

The National Equestrian Survey 2005/6

Commissioned and developed by BETA and researched by independent market research company Sportswise, the National Equestrian Survey has all the answers for the Equestrian industry. From the number of horses, to how much and on what riders spend their money on, it acts as an invaluable source of vital information on equestrianism in Great Britain today.

Initially carried out in 1995/6, and 1998/9 the latest survey was carried out over 2005/6 and published in 2006. It is the most comprehensive market research undertaken for the equestrian industry in Great Britain and is the only independent study of its kind, giving both riders and businesses essential information to promote riding and expand the industry.

The Survey examines the size and the composition of the equestrian market among both riders and horse owners, covering members of the public and major professional establishments (riding stables, livery yards, breeders and trainers).

The Survey provides such information as:

For Horse riders (Horse Owners and Non-Owners)

- their number and distribution
- the frequency with which they ride
- the nature of their riding activities
- their horse ownership
- their expenditure on equestrian goods and services
- their readership of equestrian publications

For Horseowners

- the size and distribution of the horse population
- the use made of horses
- how they are kept and who is responsible for them
- expenditure on the horse

Overview of the National Equestrian Survey

Equestrianism is an important activity which attracts a large and diverse number of riders and horses. With a total spend of over £4 billion per annum, equestrianism is the second largest spender in the British countryside. It can though be a difficult activity to measure accurately due to its very complexity.

Contributing to this complexity are factors such as:

- The relatively small proportion (7%) of the population who actively ride. Many of those who do, do so irregularly and often do not own the horse they ride.
- The widely spread nature of riders both geographically and demographically. This means not only are riders scattered across the whole of the country, but vary widely in age, sex and lifestyles.
- The fact that riders greatly outnumber horses. Many ride but do not own their own horse, while others own but do not ride. Others ride and own a number of horses.
- The multitude of uses for which horses are kept. Some are trained to compete across several disciplines and to differing levels (point to point, hunting and eventing), others are kept solely for one purpose, whether this be breeding, hunting, or riding school use. Others are kept to ride for pleasure only.

- The different ways and forms in which horses are kept. Some are kept in livery yards on behalf of their owners, some are owned for teaching others are kept at home. Many 'professional' establishments also fulfil multiple functions, eg. being riding schools, livery yards, breeders and trainers, all at the same time.

Scope of the Survey

Two main sectors are examined in the survey

- members of the public who ride and/or own horses
- the professional sector

Amongst members of the public a difference was drawn between horse riders and horse owners, though many fell into both categories. Riders were asked not only about their riding habits, but about their expenditure on riding, (lessons, clothing, tack etc.) and their readership of equestrian publications.

Owners were asked about the horses they owned, particularly on the related expenditure.

Professionals (including riding stables, breeders and trainers) were asked about

- The characteristics of their business (numbers of horses owned, looked after and uses to which they were put)
- The expenditure on those horses
- The general running costs of the business
- How satisfied they were with the quality of service provided by their suppliers.

KEY FINDINGS

- 4.3 million people have ridden a horse in the last 12 months, up from an equivalent 2.4 million in 1999
- 2.1 million people ride on a regular basis (once a month), up from 1.4 million in 1999
- 2.7 million people used to ride and are interested in riding again
- Owners ride far more frequently, but remain far fewer in numbers
- A £4 billion industry (consumer and professional)
- Annual horse sales estimated at over £400 million
- Riding lessons worth over £700 million
- A 1.3 million consumer and professional horse population – a growing trend
- 720,000 Horse owners – a growing trend
- It costs as much to buy a horse as it does to keep it for a year
- A year-long activity (limited seasonality now associated with riding)
- Leisure riding is key motivator
- Time remains the enemy, but to a lesser degree in 2006 than in 1999

National Equestrian Survey Report Publications

Reports on the Survey are available at three levels.

Level One: Overview

This provides an account of equestrianism at a national level and summarises the main research findings. It will suit the reader who wishes to gain an insight into horse riding and ownership in Great Britain without wanting to examine particular aspects in more detail.

[Click here to download contents page \[overview report contents page\]](#)

Level Two: Structural

This examines the principal findings from the Level One report in more detail, segmenting the 'market' by frequency of riding, by region, by horse ownership and other relevant characteristics.

[Click here to download contents page](#)[structural contents page]

Level Three: Products and Brands

These more detailed reports examine purchases of some key equestrian products and services in terms of products and brands bought, sources of purchase, brand awareness etc.

These specially prepared reports provide market share and composition estimates in important sectors such as:

Horse feeds and bedding - conducted among over 1200 horse owners drawn from both the general public and 'professional' sectors. [Click here to download contents page](#) [Feed & Bedding contents]

Clothing, footwear and saddlery- conducted among over 1000 horseriders and 200 professional establishments about their purchases and awareness of manufacturers and brand names. [Click here to download contents page](#) [Horse equipment contents]

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