Consultation draft –
Strategy for the Horse Industry in England and Wales
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1. © Thoroughbred Breeders Association  
2. © Defra Photo Library  
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Strategy for the Horse Industry in England and Wales

Prepared by the British Horse Industry Confederation

in partnership with

the Department for Environment, Food and Rural Affairs

the Department for Culture, Media and Sport

the Welsh Assembly Government

February 2005
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Ministerial Foreword

The fortunes of horses and humans have been inextricably intertwined throughout recorded history. Once horses were central to warfare, transport and agriculture. Today they support a multi-billion pound industry, up to a quarter of a million jobs, and the social fabric of many communities. They also contribute greatly to human health and wellbeing, sporting prowess and education.

We want these major public benefits to grow. The key is to increase participation in all aspects of equestrian activity. Almost 2½ million people ride. If this strategy is successful that figure will rise significantly. The growing leisure economy offers rich opportunities to tap.

In the past three years we have seen a major increase in engagement with the horse industry led by Ministers and our Departments. Significant developments in access and the bridleway network are complimented by the encouragement of riding for the benefit of sport, recreation, health and social activity. Government support through research, the introduction of horse passports and the creation of a national database have provided the foundation on which Government and the industry have been able to create a plan for the industry’s future which we want to be owned and led by the industry itself.

This strategy is a landmark in the recognition of the horse industry and its contribution to national life. The industry encompasses a remarkably broad range of activities and businesses, all of which rest in one way or another on the horse and draw on the passionate enthusiasms it engenders.

This is the first time the industry has come together to plan its own future with our encouragement. Government has looked systematically at what it can do to help. For the strategy to succeed it is vital that industry organisations cement this progress, into a continued pattern of close cooperation in their common interest. Many leading figures have acknowledged that past divisions and fractiousness have held the industry back and it would be a tragedy if such conflicts were to re-emerge.

We urge everybody concerned with equestrianism and the future of the horse industry to take part in the public consultation on the draft strategy, and to express your views on the priorities for action as we move forward in unison.
Alun Michael MP
Minister for Rural Affairs and Local Environmental Quality and
Minister for the Horse

Richard Caborn MP
Minister for Sport and Tourism

Carwyn Jones AM
Minister for Environment, Planning and Countryside
Welsh Assembly Government
Industry Foreword

The British Horse Industry Confederation was launched in 1999 at the suggestion of Lord Donoughue, who was concerned that the horse industry was too fragmented to make progress and should come together to speak to Government with one strong voice. By establishing one umbrella body for the racing and non-racing equine organisations we have been able to pool our strengths and knowledge and liaise more effectively with policy-makers.

We are delighted that the present Minister for the Horse, Alun Michael, identified the need for dedicated officials to deal with horse industry interests. Since the appointment of an ‘Official for the Horse’ we now have an effective and efficient conduit to relevant departments through the Horse Industry Team in the Department for Environment, Food and Rural Affairs (Defra). Ministers also took a significant step forward by inviting us to work with Defra and the Welsh Assembly Government to draw up the first-ever strategy for the horse industry in England and Wales. We hope that Scotland will follow suit in due course.

This is an important and exciting development which has enabled us to address our strengths and weaknesses, and to assess how to raise the profile of the industry, increase its prosperity and help Government achieve its national and regional agenda. It is vital that the horse world as a whole recognises this opportunity to work together with all our different sectors, from our Olympic competitors and racing participants to the thousands of grassroots riders and horse owners throughout the country, building on existing infrastructure where possible. It is not our intention to interfere with the excellent work being done by many organisations in the thoroughbred and non-thoroughbred sectors, but rather to enhance the effectiveness of that work where appropriate through ensuring wider cooperation and action.

In the past we have been too easily overlooked by policy-makers, and Ministers have made it clear that it is difficult to help a divided and fractious industry. That is now changing. Recent research has shown that the horse industry is a huge sector with great potential for growth. The horse has a unique and central role in our country and its history, as an integral part of both rural and urban economies. We have an important role to play in helping Government achieve its objectives of economic growth, social inclusion, health, education and sporting success. We look to Government itself to work with us to help us grow and prosper. We believe that the proposals in this outline strategy can help horses, riders, owners and businesses flourish. The implementation of these proposals can also support parallel work on a horse health and welfare strategy.

We can only progress this initiative on a partnership basis. We look to all those in England and Wales who are connected with horses to give us their views on the ideas and proposals in this outline strategy. It is intended to foster further debate among those in the horse world and in Government and its agencies about how we can work for the good of the horse industry, and above all, for the good of the horse.
Tristram Ricketts
Chairman, British Horse Industry Confederation and Secretary-General, British Horseracing Board

Andrew Finding
Vice-chairman British Horse Industry Confederation and Chief Executive, British Equestrian Federation

Duncan Brown
Chairman, Association of British Riding Schools

Claire Williams
Chief Executive, British Equestrian Trade Association

Lesley Barwise-Munro
President, British Equine Veterinary Association

Graham Cory
Chief Executive, The British Horse Society

Gavin Pritchard-Gordon
Executive Director, Thoroughbred Breeders Association
Executive Summary

The purpose of this strategy is to foster a robust and sustainable horse industry, increase its economic value, and enhance its contribution to the social, educational, health and sporting life of the nation. It sets out a vision of where the industry aspires to be within ten years, how its different parts fit into this picture, and how the Government can help it in following this path.

The horse industry

The horse industry can be divided into two parts (see the diagram on page 13):
- activities based on the use, possession or ownership of horses, ranging from professional through to leisure; and
- suppliers of horse-related goods and services for those core activities.

The use of the term ‘industry’ is intended to emphasise the national importance of these activities, and the many links between them, as well as the shared commitment of participants. It is not intended to exclude the many equine enthusiasts who are not engaged in these pursuits full-time, some of whom may not see themselves as part of an industry.

Estimates suggest that:
- the horse industry’s gross output is £3.4 billion;
- the horse industry employs up to 250,000 people directly and indirectly;
- 2.4 million people ride;
- 11 million people have some interest in the horse industry, and 5 million an active interest; and
- the horse population is between 600,000 and just under a million.

The industry makes a hugely important contribution to the economy, and to the social fabric of many communities. It is particularly important in rural areas. It contributes to human health and wellbeing, sporting prowess, education, community development and social inclusion. The Government and the industry will work in partnership to maximise these benefits.

Current trends, especially the growth in the leisure economy, suggest the potential for real growth in the industry. However, some small businesses and riding schools have fallen behind other leisure sectors and may decline even further if they do not become more competitive.

The industry is diverse, with communication between the various parts not always very effective. It is essential that disagreement within the industry is overcome and that those with an interest in the industry begin to view it as a partnership. **The principal requirement for growth over the next ten years is to develop the necessary infrastructure to build and implement a successful strategy that is actively promoted by the entire horse industry.**
The draft strategy

The draft strategy identifies six interlinked aims as key to achieving its purpose. It divides the accomplishment of each aim into broad objectives, accompanied by specific proposals for action. It indicates the proposed responsibility for taking each action, the level of priority, and where the required resources are expected to come from. These proposals are prioritised as short-term (within one year), medium-term (between one and five years) and long-term (between five and ten years).

The strategic aims, objectives and proposals for action are summarised below. The welfare of horses is vital to all six strategic aims. Because of this special position, it is to be the subject of a separate but related equine health and welfare strategy, which is being developed as part of the animal health and welfare strategy for Great Britain.

Aim 1: Enhance the horse industry’s image and increase participation

(a) Bring the industry together nationally
Proposal 1 Create a central industry communications function, owned by and operated in conjunction with all organisations, to enhance the communication, public relations and information structure for the industry and promote equestrian issues and participation [short-term].

(b) Develop a regional structure and local horse networks
Proposal 2 Establish a regional structure for the industry, and promote a framework for local horse networks where sufficient demand exists [medium-term].

(c) Increase participation in equestrianism
Proposal 3 Consider how the industry can more effectively recognise, support and expand the vital role of riding schools [medium-term].
Proposal 4 Research number and location of riders, and public perceptions of equestrianism [short/medium term].

Aim 2: Boost the economic performance of equestrian businesses

(a) Raise standards of business performance
Proposal 5 Introduce a benchmarking system, to raise standards and performance across all types of equestrian business [short-term].

(b) Encourage cooperation to improve business opportunities
Proposal 6 Encourage greater use of inter-sectoral projects, to facilitate sharing of information and build business opportunities [medium-term pilot, long-term roll-out].
Proposal 7 Encourage targeted continuing professional development in the workplace for equestrian managers, make access to training easier and establish a business networking system [short-term].

(c) Ensure strong links with Development Agencies
This is covered in proposal 2 above.
(d) **Ensure a level fiscal and regulatory playing field**
Proposal 8  Set up an industry working group to identify any significant fiscal and regulatory constraints on equestrian businesses, and make a cogent case for change where appropriate [medium-term].

(e) **Reach an industry view on the status of the horse**
Proposal 9  Set up an industry working group to determine whether the status of the horse is a significant issue, and if so to establish an industry-wide position and make a convincing case for change [medium-term].

(f) **Address problems associated with insurance**
Proposal 10  Make rider, horse and instructor record forms freely available, and devise an educational programme to help riding establishment proprietors improve the quality of their records [short-term].

(g) **Enhance the value of equestrian goods and services**
Proposal 11  Facilitate the gathering of statistics that will better allow the value of the industry to be assessed, through a revision of the Standard industrial Classification and Standard Occupational Codes [medium-term].
Proposal 12  Promote the UK as a source of quality goods and services through preparation of a promotional guide [short-term].
Proposal 13  Increase participation in overseas and domestic equestrian trade fairs and travel promotions, in order to highlight British expertise, products and tourism opportunities [medium-term].
Proposal 14  Encourage use of new and developing technologies and research and development in business, to improve productivity and efficiency; introduce a standard for the manufacturing of safe saddles [long-term].

(h) **Increase equestrian tourism**
Proposal 15  Encourage a cohesive approach to promoting equestrian tourism through local authorities, regional tourism councils and national bodies; publish a national register of riding holidays and tourism opportunities; and establish a national descriptive grading system [medium-term].

**Aim 3: Raise equestrian skills, training and standards**

(a) **Attract and retain staff**
Proposal 16  Devise and implement a strategy for attracting and retaining staff in all industry sectors, including a marketing campaign, closer working with careers advisors, a clearer career structure, and a central jobs register [short-term start, medium-term implementation].
Proposal 17  Introduce a coordinated industry strategy to work with schools so as to provide work experience opportunities and vocational training [medium-term].

(b) **Provide an environment in which people wish to build a career**
Proposal 18  Encourage equestrian businesses to achieve Investors in People status [medium-term].
Proposal 19  Promote the wider use of National Occupational Standards for human resource management, health and safety, and physical resource management [medium-term].
Proposal 20: Representation for employees in the horse industry remains an important issue, on which we are unable to make recommendations now. Ministers will look to foster early discussion to improve employee representation. Views on possible action are also invited in response to this document.

(c) Identify skill levels and training needs
Proposal 21: Undertake research to establish skill levels and training needs with the aim of defining current and future skills requirements [short-term].

(d) Improve opportunities for work- and college-based learning
Proposal 22: Industry-based training providers and colleges to work together to disseminate and share good practice for the practical training elements of education programmes [medium-term].
Proposal 23: Work with the Learning and Skills Council regarding the current policy of funding mainly large providers, and barriers created by current age restrictions [medium-term].
Proposal 24: Industry organisations to work together to achieve more coordination of training and better understanding of respective skills and qualifications [medium-term].

Aim 4: Increase access to off-road riding and carriage driving

(a) Ensure an effective and well-maintained network of public rights of way
Proposal 25: Recognise a single body within the industry to co-ordinate and lead Public Rights of Way progress [medium-term].
Proposal 26: Horse industry to contribute more effectively to local rights of way processes, and local authorities to advertise and promote successful initiatives [medium-term].

(b) Increase provision of safe non-statutory riding routes
Proposal 27: Campaign to encourage farmers to allow equestrian routes on their land [medium-term].
Proposal 28: Encourage local riding groups to raise funds and set up toll rides [medium-term].

(c) Continue safety education
Proposal 29: Campaign to educate riders, carriage drivers and motorists as to how to behave correctly both on roads and off-road routes [medium-term].

(d) Raise the status of urban riding and carriage driving
Proposal 30: Campaign to alert people and local authorities to the benefits of equestrianism and the availability of urban riding and driving [medium-term].

Aim 5: Encourage sporting excellence

(a) Establish a national database for riders
Proposal 31: Appoint consultants to review and assess the task and make recommendations; implement agreed recommendations [medium-term].
(b) **Extend coaching development programme**
Proposal 32 Extend British Equestrian Federation’s coaching development programme to other organisations wishing to enhance their own coaching standards [short-term].

(c) **Improve the standard of facilities**
Proposal 33 Share British Equestrian Federation’s facilities strategy with other riding bodies [short-term].

(d) **Extend long-term athlete and equine development programmes**
Proposal 34 Extend British Equestrian Federation’s long-term athlete and equine development programmes to other equine organisations [medium-term].

(e) **Encourage unaffiliated bodies to engage**
Proposal 35 Market to unaffiliated groups the benefits of affiliation [short-term].

**Aim 6: Improve the quality and breeding of our horses and ponies**

(a) **Establish a lead body to improve breeding, marketing and evaluation**
Proposal 36 Establish a lead body to improve breeding, marketing and evaluation [medium-term].

(b) **Capitalise on National Equine Database to improve breeding**
Proposal 37 Use information available from the Database to: develop a simple system for comparing the breeding values of mares and stallions; collate and market pedigree and performance data; support work being undertaken to eliminate genetic defects; and make evaluation scores widely known [medium-term].

(c) **Raise standards in studs**
Proposal 38 Generate sufficient income from *British Breeding* initiatives and sponsorship to be able to offer premiums for British-bred mares and stallions achieving given grading standards, British breeders achieving outstanding success, and British horses and ponies succeeding in selected competitions [short- to medium-term].

(d) **Balance genetic improvement with genetic diversity**
A National Steering Committee has been established to inform Government policy and assist in monitoring and managing farm animal genetic resources.
Introduction

The purpose of this strategy

1 The purpose of this strategy is to foster a robust and sustainable horse industry, increase its economic value, and enhance its contribution to the social, educational, health and sporting life of the nation. It sets out a vision of where the industry aspires to be within ten years, how its different parts fit into this picture, and how the Government can help it in following this path.

The nature of the horse industry

2 The horse industry is more varied than almost any other sector. Essentially it can be divided into two parts:

- activities based on the use, possession or ownership of horses; and
- suppliers of horse-related goods and services for those core activities.

3 Activities forming the core part of the industry range from professional through to leisure. In between lie many semi-professional riders, and participants whose interest is split between earning a living and pure leisure activity.

4 The industry core caters directly for the needs of consumers. The activities geared toward professional riders include commercial breeders, affiliated sports, trainers and racing. The leisure-orientated activities include the provision of riding lessons and hacking, unaffiliated sports and tourist attractions.

5 The other part of the industry is made up of providers of goods and services to the core. Examples include farriery, feed supply, veterinary services, livery yards, venues, tack, workforce training, and insurance.

6 The following diagram illustrates how the various parts of the industry relate to each other.
The use of the term ‘industry’ is intended to emphasise the national importance of these activities taken as a whole, and the many links between them, as well as the shared commitment of those who participate in them. It is not intended to exclude the many equine enthusiasts who are not engaged in these pursuits full-time, some of whom may not see themselves as part of an industry in the conventional sense but rather as belonging to a looser horse confraternity or primarily to a specialist equine group. The term ‘horse’ includes ponies and donkeys, while ‘rider’ includes carriage drivers and vaulters.

The extent of the industry

In March 2004 the Department for Environment, Food and Rural Affairs (Defra) and the British Horse Industry Confederation (BHIC) published research on the horse industry in Great Britain\(^1\), with the National Assembly for Wales and the Scottish Executive. This estimated the industry’s gross output\(^2\) at £3.4 billion. While this figure was based on the limited data available, and is not as robust as those for other industries, it suggests that the horse industry is even more considerable than many would have thought.

Other estimates derived from existing data are:

- the horse industry employs 50,000 people directly and up to 200,000 people indirectly;
- 2.4 million people ride;
- 5 million people have an active interest in the horse industry;
- 11 million people have some interest, including watching horse racing on television; and
- the current horse population is between 600,000 and just under a million.

The importance of the industry

The significance and potential of the horse industry itself, and of the benefits it brings to the life of the nation, are only now being fully recognised. As the figures above demonstrate, the industry makes a hugely important contribution to the economy, as well as to the social fabric of many communities. Given the geographical distribution of the industry, it is particularly (but not exclusively) important in rural areas. Participation in equestrian sport and other riding activities promotes health and wellbeing, including helping to combat the growing problem of obesity; contributes to the education of many young people, helping them to develop

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\(^1\) A Report of Research on the Horse Industry in Great Britain, prepared by The Henley Centre, and commissioned by Defra and the British Horse Industry Confederation, with the National Assembly for Wales and the Scottish Executive, March 2004.

\(^2\) In simple terms, this is the market value of total sales of horse-related goods and services produced in Great Britain each year. To give an example, gross output in the car manufacturing industry is what people spend on buying cars and spare parts; gross value added (GVA) is gross output minus what the car industry buys in from other industries. GVA is the more useful figure in determining what an industry is worth, because it equals the incomes directly earned within it. Unfortunately, we do not have the necessary information to give the GVA of the horse industry.
both independence and a sense of responsibility; fosters volunteering, community development and social inclusion (see for example some of the case studies under strategic aims 1, 3 and 4); and helps care for the land and the environment. The Government and the industry will work in partnership to maximise these benefits.

The future of the industry

11 The research mentioned above also investigated the industry’s prospects. It concluded that current trends, especially the growth in the leisure economy, suggest the potential for real growth. However, some small businesses and riding schools have fallen behind other leisure sectors and may decline even further if they do not become more competitive.

12 On 18 November 2004 Parliament legislated to ban hunting with dogs in England and Wales. In drafting this strategy we have consciously avoided any consideration of the ethics of a ban. Over time we will monitor whether the effects of a ban require any revisions to actions included in the strategy.

13 The research observed that the horse industry is diverse, with communication between the various parts not always very effective. It is essential that disagreement within the industry is overcome and that those with an interest in the industry begin to view it as a partnership. The principal requirement for growth over the next ten years is to develop the necessary infrastructure to build and implement a successful strategy that is actively promoted by the entire horse industry.

The preparation of this strategy

14 The British Horse Industry Confederation is the umbrella body formed to represent the industry’s views to Government. It has led in developing this strategy, in cooperation with Defra’s Horse Industry Team.

15 The Horse Industry Team supports the Minister for the Horse by drawing together the various strands of Government responsibilities affecting the industry. Defra is responsible for equine affairs in England. The Department for Culture, Media and Sport is responsible for policy on equine sport, racing and tourism. The Welsh Assembly Government is responsible for equine matters in Wales.

16 We have sought to make the process of preparing the strategy as inclusive as possible. Following publication of the research, which itself investigated strategic issues, we wrote to some 300 organisations and individuals seeking their views on the way ahead for the industry. We also convened a national conference with 150 participants. Various industry representatives were charged with bringing together

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3 The membership of the steering group which has overseen preparation of this draft strategy is: British Horse Industry Confederation (Fiona Birt-Llewellin [to September 2004], Duncan Brown, Graham Cory, Annie Dodd, Andrew Finding, Pat Harris, Margaret Linnington-Payne, Cathy McGlynn, David Mountford [succeeded Lesley Barwise-Munro], Tristram Ricketts, Graham Suggett, Claire Williams); Defra (James Bradley, Des Coles, Alice Elliott, Amy Westaway); Welsh Assembly Government: (Fiona Leadbitter).
the conclusions, consulting further and devising practical proposals. The draft strategy is the result of this work.

**Strategic aims**

17 We have identified six interlinked aims as key to achieving the purpose set out in paragraph 1 above:

- to enhance the horse industry’s image and increase participation;
- to boost the economic performance of equine businesses;
- to raise equestrian skills, training and standards;
- to increase access to off-road riding and carriage driving;
- to encourage sporting excellence; and
- to improve the quality and breeding of our horses and ponies.

18 The following chapters present supporting analysis, a set of objectives to contribute to achieving each aim, and specific actions proposed to accomplish these objectives. They indicate who would be responsible for taking each action, the level of priority\(^4\), and the expected resource consequences. We intend to ensure that all actions included in the final, post-consultation version of the strategy are costed and that specific organisations commit to meeting these costs.

19 The welfare of horses is a fundamental part of the industry’s future growth, and is vital to all six strategic aims. Because of this special position, it is the subject of a separate but related equine health and welfare strategy, which is being developed as part of the Animal Health and Welfare Strategy for Great Britain.

**Resources and monitoring**

20 Implementation of this strategy will not come without some costs attached. In order to achieve the joint objectives, all parts of the horse industry will need to continue to invest adequately in the development of the industry, and Government will need to continue to play its part. That investment will only be made by the various parties if there is a firm expectation of a return in the form of a healthier and more sustainable industry, contributing more effectively to the economy, rural communities and employment and a range of other public benefits. This reinforces the need for the strategy to gain widespread support in order to secure adequate funding for its implementation.

21 We will monitor the effectiveness of this strategy, and report annually on its implementation.

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\(^4\) ‘Short-term’ = within one year, ‘medium-term’ = between one and five years, ‘long-term’ = between five and ten years.
Aim 1: Enhance the horse industry’s image and increase participation

1.1 For such a significant industry, the horse industry has not achieved the widespread recognition and substantial influence that we merit, despite some recent advances. Nor are we best equipped to increase participation and take advantage of businesses opportunities, by selling the riding ‘product’ and its accompanying public and individual benefits, until we have put our own house in order. To put ourselves in the best position to face outwards, we need to begin by looking inwards.

1.2 The initial consultation exercise revealed a strong belief within the Industry that it is divided internally, to the extent that communication between its parts ranges from patchy at best to virtually non-existent. The Henley Centre report highlighted this as one of the main reasons why the industry is not achieving its potential. It suggested that, without a robust, effective and inclusive internal consultative structure, there was little chance of the desired repositioning being attained.

1.3 We recognise that each distinct interest group within the industry has the right to organise and represent itself. This is accompanied in our view by the responsibility to cooperate with other groups with similar interests. The industry needs to act together as a whole, in order to pull our weight at national, regional and local level, and to increase participation in equestrianism.

(a) Bring the industry together nationally

1.4 Industry bodies need to coordinate their activities so that we can achieve measurable improvements well within the next ten years, such as:

- promoting riding opportunities and equestrian sports more effectively, and increasing participation;
- raising the profile of the industry and its organisations;
- increasing its media coverage and influence, including coverage of our national and international sporting achievements;
- widening recognition of our contribution to the national and rural economy and to society, of our position as a world leader in equestrianism and breeding, of and our equestrian heritage; and
- increasing awareness and appreciation of the industry’s concerns.

1.5 This requires industry organisations to commit themselves to:

- enhance communications within the industry;
- coordinate the marketing and image of the industry as a whole;
- coordinate policies;
- organise the sharing of knowledge and resources;
- collect information from all organisations into one resource; and
- appoint a lead organisation for each of the individual actions in this strategy, and support it in that task.
PROPOSAL 1: Central industry communications function

**Action**
Create a central industry communications function, owned by and operated in conjunction with all organisations, to enhance the communication, public relations and information structure for the industry and promote equestrian issues and participation. The function would:

- create a unifying brand to underpin the coordination of the industry;
- provide a single media access point;
- coordinate the marketing and promotion of different elements, including sponsorship, tourism, careers, job vacancies, and safety;
- promote media coverage of sporting success and other horse-related issues;
- coordinate access to essential help and advice to equestrian businesses and riders on issues such as business management, access to funding schemes, rates and land use planning;
- increase awareness among equestrian businesses of the opportunities afforded by the national, county and local show circuit, the British Equestrian Trade Association’s BETA International Trade Fair and foreign trade fairs;
- support the development of a regional structure and local horse networks (see proposal 2);
- act as a conduit for enquiries from within the industry and from the public; and
- help to promote horse welfare and best practice throughout the industry.

**Responsibility**
The British Horse Industry Confederation, in partnership with the other industry signatories to this strategy.

**Priority**
Short-term.

**Resources**
Funded from existing industry resources, including the economies of scale achieved by reducing duplication of activity.

1.6 A National Equine Centre could provide a focal point for the horse industry in this country. The racing industry’s base is seen as Newmarket, and the concentration of racing businesses, services and organisations in this area has proved of enormous benefit to racing. A National Equine Centre could not only bring together racing and non-racing interests but also provide a focal point for equestrian promotion, competition, business advice and tourism. The Royal Agricultural Society for England is developing a proposal for such a centre at Stoneleigh in Warwickshire, in partnership with horse organisations, with the active interest of public bodies.
(b) Develop a regional structure and local horse networks

1.7 Just as coming together more will greatly increase the industry’s weight nationally, so greater cooperation at regional and local level will multiply our effectiveness. It will help to increase participation, to encourage development of resources, and to secure better provision for existing and potential riders and equestrian businesses. It will enable us to boost awareness of our products, give us more influence over potential partners, and allow grassroots equestrians greater involvement in issues which affect them.

1.8 Many national equestrian bodies have a regional structure, using boundaries of their own choosing. To maximise our effectiveness we need to re-align these boundaries to match those of the Government Offices for the Regions and Sport England regions. Industry organisations, where appropriate, need to appoint regional development officers from within their existing staff, to join up our activities within each region and create effective links with Regional Development Agencies, Sport England regions and other regional bodies and operations.

1.9 Several successful networking initiatives have been undertaken locally. The knowledge and best practice gained from them should be made available to all areas of the country, and similar schemes should be encouraged elsewhere. Local networks offer the opportunity to work in partnership with local authorities and bodies such as chambers of commerce so as to advance our interests, to discuss local equestrian issues (for example planning, tourism or input to Local Access Forums), to draw up equine strategies in order to promote sustainable growth, and to encourage greater participation by for example creating links with schools and colleges. They have the potential to speak for local riders and equestrian businesses, conduct consultations, feed back information to the new industry central communications function, and work with riding schools and centres (see proposal 3) to enhance our industry contribution as an asset to the local community.

PROPOSAL 2: Regional structure and local horse networks

| Action | Establish a regional structure for the industry, and promote a framework for local horse networks where sufficient demand exists. |
| Responsibility | British Horse Industry Confederation to lead assisted by other industry signatories to this strategy and the new central industry communications function (see proposal 1). |
| Priority | Medium-term. |
| Resources | Funded from existing resources and as part of central communications function. |

Leicestershire Equestrian Enterprise Partnership
The Partnership works with Leicestershire County Council, meeting monthly to discuss matters of mutual interest. Together they devised the Leicestershire Equestrian Strategy, to develop local networking implemented by a specially appointed officer. This has spawned even more local groups (see below), which benefit from the generation and dissemination of information and the encouragement of best practice among local authorities and other partners.
Woodhouse Eaves and Swithland Recreational Riding Association
This is a group of riders, livers, and a riding school within two adjacent parishes in Leicestershire. It was formed through local equestrians recognising the need for local responsibility. In less than a year it has gained around 100 members, negotiated more off-road access and horse warning signs, helped develop the local Parish Plan, and started looking at action with the local Riding for the Disabled Association.

Broadstairs and St. Peters Annual Horse Show
The show makes full use of the regional press, usually gaining front-page coverage. In 2002 the local BBC station broadcast live coverage. The organisers believe this level of publicity is essential, not only to provide a successful horse show for local riders but also to develop equestrian awareness among the public at a local level.

(c) Increase participation in equestrianism

1.10 The initial consultation exercise made clear that the substantial expansion which the horse industry is capable of in the growing leisure economy (see paragraph 1.2 above) is hindered by the perception that it is expensive, elitist and sometimes unwelcoming to newcomers. Those from a non-horse, and particularly an urban, background report difficulty in becoming involved and feeling accepted.

1.11 We must take every opportunity to generate interest, and to convert interest into enthusiasm, and enthusiasm into participation. The future of our industry depends on adopting a more inclusive approach and attracting a constant stream of new riders. Creating the central communications function, developing a regional structure and strengthening local networks will help. But it is far from enough. People’s first-hand experiences of equestrians and equestrian enterprises, particularly riding schools, will be crucial.

1.12 Riding schools are the most important way of giving riding access for all. For most people, the riding school is their introduction to our industry. If this experience is good, a life-long involvement is born. If it is not, then a potential participant (and advocate) may be lost forever. Moreover, most riders do not own horses, and rely on riding schools to continue in equestrianism. Riding schools offer a wide range of activities: ‘riding centres’ would be a more accurate description.

1.13 All equestrians and all parts of our industry need to recognise and support the integral role of riding schools, as the bedrock of the industry, in creating and maintaining mass participation. Reinforcing their role is a vital accompaniment to the other measures proposed in this chapter to help increase participation. The Henley Centre report found that riding schools are sidelined within the industry, to the detriment of social inclusion and sporting excellence. Riding schools can offer access to equestrianism for all. They should be promoted as an asset for the local community, like for example sports clubs or leisure centres. They should act a feeder into top sport, in the same way as say local gymnastics or athletics clubs. They can also be a focus for the entire local equestrian community and its activities, including equine education, welfare promotion and career recruitment. They might link in with
local horse networks (proposal 2), and with the thriving riding clubs which exist in many areas\textsuperscript{5}.

1.14 For their own part, riding schools need to be professionally run businesses. They need to offer attractive, efficient and as far as possible safe facilities, in order to compete effectively with the range of other modern leisure activities. The following section discusses business and management skills, and rating and insurance issues. The section on industry skills, training and standards considers how to attract and retain staff. The actions proposed in those sections should help riding schools. We are well aware of the financial pressures on them and of the closures which have taken place.

**PROPOSAL 3: The role of riding schools**

| Action | Consider how the industry can more effectively recognise, support and expand the vital role of riding schools (perhaps exploring the potential for developing riding schools into community riding centres which would act as local ‘horse hubs’). |
| Responsibility | The British Horse Industry Confederation, in partnership with the other industry signatories to this strategy, with advice from Defra if required. |
| Priority | Medium-term. |
| Resources | To be determined. |

**Local riding clubs in Germany**

Most riders in Germany acknowledge that membership of a local riding club is a must if good standards and enjoyment are to be maximised. People ride horses at their local riding clubs, and owners keep their horses there. Regular and occasional riders and leisure horse owners mix and develop their interests further. The club is a centre for socialising as well as equestrianism, and is viewed as a community asset. This infrastructure plays a huge part in maintaining levels of participation and a sound level of basic equine education. It also provides opportunities for spotting talent in both horse and rider, and leads to consistently high levels of international success. Local riding clubs support the **German Equestrian Federation** mass membership, totalling over 900,000.

1.15 More reliable data is needed on the number and location of existing riders. This is central to estimates of the market and the turnover of the industry. It is also important to gather information on people's perceptions of equestrianism, and their reasons for taking part or not taking part (including dropping out). These influence the level of participation and the potential for increasing it, as well as the prospects for equestrian enterprises.

\textsuperscript{5} There are currently 440 riding clubs affiliated to the British Horse Society, encompassing 38,000 members. There are many more clubs which are not affiliated. Affiliated clubs encourage members to give their time in support of others, as well as enjoying the network of support and knowledge that comes with being part of a club. Horses in riding club homes benefit from the horse welfare education the affiliation system provides. The system has a clear progression from the novice horse and rider taking part in local club events, through the area qualifiers to national championships at various levels. Encouraging all horse owners to join their local affiliated club would provide a system similar to that described in Germany, and would bring its associated benefits.
PROPOSAL 4: Research participation in riding

**Action** Research number and location of riders, and public perceptions of equestrianism.
**Responsibility** British Equestrian Trade Association, with Defra.
**Priority** Short-/medium-term.
**Resources** Existing BETA/Defra resources.

Riding for the Disabled Association
The Association's activities illustrate the wider benefits which equestrianism can bring to society. Its objective is to provide disabled people with the opportunity to ride or carriage-drive so as to benefit their health and wellbeing. Its 16,000 volunteers provide over 600,000 horse rides and drives a year, for more than 25,000 mentally and physically disabled children and adults. Horse riding and carriage driving offers valuable therapy, enjoyment and exercise, and the chance to communicate with and care for horses and ponies. Riding can significantly aid recovery following a debilitating accident for example, and can help develop and strengthen the use and coordination of muscles and limbs. The volunteer instructors work closely with physiotherapists and other health professionals to encourage every individual to aim for attainable goals, some modest (such as gripping the reins) and others far more ambitious (such as completing a full jumping course). Most of our medallists at the 2004 Athens Paralympic Games started with Riding for the Disabled.

Fortune Centre for Riding Therapy
The Fortune Centre of Riding Therapy is a college for around 45 youngsters, aged between 16 and 21, with learning disabilities and behavioural difficulties. They are on the Further Education Through Horsemastership course and work towards National Vocational Qualifications and British Horse Society stage one exam. The horsemastership course is funded by the Learning and Skills Council. It uses working with horses to teach life and social skills, such as numeracy, literacy, money management, independent travel, hygiene and home skills. Horses have been found to help motivate young people to learn skills that on the surface seem to have little to do with horses and riding. For example social skills such as self-awareness become important when riders and horses are all sharing a sand school together, and maths becomes more meaningful when calculating the ratios of different horses feeds. Some of the young people live in student accommodation and some in a more domestic situation, often close to the yard and involved in responsibility for running their own lives.

1.16 One aspect of the horse industry that can affect people’s view of equestrianism is its environmental impact. This is also important in its own right. It has several facets, including effects on the landscape and visual amenity, on wildlife, and on land, water and air quality. In particular cases people may perceive landscape impacts for example as favourable (citing say the distinctive ‘stud landscape’ of Newmarket) or adverse (instancing unsightly temporary equine buildings and apparatus in some urban fringe areas). We will give further consideration to the industry’s environmental impact before finalising the strategy.
Welsh mountain ponies and wildlife conservation
Well-managed equines can be good for wildlife on meadows and pasture. Welsh mountain ponies for example keep hill vegetation open, knock down bracken, and eat rough grasses and rushes while generally avoiding heather and flowering plants. They are used for conservation grazing in Anglesey, the Brecon Beacons and Pembrokeshire. Similar uses occur in England.

Surrey County Council Horse Pasture Management Project
The Horse Pasture Management Project is Britain’s first Council-supported and funded, online resource, that gives advice on practical ways horse owners can maintain their paddocks to give maximum benefit to their animals as well as the landscape and environment. It has been created by Surrey County Council and The Countryside Agency and is supported by the Lower Mole Countryside Management Project and the British Horse Society. The Project has also produced a 2005 Surrey Horse Calendar and information leaflets to provide year-round grassland management advice for horse keeping sites across Surrey. For more information see www.surreycc.gov.uk/horsepastureproject
Aim 2: Boost the economic performance of equestrian businesses

2.1 There are over 18,000 active equestrian businesses in this country, all in some way linked to or dependant on equestrianism. The majority are small and medium-sized enterprises, many employing fewer than five people. Business activities range from tack shops to feed manufacturers, instructors to photographers, riding holidays to specialist recruitment companies. Improving the economic performance of these enterprises is important not just for the individuals directly involved - as customers, owners or employees - but for the industry as a whole. A healthy and thriving equestrian business sector is vital to the continuing growth and development of our sport, while the economic performance and even the survival of many equestrian businesses depends on a healthy market, buttressed by the other strategic aims.

2.2 A strong equine business sector, performing well in economic terms, will help to keep a constant flow of money coming into the equestrian world. This will benefit not only rural areas but also urban areas, where many of our manufacturing and retail businesses are based. A successful and well-run industry will also be able to lobby more effectively for any changes needed to consolidate and enhance performance in the future.

2.3 The key themes brought out in the initial consultation focused on the business environment (regulation, interaction with local and national government bodies, insurance), internal matters (such as business skills), and joint activities (like promotion, market development and standard-setting). These themes link with one another, and with the other strategic aims (in particular see proposals 1 and 2 above).

2.4 The main points raised in the consultation are summarised below.

- The majority of respondents felt that regulations – including fiscal and legislative ones, such as the perceived inequity in the rating system between diversifying farmers and existing or new equestrian establishments – were the greatest obstacle to the success of their business. This is similar to the views of small and medium-sized enterprises nationally.
- Improving business skills, as well as access to and awareness of sources of advice and assistance, was the second most mentioned theme. The development of regional equine strategies could provide networking opportunities and highlight the growing significance of equestrian activity in certain areas.

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6 Source: British Equestrian Trade Association.
7 Defined as any business with fewer than 250 employees. In the case of equestrian retailers, annual surveys carried out by the British Equestrian Trade Association show that the average number of staff employed is three or fewer.
9 The Defra Rural Funding Streams Review is looking at this issue and the Rural Advice Channel will be a useful source of information for the horse industry when it is rolled out from December 2005. The intention is to supply better and more accessible advisory services for rural business people, providing advice that is more relevant to them and to the area in which they work and live, and to offer an integrated Defra-family wide information service via a helpline and website.
• Many consultees focused on enhancing the value of equestrian products and services. One strand was to encourage the leisure sector (riders, trainers and riding schools) and business (trade, farmers and education establishments) to work together at local level with local government. Another was to develop new markets, not only export but also domestic, capitalising on the quality image possessed by so many British equestrian products.

• The active inclusion of horses in the development of rural and land use policies also attracted significant comment, including the need to recognise the importance of farm diversification in the development of the industry.

• Equine tourism was identified as an area for development, albeit not as frequently or in as concrete terms as perhaps expected.

(a) **Raise standards of business performance**

2.5 Successful equestrian businesses depend on both addressing the causes of external pressure *and* ensuring that the enterprises are run as efficiently and economically as possible. Although generalisations can mask individual differences, equestrian businesses tend to be run on lower than average profit margins compared to similar businesses in other sectors. This means that even a slight increase in costs can prove the difference between continued viability and insolvency. Equestrian retailing, for example, comprises many small outlets working off margins that in other retailing sectors would be unviable.

2.6 Many small businesses are run with little awareness of how they are performing relative to others, either within the sector or in other sectors. A benchmarking system would enable businesses to assess their performance in a non-competitive way, and to focus on parts of their operations where there was potential for improvement. It could be developed to cover all kinds of equestrian businesses (riding schools and centres, farriers, retailers etc.) and include comparisons both within and without the sector. This should help increase business productivity and profitability. It might be based on the existing Department of Trade and Industry Benchmarking Index,

**PROPOSAL 5: Business benchmarking**

<table>
<thead>
<tr>
<th>Action</th>
<th>Introduce a benchmarking system, to raise standards and performance across all types of equestrian business.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>British Equestrian Trade Association to lead.</td>
</tr>
<tr>
<td>Priority</td>
<td>Short-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>For consideration. Should include funding of research.</td>
</tr>
</tbody>
</table>
(b) **Encourage co-operation to improve business opportunities**

2.7 Equestrian businesses often have little interaction with each other, either businesses of the same type or with related ones. This is due both to concerns about competition and to lack of awareness of the possible relevance of what others are doing. There is however a vital link between participation in riding and the viability of many businesses. As participation increases, so the demand for related goods and services rises. The links between the industry core and the providers of goods and services to that core (see diagram on page 9) need to be formalised and strengthened. An example is the way that riding schools and retailers can work effectively together to increase the number of customers for both parties by mutual referrals.

**PROPOSAL 6: Industry co-operative projects**

<table>
<thead>
<tr>
<th>Action</th>
<th>Encourage greater use of inter-sectoral projects, to facilitate sharing of information and build business opportunities.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>Medium-term pilot in one area, long-term rollout.</td>
</tr>
<tr>
<td>Responsibility</td>
<td>British Equestrian Trade Association to lead.</td>
</tr>
<tr>
<td>Resources</td>
<td>For consideration.</td>
</tr>
</tbody>
</table>

**National Riding Festival**

The National Riding Festival was started in the 1990s, after the British Equestrian Trade Association’s first national equestrian survey suggested a decline in the number of riders. The Festival was established to stimulate new and lapsed interest in riding. It offers the opportunity for the many different components of the industry - including the trade, riding schools, representative bodies, riding disciplines, equine welfare bodies and breeders - to work together to increase participation and thus secure the future of the industry. An important aspect is to give school children the chance to experience riding using “Trigger” the mechanical horse. This activity is supported by a teacher pack linked with the national curriculum, and offers the opportunity to establish links between primary schools, riding schools and local equestrian retailers.

2.8 To be successful a business must manage its affairs efficiently, economically and prudently – in other words “in a professional business-like manner”. Many people however move into running an equestrian business by default, not design, driven by an interest in horses rather than in business. Many of these enterprises - whether riding schools, breeders, livery yards or saddleries - may well be run by experts in equine welfare, equestrianism or the craft involved in manufacturing. But this practical expertise is not always matched by sufficient business acumen or management skills to maximise the potential of the business.

2.9 Managers often lack the necessary skills or knowledge to manage their business, including staff, in order to make the most of available resources. Continuing training in modern management practices would assist in business survival and growth, and in the retention and
development of staff. Generic business skills should be tailored to the needs of equestrian businesses (see also proposal 19, National Occupational Standards). Signposts to sources of information such as Business Link should also be provided.

**PROPOSAL 7: Business professionalism**

| Action | Encourage targeted continuing professional development in the workplace for equestrian managers, and make access to training easier; establish a business networking system on a local or regional basis to share information, experiences and best practice. |
| Responsibility | Industry professional bodies in partnership with Lantra |
| Priority | Short-term. |
| Resources | For consideration. |

(c) **Ensure strong links with Development Agencies**

2.10 The nine Regional Development Agencies were set up by Government to promote sustainable economic development in England. The Welsh Development Agency fulfils a similar function in Wales. As well as contributing to sustainable development, the purposes are to:

- further economic development and regeneration;
- promote business efficiency, investment and competitiveness;
- promote employment; and
- enhance the development and application of skill relevant to employment.

2.11 The Regional Development Agencies’ have a total budget of around £2 billion. Each Agency holds its allocation in a single pot, to spend as it sees fit to achieve the priorities in its regional economic strategy and the targets in its corporate plan. Among their other functions the Agencies have recently taken on responsibility for funding regional tourism promotion, and from April 2005 will manage Business Links, the business advice network for small and medium-sized enterprises.

2.12 In view of their wide-ranging functions and extensive resources relevant to boosting the horse industry’s economic performance, it is vital that we establish a regular dialogue with the Agencies so as to highlight the industry’s importance and make the most of available opportunities. This is covered under proposal 2 above.
(d) Ensure a level fiscal and regulatory playing field

2.13 Perceived regulatory barriers to growth and uneven business playing fields across the industry were repeatedly expressed during the initial consultation. Examples were:

- Rate reductions are available to farmers diversifying into equestrian activities but not to existing businesses\(^{10}\).
- Commercial riding activities at educational establishments such as further education colleges are considered by the industry to benefit from favourable rating treatment, whereas riding schools are fully rated.
- Cycle and motorcycle helmets for adults benefit from a zero rate of Value Added Tax (VAT), as do children’s riding hats, while adult riding hats continue to be subject to the full rate of 17.5%.
- Thoroughbred breeders are subject to 17.5% VAT, far more than their competitors in the Republic of Ireland (4.4%) and France (5.5%)\(^{11}\).

2.14 On the other hand the horse industry enjoys some existing and prospective fiscal benefits.

- Some horse enterprises will qualify for rate relief under a new scheme for all small businesses which begins in April 2005. This is proposed to be available to a business occupying only one property, with a rateable value below £15,000.
- Horse enterprises which are categorised as community amateur sports clubs and are registered with the Inland Revenue are eligible for 80% mandatory rate relief. A riding school proprietor can lease premises to a community amateur sports club and secure the relief.
- Stud farms benefit from a £3,000 reduction in rateable value\(^{12}\), and can participate in the agricultural flat rate scheme for VAT.
- Equestrian facilities which are used infrequently (such as some indoor ménages, stables and covering yards) may benefit from empty property relief\(^{13}\).
- Rate reliefs are also available for charities, and on a discretionary basis to other non-profit making organisations and to businesses with a rateable value below £12,000 in a rural village with a population below 3,000\(^{14}\).
- Under the Common Agricultural Policy, the Single Payment Scheme in England has been extended to include land grazed by horses\(^{15}\).

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\(^{10}\) New horse enterprises on former agricultural land with a rateable value of up to £6,000 receive 50% mandatory rate relief and may have up to 50% discretionary relief. These benefits apply to any form of farm diversification, not only diversification into equestrianism.

\(^{11}\) The Irish Republic and France apply these reduced rates under special derogations, because they cannot do so under current European Community legislation.

\(^{12}\) Non-Domestic Rating (Stud Farms) (England) Order 2001 (No 2586).

\(^{13}\) No business rates are generally payable for the first three months that a property is empty. Thereafter an empty property rate of 50% is payable (but not on small properties with rateable values below £1,900).

\(^{14}\) See www.mybusinessrates.gov.uk/rates/other-reliefs.

\(^{15}\) The land must be kept in Good Environmental and Agricultural Condition, and included in a holding of at least 0.3 hectares. No claim may be made where the land is mainly used for recreational purposes such as racecourses, gallops or cross country courses. In Wales the calculation for the Single Farm Payment will be based on Common Agricultural Policy (CAP) direct payment claims that farmers made during 2000 to 2002. Those who were not in a position to claim agricultural subsidies in those years will not be eligible. So in Wales, no change as far as new CAP payment regime is concerned for farmers or landowners running solely horse-based businesses.
2.15 Concerns were also expressed about the treatment of horse enterprises in the land use planning system. Guidance which positively encourages planning authorities to support equine-related activities was introduced in August 2004 with the publication of Planning Policy Statement 7, *Sustainable Development in Rural Areas*. It also includes advice on occupational dwellings for rural enterprises, which should help alleviate difficulties in obtaining planning permission for on-site staff accommodation. The central industry communications function (proposal 1) would provide equestrian businesses with access to advice on land use planning, while local and regional horse networks (proposal 2) would be able to lobby local planning authorities.

**South Shropshire District Council planning advice**

South Shropshire District Council has produced a detailed Practice Note, available on-line, which gives information on planning law and practice concerning development which involves the keeping and use of horses. Equestrianism and horse-related activities are increasingly popular in this area. The Council has actively supported new and existing horse enterprises, while at the same time producing advice such as the Practice Note to help ensure that necessary consents are sought.

2.16 While the views expressed in paragraph 2.13 need to be put into context, they are strongly held. Defra and the British Horse Industry Confederation have repeatedly discussed the taxation of horse enterprises. Defra has provided the Confederation with a checklist of the issues which the industry needs to address in order to make a case for change. Progress is being made gradually on many of these issues. Equestrian industry bodies need to develop a more cohesive approach to lobbying and engaging in dialogue with Government at national and regional level.

**PROPOSAL 8: Fiscal and regulatory constraints**

<table>
<thead>
<tr>
<th>Action</th>
<th>Set up an industry working group with external professional advice to identify any significant fiscal and regulatory constraints on equestrian businesses, and make a cogent case for change where appropriate.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibility</strong></td>
<td>British Horse Industry Confederation. Industry and Government should meet regularly to discuss action and progress. Defra would support the working group on request by providing factual advice and guidance.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Medium-term.</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td>Joint industry/ British Horse Industry Confederation resources.</td>
</tr>
</tbody>
</table>

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16 It states that 'Local planning authorities should set out in their development documents their policies for supporting equine enterprises, whilst maintaining environmental quality and countryside character. These policies should provide for a range of suitably located recreational and leisure facilities and, where appropriate, for the needs of training and breeding businesses. They should also facilitate the re-use of farm buildings for small-scale horse enterprises [that is, enterprises involving up to ten horses] that provide a useful form of farm diversification.'

17 The rate-relief scheme, which applies to all types of farm diversification, will end in 2006 unless it is extended. The Valuation Office is not aware of any difference between the rating treatment of indoor arenas at educational establishments and at riding schools, although the basis of assessment may vary. It would be happy to investigate if details were provided. The zero-rate of VAT relief for pedal cycle helmets arose because motorcycle helmets were already subject to a zero-rate when the UK joined the European Union, and its rules permit only marginal adjustments to zero rates.
(e) Reach an industry view on the status of the horse

2.17 In this country only horses that are used to farm agricultural land or are farmed for meat or hides can be said to be agricultural animals\(^{18}\). By contrast European Union legislation treats the horse as a food-producing animal\(^ {19}\), reflecting the fact that horsemeat is eaten in some Member States.

2.18 Some initial consultees consider that our domestic legislation should class the horse as an ‘agricultural animal’, paralleling what they saw as its treatment in some other Member States as in the main an ‘agricultural’ or ‘production’ animal. They believe that this classification would automatically lead to the horse industry being granted the same benefits under the fiscal and planning systems as farming\(^ {20}\). In practice this is not so, as any change in the treatment of horse enterprises would require a specific and convincing case to be made (see proposal 9). Moreover, agricultural classification could damage competitiveness, for example if the requirement to record movements of agricultural animals was applied to horses.

2.19 Others within the industry consider that the horse should be defined as a companion animal, whilst a third group believe that there is a case for the horse to have its own status within agriculture as a production animal for sport, leisure and potentially food. Before we lobby for any change in the status of the horse, we must be clear whether this would make any substantive difference, and if so what the repercussions for all parts of the industry would be - what could be helpful for one part could work against another. There may be an argument for a case-by-case approach.

PROPOSAL 9: The status of the Horse

<table>
<thead>
<tr>
<th>Action</th>
<th>Set up a working group representative of all parts of the industry to determine whether the status of the horse is a significant issue, and if so to establish an industry-wide position and make a convincing case for change, with consideration being given to the situation in other Member States.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>British Equestrian Trade Association/ British Horse Industry Confederation to lead. Defra would support the working group on request by providing factual advice and guidance.</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
</tbody>
</table>

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\(^{18}\) This follows from the Agriculture Act 1947, section 109. The interpretations in other legislation, including the Town and Country Planning Act 1990 and the Agricultural Tenancies Act 1995, are based on the 1947 Act.

\(^{19}\) The root legislation is Directive 64/433/EEC, which regulates trade within the Community in fresh meat for human consumption. One consequence is that horse feed is zero rated for Value Added Tax.

\(^{20}\) Exemption from business rates, zero rating of agricultural animals for Value Added Tax, and permitted development rights for agricultural buildings.
(f) **Address problems associated with insurance**

2.20 Riding is a risky activity. This very risk contributes to the value of the learning experience, and to the role riding plays in the social development of young people, who may apply the lessons they learn to other parts of everyday life. In recent years significant increases in insurance premiums have however contributed to severe financial difficulties for owners of riding and livery establishments, in some instances apparently precipitating closure. Similarly, equestrian retailers are increasingly faced with litigation following equipment failure that is not attributable to them, and it is becoming more difficult for feed manufacturers to obtain product liability insurance. These problems are in part a reflection of an increasingly litigious society, fuelled by the proliferation of “no win, no fee” cases. Added to this is the owner's liability in some circumstances for damage caused by their horses, even where they have not been negligent.

2.21 It must be for insurers to determine the level of risk inherent in any activity and set premiums accordingly. Following encouragement by Defra, the horse and insurance industries set up a joint working group to help ensure that increases are fully justified by the level of risk, identify how risks can be reduced, and find a way forward that makes commercial sense to both sides. This has concluded that better record keeping holds the key to keeping the lid on insurance premiums for equine establishments. It does not believe that this necessarily means more paperwork, except for those establishments which are currently lax in this regard. The group is working to produce rider, horse and instructor record forms which will capture the essential data and provide insurers with the evidence they need to resist claims which have no merit.

**PROPOSAL 10: Insurance Issues**

<table>
<thead>
<tr>
<th>Action</th>
<th>Make rider, horse and instructor record forms freely available, and devise an educational programme to help riding establishment proprietors improve the quality of their records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>The British Horse Society and the Association of British Riding Schools (working closely with the insurance industry)</td>
</tr>
<tr>
<td>Priority</td>
<td>Short-term</td>
</tr>
<tr>
<td>Resources</td>
<td>Existing industry resources</td>
</tr>
</tbody>
</table>

**Legislation in the United States**

Legislation has been passed in the State of Kentucky that recognises the inherent risk surrounding anything to do with farm animals, including horses. Under it, keepers have no specific duty to reduce that risk. The legislation is no defence against negligence, and there is a duty to warn participants of the inherent risk. Such legislation has prevented spurious claims, for example against a riding school following an accident where the proprietor has not been negligent and has made known to the participant

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21 The Animals Act 1971 provides that owners of domesticated animals are liable for damage caused by the animals if the likelihood of the damage is due to characteristics not normally found in the species or not normally so found except at particular times or in particular circumstances. The Law Lords held in *Mirvahedy v. Henley* (2003) that owners were liable for the actions of horses behaving in a way that was normal for horses in a state of panic, even though they had not been negligent.
the risks associated with riding horses. Other States have passed similar legislation.

(g) Enhance the value of equestrian goods and services

2.22 Adequate data on the value and growth of the horse industry and its component parts is essential for proper commercial and policy decisions. The official statistics are unhelpful, as the standard classification generally does not identify equestrian goods and services specifically. For example, saddles are included in the same code as handbags and luggage, so the only way to quantify the (growing) value of saddlery exports is to obtain sensitive data direct from individual companies,

PROPOSAL 11: Statistical classifications

| Action: | Facilitate the gathering of statistics that will better allow the value of the industry to be assessed, through a revision and redefinition of the Standard industrial Classification and Standard Occupational Codes. |
| Priority: | Medium-term. |
| Resources: | Existing resources, plus possible research. |

2.23 The growth of riding as a leisure activity has run alongside the expansion of the equestrian industry that supports it. The reputation of British manufactured equestrian products is recognised around the world. For example many export markets view us as the natural home to finely crafted saddlery, with a tradition of craftsmanship that still thrives. Yet our manufacturers and designers are also at the forefront of innovation in a wide range of equestrian-related products, including the introduction of new methods in the manufacturing of traditional products. Innovation, style, design, safety, and value for money are all characteristics that buyers of these products expect to receive. This reputation needs to be more fully promoted and exploited in order to better develop existing and emerging markets.

PROPOSAL 12: Promotional material

| Action | Promote the UK as a source of quality goods and services through preparation of a promotional paper and digital (DVD) guide to British excellence in the equestrian industry. See also proposals 13 and 15. |
| Responsibility | British Equestrian Trade Association to lead for industry, with UK Trade and Investment. |
| Priority | Short-term. |
| Resources | Existing resources. |
PROPOSAL 13: Trade fairs and promotions

**Action** Increase participation in overseas and domestic equestrian trade fairs and travel promotions, in order to highlight British expertise, products and equestrian tourism opportunities.

**Responsibility** British Equestrian Trade Association to lead for industry; Visit Britain offices and UK Trade and Investment.

**Priority** Medium-term.

**Resources** International Business Schemes funding and industry resources.

Overseas trade promotions
Overseas equestrian consumer fairs or competitions offer one of the best opportunities to market and promote British expertise and products. The British Equestrian Trade Association has taken groups of exhibitors to the World Equestrian Games, Equitana (the world’s largest equestrian consumer fair in both Germany and Australia), the Rolex three-day event in Kentucky, USA, as well as to trade fairs in Germany and the Middle East. Information about British companies has reached a targeted world audience of over 500,000 riders and equestrian-minded individuals, highlighting the opportunities available to them to ride or visit equestrian events here, buy British horses or benefit from the quality offered by our equestrian equipment.

2.24 The horse industry needs to be able to utilise new technology and research and development opportunities more effectively so as to boost its international competitiveness. Improved access to information and communication technology and supply could be obtained through the development of closer links between the industry and the business support, advice and information network provided by Business Link\(^{22}\).

PROPOSAL 14: New technologies and research and development

**Action** Encourage use of new and developing technologies and research and development in business, to improve productivity and efficiency; introduce a standard for the manufacturing of safe saddles.

**Responsibility** British Equestrian Trade Association to lead for industry; Department for Trade and Industry.

**Priority** Long-term.

**Resources** Department of Trade & Industry, Business Link and EU funding streams.

**Equitech saddlery project**
Equitech is a three-year project, set up in 2002, specifically tailored to look at technology opportunities within the equestrian manufacturing industry. The project was initiated by the Centre of Engineering Excellence in conjunction with local

\(^{22}\) See [www.businesslink.gov.uk](http://www.businesslink.gov.uk).
companies, industry sector bodies such as the Walsall Equestrian Society and the British Equestrian Trade Association and Advantage West Midlands. Through Equitech, saddlery-manufacturing companies have access to support that helps them to explore and diversify into new areas of development, aiding business growth and keeping abreast of technological advances. As a result of the project companies have introduced lean manufacturing practices, and looked at the benefits of reverse engineering. They have also considered how motion analysis research can be used in the design of saddles, and how technology that measures the dynamic pressure distribution between a saddle and the horse’s back during riding can be utilised in assessing saddle fit.

(h) Increase equestrian tourism

2.25 The initial consultation attracted several references to the need to enhance the value of equine tourism, although few concrete suggestions for action. This may be partly due to confusion over what exactly is meant by “equestrian tourism”. For some it means inbound visitors attending race meetings, watching major equestrian events or going on packaged riding holidays. For others it means the activity regularly undertaken by many of our own riders, travelling to areas away from home to ride their own horses on bridleways or long distance routes. It can also mean going away to a trekking centre for a hack, or a riding centre for a course of training or weekend break. All of these activities are important aspects of the tourism product. Aim 4, increasing access to off-road riding, is particularly relevant to the middle option.

2.26 Much work is already being done in relation to farm-based tourism. A similar structure needs to be developed for equestrian tourism. This should be carried out in partnership with other rural-based tourism. The Rural Enterprise Scheme (offered through Defra) supports a wide range of tourist activities, including activity-based holiday facilities such as trekking centres, and does not require the applicant to be a farmer. The emphasis is on activities that bring tourists into the area, rather than for example riding schools which cater mainly for leisure activities for the local population.

PROPOSAL 15: Equestrian Tourism

| Action | Encourage a cohesive approach to promoting equestrian tourism through local authorities, regional tourism councils and national bodies; publish a national register of riding holidays and equestrian tourism opportunities on the internet; and establish a national descriptive grading system for equestrian tourism. |
| Responsibility | Associations representative of professionals in the industry, including British Equestrian Trade Association, British Horseracing Board, British Horse Society and the Association of British Riding Schools, working with holiday providers and regional and national tourism bodies. |
| Priority | Medium-term. |
| Resources | Industry resources and Rural Enterprise Scheme. |
A strategy for Equestrian Tourism in the South East
In 2003 Tourism South East and Rural Ways commissioned a project to “scope the equestrian tourism sector” through relevant research, and to draft a plan setting out a three year programme for the development of the region’s sustainable equestrian tourism. The overall aim was to enhance the economic contribution of the sector, by developing its tourism potential whilst ensuring the sustainability of any future equestrian tourism enterprises. The strategy was published in late 2004. It identified key priorities, and proposed objectives for the action plan. The key priorities include raising the profile of the South East as a focus for equestrian tourism, creating new product and marketing links and packages between equestrian and tourism products, and integrating initiatives between the two sectors. The objectives include marshalling information on equestrian tourism for visitors, developing specific riding holidays, racing packages and events, and marketing these to the primary target markets, and supporting further development through market research and profile raising of equestrian tourism.

Horse tourism in Wales
Forestry Commission Wales and the British Horse Society signed a concordat in July 2004 to work together to promote the growth in horse tourism in Wales. The concordat aims to promote:
- open access wherever possible for horse riding in woodland;
- opportunities for horse riding and pony trekking businesses
- a new code of practice for horse riders using National Assembly for Wales woodlands, to encourage a safe and responsible approach to riding;
- the establishment of local horse riding associations to help with managing the trails;
- pilot horse riding associations in areas where there is a need to regulate riding in National Assembly for Wales woodlands; and
- annual workshops to promote understanding and raise awareness of the impact of recreation on the environment.

Dyfnant & Vyrnwy Forest Trails
The idea of developing the two neighbouring forests between Welshpool and Dolgellau to promote horse tourism came about as a result of a conversation between a riding enthusiast and the Forestry Commission Wales area manager. This led to the creation of a 200-strong (and growing) society of enthusiastic equestrians, the Dyfnant and Vyrnwy Horse Riders & Carriage Drivers Association, who liaised with the Commission about the creation of safe off-road riding facilities in the remote uplands of Mid-Wales.

Following a successful bid for Objective 2 European Funding, a suite of forest tourism projects have been developed to attract more visitors to Powys. The neighbouring forests are set to become an important national centre for equestrian recreation in the same way as the nearby Coed y Brenin forest has developed into a nationally renowned mecca for mountain bikers.

Considerable work has already taken place in the Dyfnant Forest to provide safe off-road facilities recreational and competitive riding and carriage driving. Disciplines
benefiting from the new facilities include endurance riding and the new equestrian sport of le Trec, with the forest being used for fun weekends and taster sessions for novices. Facilities include a roll-in roll-out car park for horseboxes, a corral where horses can be turned out safely whilst riders prepare vehicles for the journey home, and two hard track trails and two soft track trails ranging from 3 miles to 18 miles in length. A further 18 miles of soft trails are being created.

The Severn Trent Water Authority have developed several tracks in neighbouring Vyrnwy Forest, and work continues to look at the best way to open some impassable routes to link the two forests.
Aim 3: Raise equestrian skills, training and standards

3.1 The initial consultation showed that all parts of the industry wish to raise standards and skill levels, and improve training opportunities. The key themes which emerged were attracting and retaining staff, providing an environment in which people wish to build a career, identifying skill levels and training needs, and improving opportunities for work- and college-based learning.

3.2 The need for greater cooperation between all sectors of the horse industry to address the issues and identify workable solutions was also highly apparent. Collaborative projects with industry-wide promotion will be required in order to make the necessary impact. It was also evident that awareness of the work of Lantra, the Sector Skills Council for the environmental and land-based sector, was patchy.

3.3 Improving the skills, training and standards of those working with and riding horses will help improve the industry’s image (including horse health and welfare) and economic performance. Implementing the proposals under aims 1 and 2 to enhance image, increase participation and boost business will in turn have a positive impact on the industry’s ability to attract and retain staff.

(a) Attract and retain staff

3.4 The horse industry is facing major challenges in attracting and retaining sufficient numbers of staff. Information on the nature and range of career opportunities is not always made readily available to young people. A clear career structure, allied to training and progression opportunities and improved working conditions, is needed to encourage staff retention.

3.5 Qualifications are paramount in a modern career. The horse industry should look at what others facing skills and staff shortages have done to promote careers. The construction industry, the National Health Service, the police, and hotels and catering are examples. The necessary marketing campaign should also address the need to widen participation and be more inclusive. Those sectors of the industry which have made progress in the key areas should be encouraged to share information and experience.
PROPOSAL 16: Recruitment and retention strategy

<table>
<thead>
<tr>
<th>Action</th>
<th>Devise and implement a strategy for attracting and retaining staff in all sectors of the industry, including:</th>
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</thead>
<tbody>
<tr>
<td>•</td>
<td>a marketing campaign to promote a career with horses;</td>
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<tr>
<td>•</td>
<td>closer working with all careers advisors, including Connexions;</td>
</tr>
<tr>
<td>•</td>
<td>a clearer career structure; and</td>
</tr>
<tr>
<td>•</td>
<td>a central jobs register to facilitate both initial access and retention.</td>
</tr>
<tr>
<td>Responsibility</td>
<td>British Horse Industry Confederation, central industry communications function [proposal 1] and Lantra.</td>
</tr>
<tr>
<td>Priority</td>
<td>Short-term start, medium-term implementation.</td>
</tr>
<tr>
<td>Resources</td>
<td>Existing industry resources.</td>
</tr>
</tbody>
</table>

3.6 The exclusion of equestrian training from sports teaching in schools reduces access both to leisure riding and to potential equestrian careers. The recent introduction of apprenticeships for those over 14, involving up to two days per week in the workplace, presents an opportunity for the horse industry. The Schools Education Programme could provide a model for other industry sectors.

PROPOSAL 17: Vocational training

<table>
<thead>
<tr>
<th>Action</th>
<th>Introduce a coordinated industry strategy to work with schools so as to provide work experience opportunities and vocational training across the horse industry.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Industry organisations in partnership with Lantra.</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>Lantra to lead on curriculum and qualification strategic influence.</td>
</tr>
</tbody>
</table>

The Schools Education Programme

The Schools Education Programme is run by the British Horseracing Education and Standards Trust. It is intended to open horseracing to a new, young audience, through the use of exciting and informative educational activities to complement the work of schools within the National Curriculum. The Programme is based on themed days out at racecourses and/or other racing facilities such as trainers' yards. The subjects covered include art, design and technology, English, geography, history, information technology, mathematics, modern languages, music, physical education and science. Several specialist vocational subjects are also covered, such as business studies, hospitality and catering, and leisure and tourism. The number of pupils participating has risen from 1,000 to when the scheme began in 2000 to over 8,500 in 2003/04. This shows the growing awareness amongst education authorities of the Programme’s value and its benefits for the pupils taking part. Further information is at www.britishhorseracing.com/inside_horseracing/racingindustry/education.asp.
(b) **Provide an environment in which people wish to build a career**

3.7 The industry requires a diverse range of skills, from business owners to vets, farriers and grooms. There is a particularly strong belief that the owners of equestrian businesses need to be trained in staff management skills, and in health and safety, in addition to training in business skills and access to business advice (which are covered under aim 2). The welfare aspects of horse management should also feature in all training programmes.

**PROPOSAL 18: Investors in People**

<table>
<thead>
<tr>
<th>Action</th>
<th>Encourage equestrian businesses to achieve Investors in People status.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Industry organisations in partnership with Lantra.</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>Small Firms Initiative offers funding towards Investors in People in England.</td>
</tr>
</tbody>
</table>

3.8 A National Occupational Standard describes what a person must be able to do, know and understand to perform competently within their job or role. Lantra works with the horse industry in developing National Occupational Standards based upon the needs of equestrian businesses and individuals.

**PROPOSAL 19: National occupational standards**

<table>
<thead>
<tr>
<th>Action</th>
<th>Promote the wider use of National Occupational Standards for human resource management (including recruitment, performance management, employment contracts and development), health and safety, and physical resource management.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Industry organisations in partnership with Lantra.</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>Existing resources.</td>
</tr>
</tbody>
</table>

3.9 In racing, all stable staff are required to be registered with the Jockey Club, and are automatically members of the Stable Lads Association. The Association, which is currently undergoing modernisation, represents the interests of the workforce in discussions throughout racing, acts on behalf of all staff in national negotiations on terms and conditions of employment, and provides an advice and representation service in individual disputes. However, this is the exception. The interests of people working in the horse industry are not generally represented by a union or staff association. This can make the industry a less attractive place to work, and denies employers the opportunity to talk to a body representing employees'
interests. Moreover, in the Government’s view workplaces where employees are informed and involved operate more effectively and successfully\textsuperscript{23}.

**PROPOSAL 20: Employee representation**

Representation for employees in the horse industry (including who would be responsible for taking action on it, where the resources would come from, and what the priority should be) remains an important issue, on which we are unable to make recommendations at this stage. Ministers will look to foster early discussion involving industry and trade union representatives and others to improve employee representation in the industry. Views on possible action are also invited in response to this document.

**(c) Identify skill levels and training needs**

3.10 The key to success for any business is the skill base of its staff. Little accurate data is available on the numbers and skill levels of those working in it or on its future skills requirements. It is difficult to plan appropriate, effective solutions without such data. Addressing the ongoing training needs of the workforce is vital if the other strategic aims are to be achieved. This is an urgent objective given the timing of funding applications, the next round of which is provided in September 2005. Action needs to be taken before this strategy is finalised.

**PROPOSAL 21: Skill levels and training needs**

<table>
<thead>
<tr>
<th>Action</th>
<th>Undertake research to establish skill levels and training needs with the aim of defining current and future skills requirements.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>Short-term.</td>
</tr>
</tbody>
</table>

\textsuperscript{23} New Information and Consultation of Employees Regulations coming into force in April 2005 give employees the right to be consulted and informed about matters that affect them at work. The legislation gives employers the flexibility to agree consultation arrangements with their employees tailored to their particular circumstances. It will facilitate voluntary agreements and allow pre-existing arrangements supported by the workforce and management to continue. It applies to firms with 150 or more employees, and is being phased in over three years to give smaller firms longer to prepare.
(d) Improve opportunities for work- and college-based learning

3.11 Nowadays more young people choose to pursue college courses to gain skills and knowledge than to train on-the-job. Many riding schools and private training providers thus find themselves in competition with colleges and higher education establishments to provide training.

3.12 Equal value should be placed on both academic and vocational forms of learning. Many other industries manage to combine training at college and in the workplace, so as to get the best of both worlds for all involved. Greater alliances between colleges and equestrian establishments would help to provide more relevant work experience, and to make course content more relevant for future employability. Concerns have been voiced about the suitability of the curriculum content of academic and National Vocational Qualification courses with regard to employment. There is anecdotal evidence of a demand for the emphasis of training to be practical and ‘on-the-job.’

3.13 The training available to those in the horse industry should not only address entry-level needs but also provide continuing professional development (see proposal 7). Training also needs to be available for leisure riders and horse owners to improve their riding, welfare and horse-care skills.

PROPOSAL 22: Practical training good practice

<table>
<thead>
<tr>
<th>Action</th>
<th>Industry-based training providers and colleges to work together to disseminate and share good practice for the practical training elements of education programmes through optimising the use of human and physical resources.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>The Equine Education Forum.</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>For consideration.</td>
</tr>
</tbody>
</table>

3.14 The training infrastructure needs to be accessible and affordable, with bureaucracy kept to a minimum. Employers have to play their part in investing and assisting in training and development. Better communication is needed between employers and training providers, which will result in ongoing improvements in the quality of training.

PROPOSAL 23: Funding policy and age restrictions

<table>
<thead>
<tr>
<th>Action</th>
<th>Work with the Learning and Skills Council regarding the current policy of funding mainly large providers, and barriers created by current age restrictions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Industry organisations in partnership with Lantra.</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>Existing resources.</td>
</tr>
</tbody>
</table>
3.15 The training and career pathways available should be better coordinated across the industry to enable employees to move more readily between the different horse disciplines and parts of the industry. The current training systems are fragmented and diverse, and there is little understanding of each other’s qualifications.

**PROPOSAL 24: Training and skills coordination**

<table>
<thead>
<tr>
<th>Action</th>
<th>Industry organisations to work together to achieve more co-ordination of training and better understanding of respective skills and qualifications.</th>
</tr>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Responsibility</td>
<td>Industry organisations in partnership with Lantra.</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>Existing resources.</td>
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</table>

**Children’s riding and qualifications**

A pilot scheme started by the British Horse Society at Lee Valley Riding School in North London offers children the chance to ride and gain an NVQ Level 1 or BHS Stage 1, opening up the possibility of a job in the industry after they have left school. The scheme has also shown how interacting with horses can be of great benefit to these children with learning difficulties, as it has been a huge motivator to the children not just to learn to ride but to progress with their reading and writing too. The BHS Examinations Manager who conceived the course says, “It introduces people to working with horses and gives them a hobby that can be for life or even a career. But this is just the pilot stage. To succeed it must to open to everyone”.

**British Racing School studentships**

The British Racing School in Newmarket runs a free, fully residential course, including accommodation, board, and £40 a week. Under the Rules of Racing, if you are aged between 16 and 18 years and want to work in a trainer’s yard you are required to undergo training either at the British Racing School or at the Northern Racing College. Students will typically spend nine weeks at the School. In this time they should achieve part of the NVQ2 qualification. Students are placed in a guaranteed job at the end of the course. The remainder of the qualification is then completed and assessed at their new job by a team of roving assessors. They visit soon after the student starts, to make sure they have settled in, and then every two months until they have completed the qualification. This usually takes just under a year.
Aim 4: Increase access to off-road riding and carriage driving

4.1 Almost half of the written responses to the initial consultation addressed the aim of improving access to off-road riding, particularly the need to provide more safe riding and driving routes for existing riders, potential riders and tourists. Many respondents felt that central government and many local authorities had failed to properly appreciate its importance, provide adequate funding, or work effectively towards a proper network of equestrian rights of way.

4.2 The key themes that emerged from the consultation were:
- ensuring an effective and well-maintained network of public rights of way;
- increasing provision of safe non-statutory riding routes;
- continuing safety education for motorists, riders and carriage drivers; and
- ensuring urban and rural riding and carriage driving achieve the same status.

4.3 Consultees voiced many concerns. Some rights of way had been incorrectly classified as footpaths or not recognised on the definitive map. Some bridleways had been severed by new roads. The Highways Agency had slowed down implementation of actions identified in its former vulnerable users crossings improvement programme. Roads were increasingly dangerous to use due to the speed and volume of traffic, bad driver behaviour, obstruction of verges, failure to provide suitable crossings or horse margins, and slippery surfaces (particularly stone mastic asphalt). Local authorities were reluctant to use their powers to create rights of way, due to uncertainty about the costs of compensation payable. Procedures were time consuming (up to fifteen years) and expensive. Rights of Way Improvement Plans and other initiatives were generating much discussion but little improvement on the ground.

4.4 Action is underway to address such concerns. The Countryside Agency’s Discovering Lost Ways project is tackling the issue of lost rights, which should help resolve problems of severed routes and fragmentation. This research is planned to be complete in about ten years, and should result in many more bridleways throughout England. The Highways Agency is producing guidance on making alternative provision when new roads affect existing equestrian routes. The British Horse Society and the County Surveyors Society are preparing a joint code of practice on road surfacing. The Department for Transport has included measures for horse riders in the national road safety strategy, improved the driving test and produced publicity to increase motorists’ awareness of horse riders’ vulnerability, provided funding to encourage take-up of the British Horse Society’s Riding and Road Safety Test, and has asked the Society to take forward the production of guidelines for highway authorities on using stone mastic asphalt.

4.5 Local highways authorities must introduce their Rights of Way Improvement Plans by 2007. These should provide better facilities for equestrians and other users who have not been so well served in the past. Authorities must consult Local Access Forums, which provide the industry with the opportunity to propose improvements.

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24 Riding Clubs and Pony Clubs also promote this test. Around 5,000 candidates a year sit it.
Improvement Plans will be incorporated into Local Transport Plans, which will shape resource allocation.

The Pennine Bridleway
The Countryside Agency is developing this new National Trail as the first purpose-built long-distance bridleway. At the start of the project much of the route was not legally available for horse riders, so that new bridleway rights have to be negotiated with landowners. When completed the Pennine Bridleway will run for 350 miles, from the High Peak Trail in Derbyshire to Byrness in Northumberland. A 120-mile stretch from Derbyshire to the Mary Townley Loop is already open.

Rights of way improvement in Hampshire
The Countryside Agency has a demonstration programme to produce exemplar Rights of Way Improvement Plans. In Hampshire research in connection with the exemplar plan has examined the needs of horse riders and carriage drivers. It identified how far they use public rights of way and other routes, the barriers to increased use, and the key issues regarding equestrian access25.

(a) Ensure an effective and well-maintained network of public rights of way

4.6 There was general agreement that a single organisation was needed to take the lead in pursuing increased access and defending existing access, and to advise everybody with an interest in equestrian public rights of way. Numerous volunteers spend hundreds of hours trying to improve and expand routes for riding and driving. There is a great deal of passion and enthusiasm that can be harnessed and the formation of a single body would help to give leadership and direction for this.

PROPOSAL 25: Lead rights of way body

<table>
<thead>
<tr>
<th>Action</th>
<th>Recognise a single body within the industry to co-ordinate and lead Public Rights of Way progress.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responsibility</td>
</tr>
<tr>
<td></td>
<td>Priority</td>
</tr>
<tr>
<td></td>
<td>Resources</td>
</tr>
</tbody>
</table>

4.7 Local and regional horse networks (see proposal 2) would be able to oversee action on access in their areas, and help riding groups and other parts of the horse industry to contribute effectively to Local Access Forums, Rights of Way Improvement Plans and the Discovering Lost Ways project.

25 See www.prowgpg.org.uk/gpg/demo.asp
PROPOSAL 26: Local rights of way

Action Horse industry to contribute more effectively to local rights of way processes, and local authorities to advertise and promote successful initiatives.
Responsibility Regional horse structure, local horse networks and single industry access body.
Priority Medium-term.
Resources Included within proposals 2 and 25.

(b) Increase provision of safe non-statutory riding routes

4.8 Differing views were expressed in the initial consultation exercise about how to provide more safe, non-statutory riding routes. Some felt that the best way forward was to create a proper network of dedicated routes. One radical idea was to turn all footpaths into bridleways. Others cited innovative methods of providing off-road riding, such as the free public use of disused railway tracks, set-aside land, headlands, and better access to Forestry Commission land. Horse rides and statutory open equestrian access in Royal Parks, public open spaces, and many commons have been providing superb facilities, in some cases for centuries, and should be used as models.

The Mendip Cross Trails Trust
This is a charity with a proven track record of installing recreational routes for walkers, cyclists and horse riders. New routes are created to link in with and maximise the existing fragmented rights of way network. The Trust identifies and surveys routes, negotiates with landowners, and instigates capital projects to install and promote routes on the ground. Among other forms of funding the Trust have been successful in accessing funding from the Aggregate Levy Sustainability Fund. Part of this funding has been used to compensate farmers who agreed to have new rights of way across their land and have dedicated them in perpetuity.

4.9 Consultees saw engaging farmers and encouraging them to allow use of their land as a valuable means of securing additional off-road riding and driving opportunities. Many complained that the Countryside Stewardship Scheme had paid farmers to put bridleways where they wanted them, not necessarily where equestrians needed them (although the Scheme requires any new bridleway to link with an existing bridleway or road). Some consultees considered that paying farmers to dedicate permanent rights of way would be a better use of public money than funding permissive tracks. This Scheme is closed to new applicants, and is due to be replaced by the Environmental Stewardship Scheme in 2005. Farmers will be required as part of the application process to show the location of existing rights of way. This should assist in determining the appropriate siting of new permissive bridleways. The Conservation Walks and Rides website26 gives information on all access routes provided under the Countryside Stewardship and Environmentally Sensitive Areas Schemes.

26 http://countrywalks.defra.gov.uk
PROPOSAL 27: Equestrian routes on farmland

<table>
<thead>
<tr>
<th>Action</th>
<th>Campaign to engage farmers and encourage them to allow equestrian routes on their land.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Single horse industry rights of way body (proposal 25).</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>As for proposal 25.</td>
</tr>
</tbody>
</table>

4.10 The Forestry Commission has a concordat with the British Horse Society on equestrian access to woodlands. It allows free, open access to roads and tracks where management control is not required to regulate access. In some heavily-used areas the Commission makes a charge to fund necessary management. Some consultees considered this should be dropped, and argued that the Commission does not charge other users. The Commission also grants permissive access so as to link bridleways and permissive routes which run on land owned by others, and provides opportunities for riding and trekking businesses.

4.11 The setting up of toll rides by such organisations as the Toll Rides (Off-road) Trust is an imaginative, pro-active and fast-growing way of providing extra access to safe off-road riding. They encourage farmers to open up rides on their land and pay them from riders’ subscriptions. Some consultees question the value of these initiatives, saying that under them access is not permanent or mapped, sufficient riders are required to subscribe to make a scheme viable, and it becomes harder to secure new public rights of way.

PROPOSAL 28: Toll rides

<table>
<thead>
<tr>
<th>Action</th>
<th>Encourage local riding groups to raise funds and set up toll rides.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Single horse industry rights of way body (proposal 25), working with regional horse structure and local horse networks (proposal 2).</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium- to long-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>As for proposal 25.</td>
</tr>
</tbody>
</table>

The Toll Rides (Off-road) Trust
TROT is a registered charity run by volunteers. It creates routes on private land, either linking to existing bridleways, avoiding dangerous roads, or establishing new rides. TROT have established over 350 miles of toll rides, which have in turn opened up many more miles of accessible bridleway networks. Riders pay around £100 a year. Landowners are paid some £200 a year per mile of ride and benefit from proper management and policing of access on their land. The flexibility of permissive rides appeals greatly to landowners at the outset. Very few subsequently withdraw permission. TROT works mainly with farmers, as well as with the Forestry Commission.
(c) Continue safety education

4.12 The British Horse Society estimates that at least 3,000 road accidents every year involve horses. Fortunately few involve rider casualties: in 2003 there were 158 casualties, with three fatalities. This represents less than 0.05% of all reported accidents. The Society considers that official statistics should be collected for all horse-related road accidents, not just those where people are injured, which would produce higher figures. It commends the Department for Transport’s excellent work educating motorists to pass horses ‘wide and slow’. The Department will continue to educate drivers to be more aware of horse riders, and welcomes the horse industry’s educational efforts.

PROPOSAL 29: On- and off-road safety campaign

<table>
<thead>
<tr>
<th>Action</th>
<th>Equine industry campaign to educate riders, carriage drivers and motorists as to how to behave correctly on both roads and off-road routes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Single horse industry rights of way body and central industry communications function (proposals 25 and 1).</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>As for proposals 25 and 1.</td>
</tr>
</tbody>
</table>

(d) Raise the status of urban riding and carriage driving

4.13 Riding is often mistakenly seen as an exclusively ‘rural’ activity. Most people live in urban areas. There is a huge demand for access to safe places to ride on the outer margins of towns and cities as well as within central limits. It is vital that these areas are not forgotten when considering the provision of equestrian routes, and that safe places to ride are maintained and increased.

4.14 It is essential that riding tracks, riding schools and livery stables are regarded as a coherent whole, with easy access by public transport. London boasts some highly integrated schemes, both old and new, which could serve as models for other towns and cities. If there is nowhere to ride outside the confines of sand schools then many in the horse industry believe that riding school clients will be discouraged and people will become unenthusiastic about taking up riding and driving.

PROPOSAL 30: Urban riding and driving

<table>
<thead>
<tr>
<th>Action</th>
<th>Mount a high-profile campaign to alert people and local authorities to the benefits of equestrianism and the availability of urban riding and driving.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Central industry communications function (proposal 1).</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>As proposal 1.</td>
</tr>
</tbody>
</table>
Aim 5: Encourage Sporting Excellence

5.1 We are already successful in many areas of equestrian sport, and have been recognised by Government at all levels for our achievements and potential. At the Olympic Games and Paralympic Games in Athens in 2004 our riders won more medals than any other equestrian nation: an Individual Gold Medal, a Team Silver and an Individual Bronze at the Olympics and 5 Gold and 3 Bronze Medals at the Paralympics.

5.2 Commenting on the preparation of this strategy, Olympic gold medallist Leslie Law27 said:

“It’s fantastic to see everyone united with the aim of making the British Horse Industry great again. From the elite riders to the grass roots, we all want the same thing – success in all spheres – competition, breeding, standards, business and safety. I welcome the chance to contribute to the development of a strategy to achieve this success and hope everyone will use the opportunity to make their views known.”

5.3 Leslie’s success was well-deserved: few people work so hard while appreciating that their glory rests on the contribution made by so many others. To encourage sustainable sporting excellence we must achieve “success in all spheres”.

5.4 Equestrian sport is sometimes criticised for concentrating too much on the elite. This is more a perception than a reality. The profile of elite activity attracts media attention but underlying this there is a great deal of work to support and develop sport and recreation at all levels. But we must recognise that that elite success helps to ‘pull’ people into equestrianism, and to encourage riders to aspire to higher standards. It is evident that the successes enjoyed in rugby, especially after the rugby World Cup win, have caused young players to turn to rugby as their sport of choice. Success in all equestrian sports will enthuse more people to start and stay in horse sports in the knowledge that those who persevere can succeed.

5.5 Sporting success can only be achieved through a combination of factors, all of which our initial consultation says we need to get right:

- clearly defined plans with targets over a set period;
- attention to detail;
- a well organised and resourced governance structure;
- good marketing;
- solid athlete development programmes for horses and riders;
- good competition structures;
- good facilities;
- adequate and open access for young people;
- dynamic talent spotting programmes;
- advanced sports science and medicine;

27 Winner of the Individual Gold Medal for Eventing in Athens, and only the second rider from Great Britain ever to win the Individual Gold Medal.
• outstanding coaching structures;
• access to well bred and produced horses; and
• support for schools, clubs and "grass roots" riders

5.6 A range of initiatives catering for some of these needs is already in place. The British Horseracing Board has a clear plan of action in the Modernisation of British Racing\textsuperscript{28}, is well governed and has a range of talent development programmes run primarily through the British Racing Schools. With its member bodies, the British Equestrian Federation:

• is developing a new governance structure for itself over the next decade;
• has a clear plan of action;
• has in place Lottery Sports Fund and Sports Council funded World Class Performance, Potential and Start programmes to identify, nurture, promote and support the most talented riders; and
• has sports science and medicine programmes for horses and riders.

5.7 But there is much more to achieve. The British Equestrian Federation’s Strategic Plan for 2005-2009\textsuperscript{29} covers a range of issues which correlate with this strategy, and may be read in parallel with it. Additionally, encouragement of excellence is dependent on all of the other components of this industry strategy being achieved, as mentioned above. Thus the proposals set out here concentrate on the areas where the greatest specific development resource is required to encourage genuine and sustainable sporting excellence while not duplicating the other strategic aims. So for example the need to develop a regional structure for the horse industry, which will among other advantages help to promote sporting excellence, is covered under aim 1.

(a) Establish a national database for riders

5.8 To encourage people we need to know how to communicate with them and to ensure that our initiatives are based on reliable facts. Many organisations have their own databases where information is repeated, not always correctly, and resources are wasted in duplication of effort. A “people” based database is needed to promote good internal communication and knowledge sharing, to promote the use and development of facilities, to use as a tool to raise coaching standards, to encourage access to riding, undertake effective research and development and manage talent-spotting programmes. A national database for riders\textsuperscript{30} will have many other potential uses, and would fit well with new National Equine Database (see paragraph 6.10 below).

\textsuperscript{28} See \url{http://www.britishhorseracing.com/}
\textsuperscript{29} See \url{www.bef.co.uk}
\textsuperscript{30} “Riders” is a generic term for riders, drivers, jockeys and vaulters – they are all athletes.
PROPOSAL 31: National Database For Riders

| Action | Appoint consultants to assess the task of creating a National Database for Riders and make recommendations. Implement agreed recommendations. |
| Responsibility | British Horse Industry Confederation to lead. |
| Priority | Medium-term. |
| Resources | Industry, with requests for public sector financial assistance. |

The Royal Yachting Association
The RYA use a single database, having converted over 50 internal databases within their headquarters and over 200 external databases used by their clubs and other agencies. This has improved communication and research capability, reduced duplication, and produced considerable savings in maintenance and administration. As a consequence the RYA is able to provide a much improved professional service while drawing its wider industry together effectively through effective usage of the database.

(b) Extend coaching development programme

5.9 The member bodies of the British Equestrian Federation are developing and implementing a unified Coaching Development Programme for all sport and recreation. It is devised to new “UK Coaching Certificate” standards set for all sport with the National Governing Bodies and Sports Coach UK, and will also relate to standards being developed by the International Equestrian Federation. The programme is relevant to all equestrian sports. Its propagation would raise standards throughout the industry, thus helping to increase participation.

PROPOSAL 32: Coaching Development Programme

| Action | Extend British Equestrian Federation’s coaching development programme to other organisations wishing to enhance their own coaching standards. |
| Responsibility | British Equestrian Federation to lead. |
| Priority | Short-term. |
| Resources | Industry, with requests for public sector financial assistance. |

Coaching and development in other sports
The governing bodies for rugby union, swimming, sailing, football, cycling, cricket and tennis have adopted robust policies for coaching and coaching development. Levels of participation and success in these sports are rising as a consequence of investment of effort in professionalism in the area. The work helps to bring the industries surrounding the sports together in a more cohesive manner.
(c) Improve the standard of facilities

5.10 Like golf, racing has driven up the standards of its facilities for sound commercial reasons, providing environments that encourage take-up and social interaction. The same cannot be said of those in the sporting and recreational equine world. The British Equestrian Federation is developing a strategy with its member bodies to encourage improved facilities. Sharing this within the industry would widen the benefits.

**PROPOSAL 33: Facilities Strategy**

<table>
<thead>
<tr>
<th>Action</th>
<th>Share British Equestrian Federation’s Facilities Strategy with other riding bodies.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Federation to lead.</td>
</tr>
<tr>
<td>Priority</td>
<td>Short-term.</td>
</tr>
<tr>
<td>Resources</td>
<td>Industry, with requests for public sector financial assistance (for example for facilities in deprived areas).</td>
</tr>
</tbody>
</table>

Golf club facilities
Golf clubs provide more than the field of play. Almost all include pro-shops and comfortable club-houses where additional social facilities are provided. Clean toilets, good changing rooms and hot showers are the order of the day in golf clubs but are often not seen at equestrian venues. Golf is a mass participation sport, attracting players in part because the golf club is the place to play and socialise in comfort. Similar examples may be found in local riding clubs in Germany (see case study on page 21), France, the Netherlands and Scandinavia.

(d) Extend long-term athlete and equine development programmes

5.11 Long-term athlete development is used in various sports. It is about achieving the correct training, competition and recovery throughout a young athlete’s career, particularly in relation to the important growth and development years of young people. It provides a framework for individuals and their connections to help define their best route so as to maximise potential. It helps people to learn to enjoy themselves, to train, to compete effectively and ultimately to win. The British Equestrian Federation’s member bodies are introducing a long-term athlete development programme, to ensure that young people starting in equestrian sport and recreational activity enjoy the experience and have “fun”. This is a crucial starting point for anyone likely to be satisfied by their experience.

5.12 The concept of long-term development has equal value for young horses. The racing sector is adept at matching young-horses-with-potential with successful trainers, and then finding equally successful jockeys to race ride. These lessons need to be taken on board for sport horses, for example by establishing a protocol whereby the best young horses are trained by the best trainers, identifying and publicising the key components in successfully training young horses, and perhaps holding courses to train trainers and developing an accreditation scheme. Long-term equine development and long-term athlete development should be related, so that eventually the best horses are ridden by the best riders.
PROPOSAL 34: Long-term Athlete and Equine Development Programmes

<table>
<thead>
<tr>
<th>Action</th>
<th>Extend British Equestrian Federation’s Long-term Athlete and Equine Development Programmes to other equine organisations wishing to enhance their interests in encouraging excellence.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibility</strong></td>
<td>Federation to lead.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Medium-term.</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td>Industry, with requests for public sector financial assistance.</td>
</tr>
</tbody>
</table>

Long-Term Athlete Development in swimming

Since the late 1990s swimming has incorporated long-term athlete development in its training and competition programmes, and made significant changes in the way the sport is organised for young people. The Journey Through Swimming is a guide from club through county, district/regional and national competition to possible selection for international representation. It explains not just what can be expected at each level, but why. Some swimmers will journey all the way, some only part of the way, but all will have the best chance of reaching their full potential if they are treated as individuals. It is important within the competitive programme that individuals can compete in events which are appropriate to their stage of development and talents. This is reflected in the different formats for competition, which helps to ensure that the coach can select levels of competition appropriate for their swimmers.

(e) Encourage unaffiliated bodies to engage

5.13 Many local sporting bodies organise equestrian activities without being linked to the national governing bodies of the sport in question. Sometimes rules and regulations are not administered well, and standards of insurance and health and safety are not what they should be. While costs may be lower for participants, the experience can be disappointing. Bringing such ‘unaffiliated’ groups into direct membership of the existing governing bodies would raise standards, give competitors a better experience and encourage excellence. These groups should be encouraged to reconsider their roles and work with the relevant governing body, while governing bodies should help them to join.

PROPOSAL 35: Affiliation

<table>
<thead>
<tr>
<th>Action</th>
<th>Market to unaffiliated groups the benefits of affiliation.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibility</strong></td>
<td>British Equestrian Federation to lead.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Short-term.</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td>Existing Federation and Board resources.</td>
</tr>
</tbody>
</table>
Aim 6: Improve the quality and breeding of our horses and ponies

6.1 Breeding higher quality horses and ponies in this country will benefit the horse industry and the nation. By increasing the value of horses bred here and the market share of our breeders and studs, it will boost the economic and employment benefits these enterprises bring to rural areas and improve the balance of trade. Better breeding of competition animals will also assist recreational riders by making better quality horses and ponies available to them through a cascade effect.

6.2 We need to reduce indiscriminate breeding and only breed from the best in order to produce horses and ponies of the quality that customers require. Although we remain a world leader in thoroughbred breeding, we have slipped to third position in terms of sales. Our dressage and show jumping horse-breeders have lost a large proportion of their market to overseas competitors. Our native ponies and horses are still supreme, and our representative eventing riders are mostly mounted on horses bred here. Overseas breeders are however gaining ground in both areas.

6.3 The initial consultation clearly indicated the need for greater cooperation. It highlighted problems arising from the fragmentation of our breeding sector, due to the large number of often small organisations involved. Marketing can be ineffectual, and prospective buyers may not know where to go. Among our overseas competitors considerably fewer organisations are involved in breeding. The consultation also showed that many breeders consider they are engaged in an expensive, time-demanding occupation without commensurate financial returns, and have far more in common with the circumstances of modest riding schools and livery yards than with high-profile racing yards attracting rich clients.

(a) Establish a lead body to improve breeding, marketing and evaluation

6.4 There can be few, if any, other countries with as many organisations concerned with breeding. There are three distinct sub-sectors - thoroughbred racing, native breeds and sport horses - each with unique characteristics. All three contribute to the stock of recreational horses and ponies. Racing and thoroughbred breeding is exceptionally well coordinated and there are lessons to be learned by the other two sectors. Different native breeds have different organisations (in some cases more than one per breed) dedicated to maintaining them. The British Equestrian Federation has established British Breeding to provide leadership in the breeding of sport horses. Sport and recreational horses and ponies are generally of mixed blood (see diagram), so it is not apparent why there are so many organisations involved in breeding.
Sport horse breeding

All Breeders seek to produce top quality horses; the horse then finds its level depending on ability, training

© RH Graham Suggett
With some notable exceptions, there is a serious shortage in marketing skill within the sector. Where marketing does take place, it is fragmented due to the excessive number of organisations involved, many with small budgets, and the consequent confusion in the minds of potential buyers about where to go for advice and viewing. The British Horseracing Board promotes the British thoroughbred at home and abroad, working with Thoroughbred Breeders Association and UK Trade and Investment. The remainder of the breeding sector needs to unite, pool resources and employ professionals in order to publicise the merits and successes of our horses. A national centre should to be established where young stock can be professionally presented on behalf of their owners before prospective buyers.

Many breeding organisations hold grading, evaluation and performance testing events, all with different systems of comparison. There needs to be some standardisation in order to promote sales and marketing and help potential buyers understand the scores. This would involve no more than using the same range of marks (for example 0-10), and the same headings (for example paces, conformation), for each item assessed. There are also opportunities for societies to share the overhead costs of evaluations by holding them at the same location on the same day.

Young Horse Evaluation Scheme
The Young Horse Evaluation scheme, promoted by the British Equestrian Federation and South Essex Insurance Brokers, assesses potential soundness, trainability, jumping ability, paces and temperament in four-year-old horses. The evaluations:

- provide data about stallions and mares to enable the earliest possible identification of good stock;
- enable the development of estimated breeding values (see paragraph 6.12 below);
- indicate where quality lies in individual horses;
- expose the most talented young horses and provide a market for young evaluated horses;
- provide information of value in subsequent training programmes;
- and supply reliable material for research and development.

Establishing a lead body to improve breeding, marketing and evaluation would:

- encourage greater cooperation within the breeding sector, for example on common plans of action to improve the overall quality of the national herd;
- provide an efficient communication network between breeders, breeding organisations, riders, drivers and the competition disciplines;
- develop much closer links between thoroughbred and non-thoroughbred breeders;
- speak for the breeding sector with a single voice where appropriate, for example when dealing with Government or raising finance;
- provide a central source of breeding information and advice;
- identify the different characteristics required in horses in different competitive disciplines and recreational activities;
- enable qualified and experienced staff to undertake marketing and publicity;
- join forces with the national tourist boards to promote buying tours of studs for overseas buyers;
• establish a centre where quality young stock from many breeders can be professionally presented for sale;
• encourage market research into the requirements of buyers of sport horses and ponies, to match knowledge already available for racehorses and native breeds;
• demonstrate and publicise the benefits of using proven stallions and semen over indiscriminate breeding;
• research the effect of introducing an industry-monitored stallion approval scheme;
• reduce duplication of effort between breeding organisations;
• offer the opportunity to incorporate a Breeders Support Unit, which could become a resource and educational centre for breeders and develop 'flagship' breeding schemes and evaluate genetic progress, as well as taking over work currently being carried out on a voluntary basis to improve sport horse breeding;
• help persuade breeding organizations of the need to introduce more standardised systems of evaluation;
• help publicise the successes of equines identified as having potential during evaluations, and encourage the entry of young stock for evaluation;
• help make best use of the National Equine Database (see proposal 37 below); and
• publicise the benefits of the Breeders’ Quality Mark scheme (see paragraph 6.13 below) to both studs and customers, and encourage studs to join it.

6.8 Such an entity would need to be seen by the existing breeding organisations, with their different perspectives as a representative, non-threatening, non-partisan body. It might be constituted as a federation with three distinct components (racing, native breeds and sport horses), with recreational horses subsumed within each. It might be located at the proposed National Equine Centre (see paragraph 1.6 above). This could accommodate many of the breeding organisations, resulting in considerable savings in overheads and more effective working; provide a venue for evaluations and gradings; provide a central sales point for overseas buyers; and offer a central attraction for those interested in the non-racing thoroughbred and the sport horse and pony, to match those in many other European countries. Thoroughbred breeding already has a recognised centre at Newmarket.

PROPOSAL 36: Lead body to improve breeding, marketing and evaluation

<table>
<thead>
<tr>
<th>Action</th>
<th>Establish a lead body to improve breeding, marketing and evaluation.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibility</strong></td>
<td>British Horse Industry Confederation in the first instance.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Medium-term.</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td>Existing industry resources.</td>
</tr>
</tbody>
</table>
(b) Capitalise on National Equine Database to improve breeding

6.9 The quality and performance potential of some of our equines is as good as anywhere in the world. Unfortunately this is a small pool, which is overshadowed by many mediocre animals. To prevent further erosion of the equine breeding industry and to recover lost ground it is essential to improve the overall quality of the national herd. The vast expertise and experience of our breeders is not being best utilised as there is a tendency to act in isolation. The solution lies in creating a comprehensive national data source, containing breeding and performance information, through which all can benefit from each other's experiences.

6.10 The National Equine Database is a collaborative project between Defra and the horse industry. It will provide a central source of reliable information on horses bred, owned or registered in the UK. From mid-2005 information should be available through a public website, NED Online. Buyers, sellers and breeders will have one-stop access to a horse's name, breed, sex, and age, and its breeding line, competition results, show grading and performance achievements. Breed societies, competition disciplines and others will supply breeding and performance information on a voluntary basis. Following Government start-up funding, inclusion of this information on the Database is intended to be funded from fees from users.

6.11 For the Database fully to succeed in supporting the successful breeding of higher-quality horses, it is essential that the industry bodies called on to provide breeding and performance information actually do so. Other benefits of the Database are that it will help to provide more accurate information on the size and shape of the equine industry, and assist with disease surveillance and control, equine welfare, identifying keepers of abandoned animals and deterring theft (when used in conjunction with microchipping), and demonstrating the UK's compliance with EU passport legislation.

6.12 In addition to its benefits for individual breeders, the National Equine Database provides opportunities for the breeding sector as a whole. It will enable the 'estimated breeding values' of stallions and mares to be calculated. This will allow both casual and professional breeders to compare the breeding value of animals, facilitating informed decisions which should help reduce indiscriminate breeding from unsuitable animals. It will also provide the potential to collate validated and reliable pedigree and performance data about breeding animals and their offspring, and to market it to breeders and buyers. It will inform research currently being undertaken to detect genetic defects manifested during training and competition. British Breeding has commissioned research to develop a UK model for Estimated Breeding Values, to include all relevant information available on the Database. It will also enable evaluation scores to be recorded centrally (see paragraph 6.6 above).
PROPOSAL 37: Capitalise on National Equine Database

Action Use information available from the National Equine Database to: develop a simple system for comparing the breeding values of mares and stallions; collate and market pedigree and performance data; support work being undertaken to eliminate genetic defects; and make evaluation scores widely known.

Responsibility New lead body to improve breeding (see proposal 36).

Priority Medium-term

Resources See proposal 36.

(c) Raise standards in studs

6.13 Whilst acknowledging the efficiency of many studs, there is concern that others are working to lower standards and are unable to provide verification of basic elements of record keeping such as conception rates. The Breeders Quality Mark scheme is intended to encourage these studs to aspire to higher standards (see case study below, and paragraph 6.6 above).

Breeders’ Quality Mark Scheme
The British Equestrian Federation, through British Breeding, has introduced a voluntary scheme with the objective of giving added confidence to those breeding and/or purchasing horses and ponies and increasing the marketability of such horses/ponies and semen. This is achieved by recognising and improving the quality of record-keeping and disease and accident prevention on studs, which in turn gives breeders further acknowledgement of their skill and increases the validity of their breeding data. Those studs achieving the standards set are entitled to display the Breeder’s Quality Mark on their stationery, in advertising material and as a wall plaque.

To customers the quality mark is proof that the stud has met the standards considered by Federation to be prerequisite for the operation of premises where the health, welfare and reproductive efficiency of the breeding stock are paramount; and where every effort will be made to ensure that your mare/stallion/foal will return home free from disease and injury and that prompt and appropriate veterinary attention will have been sought where necessary.

To studs it means that they have an added marketing tool in that it can be reasonable expected that customers will look more favourably on studs sporting the logo on their stationery and in their advertisements. However, it does come with a cost in that to obtain the Quality Mark studs must reach and maintain the high standards set. These include complying with the appropriate Horserace Betting Levy Board and British
Equine Veterinary Association guidelines and the keeping of detailed records for resident and visiting horses and ponies and, if applicable, the production, handling and shipping of fresh, chilled and frozen semen.

6.14 When a horse or pony succeeds in the competition ring, the rider is acknowledged, the animal’s name becomes recognised, and the sponsor also generally receives publicity. However, unlike on the racecourse, rarely are the breeder and trainer acknowledged and the breeding stated. This is disheartening for the breeder, without whose work the others in the chain would not have had their glory. Moreover, quality breeders with only a few mares often have to sell horses as youngsters at relatively low prices, because their business cannot afford to support them until they are old enough to begin serious training and demonstrate their value. Additional incentives are required for breeders, especially smaller ones, so as to retain their expertise and maintain the overall gene pool. The Horserace Betting Levy Board’s Breeders’ Prizes Scheme for thoroughbreds could provide a model for developing an incentive scheme for the non-thoroughbred sector.

State Premium Mares
In Germany, Hannover and several other states run a scheme for small breeders, in which top quality mares are awarded the prefix StPrSt (state premium mare) in the front of their name for life. These recognised state premium mares always command a high price when they come on the market.

PROPOSAL 38: Premiums for quality mares and stallions

| Action | Generate sufficient income from British Breeding initiatives and sponsorship to be able to offer premiums for British-bred mares and stallions achieving given grading standards, British breeders achieving outstanding success, and success by British horses and ponies in selected competitions. |
| Responsibility | British Breeding. |
| Priority | Short- to medium-term. |
| Resources | Sponsorship. |

(d) Balance genetic improvement with genetic diversity

6.15 The drive for genetic improvement needs to be balanced with maintaining genetic diversity and ensuring the genetic ‘fitness’ of the national herd. The 2002 UK Country Report on Farm Animal Genetic Resources showed that we have a rich diversity of equine genetic resources, and native breeds make an important contribution to breeding programmes and deliver key biodiversity objectives as well as augmenting regional identity and culture. A National Steering Committee has since been established to inform Government policy and assist in monitoring and managing farm animal genetic resources. As well as producing a National Action Plan, the Committee aims to:
• characterise breeds and promote their benefits and use (for example, the use of native breeds such as Exmoor and New Forest ponies in grazing programmes that deliver other important biodiversity objectives);
• maintain an inventory of pedigree animals in co-operation with breed societies;
• agree conservation priorities with stakeholders, especially for those breeds most at risk such as the Suffolk Punch and Cleveland Bay; and
• improve breeds.

6.16 In addition, the British Horseracing Board and the Animal Health Trust are conducting work on the inheritability of disorders in the thoroughbred. In time this could be applied to all horses with a view to eradicating certain predispositions (for example broken blood vessels).