

HORSE RIDING IN SCOTLAND

WELCOME TO THE NATIONAL EQUESTRIAN SURVEY 2019

This report contains results as they relate to Scotland. This is a far-reaching national report that provides critical insights on the state of the equestrian sector in Britain. The results presented here are specifically taken as a Scottish subset. For more information and details on the project please contact BETA.

This summary provides insights on a range of important areas for the equestrian sector in Scotland – ranging from riding participation to estimates of consumer spending. They provide a base of information from which Horse Scotland, BHS Scotland and member bodies can support and promote the sector moving forward.

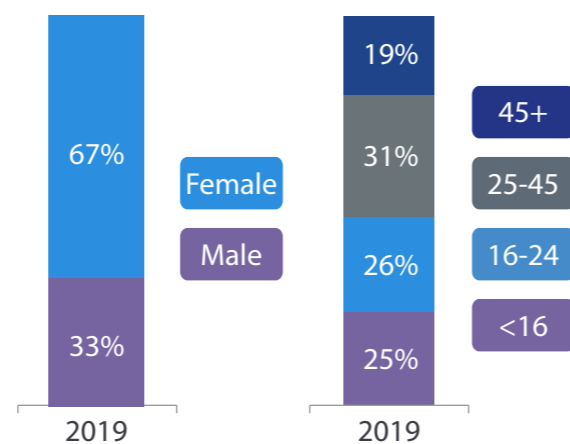


In the last 12 months, we estimate there to have been nearly 200,000 regular riders – those that ride at least once a month. This represents a staggering increase from 117,000 in 2015, and a growing proportion of all riders (70% vs 45% in 2015). Nationally representative sample from TNS Omnibus Survey, 2019 n=531 (Scottish Sample)

REGULAR RIDERS

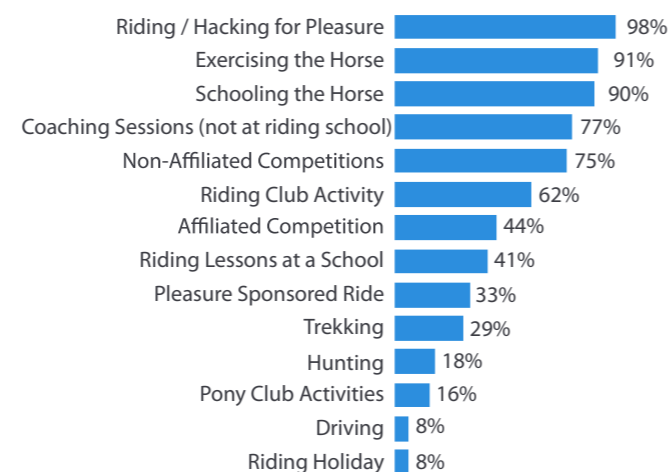
Riding is a female dominated activity in Scotland (as it is elsewhere in Britain). More than 2 in 3 regular riders are female. As many as 1 in 4 regular riders are aged under 16, whilst the largest group are those aged 25-45.

Nationally representative sample from TNS Omnibus Survey GB Regular Riders (n=226). Note: Scottish regular rider sample too small in this instance – the above is intended as indicative.



RIDING ACTIVITIES

Nearly all riders in Scotland participate in hacking, with the vast majority also involved in exercising and schooling horses. Three quarters compete in non-affiliated competitions, whilst 6 in 10 are involved in Riding Club activities.



Base: Regular Riders in Scotland (n=57) / Telephone Survey

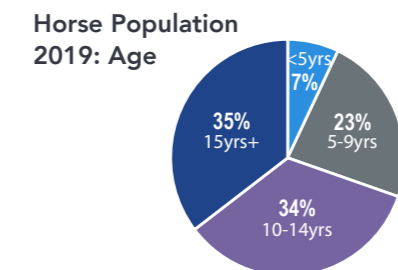
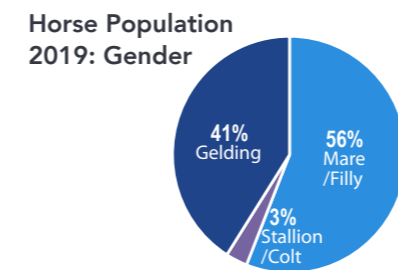
70,000 HORSES IN SCOTLAND



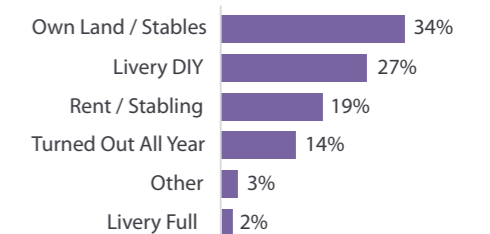
We estimate the equine population in Scotland to be around 70,000, which is a growth of 21% since 2015. The estimated number of households that own a horse in Scotland has fallen to an estimated 22,400 homes, down from 44,000 in 2015. Note: Scottish estimates based on % of GB owners (6% of 374K GB owning households)

OUR HORSES...

More than half of horses in Scotland are Mares/Fillies, a picture virtually identical to Britain as a whole. The average age of a horse is 13 years with nearly 7 in 10 aged 10 or older.



Horse Population 2019: How Horses are Kept



THE EQUESTRIAN ECONOMY IN SCOTLAND

We report a Scottish equestrian economy of an estimated £335 Million in consumer spending per annum. This estimate includes direct spending on equestrian goods and services (£202 million), indirect spending on related activity (£82 million) and other related spending on equestrian involvement (£51 million). Note: These estimates are based upon the proportion of GB owners based (6%) and regular riders (11%) based in Scotland.



TOTAL = £335 MILLION

Total annual spending on equestrian goods and services in Scotland
Note: Estimates are based on the proportion of GB horses owners (6%) and regular riders (11%) based on Scotland.

Note: This estimate includes direct spending on equestrian goods and services (£202M), indirect spending on related activity (£82), and other related spending on equestrian involvement (£51M).



22 MILLION

Riding days per annum
Estimated 'total' riding days each year in Scotland



441,000

Ex-rider households
Households that contain at least one ex-rider



67%

Female Dominated
Regular riding activity (at least once a month for 12 months)

This survey has been funded by Horsescotland with support from BHS Scotland. The findings from the 2019 National Equestrian Survey deliver robust and concise information on the state of the equestrian sector in Scotland.

For more information on the survey, or other opportunities to get involved
contact@horsescotland.co.uk