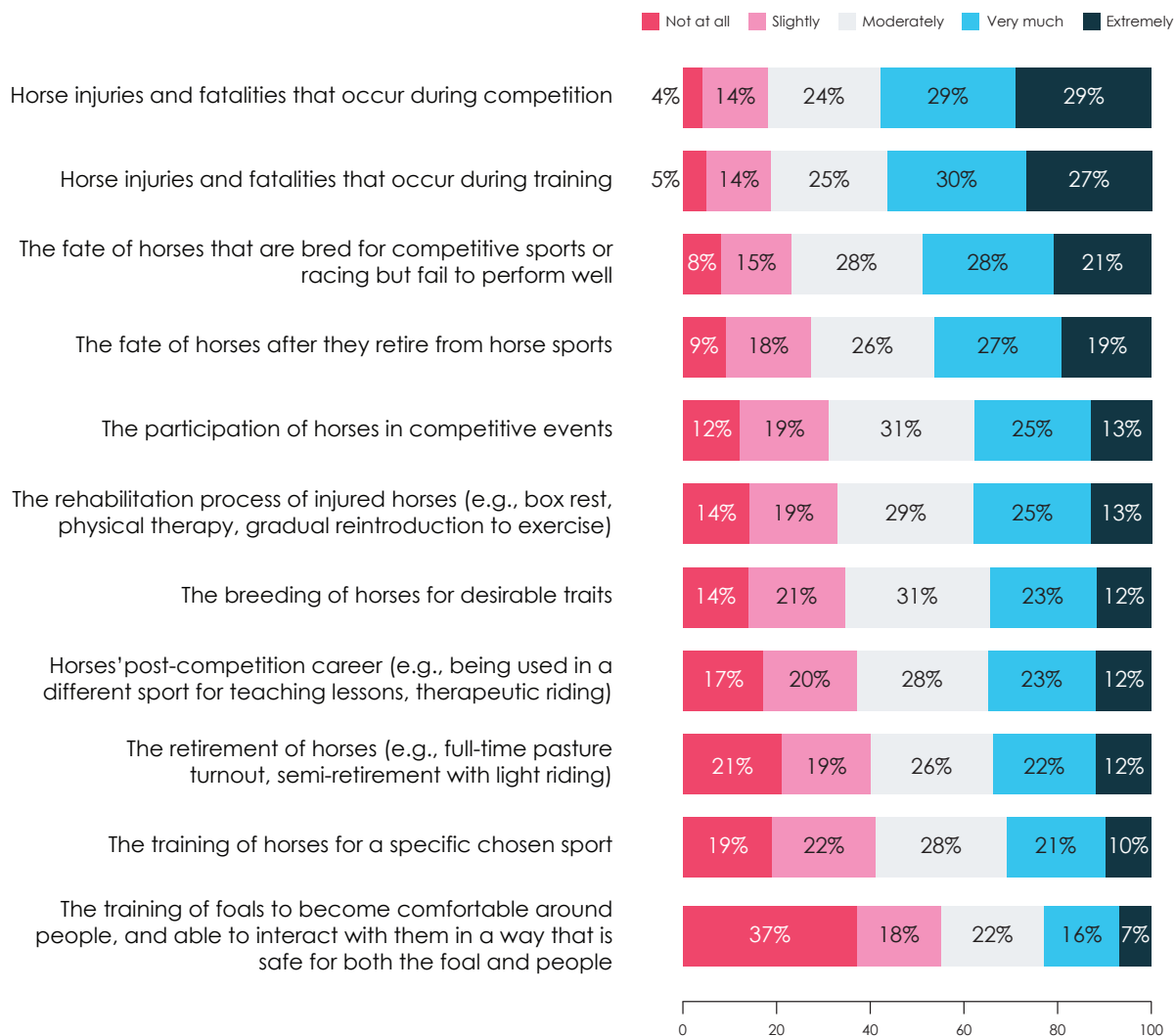
Figure 8: Distribution of scores on the level of concern for the lives of horses in the UK.

Concern for horse welfare in a competitive environment is underscored by almost three-quarters of participants (74%) agreeing that horse sports are responsible for ensuring the welfare of retired horses and horses that fail to perform well. In addition, 76% agreed that the long-term quality of life and welfare of horses is more important than the pursuit of immediate success in horse sports.

Recreational riding was perceived as a lesser welfare concern in comparison to the competitive use of horses. When asked a trade off question of if it was more acceptable to use horses for recreational riding than in competitive sport, 52% of participants agreed (12% disagreed, 36% neutral). Despite this, concern still exists around recreational riding, 40% of participants agreed they are concerned about the welfare of horses used for recreational riding compared to 30% who disagreed (30% neutral). A similar proportion agreed (39%; 32% disagreed; 29% neutral) that they were concerned about the welfare of horses kept as pets or companions.

> *Yes, my concern is that they are viewed as instruments to win competitions and are treated inhumanely when they retire.*
> *– 2024 survey participant.*

Figure 9 below outlines the level of concern the general public has for each classification of horse sport. The results show that increased levels of speed or complexity of movement for the horse result in increased concern for the horses.

These results mirror the levels of trust that respondents had in different horse sports (Figure 1). However, 36% agreed that they worry more about the welfare of horses in amateur-level sports than they do about horses in professional-level sports (25% disagreed, 39% neutral).

> *It is such a complex issue and difficult to include non-competitive recreational riding in the same category as highly competitive sport.*
> *– 2024 survey participant*

Legend: Not at all | Slightly | Moderately | Very much | Extremely

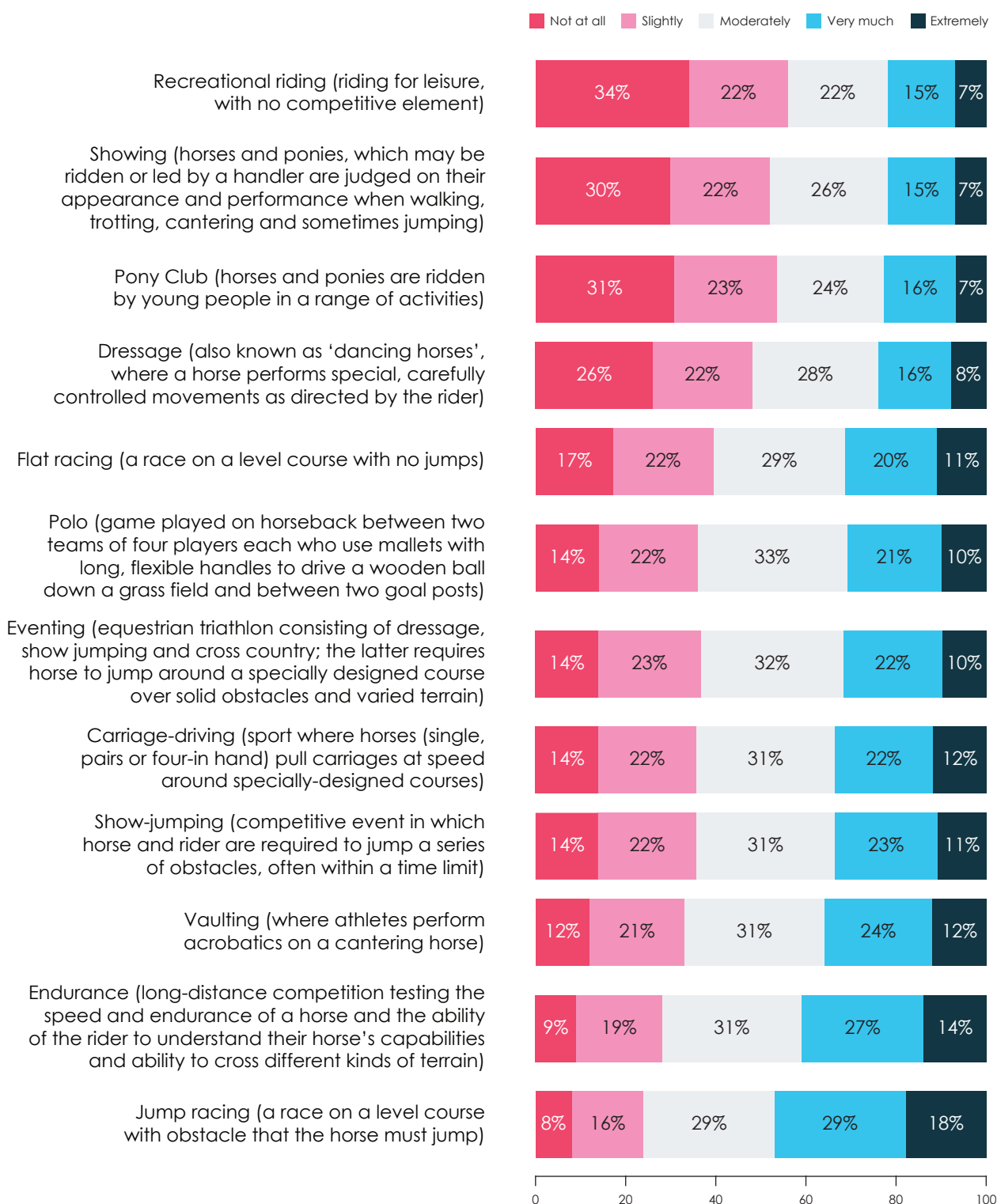| Purpose	Not at all	Slightly	Moderately	Very much	Extremely
Recreational riding (riding for leisure, with no competitive element)	34%	22%	22%	15%	7%
Showing (horses and ponies, which may be ridden or led by a handler are judged on their appearance and performance when walking, trotting, cantering and sometimes jumping)	30%	22%	26%	15%	7%
Pony Club (horses and ponies are ridden by young people in a range of activities)	31%	23%	24%	16%	7%
Dressage (also known as 'dancing horses', where a horse performs special, carefully controlled movements as directed by the rider)	26%	22%	28%	16%	8%
Flat racing (a race on a level course with no jumps)	17%	22%	29%	20%	11%
Polo (game played on horseback between two teams of four players each who use mallets with long, flexible handles to drive a wooden ball down a grass field and between two goal posts)	14%	22%	33%	21%	10%
Eventing (equestrian triathlon consisting of dressage, show jumping and cross country; the latter requires horse to jump around a specially designed course over solid obstacles and varied terrain)	14%	23%	32%	22%	10%
Carriage-driving (sport where horses (single, pairs or four-in hand) pull carriages at speed around specially-designed courses)	14%	22%	31%	22%	12%
Show-jumping (competitive event in which horse and rider are required to jump a series of obstacles, often within a time limit)	14%	22%	31%	23%	11%
Vaulting (where athletes perform acrobatics on a cantering horse)	12%	21%	31%	24%	12%
Endurance (long-distance competition testing the speed and endurance of a horse and the ability of the rider to understand their horse's capabilities and ability to cross different kinds of terrain)	9%	19%	31%	27%	14%
Jump racing (a race on a level course with obstacle that the horse must jump)	8%	16%	29%	29%	18%

Figure 9: Distribution of scores on the level of concern for horses in the UK based on the purpose for which they are used.

More than half of survey respondents (52%) disagreed with the statement 'the number of horses that are injured or die during training, racing and competitive sport is acceptable to me' (23% agreed, 25% neutral), with 54% agreeing that 'it does not matter how many horses die during training, racing and competitive sport, one death is too many' (23% disagreed, 22% neutral). Furthermore, 46% of respondents disagreed with the statement that it is acceptable for horses to be injured or die in horse sports, as long as every measure is taken to make sports as safe as possible for them (29% agreed, 25% neutral).

Acceptability for horse deaths, whether through euthanasia (painlessly ending a horse's life) or slaughter (the process of preparing horses for non-human or human consumption) was overwhelmingly rated 'not at all' acceptable (Figure 10). The exception to this was when euthanasia was perceived as a preventative action to further injury or painful death, with 42% of participants rating the statement "it is acceptable to euthanise horses that have serious untreatable injuries" as 'very much' or 'extremely' acceptable.
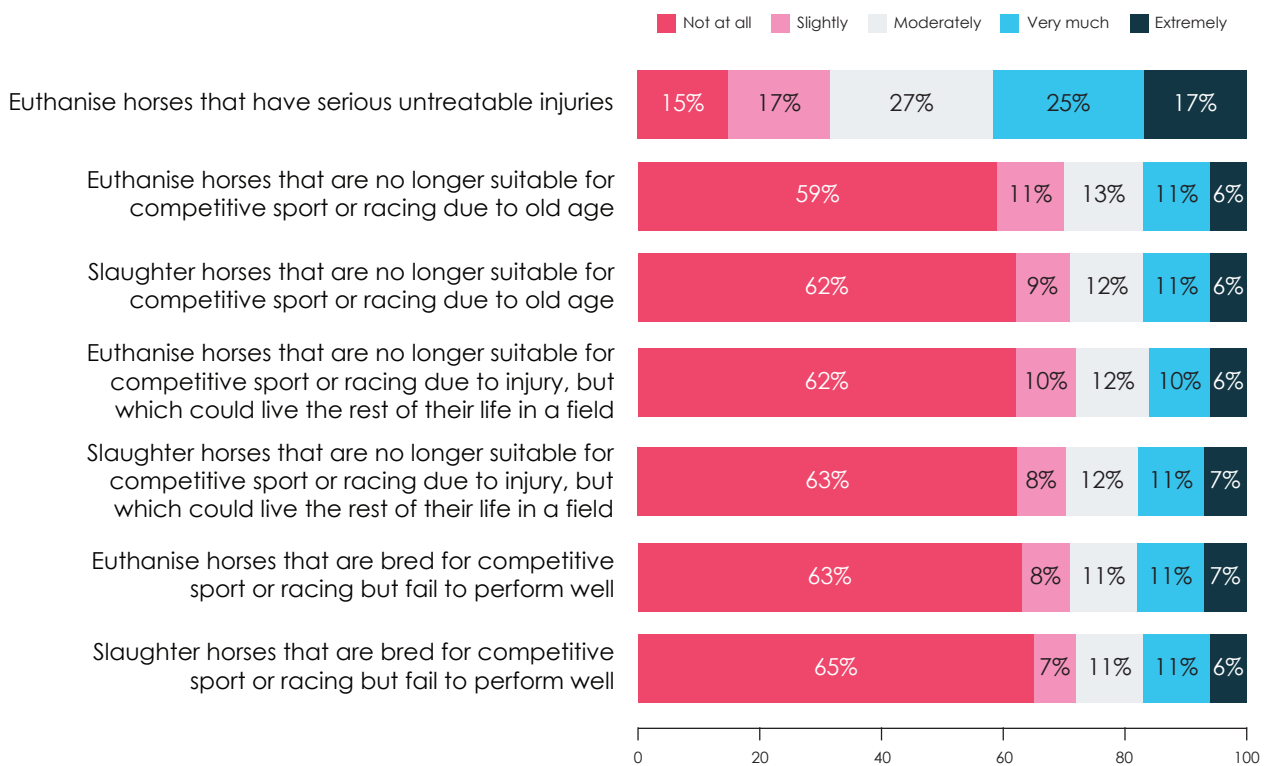
Figure 10: Distribution of scores on the acceptability of various factors regarding horse deaths in the UK.

When looking at community sentiment towards different aspects of welfare relative to recreational or competitive riding, it is evident that the public are aware of, and understand, the complexity of horse welfare. When asked questions on the continued use of horses in sports, 51% of respondents agreed that they support the continued involvement of horses in sports, whereas 27% stated they do not support the use of horses under any circumstances. 50% of respondents agreed they would only continue to support the use of horses in sports if welfare improved.

Many horses enjoy what they do and many owners are great with their horses. We just need to make sure everything that can be done to keep horses as safe as can be is done.
– 2024 survey participant.

I enjoy horse related sports and there is a fine line between safety for the horse and excitement of the race for people. It is never acceptable to put an animal into a situation that is dangerous, detrimental to their well being or even a sport or situation they are not happy to be in. I grew up with horses and have had horses who loved being part of sports and I have had horses who hated it. Responsibility has to be on the owner to do the right thing.
– 2024 survey participant.

In summary

The UK public has real concerns about the welfare of horses in sports. This is not a surprise, but the current research has provided important nuance in this discussion. First, participants demonstrated clear agreement that welfare is complex and that it involves more than just preventing harm to horses – there is deep concern that a horse's whole life is rich, engaging, and dignified. The very strong views about euthanasia suggest that this may be seen as a way for horse sports to dispose of horses that have no sporting purpose, and demonstrates a clear feeling that a responsible industry is one that sees itself as working in partnership with animals rather than as a user of them as a resource.

Horse welfare is deeply important to community members and underpins many of the drivers of trust in the model. Additionally, the extent to which horse sports are transparent about injuries and fatalities was found to be a direct driver of trust. Moreover, due to the public's understanding of the complex nature of horse sports, there is support to undertake change activities related to improved welfare. This provides an opportunity to work on the internal standards of horse sports, their enforcement, and other aspects of horse welfare with the support of the community behind them, reducing the fear that these changes will create substantial additional risk of social pressure and rejection.

Industry responsiveness and regulation

Procedural fairness is a key driver of trust in the UK's horse sports industry. A substantial proportion of the industry is seen to be responsive, with 42% of respondents agreeing that if there is an issue in horse sports, they act quickly to address it (17% disagreed; 41% neutral). The same percentage agreed that horse sports listen to and respect community opinions (18% disagreed; 40% neutral) and 41% agreed that horse sports are prepared to change their practices in response to community concerns (20% disagreed; 40% neutral).

When asked questions on industry responsiveness (above) and regulation (Figure 11), participants provided a high percentage of neutral responses. In survey research, a neutral response can indicate that the participant neither agrees nor disagrees nor has a strong opinion on the question asked[8]. This can come from a place of uncertainty or lack of knowledge. Uncertainty was shown in areas including the rules and regulation, being held to account, transparency, and governance (Figure 11). However, all answers also scored high on agreement and over half of respondents (52%) agreed with the statement 'I trust in the current system and organisations that are responsible for monitoring and enforcing horse welfare standards'. This suggests that the public has confidence in regulation to address their welfare concerns. However, the high percentage of neutral responses provides UK horse sports with an opportunity to educate the public about the measures that are currently in place to regulate welfare.
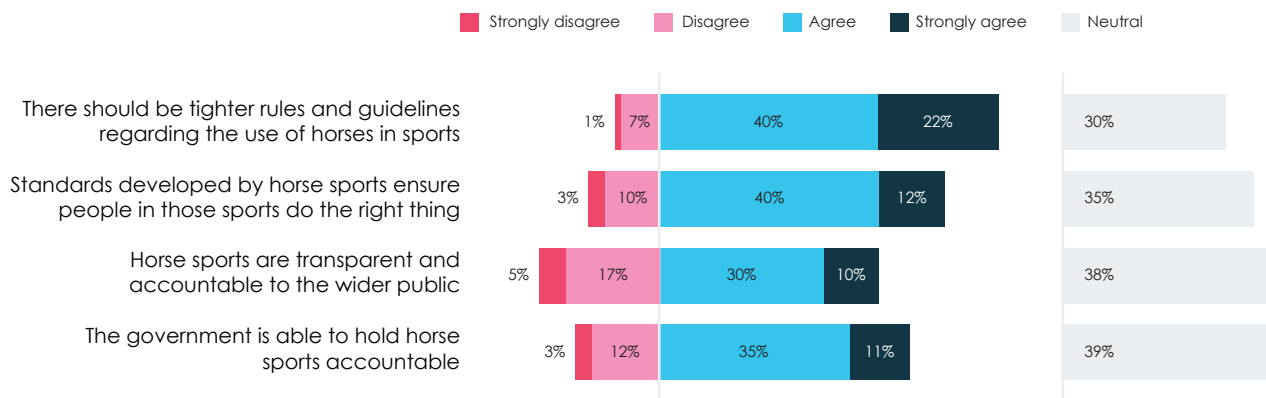
Figure 11: Distribution of scores on regulation and transparency questions regarding horse sports in the UK.

This could be achieved by utilising equine veterinarians and animal welfare groups as a resource to increase public awareness and knowledge of regulation within the industry, since trust in these groups is significantly higher than in the various equestrian sports themselves (Figure 1). Over half of participants trust horse veterinarians and animal welfare organisations 'very much' or 'extremely' (56% and 52% respectively) whereas trust in horse sports overall was lower, (29% 'very much' or 'extremely') (Figure 12). Voconiq has shown in previous work that information that is provided by those who are trusted by the community is given greater credibility.
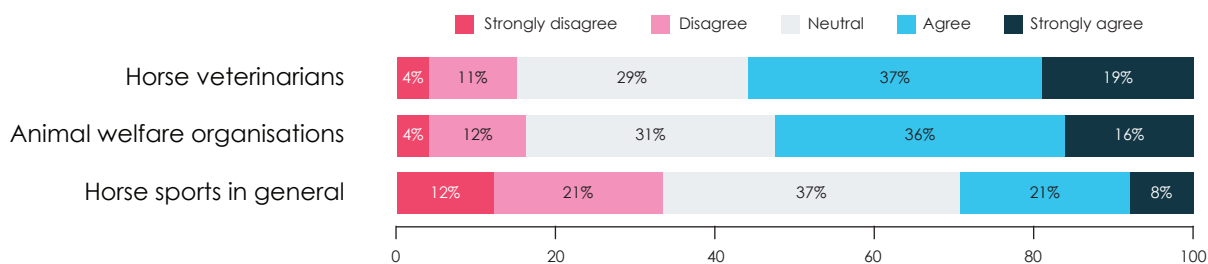
Figure 12: Percentage of agreement with statements relating to trust of the horse sport industry in the UK.

In an Australian context, a very similar result has been observed in the live export industry, where veterinarians are also considered to be a highly trusted party in animal welfare issues. In that context, and for UK horse sports, it is likely that veterinarians represent a presence that is vocationally assumed to have an interest in maintaining the welfare of animals under their care. There is substantial opportunity to leverage these professionals as compelling voices in engaging community members on the issue of horse welfare.

The extent to which horse sports are transparent is of importance to the public. 40% of respondents agreed with the statement 'horse sports are transparent and accountable to the wider public', with 38% indicating a neutral response (Figure 11, above). A slightly smaller proportion of respondents (37%) agreed that horse sports are transparent about horse injuries and fatalities that occur during training, racing and competitive sport, with 27% of respondents disagreeing and 36% responding neutrally. This suggests that the community is sensitive to, and responds positively to, information provided regarding transparency of horse sports.

> *I enjoy watching horses race but I do feel awful for the horses when there is a fatality or serious injury, more for the horse than even the jockey. I don't think that they are transparent enough when telling us about what happens to these horses and are treated a bit superficially.*
> *– 2024 survey participant.*

In summary

Although transparency is under scrutiny, it's within the control of the industry to manage. Given that both procedural fairness and transparency about the injuries and fatalities that occur are key drivers of trust for the community, industry may want to consider including the public in conversations on issues that concern them to bolster trust, thereby demonstrating transparency. This may include the mechanisms and standards that are currently in place, as well as how horse sport industries plan to (or currently do) monitor performance against them. It can also be useful to discuss the sanctions that are available to enforce welfare standards when they are breached.

[8]Sturgis, P. and Roberts, C. (2012). Middle Alternatives Revisited: How the neither/nor Response Acts as a Way of Saying "I Don't Know"? Sociological Methods & Research 43(1), 15-38; Nadler, J., Weston, R. and Voyles, E. (2015). Stuck in the middle: the use and interpretation of mid-points in items on questionnaires. The Journal of General Psychology, 142(2), 71-89; Wang, R. and Krosnick, J. (2019). Middle alternatives and measurement validity: a recommendation for survey researchers. International Journal of Social Research Methodology, 23(2), 169-184; Schaeffer, N. and Dykema, J. (2020). Advances in the Science of Asking Questions. Annual Review of Sociology, 46, 37-60.

Knowledge and information sources

When asked to self-rate their level of knowledge about horse sports, 45% of survey participants indicated they had 'no knowledge' or 'a little knowledge' and 54% rated themselves as having 'some,' 'very much' or 'extensive' knowledge. Although the public believe that information about horse sports is available (61% agreement), 42% stated that they do not actively seek such information.

Overall, an equal percentage of participants stated that they receive news about horse sports from friends or family and television news media (36% each), with direct internet searches (30%) and national newspapers (21%) rounding out the top four sources of information on horse sports. Over half of respondents (55%) agreed that the information they see portrays horse sports in a positive light (31% neutral; 13% negative).

These levels of self-rated knowledge and sources of information may be influenced by the contact participants have with the horse sports industry. 31% of respondents knew nobody who participated in horse sport. Of those that did know at least one 'horse person', the majority (60% of all respondents) knew between one and five people, with only 11% of all respondents knowing 6 or more people who participate in horse sports. Of those that knew at least one person, 21% rarely or never contacted them, 41% did so occasionally, and 38% did so frequently or very frequently (Figure 13).
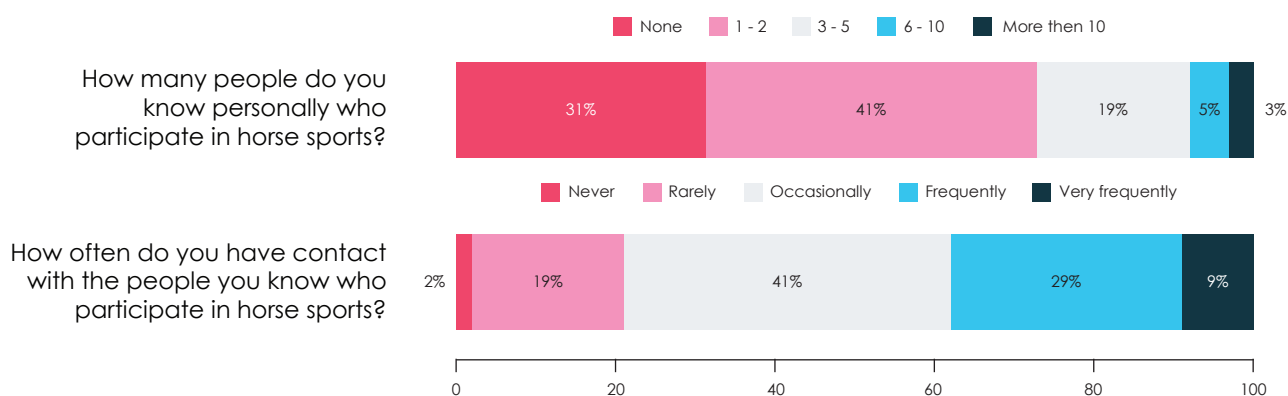
Figure 13: Distribution of scores on questions relating to contact with horse sport participants in the UK.

> *The people I know that have horses are involved in Pony Club, show jumping, dressage and eventing. They all care deeply about their animals.*
> *– 2024 survey participant.*

Regardless of how much contact participants had with people they know in the industry, the quality of that contact was generally positive. When asked to rate their overall experience when interacting with people who participate in horse sports, 77% of participants agreed that their interactions were positive (3% negative, 20% neutral). The percentage who described their contact as positive increased as participants' experience with horses increased (Figure 14). This reveals an opportunity for the industry to leverage positive interactions with the public to build trust.
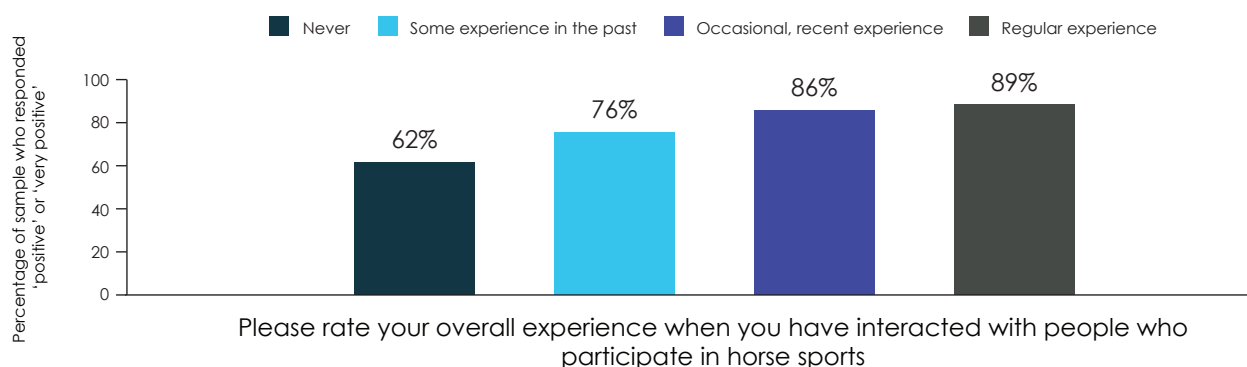
Figure 14: Percentage of respondents who rated the quality of their contact with people who participate in horse sports in the UK as 'positive' or 'very positive', split by experience with horses.

Responses to questions relating to information and knowledge-seeking measures also varied based on respondents' level of experience interacting with horses. Those who had never interacted with horses (n = 1,273; 24% of the total cohort) had lower levels of self-rated knowledge, with 73% of this group stating they had 'no knowledge' or 'a little knowledge'. These individuals were less likely than those with higher levels of self-rated knowledge to actively seek out information about horse sports but they did have some awareness of the availability of that information (Figure 15). Over a third of respondents who had never interacted with horses cited news on the television as their primary source of information, with the second most frequent response being that they do not get information on horse sports (Table 2). When asked whether the information they see on horse sports generally portrays these sports in a positive or negative light, those who had never interacted with horses were more inclined to be neutral (45%) than positive (40%) or negative (16%).

The majority of survey participants stated that they had 'some experience with horses in the past' (n = 2,686; 51% of total cohort). The term experience is self defined by the respondent and unable to be quantified. Over half of this group (54%) rated their level of knowledge as 'some', 'very much', or 'extensive', with 38% stating they had 'a little knowledge'. A little over a quarter of respondents indicated that they actively seek out horse sports information, but again acknowledged that information as being readily available (Figure 15). Those with some experience cited family or friends and television news as their top two information sources (Table 2). Compared with those who had never interacted with horses, a higher proportion of respondents (55%) agreed that the information they see portrays horse sports in a positive light (32% neutral; 14% negative).

In contrast to the groups above, those who had occasional, recent experience with horses (n = 952; 18% of total cohort) rated themselves as more knowledgeable (83% 'some', 'very much', or 'extensive' knowledge) and more inclined to actively seek information about horse sports (Figure 15). Where those who had never interacted with horses and those with some experience cited television news as their main source of information, those with recent experience obtained most of their information about horse sports from friends or family or direct internet searches (Table 2). When asked whether the information they see on horse sports was positive or negative, a higher proportion of those with recent experience agreed that the information was positive (72%) than negative (10%).

Following this trend, those who had regular experience with horses (n = 326; 6% of total cohort) rated themselves as the most knowledgeable of the four categories, with 93% rating their level of knowledge as 'some', 'very much', or 'extensive'). Those with regular experience were the most inclined to actively seek information on horse sports and find that information readily available (Figure 15). Unlike the other experience categories, the second most used source of information for those with regular experience was horse and/or animal charities, with direct internet searches topping the list (Table 2). 79% of respondents within this category believed the information they saw on horse sports portrayed them in a positive light.
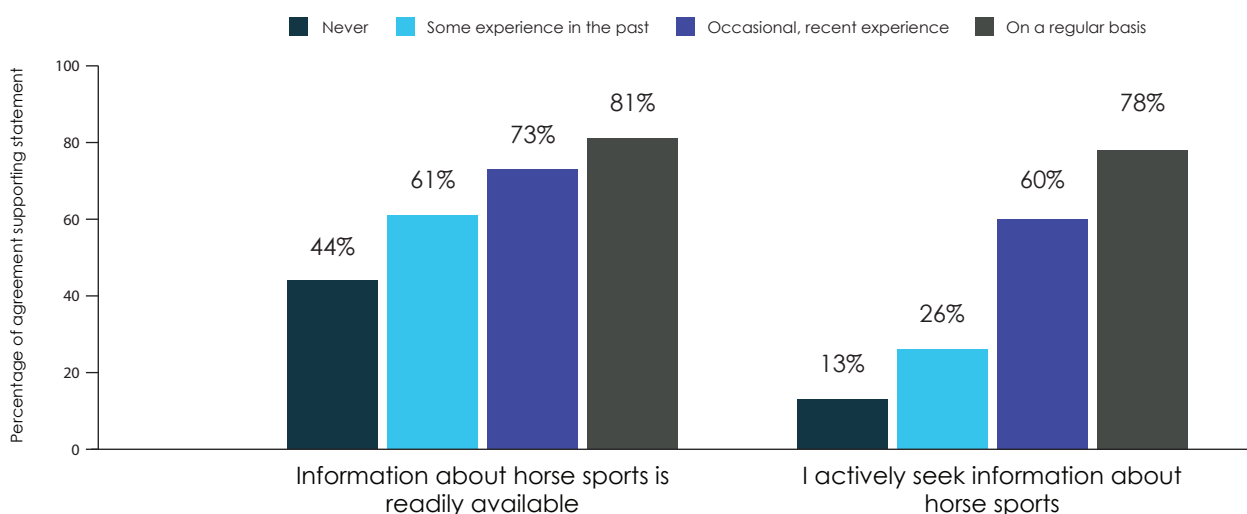
Figure 15: Percentage of agreement with horse sport information statements, split by level of interaction with horses in the UK.

Experience of interacting with horses (N=5,236)	Sources of information about horse sport	
	Primary	**Secondary**
Never (n=1,273)	Television - news (34%)	I don't get any information about horse sports (24%)
Some experience in the past (n=2,686)	Friends and family (40%)	Television - news (38%)
Occasional, recent experience (n=952)	Friends and family (49%)	Direct internet searches (43%)
On a regular basis (n=326)	Direct internet searches (50%)	Horse / animal charities (48%)

Table 2: Sources of horse sports information in the UK, split by experience with horses.

In summary

These perceptions of positive and negative portrayals of information about horse sports across demographics suggest that those with little experience with horses or horse sports, as well as those with little contact in the industry are more attuned to negative portrayals of horse sports or feel neutral towards the information they do see. Industry may want to consider targeted, educational television campaigns geared towards those with less experience of interacting with horses. It is also important to recognise that participants in our surveys generally – and increasingly with greater direct interaction with horses – feel that the information they see in the media is positive. Very often, industry bodies feel as though all press about their industry is negative, creating a defensiveness and exaggerating an instinct to communicate harder, more positively. These data suggest that the greater the connection with horse sports, the lesser the impact of external communication stimuli on their point of view.

Impacts and benefits

Economic benefits

> *Horse sport is a great tool for economic and cultural improvement.*
> *– 2024 survey participant.*

A key metric of community trust and acceptance research is gauging the extent to which community members feel as if they receive a fair share of the benefits provided by the industry– this is known as distributional fairness. When asked to rate their agreement on whether they felt that people like them, or their community, received a fair share of the benefits of horse sports, overall disagreement was higher than agreement for both statements ('people like me': 42% disagreement, 26% agreement, 32% neutral; community: 36% disagreement, 28% agreement, 36% neutral) (Figure 16).
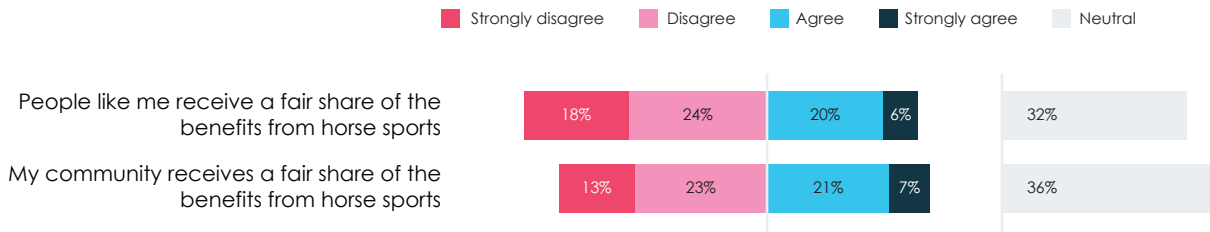

Figure 16: Distribution of scores on distributional fairness of horse sports in the UK.

The UK public was more positive when it comes to the economic benefits that horse sports provide. When asked whether horse sports' social investment activities have made a positive impact on their community, 38% agreed, although a high proportion (41%) responded neutrally to this question. 73% of respondents agreed that horse sports attract visitors from outside the local area. More than half of respondents (55%) agreed that horse sports contribute significantly to the UK's economy and 60% of respondents agreed that horse sports generate significant employment opportunities in the areas in which they are based.

Survey participants were asked to rate their level of agreement with items related to workers within the horse sports industry (Figure 17). With half of all participants responding neutrally to two items ('workers in horse sports are paid a fair wage for their work' and 'exploitation of workers is a serious problem in horse sports'), it is evident that the industry could do more to create awareness of positive working conditions within horse sports.
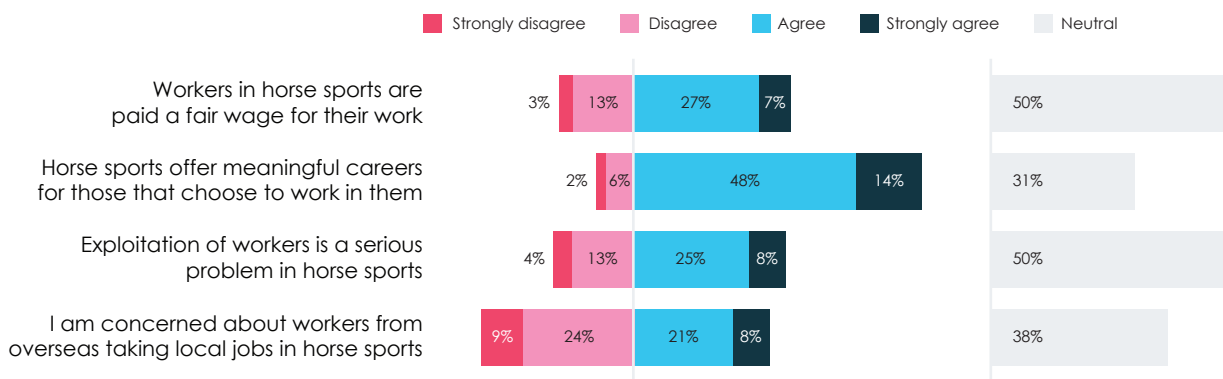

Figure 17: Distribution of scores on workers in horse sports in the UK.

Overall, 38% of survey respondents indicated that the costs of horse sports outweigh its benefits, with 35% stating costs and benefits are about equal, and 27% agreeing that the benefits outweigh the cost of horse sports (Figure 18).
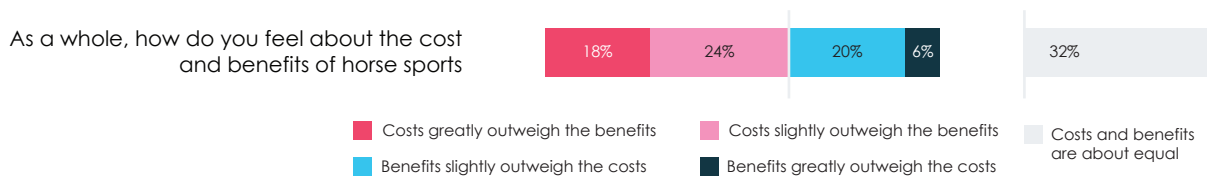

Figure 18: Distribution of scores on cost and benefits of horse sports in the UK.

Environmental impacts

The UK public hold a positive sentiment towards the environmental impacts of horse sports. When asked if horse sports have a negative impact on the environment, 41% of respondents disagreed, compared to 23% who agreed (36% neutral). In addition, 42% of respondents agreed that horse sports manage their environmental impacts effectively, although a high level of neutral responses to this item (46%) may indicate a lack of knowledge by the wider public on measures taken by the industry in their environmental management practices.

> *Horse racing should not cause harm to the environment and horses must be well taken care of behind the scenes for those who own horses and use them actively in racing.*
> *– 2024 survey participant.*

When asked if horse sports use more water than they are entitled to, 40% of participants disagreed. While only 38% of people responded neutrally, there may be further opportunity here to build community knowledge. Waste management yielded similar results. When asked if horse sports should be doing more to manage waste (such as reducing waste and diverting landfill waste to recycling), 43% of participants agreed, with an equal proportion (43%) responding neutrally.

Carbon emissions from horse sports also present an area of opportunity. More than half of participants responded neutrally to the question 'horse sports responsibly manage carbon emissions resulting from the long-distance travel of horses and personnel' (Figure 19). When asked if they were concerned about the carbon footprint associated with long-distance transport of horses and personnel, just over a third of respondents (34%; Figure 19) agreed, with 36% responding neutrally.
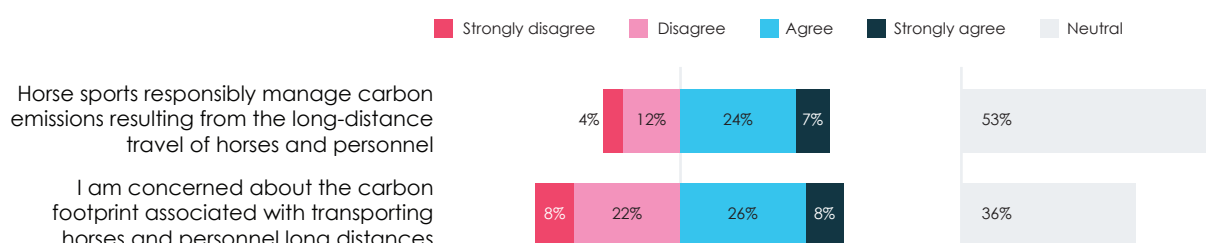

Figure 19: Distribution of scores on statements about carbon emissions of horse sports in the UK.

Respondents were more certain on questions regarding land use. When asked whether the use of land for keeping and competing horses helps protect it from urban development, 60% agreed. Furthermore, 39% of participants disagreed that spaces occupied by horse sports facilities could be better used for other purposes that benefit the community, such as affordable housing, parks or recreational facilities, with 27% agreeing with this statement and 34% remaining neutral. Industry should capitalise on this sentiment and highlight land use as a positive value of horse sports.

More than half of respondents (55%) agreed that economic sustainability of horse sports should not come at the expense of environmental management. There was some acknowledgement that horse sports are working to protect the local environment, with 38% of respondents agreeing or strongly agreeing when asked, but a higher proportion (47%) responded neutrally. These findings suggest that effectively engaging the community on areas of environmental impact and responsibility is key to building a stronger relationship. Sustainability reports that are communicated effectively to the community could help reduce the potential risk that waste management poses to the industry, as well as build community knowledge on water, carbon emissions, and land use management practices.

Cultural differences in perception

Demographic differences

In this research, participants were asked to describe themselves using multiple demographic characteristics. The key trust model components were then examined for each group and the consistent demographic patterns in these data are described below.

It is important to note that several demographic sub-categories did not have large enough participant numbers to provide statistically valid comparisons, even though large differences were observed. For example, only 121 participants identified as Arab and while the scores of these individuals were often significantly different to people of other ethnicities, their results were not included for analysis.

Across the seven drivers of trust and acceptance in the model, the greatest and most consistent differences among groups were observed for age, gender, ethnicity, and dietary preference. Location (urban vs rural vs mixed urban and rural) also featured in several variables as a meaningful comparison.

Location

Figure 20 highlights the three trust questions split by residential environment in the UK. The environments identified in this grouping were urban (60% of respondents), rural (19%), and urban/rural mixed (21%). When asked 'do you trust horse sports to act responsibly?', the urban group responded the most positively (Mean=3.11) followed by the rural group (Mean=2.92) and then the mixed group (Mean=2.82), with the difference between the urban and rural groups being statistically significant. This trend continues across other areas related to trust (see Figure 20), highlighting the strong positive regard that those in urban areas (cities and towns) have for horse sports compared to their counterparts who live in less urban locations. Interestingly, this trend is the reverse of what we see in rural industries in Australia, where proximity to the activity or community relates positively to trust in that rural industry.
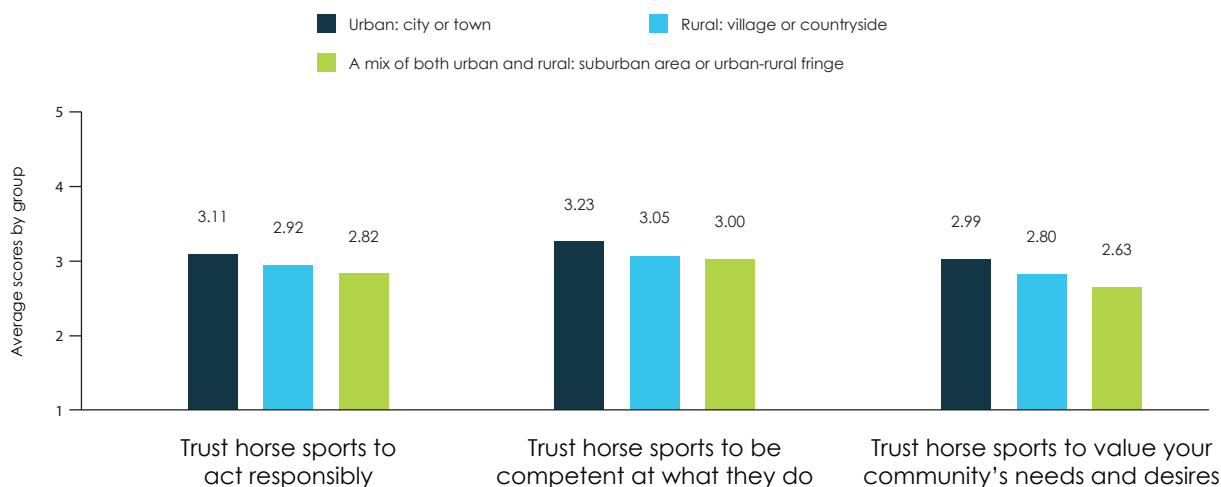

Figure 20: Average scores on trust in horse sports, split by area demographic.

Age

A fascinating pattern emerged across age groups on most measures within the seven drivers. The highest scores recorded (i.e., most positive/least negative, depending on the item) were most often found among 25–34-year-olds (17% of respondents). The youngest cohort (18–24 years, 12% of respondents) was usually less positive than the 25–34-year-olds and scores became consistently more negative as participant age increased beyond this. Figure 21 illustrates a typical pattern (those aged 65+ years have been excluded due to high error margin).
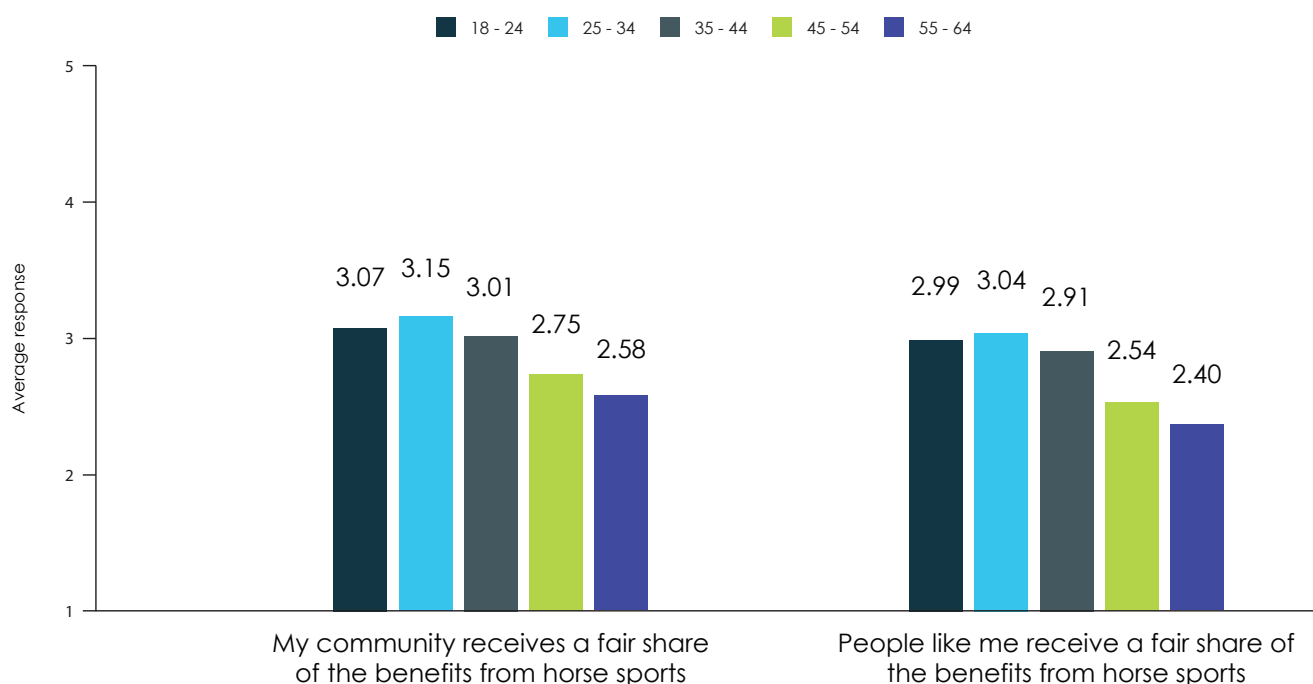

Figure 21: 'Distributional fairness' driver items, by age.

This is unusual in the context of other rural industry research conducted by Voconiq, where higher, more positive scores relating to rural industries are observed among older age cohorts. In fact, this pattern is almost the reverse of what is most frequently observed in an Australian rural industry context.

A similar trend emerges in the concern for horse welfare in different contexts (Figure 22). The data indicate that younger age groups, particularly those aged 25-34, show the highest levels of concern for horse welfare across different contexts, including sports, recreational riding, and as pets/companions. This concern tends to decrease as the age of the respondents increases. Interestingly, while the 45-54 and 55-64 age groups express slightly lower concern for horse welfare in specific contexts, they return the highest scores on the belief that "horse welfare is a complex issue," with average scores of 3.76 and 3.72, respectively, suggesting a nuanced understanding of the subject.
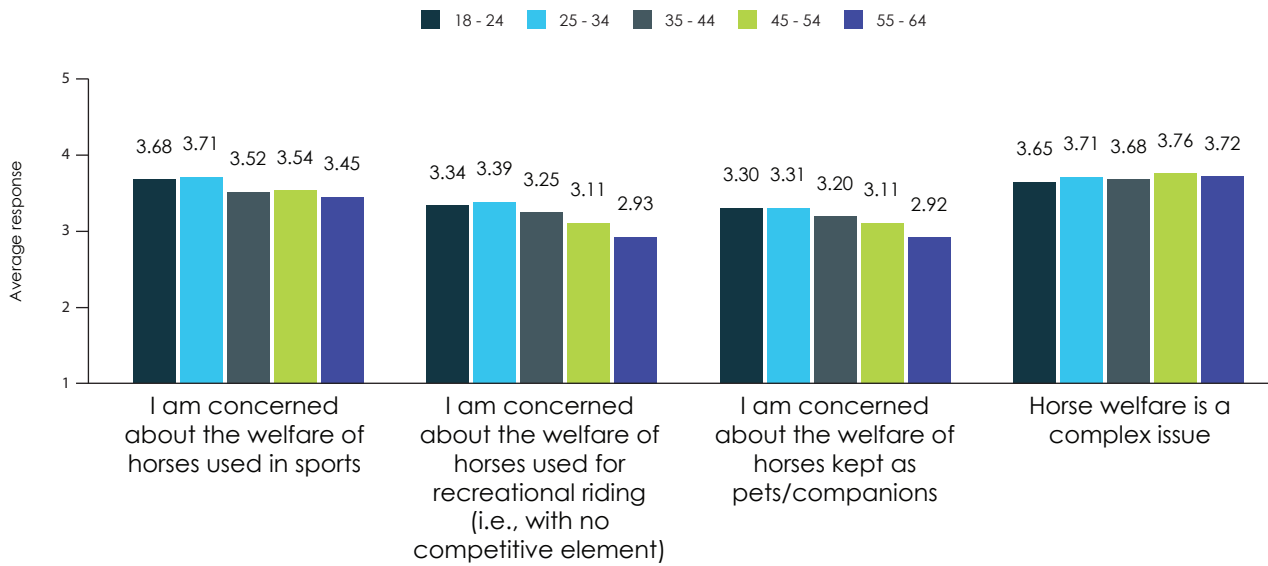
Figure 22: Concern for horse welfare measures, by age.

Younger cohorts (18–24 and 25–34 years) are generally more positive about the transparency of horse sports regarding injuries and fatalities, whereas older age groups (45–54 and 55–64 years) are more sceptical (Figure 23). The 55–64 age group is particularly negative about the acceptability of horses being injured or dying in sports, even when safety measures are in place. They are also the most supportive of making horse sports safer, even if it means reducing the traditional difficulty or challenge. Younger participants (18–24 years) are the most opposed to breeding horses specifically for sports, while those aged 35–44 (21% of respondent population) are the most supportive. This suggests a potential generational shift in attitudes towards the ethical considerations of breeding animals for competitive purposes.
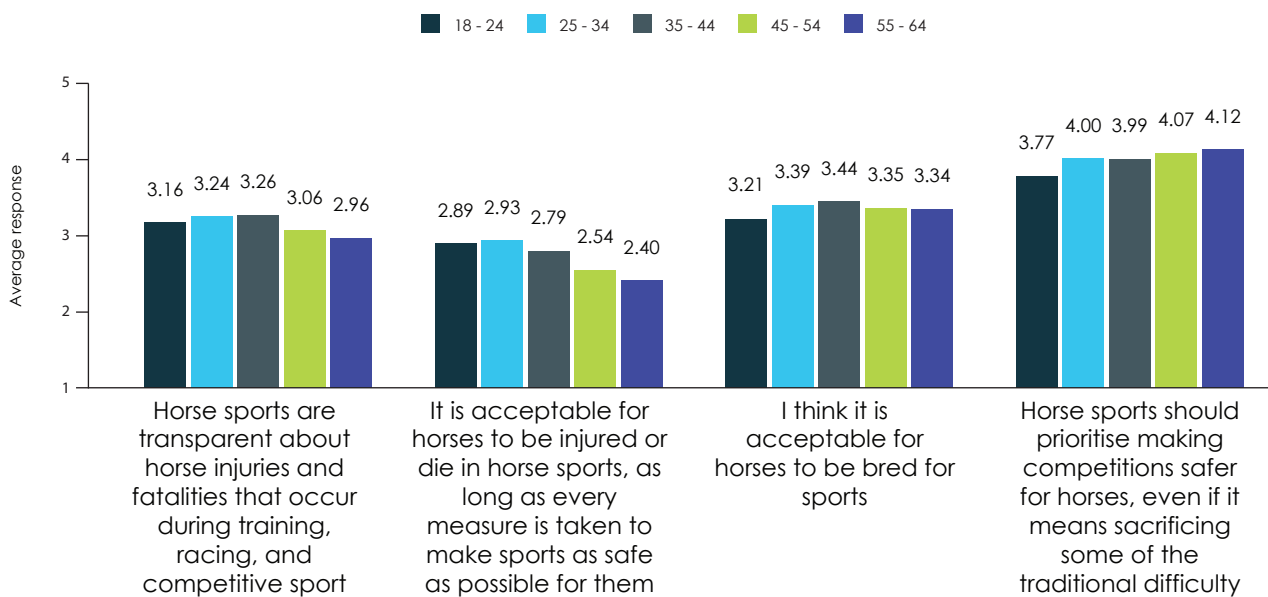

Figure 23: Horse welfare measures, by age.

The data reveal notable generational differences in attitudes towards horse welfare, particularly in the context of sports and recreational activities. Younger age groups, especially those aged 25–34, exhibit the highest levels of concern for horse welfare, while concern generally decreases with age. However, older cohorts (45–54 and 55–64 years) demonstrate a more nuanced understanding of the complexity of horse welfare issues, despite being less concerned overall. There is also a clear divide in opinions on the transparency of horse sports, with younger respondents being more positive, while older respondents express greater scepticism and a stronger desire for prioritising horse safety, even at the cost of traditional sport challenges. These findings suggest a potential generational shift in how horse welfare is perceived and addressed, which may have implications for how engagement strategies are tailored across different age groups.

Gender

On gender, a very typical pattern emerged across most items for most drivers. Participants identifying as men (who represented 50.5% of the respondent population) were found to be significantly more positive than those identifying as women (49.1%). We see this same pattern across many industries, including rural industries, resource extraction industries, and renewable generation and transmission industries. Figure 24 illustrates this pattern (non-binary and 'prefer not to say' categories have been excluded due to high margin of error). Even larger differences than those shown below were observed on trust (Male 3.16, Female 2.86) and acceptance (Male 3.43, Female 2.95).
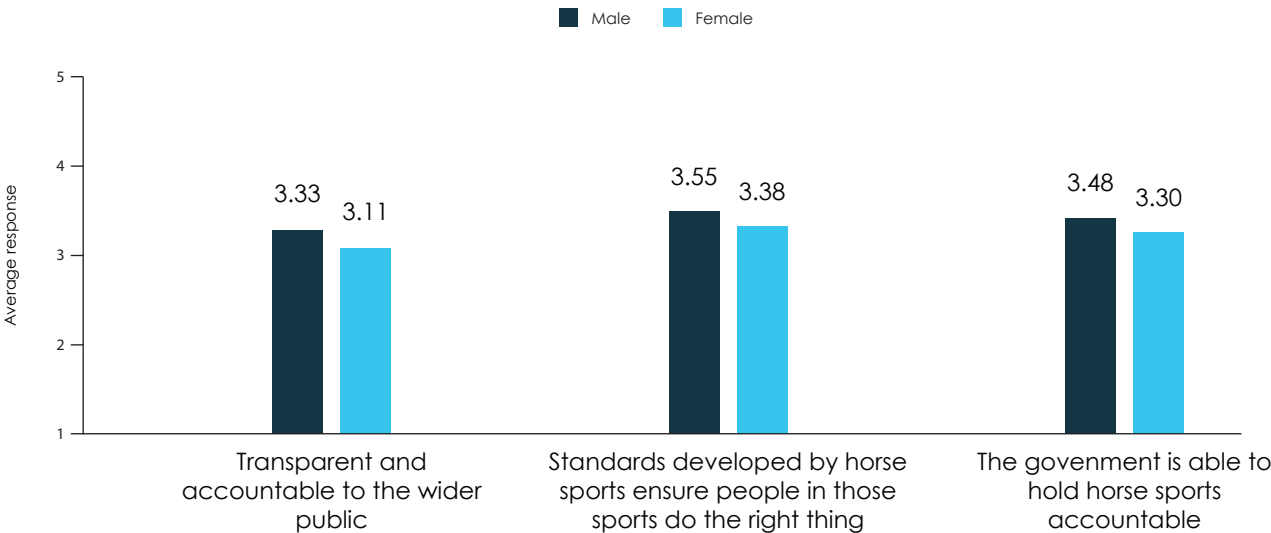

Figure 24: 'Confidence in regulation' driver items, by gender.

Ethnicity

Across all drivers, the most consistent pattern was that those participants identifying as Black/African/ Caribbean/Black British (who represented 5% of the respondent population) were significantly more positive/less negative than those identifying as White (85%). On several driver measures, those identifying as Asian/Asian British (6%) were of similarly positive sentiment as those identifying as Black/ African/Caribbean/Black British. Those of mixed/multiple ethnic groups (3%) were often the least positive/most negative on driver measures. Figure 25 illustrates a typical response pattern (Arab and 'prefer not to say' categories have been excluded due to high margin of error).
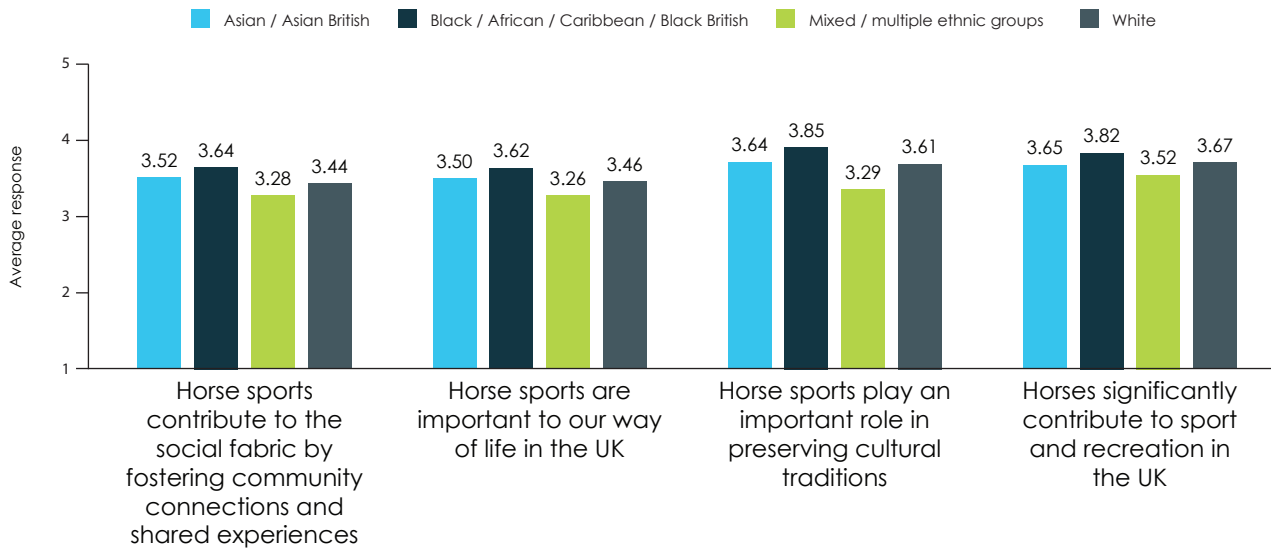

Figure 25: 'Horse sports are socially important' driver items, by ethnicity.

This trend continues when looking at measures of horse welfare (Figure 256). Those who identified as Black/African/Caribbean/Black British were more positive/less negative than any other ethnic group regarding the transparency of horse sports about equine injuries and deaths, as well as the acceptability of breeding horses for sport. Asian/Asian British participants again held similar scores to Black/African/Caribbean/Black British respondents on these measures. Those of mixed/multiple ethnic groups were least positive/most negative on these measures. Those who identified as White returned the highest average score on the measure 'horse sports should prioritise making competitions safer for horses, even if it means sacrificing some of the traditional difficulty or challenge of the sport', followed by those of Black/African/Caribbean/Black British heritage.
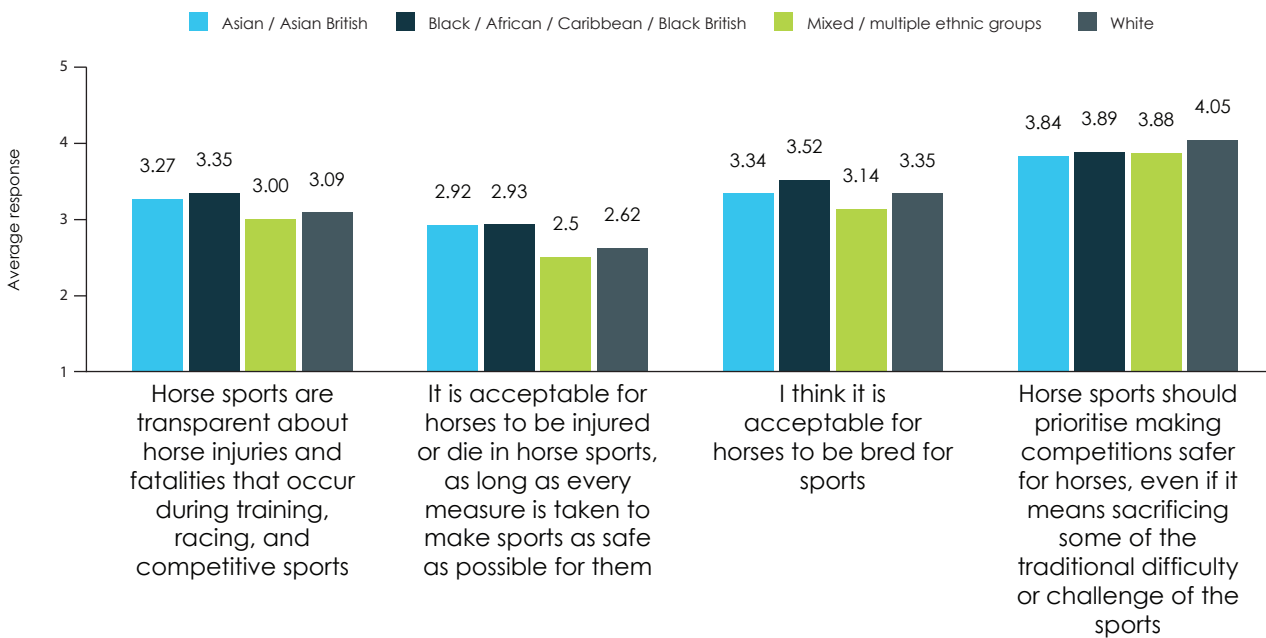

Figure 26: Horse welfare measures, by ethnicity.

All ethnic groups scored similarly on their concern for the welfare of horses used in sports and the measure 'horse welfare is a complex issue' (Figure 27). Those who identified as Asian/Asian British and Black/African/Caribbean/Black British were more concerned about horses used for recreational riding, as well as the welfare of horses kept as pets or companions than those who identified as mixed/multiple ethnic groups or White.
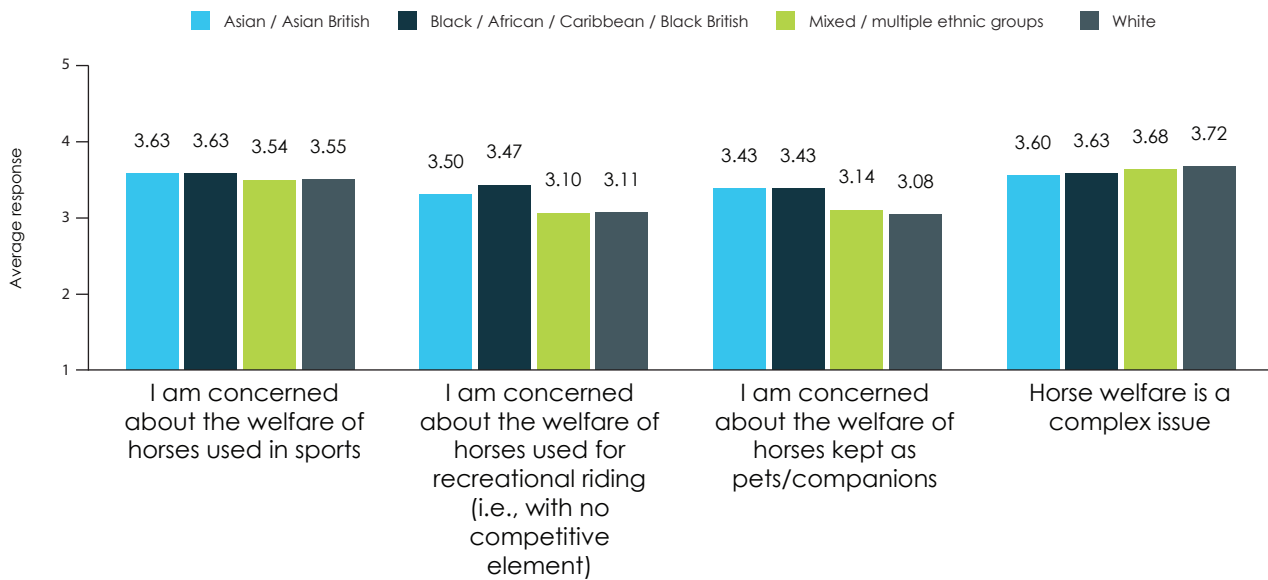

Figure 27: Concern for horse welfare measures, by ethnicity.

Dietary preference

We asked participants to select their dietary preference on a number of dimensions. Most relevant here were the distinctions among those identifying as vegan (3% of respondent population), vegetarian (7%), pescatarian (3%), flexitarian (13%), and omnivore (71%). In contrast to the other demographic characteristics, the pattern of responses by groups was not consistent across all drivers from the trust model. For example, on the environmental impacts driver of acceptance, the less animal product a participants indicated they consumed, the more negative they were in their evaluation of horse sports (e.g., see Figure 28). However, on other drivers such as distributional fairness, procedural fairness, the importance of horses in British culture, and confidence in governance, once the margin for error had been taken into account, there were only modest differences among groups (e.g., see Figure 29).
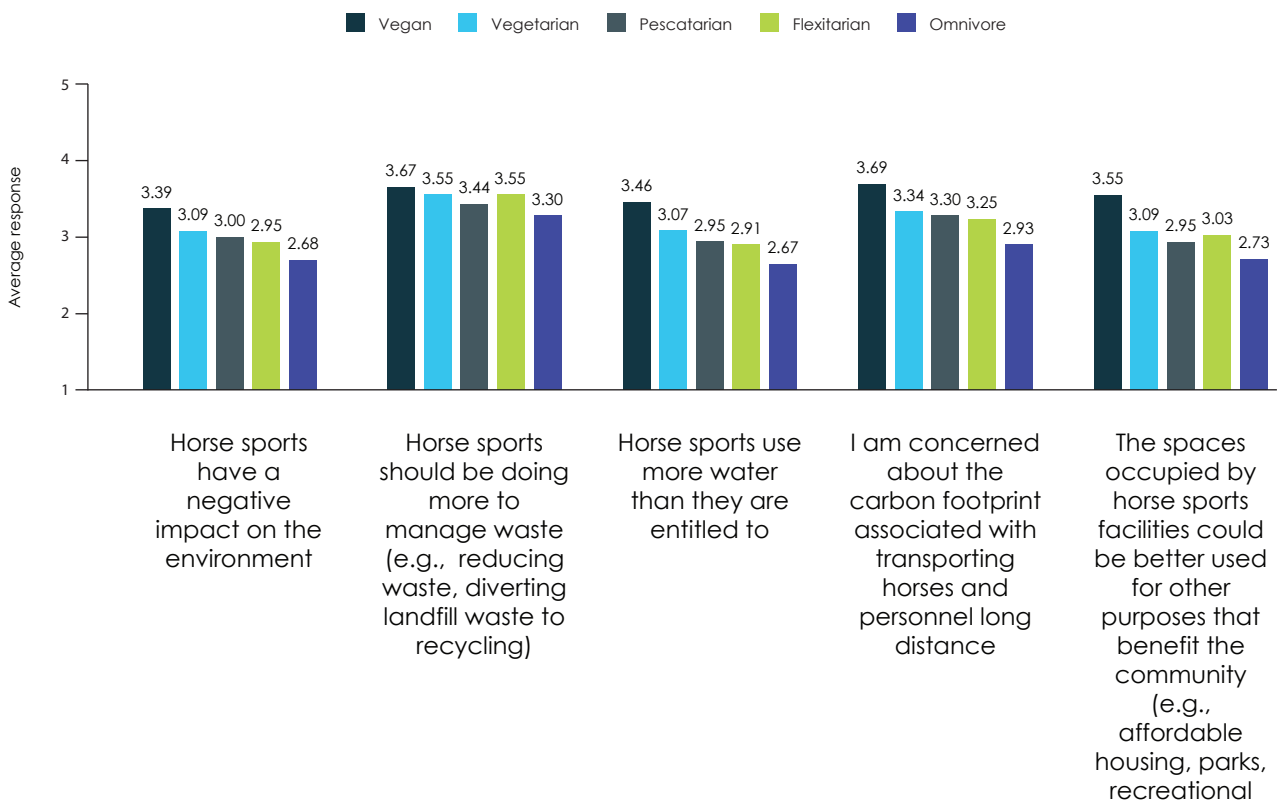

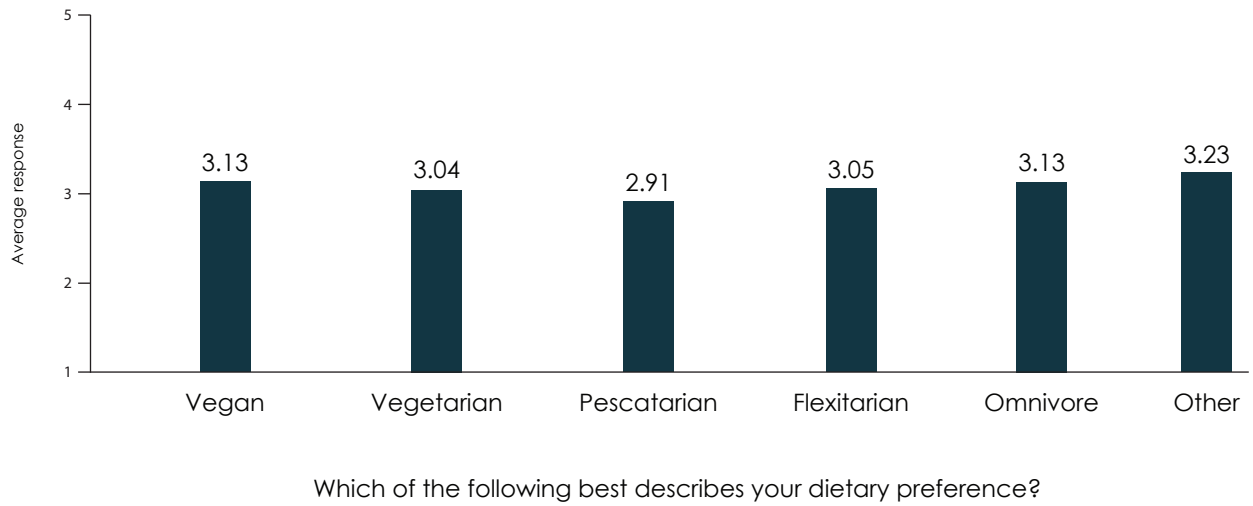Figure 28: 'Environmental impacts' driver items, by dietary preference.

Which of the following best describes your dietary preference?

Figure 29: Average responses to 'Transparency about injuries', by dietary preference.

Reflections and recommendations

Reflections

The research conducted provides a comprehensive understanding of the current state of public sentiment towards the UK equestrian industry and has highlighted multiple positive and negative features of the sport. The ability of all industry stakeholders to respond to these is key to ensuring that a robust relationship is built with the public.

The research findings highlight several critical areas that need attention to improve the industry's social licence. These key drivers of trust and acceptance include social importance, procedural fairness, transparency, confidence in regulation, distributional fairness, and the breeding and environmental impacts associated with horse sports. Many of these drivers are underpinned by equine welfare – a concept that plays a significant role in shaping trust. Additionally, the social importance of horse sports in the UK features significantly in the pathway to greater community trust.

Identification and quantification of these drivers represents an opportunity for equestrian sport to move forward in its journey towards greater public acceptance. However, despite these opportunities, the industry faces challenges related to perceived elitism, accessibility barriers, and the need for improved communication and engagement strategies. The neutral responses in the survey indicate both a risk and an opportunity. Neutral responses represent a substantial portion of the public that could be swayed towards greater trust and acceptance with better information and engagement efforts.

Recommendations

Based on these reflections, we present the following recommendations for the UK equestrian industry:

1. Demonstrate and promote competence, humanity, and integrity

The modelling has shown that trust is at the centre of community acceptance of horse sports in the UK. There are three dimensions of trust that are of greatest relevance to the relationship between industries and the broader community: competency, integrity, and humanity. We recommend considering these three dimensions of trust as a lens through which to review existing and future policy choices, investment decision-making, and communication efforts.

2. Be accountable

It is clear that the community expect horse sports to hold their participants accountable when looking at regulation and welfare measures. Taking ownership of accountability is key for horse sports to build their social licence. It is also an important way to ensure that horse sports retain control of their future; severe external sanctions and increased formal regulation are more likely when public trust is degraded.

This research has shown that the community has substantial concerns about the welfare of horses in sport, is focused on improving the safety of the sport, uncompromising in its views about euthanasia, and deeply uncomfortable with any actions that intentionally expose horses to perceived harm (e.g., the use of whips or spurs). Horse sports should consider the following, as appropriate for each sporting context:

- Identifying new or enhancing the accessibility of existing mechanisms for transparency, accrediting frameworks for the treatment of horses involved in horse sports,

- Reviewing, articulating, and enforcing criteria and penalty frameworks for sanctions, should standards be breached,

- Providing training for those who breach standards,

- Articulating and/or reinforcing existing expectations regarding whole of life care responsibilities for horses involved in, or bred for the purpose of, horse sports participation,

- Developing governance capacity within small or amateur horse sports to support consistent application of standards and rules for horse welfare,

- Investing in research and development to reduce the number of horses bred for horse sports that do not meet acceptable standard for use in these contexts,

- Assessing the culture within horse sports regarding horse welfare and acting to improve the consistency between principle and practice in the treatment of horses by all people working or participating in these industries.

- Providing (and frequently updating) education for equestrian stakeholders on a wide range of welfare-related issues; this education could be mandatory or discretionary, depending on the context.

3. Embrace (controlled) vulnerability

Building trust requires being vulnerable in ways that demonstrate trustworthiness to community members. First, we recommend considering a review of what information is currently shared with the public across horse sports on material issues such as horse welfare, and the form in which it is shared. This information may be assessed within a trust framework (i.e., does the information speak to competency, integrity, and humanity?), with reference to standards and practices already agreed within individual horse sports, and in terms of accessibility to the public (i.e., is the information understandable to a lay audience, available through mediums that are easy to find, and formatted to support readability for a diverse audience?).

Second, we suggest considering enhancing transparency through regular audit processes of horse safety and welfare practices. Ideally, these reports would be made public and delivered on a regular schedule. In its most evolved form, inviting an independent third party to conduct these audits and/or reviews would provide credibility to the process.

The process of (self)assessment has two benefits: it develops comfort within horse sports with the concept of increased vulnerability and it creates greater levels of confidence (both internally and externally) in internal governance mechanisms. Embracing vulnerability is fundamental for building trust because it demonstrates to external parties that you are trustworthy.

4. Develop clear narratives around horse fatalities

Creating a transparent and empathetic narrative around horse injuries and fatalities is essential. This involves using existing research on communication of animal deaths (both within animal industries and in sports) to shape how these narratives are articulated. This ensures that the industry is transparent about its realities, while also highlighting the measures being taken to protect horse welfare, such as the current work understanding the causes of injuries and fatalities in horse sports. Approaching this with empathy and transparency can demonstrate to the public that the industry is committed to the ethical treatment of horses. Proactive communication can help mitigate negative perceptions and foster a more positive relationship with the public. Hiding uncomfortable truths from the public will have significant negative impacts on trust and undermine how other communication and engagement efforts are viewed; cynicism undermines the capacity to build trust.

5. Emphasise best practice welfare

Aligning welfare practices with the values and expectations of different demographic groups, especially younger generations, is essential. This requires conducting detailed trend analyses to understand what these groups prioritise and value. To ensure the effectiveness of welfare improvement strategies and messaging, it is important to conduct A/B testing. This involves testing different approaches to welfare improvements and communication strategies on a smaller scale before rolling them out more widely. By identifying which strategies resonate best, the industry can implement the most effective practices and messages.

Investing in and showcasing ongoing welfare improvements can enhance the industry's reputation and strengthen its social licence. Horse sports must demonstrate responsiveness to community concerns through evidence-based actions and long-term initiatives that align with public sentiment such as considering the trade off between athletic challenges and horse (and rider) safety. Successful examples from other industries, such as the Australian egg industry, highlight the importance of transparency, investing in tangible welfare improvements, and publicly reporting these efforts as part of broader sustainability initiatives. This model can serve as a valuable guide for the horse sports industry.

Additionally, a key finding from this work is the universal recognition, across all age groups, that horse welfare is a complex issue. This presents an opportunity for the equestrian community to engage the public in discussions about the complexity of equine welfare and the multi-layered approaches already in place to protect horses.

6. Highlight social value and economic contributions

The path model shows that the social importance of horse sports was the most important driver of trust, and a significant direct driver of acceptance. In response to this, we recommend considering creative ways to emphasise the social and economic benefits of horse sports to the British public. There is an opportunity, for example, to draw on the qualitative data from the key stakeholder interviews to explore opportunities present in the community sentiment survey data and open-comment responses.

First, the views on most issues within community are significantly more positive among those that have had any direct interaction with horses. This is consistent with the power of these interactions described by the interview participants. We recommend seeking ways to facilitate direct, simulated, or inferred (e.g., through imagery or other means) contact with horses in engagement activities with community members, adapted to a sporting context.

Second, we recommend leveraging the cultural significance of horse sports within modern British identity by connecting them to the values associated with the British countryside. The data suggest that many survey respondents view horse sports and the UK landscape as inherently linked. Horses are often associated with rural landscapes, creating a unique opportunity to align the cultural values of the countryside with those of horse sports.

This approach should focus on reflecting contemporary cultural values that resonate with today's society rather than relying on nostalgia, which could evoke outdated or problematic historical associations. By doing so, the industry can strengthen its connection to modern British cultural identity while promoting horse sports in a positive, forward-looking manner.

Two examples are provided for the practical application of these ideas:

1. Promoting Sustainable Practices in Horse Sports

Develop and promote initiatives that emphasise sustainability in horse sports, such as eco-friendly event planning, conservation of rural landscapes, and responsible land use. For instance, horse sports events could partner with local conservation groups to restore and protect countryside areas used for competitions. This could include activities like planting native trees, maintaining trails, and preserving natural habitats. This aligns with the growing societal emphasis on environmental stewardship and sustainability, values that resonate strongly with contemporary British society, especially in relation to the countryside.

2. Community Engagement Through Rural Heritage Events

Organise community events that celebrate the shared heritage of horse sports and the British countryside. For example, hosting open days at equestrian centres where the public can experience horse riding, learn about the history of horse sports in the UK, and participate in rural traditions such as countryside walks or local craft fairs. These events can be designed to highlight the ongoing relevance of horse sports in the countryside, not just as a historical tradition but as a vibrant part of modern rural life.

This approach fosters a sense of community and connection to the countryside, appealing to the social value placed on preserving and enjoying rural heritage in a contemporary context.

Third, horse sports contribute to local and national economies in multi-faceted ways. We recommend broadening public understanding of the type and breadth of livelihoods embedded within horse sports beyond those that are most visible. This serves multiple purposes:

- Directly linking the public expression of horse sports with the broad economic base it supports within local communities that provide labour and expertise for these equestrian industries,

- Aiding in creating greater transparency within horse sports,

- Providing context for the complexity of horse welfare through the eyes of those that practically manage welfare practices and considerations 'behind the scenes',

- Supporting greater understanding within horse sports of the career pathways available for workforce participants – a key challenge within most agricultural and rural industries.

Fourth, there is an important role for horse sports to play in communicating the economic and amenity value of horse sport facilities across the UK. Improving community understanding of this value in its many guises helps to defend against interests seeking to reclaim such land for other 'social good' purposes now or in the future.

This recommendation may also be leveraged to address perceptions of elitism (which is discussed further below) by opening up the use of such facilities for broader public access and use, where appropriate.

7. Engage neutral respondents and increase public engagement

Neutral responses often indicate a lack of information or engagement. This represents both a risk and an opportunity for equestrian industries. Community members who do not hold a strong view on aspects of horse sports may be more susceptible to influence by both horse sports themselves and by critics of these industries.

To address this, we recommend horse sports focus on providing targeted information and engaging these individuals through various channels. This should be adopted as a cross-sector approach to maximise impact. Outreach programs, informational campaigns, and community engagement initiatives can help turn uncertainty into informed support.

By actively engaging with the public and providing clear, concise, and relevant information, the industry can foster a more informed and supportive community. A key finding in this work has been the power of any form of contact with horses in shaping people's views. Finding ways to expose more people to this experience, whether through in-person events, virtual reality experiences, or interactive online content, is a clear opportunity to shift neutral responders. For example, organising open days at stables (such as the activities currently undertaken during National Racehorse Week),

creating virtual tours of horse sports facilities, or developing educational content that highlights the benefits and joys of horse sports can significantly enhance public engagement and shift neutral opinions to positive ones.

8. Address perceptions of elitism and enhance accessibility

The perception of horse sports as elitist, combined with high entry costs and long waitlists at riding schools, significantly impact wider acceptance and participation. To counter this, the industry should highlight and promote stories that break down these perceptions and focus on initiatives that make horse sports more accessible. This includes addressing cost barriers by showcasing affordable entry points and community programmes and seeking to create more of these opportunities. Sharing success stories of diverse participation in horse sports can also help change the narrative. By making horse sports more inclusive and accessible, the industry can attract a more diverse audience and foster a more positive public image. This does also bring risk regarding the conditions of employment for many who work in horse sports. However, recognising workers' service, career pathways, and contributions to wider social ideals such as the UK's growing cultural diversity may counter narratives of exploitation or low paid roles.

In addition, there is value in considering how all horse sports fit together in a single meta-narrative. For example, Formula One motorsport celebrates its elitism and aspiration within a context of familiarity with vehicles. Horse sports may consider how different sports reflect different utility for the public. For example,

positioning polo and Thoroughbred racing as elite athletic expressions of the relationship between horse and human within a context of gentler, more accessible interactions with horses through Pony Club or other activities may make 'elite' horse sports more acceptable. Helping community members to experience the power of interactions with horses may help them to admire the skill and athleticism of some horse sports in the same way that amateur race car or karting drivers can connect to Formula One drivers through appreciation of the skills involved.

9. Clarify and enhance internal communication on recommendations

Clearly outlining the plan for integrating recommendations into internal reports and communications is crucial. This involves drafting the recommendations and contextualising them culturally and socially. For example, in the context of horse sports like racing, it is important to detail how spectator experiences can be curated to align with key values and traditions.

This can be achieved by implementing community feedback sessions to gather input on improving spectator experiences, using case studies from other sports to illustrate successful implementations, or developing a visual roadmap that outlines the steps for integrating recommendations into current practices. By clearly communicating these plans, stakeholders can better understand the rationale behind the recommendations and how they fit within the broader social context of horse sports in the UK.

This clarity may help to gain buy-in from stakeholders and ensure a cohesive approach to implementing changes.

10. Develop awareness on euthanasia and ethical treatment

Given the near-unanimous views on euthanasia, it is clear that the public sees horses as more than commodities. This underscores the importance of humane treatment and management practices. The industry may address this in two important areas.

Firstly, by launching an educational campaign to build community knowledge about how horse sports work, emphasising the humane aspects of these practices. Demonstrating that horses are being bred responsibly is central to this, as seen in the path model. While lineage is an important factor in the breeding of horses for sports, highlighting genetic factors that contribute to robust equine health may alleviate community concerns around welfare Showcase investments made in breeding programmes that aim to produce horses that are more likely to succeed in sports, and thereby reduce the number of horses that do not meet performance standards and face euthanasia.

Secondly, creating content that takes the public behind the scenes of horse sports, similar to popular shows like "Clarkson's Farm", can help the community understand the decisions and challenges involved in horse sports. This approach may foster a deeper and more human connection with the realities of the industry, helping the public appreciate the complexities and humane practices involved in horse sports.

This also leverages a key finding of this research – that people who have had any contact with horses feel much more positive about horse sports than those that have not. Simulated closeness with horses, horse sports, and – importantly – the practices that underpin horse sports will support greater empathy for the realities of the sports and the necessity of euthanasia in some contexts.

11. Decide on public vs. internal use of data

Determining the extent to which research data should be made public is an action that can influence public trust. By developing a clear communication plan that balances transparency with the need for internal improvements, the industry can demonstrate its commitment to accountability and continuous improvement. Sharing portions of the data publicly can enhance trust, while using the data internally can inform sector-wide actions and decisions. For instance, publishing summary reports that highlight key findings and actions taken, while keeping detailed data for internal analysis, has been useful in striking the right balance for other Voconiq customers.

12. Engage with stakeholders

Presenting research findings at key internal meetings (such as the annual Horses in Society meeting) and external, public conferences is an effective way to gather feedback from stakeholders and inform future action. By sharing insights and data, the industry can engage with stakeholders, answer questions, and build a collaborative approach to addressing challenges. Ongoing dialogue is crucial for maintaining open communication channels and ensuring that actions are aligned with stakeholder expectations and public sentiment.

There is value in helping people within horse sports become more accustomed to the feeling of vulnerability that comes from transparency; it is a skill that must be practised. Growing familiarity with the difficult issues, in the context of the many positive features of public sentiment regarding horse sports, will support this goal. Regular stakeholder meetings, workshops, and public forums can be used to practise and improve transparency and build a stronger relationship with the community.

13. Engage with veterinarians and welfare groups

Partnering with trusted equine veterinarians and welfare groups can significantly enhance public education efforts. These groups are often more trusted than the industry itself, making them valuable allies in communicating welfare practices and addressing public concerns. They also serve as strong independent voices in the welfare space, providing support for changes in practice. By leveraging their credibility, the industry can enhance public understanding and trust in its welfare practices, building a more positive relationship with the community. Joint campaigns, public endorsements, and collaborative research projects can showcase this partnership and its benefits.

14. Conduct further research

Continuing research to understand public attitudes and refine activities is essential for ongoing improvement. By identifying specific public concerns and addressing them through targeted initiatives, the industry can remain responsive to evolving public sentiment. Regularly updating policies and practices based on research findings ensures that the industry remains aligned with public expectations and maintains a positive relationship with the community.

Implementing these recommendations will help the UK equestrian industry build on its strengths, address its challenges, and enhance its social licence. 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.

Conclusion

This research provides World Horse Welfare and industry professionals with a thorough understanding of the relationship between the UK public and horse sports. The path model that has resulted from the research shows that trust is the central driver of acceptance of horse sports in the UK.

The current levels of trust and acceptance of UK horse sports provide a solid foundation on which the industry can build to strengthen its relationship with the public. This can be achieved by using the path model as a 'blueprint' of opportunities to leverage and potential risks to avoid as the industry seeks to build trust with the community and thereby strengthen its social licence to operate.

The social value of horse sports is the strongest driver of trust and acceptance. For the industry, this shows that the public recognise the cultural and social value of horse sports and their contribution towards enrichment of UK culture. Both industry and community agree that horse sports contribute to the UK's social fabric, and that fostering a sense of community is a key aspect of that contribution. Awareness and accessibility of the industry also factor into its social value. Horse sports are seen as significant contributors to sports and recreation in the UK, but there are barriers to accessibility, with financial expense being the most frequently cited. While some respondents agreed that the 'elitist' image of horse sports is another barrier, there is an opportunity here for sports, such as polo,

to lean into this image as a professional, elite space, not only to promote appreciation of the skill of horse and rider but also to set a high standard of horse welfare.

There is strong public interest in the welfare of horses, as expected, but this research has revealed important nuances in the discussion. The public recognise that horse welfare is a complex topic. This complexity emerges in the differing levels of concern for recreational vs. competitive use of horses, and for professional vs. amateur competitive use. The level of transparency around injures and fatalities in horse sports is a driver of trust and represents a broader family of welfare concerns held by the public. If horse sports are not being seen to be transparent and to include the community in discussions about injury or death, there is a risk that trust and acceptance of the industry will erode. Finally, breeding horses for sports is a driver of acceptance: so long as the public sense the value of breeding horses for sports, they will accept the industry.

As a driver of trust, procedural fairness underscores the concern regarding transparency. If the public feel as if horse sports are listening to their concerns – including those relating to horse welfare – and that they are taking those concerns into account during their decision-making processes, trust will grow. Confidence in regulation to ensure that horse sports do the right thing, whether through external measures or internal policies and procedures, likewise impacts trust; if the community's confidence decreases, trust and acceptance of the industry will also fall.

The information people see and the knowledge they have about horses impact their perception of horse sports. The more experience that people have with horses, the higher they self-rate their knowledge about horse sports, the more likely they are to seek information about horse sports, and the more they feel that information about horse sports portrays them in a positive light. This is reinforced by a strong sentiment that interactions with those actively involved in horse sports are positive. Utilising people who are actively involved in horse sports and creating community exposure via first-hand accounts of involvement may be an opportunity to address long-term participation and accessibility issues of horse sports in a short-term way.

Finally, this research examined the impacts and benefits of the UK's horse sports. The public recognise that horse sports contribute significantly to the UK's economy through engagement with the community and employment opportunities, but were less certain that horse sports is distributionally fair. With distributional fairness as a key driver of trust and acceptance of the industry, addressing this will be crucial for the industry. Questions related to working conditions of the industry received high neutral responses, demonstrating that the public are unsure or don't know enough about this aspect of horse sports; this reveals itself as an opportunity for the industry, particularly when coupled with utilising people who are actively involved in the industry, as discussed above.

The extent to which horse sports are affecting the environment was the only negative driver of acceptance, with greater anxiety about environmental impact leading to lower acceptance of the industry.

In summary, this research has shown that the UK public has a strong relationship with horse sports. Furthermore, the research has uncovered the factors that matter the most to the community when it comes to horse sports, and how those factors influence the industry's social licence to operate. The findings underscore the social value of horse sports while also revealing barriers to accessibility. Transparency around horse welfare, procedural and distributional fairness, and confidence in regulation emerge as critical drivers for the maintenance of trust. In addition, addressing the environmental concerns of the public will be needed to enhance acceptance of the industry. By leveraging this research and its insights, industry professionals can strengthen horse sports' social licence to operate.

Appendix A: interview framework

United Kingdom equestrian industries community attitudes project

Stakeholder interview protocol

Introductions

- Explanation of project and why we're asking these questions. Thank participant for their time.

- Make it clear that we are asking questions about the industry as a whole – i.e., not just isolated events or people, etc.

- Ethics, privacy and confidentiality – ensure informed consent and seek consent verbally. Participation is voluntary and can cease at any time without consequence.

- Inform them that we delete personal information they share with us to do the interviews 3 months after they send it or after we finish the project, whichever is sooner.

- Data and any information collected will be processed and stored in countries outside of the United Kingdom.

- Ask participants if they would like a brief summary of the project.

- Getting to know you – icebreaker questions to start conversation (e.g., how do you introduce your industry when meeting someone new at social events?)

Current and emerging concerns

[Understand the relationship that the interviewee has with their specific horse sport industry.]How would you describe your relationship with the horse sport industry?

- What do you wish people knew about your industry that you think they don't?

- Tell me about any problems or challenges that you think horse sport industry is currently facing or has faced in the recent past.

- Where does social licence, or the risk of community rejection of your industry, sit in the hierarchy of risks that the horse sport industry manages?

- What do you think would be the consequence if horse sport industry lost its social licence? What would that look like, exactly?

Welfare

[Seek specific characterisation of what welfare for horses in this industry means to the interviewee.]

- What does horse welfare mean to you in the horse sport industry?

- What do people get wrong most often about animal welfare in your industry? (what frustrates you?)

- What do you think could be done to improve animal welfare in the industry?

Empowerment of community / regulation

[Seek to inform the confidence in governance items through generating a list of 'regulating' bodies and others that hold industry publicly accountable.]

- Which organisations or people ensure that the horse sport industry does the right thing?

- How would you describe your public relationship with those organisations or people?

Impacts

[Focus on which impacts – both positive and negative, intended and unintended –horse sport industry has on its 'communities'. We're also trying to see if people see the purpose of the industry is to exist for its participants regardless of its position in society.]

- Who is the horse sport industry's community? (e.g., a mining company may view its communities as those people that live near a mine AND those that live in the country where materials are mined.)

- Can you tell me about some of the benefits that the horse sport industry provides to the community? [multiple communities if these are defined]

- Can you tell me about any negative impacts that the horse sport industry has?

- Can you describe the contribution that the horse sport industry makes to the

  community?

Ways of building relationship with the community

[Identify the different ways that the horse sport industry as a whole might be able to positively change its relationship with the community.]

- How do you think the community currently perceives your industry?

- What would you like to see the horse sport industry do to strengthen its relationship with the community?

- What do you think the horse sport industry could do to address any concerns and build trust?

- What 'levers' or strategies do you think your industry has available to it to use in this work?

- What about internally? What aspects of this process to build deeper external

- Relationships may require internal change? (e.g., culture, resourcing, recruitment, training]

Quantitative measures

[We end with a few short quantitative measures. On a scale of 1 to 5, where 1 is strongly disagree, 3 is neutral, and 5 is strongly agree, how would you rate the following questions?]

- If there is an issue in the horse sport industry, they act quickly to address it.

- The horse sport industry is prepared to change its practices in response to community concerns.

- The horse sport industry is transparent and accountable to the wider community.

- Information about the horse sport industry is readily available.

Using a scale from 1 (very negative) to 5 (very positive), please rate your overall experience when you have interacted with people involved in the horse sport industry.

On a scale of 1 to 5, where 1 is 'Not at all' and 5 is 'Extremely', how much do you trust the horse sport industry to act responsibly?

Closing

- Do you have any final comments or concerns that you want to raise?

- Is there something you were expecting me to ask but I haven't?

Demographics

- Stakeholder type staff / community organisation / government /

- Length of tenure / connection to the industry

- Gender

- Age bracket

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