Health of Riding Establishments

Insight pack: 2023 survey

Insights from 2023 survey

- Centres are operating at similar capacity to last year (75%); over 70% want to improve their capacity
- Lack of paid workforce and horsepower are the main challenges preventing delivery to customers
- Capacity issues are experienced by all types of centres, regardless of their current level of operation
- Capacity issues appear to be worse in the southeast and southwest regions
- Some centres are struggling with rising costs; others are pivoting towards activities less reliant on workforce and/or horsepower
- There are significant shortfalls of coaches, volunteers and horses across the sector

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Key statistics

Centres are at similar capacity to last year: approximately 75% on average

73% have capacity issues that prevent delivery to customers

Issues preventing growth mirror the 2022 survey, with paid workforce and horsepower the main issues. If these were resolved centres could be reaching 100%

Capacity issues are as likely for centres running at 90%+ capacity (expansion), as those operating at less than 80% (recovery)

Capacity issues appear worse in the southeast and southwest

Some centres struggle to adapt to difficult operating conditions; some are pivoting to activities less reliant on workforce or horsepower

Priorities for support include fundraising, business development, financial stability, facility maintenance, marketing and staff management

There are significant shortfalls of coaches, volunteers and horses across the sector but more accurate data to is needed to support this

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The survey

Online survey from March to April 2023

265 riding centres and livery yards responded

Nearly two thirds (64%) had been running for more than 20 years

Most common organisation type:

46% sole traders
26% PLCs
9% CICs

42% of centres have income less than £100,000**

Most likely to have the following affiliations:

BHS riding school 49%
Pony Club 38%
ABRS 25%

Geographical spread of responses

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*Based on estimated 1,497 centres/yards as defined by BHS (Horse and Hound article, 8 March 2023)

**This is not profit as does not take into account expenditure

Context on the responding establishments

During a typical week, respondent centres/yards on average had:

- 124 weekly customers
- 21 horses/ponies: 16 owned, 3 loaned and 3 on working livery
- 21 people on waiting lists

Audiences most likely to be delivered to are:

- Adults without a disability (87%) – 20% of centres consider this is their biggest customer group
- Secondary school children without a disability (85%) – 25% of centres say this is their biggest customer group
- Primary school children without a disability (83%) – 40% of centres say this is their biggest customer group

On average 19% of customers had limiting disabilities and/or long-term health conditions (LTHCs)

- Aligns with data from Sport England's Active Lives, suggesting c.20% of regular riders have disabilities/LTHCs

On average 13% of customers were from ethnically diverse communities

- Compared to 18% from 2021 census data highlighting the need to address under-representation as advocated in #HorsesForAll research

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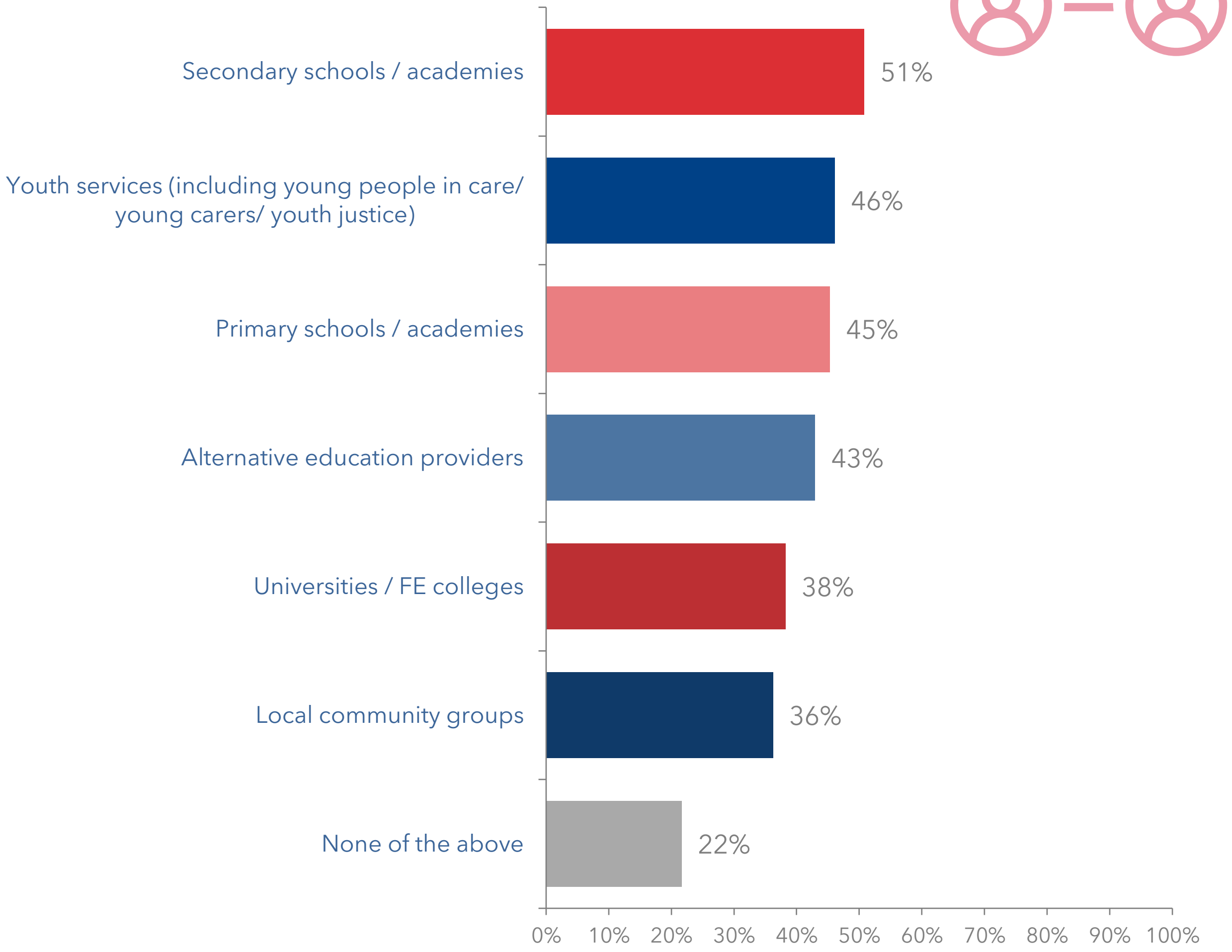
Communities centres engage with

- The top groups/communities' centres/yards deliver to include:
  - An unsurprisingly high % of centres deliver to Primary (45%) and Secondary schools (51%)
  - Youth Services (46%)
  - Alternative Education (43%)
  - Local community groups (36%)
- This highlights the broader social impact of centres, providing useful context for our upcoming social value work



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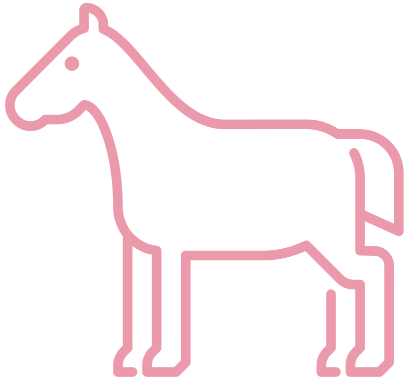
Off-the-horse activities

- Around 20% of all centre delivery time is for ‘off-the-horse’ activities, with the most popular being:

  - Horse care – 87% of centres
  - Alternative education* - 38%
  - Equine assisted learning** - 37%
  - Equine assisted therapy*** – 32%
  - Mechanical horse – 10%



- A large volume of activity focuses on improving physical health, mental wellbeing, personal development outcomes, aligning well to Sport England’s ‘Uniting the Movement’ strategy
- Demonstrates the ***potentially significant*** social value created by equestrian activity each week

*Definitions: * Alternative education = education arranged by local authorities for pupils who, because of exclusion, illness or other reasons, would not otherwise receive suitable education*
*** Equine assisted learning = using horses or ponies to focus on learning-specific skills such as leadership skills*
**** Equine assisted therapy = using horses or ponies for mental health or wellbeing treatments*

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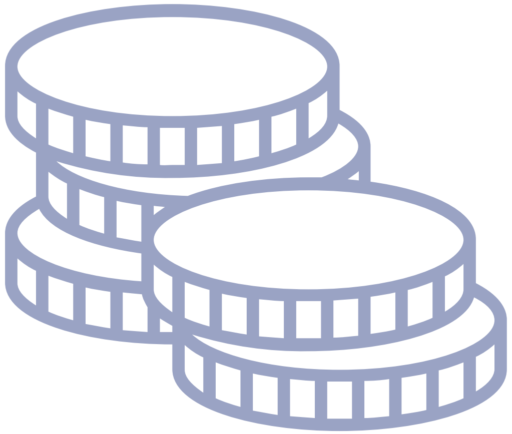
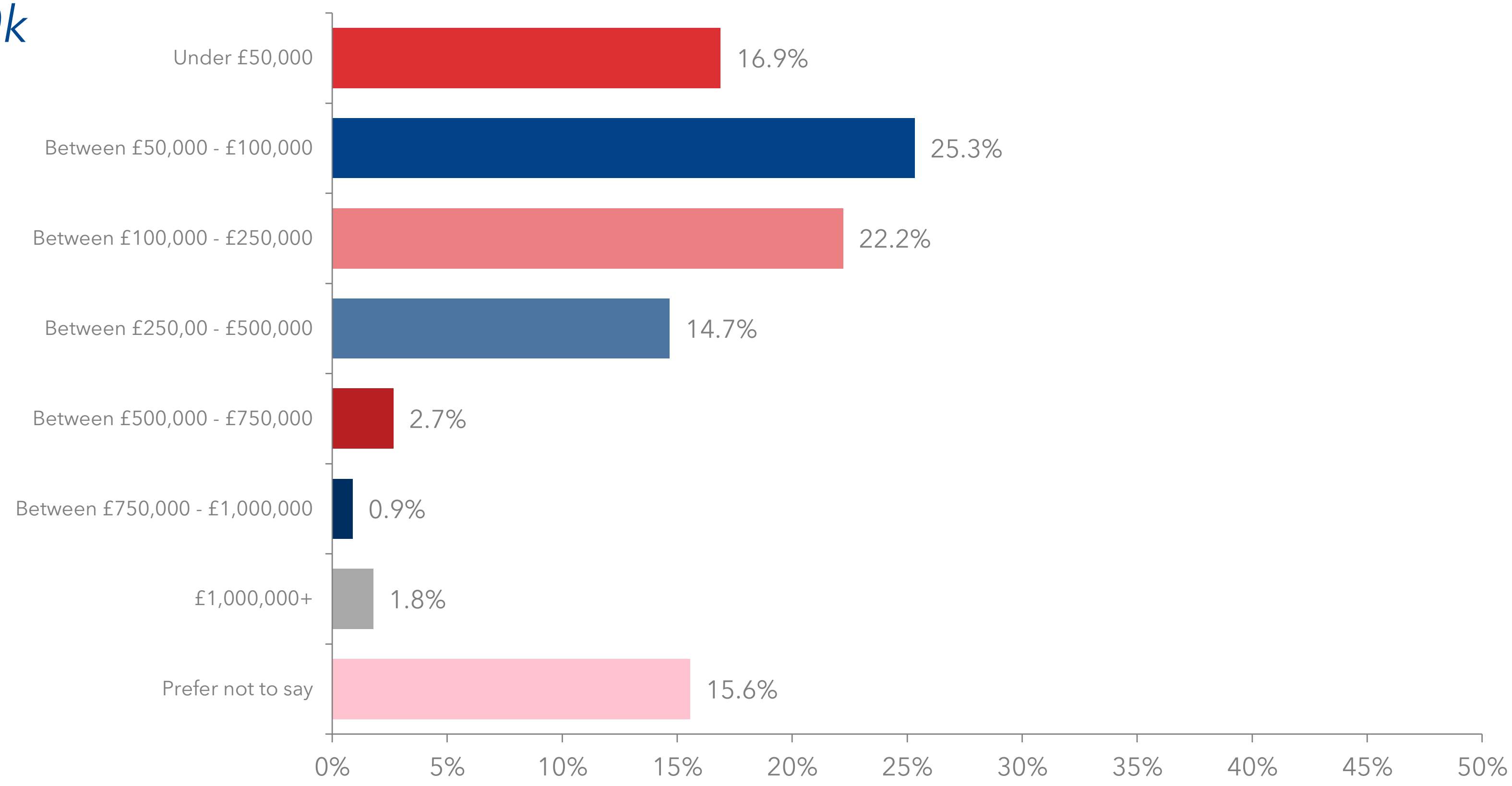
Income: profiles

42% of responding centres have a gross income of <100k



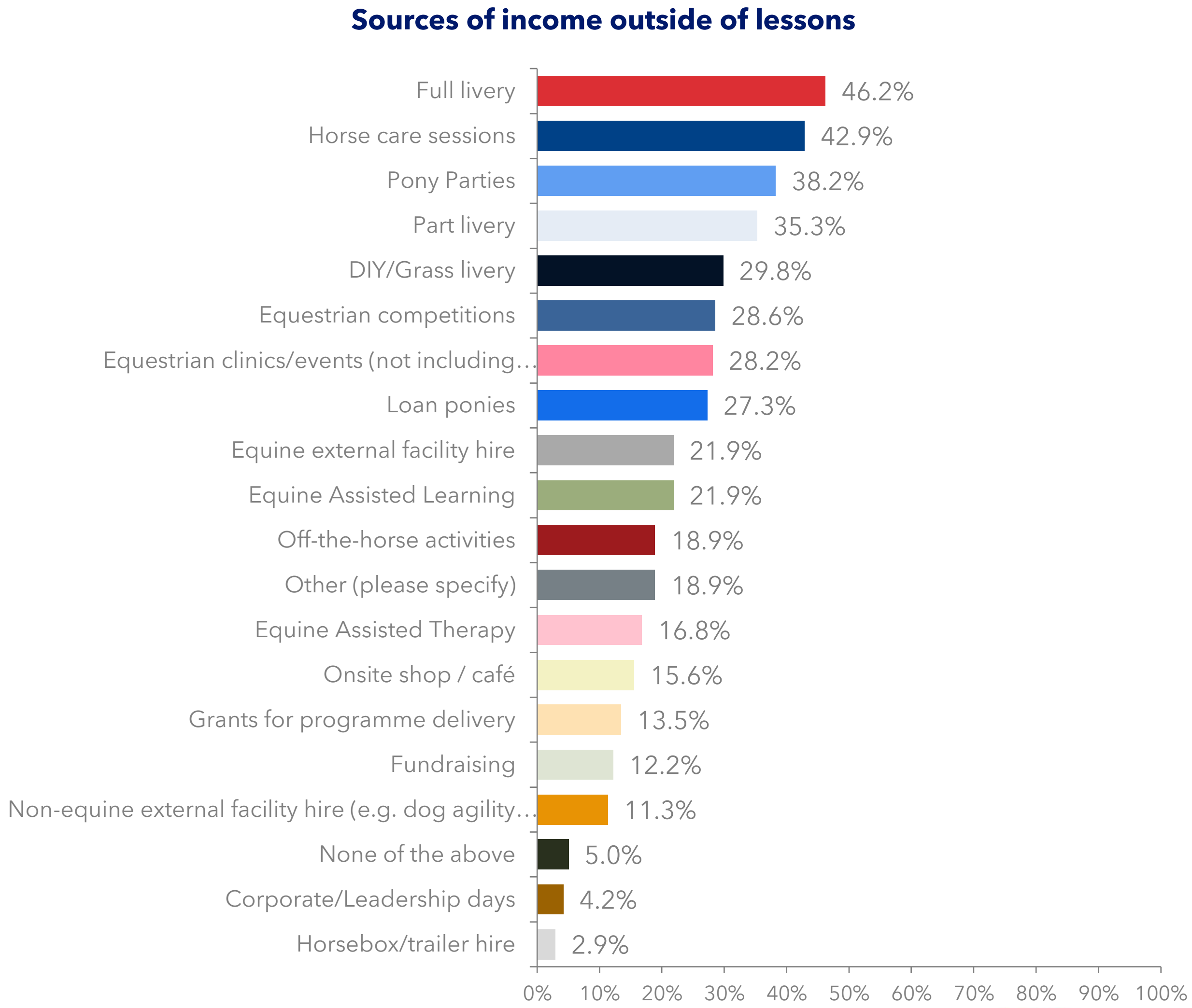
What is the gross income for your riding establishment, including grant funding and commercial income?



**This is not profit, as these figures do not account for expenditure*

Income: additional sources

- Many centres have multiple sources of income
- Along with livery the most frequently mentioned additional sources of income are:
  - Horse care sessions – although 87% of centres offer these sessions, only half generate money
  - Pony parties (38%)
  - Equestrian competitions (29%)
  - Equestrian clinics/events (28%)
  - Loan ponies (27%)
  - Equine external facility hire (22%)



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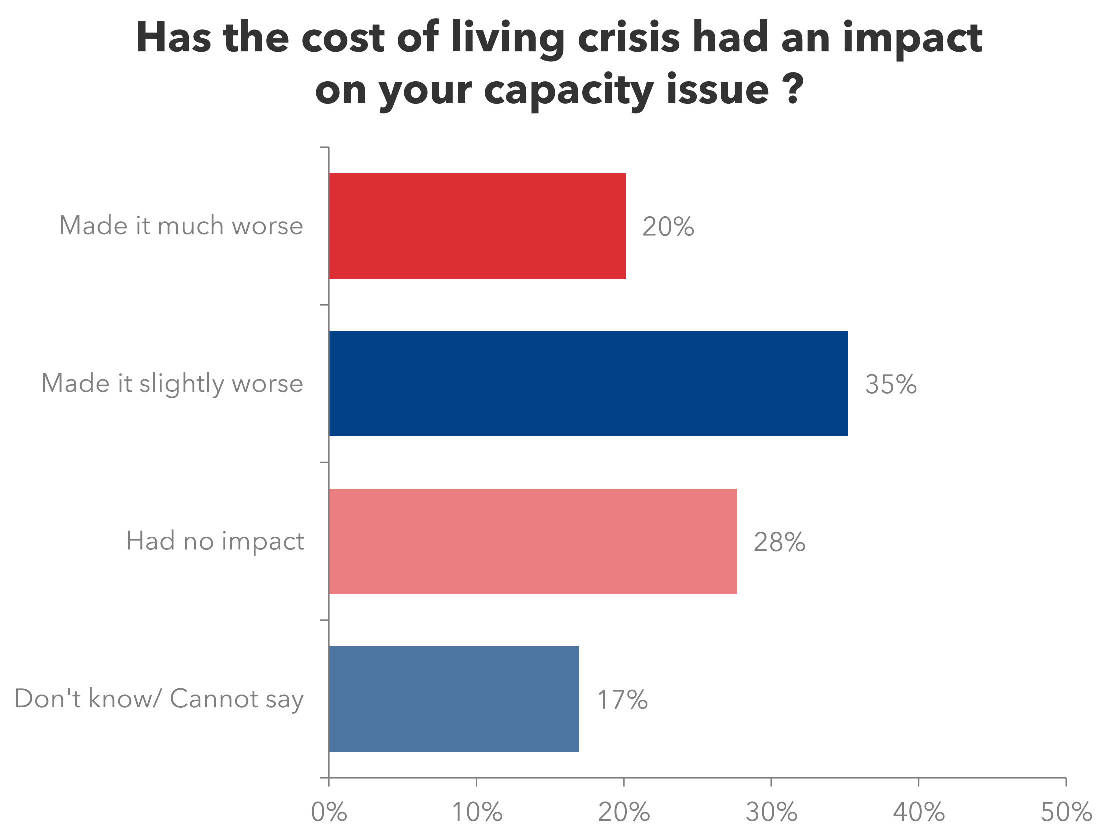
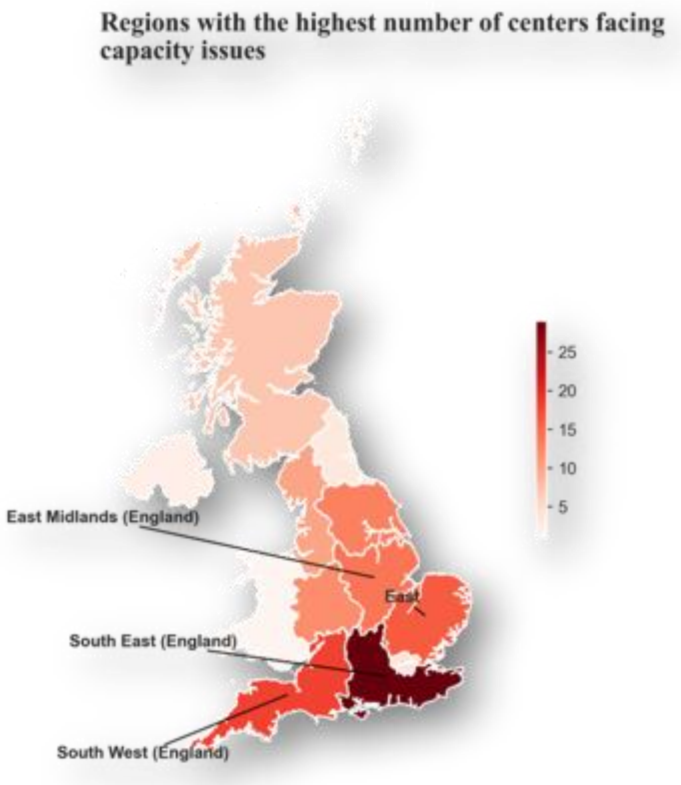
Impact of the cost-of-living

- 55% of centres say the cost-of-living crisis has made the capacity issue worse
- Despite this many have a positive outlook for the future of their centre
    - 61% were very/quite positive
    - 24% neither positive or negative
    - 15% very/quite negative
- Reflects that centres/yards pivoting to other activities since lockdown



Capacity challenges



Centres in the southeast region have reported a higher prevalence of capacity issues indicating where bigger pressures may lie

Average is 75% capacity, almost identical to last year

73% have capacity issues that "prevent delivery to customers"

72% of centres express a desire to further increase their capacity

55% say the cost-of-living crisis has exacerbated their capacity issues

55% of centres said they have enough paid staff and only 53% said they have sufficient volunteers

54% of centres have a waiting list, therefore the workforce shortfall affects who centres can deliver to

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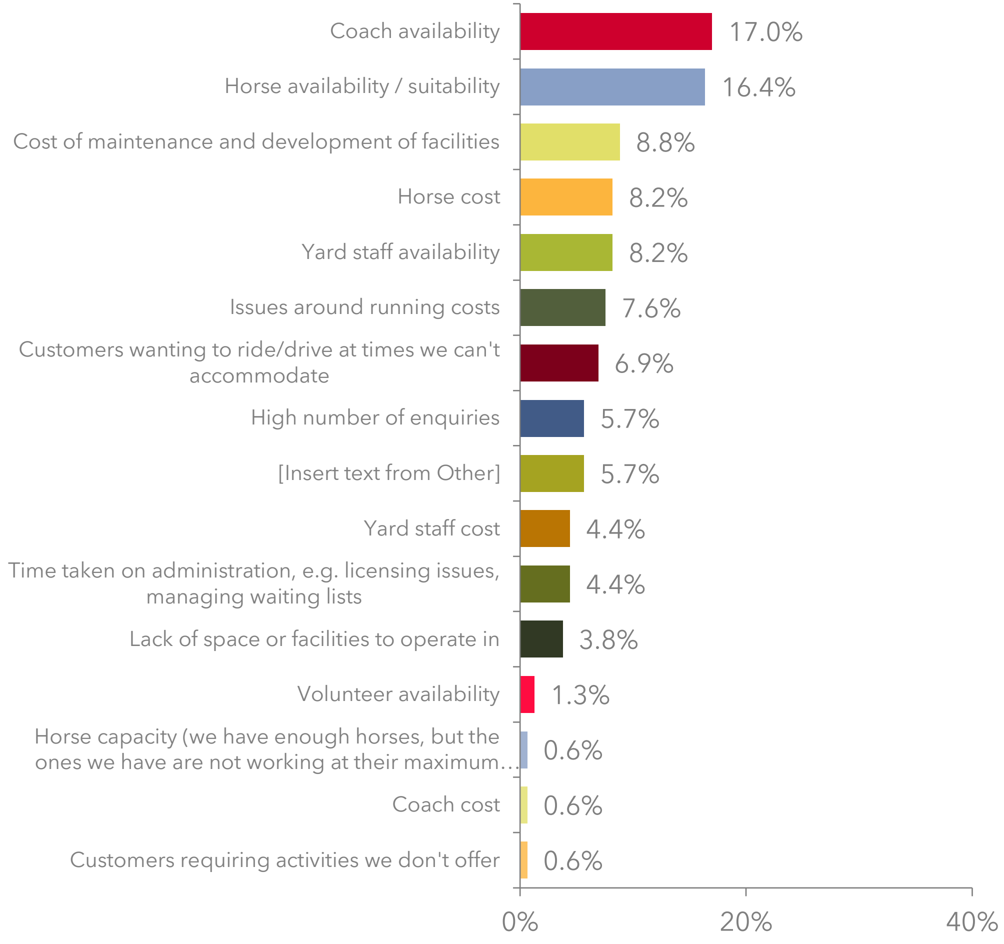
Challenges to delivery



When asked about their biggest challenge in delivering to customers, centres highlighted coach availability and horse availability/suitability

In open-ended comments, the majority suggest staff shortage as the main cause of capacity issues:

Staffing issues leading to session cancellations, including high costs, and low staff availability	Clients not willing to pay enough for qualified staff	Insufficient yard staff hours leads to additional workload on the coach/manager	If the coach is the sole trader, increasing pressure to deliver means they are unable to meet demands

Spotlight: paid workforce shortage

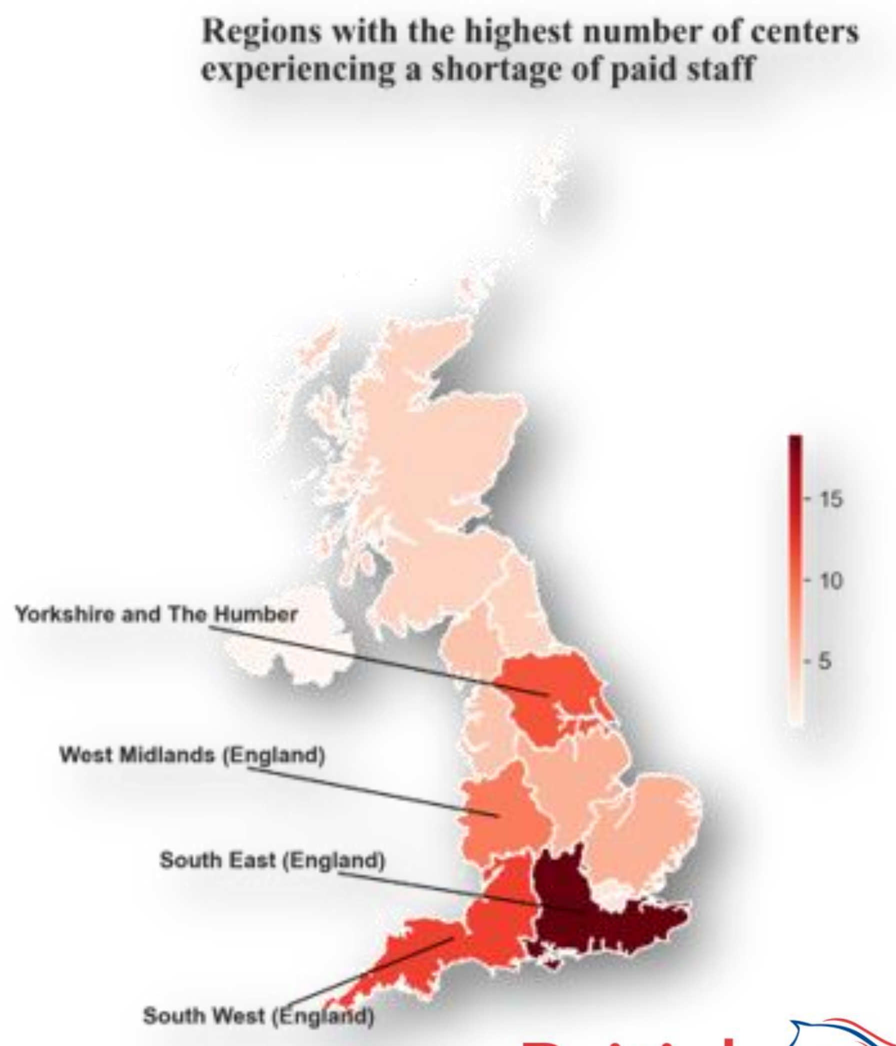
44% of centres said they don't have sufficient paid workforce

Coach availability is ranked as having the most significant effect on delivering to customers

Approximately 51% of centres experiencing capacity issues also reported a shortage of paid staff

Around 80% of centres are looking to recruit:

- 2 paid yard staff
- 2 coaches/instructors
- 1 office worker
- 1apprentice



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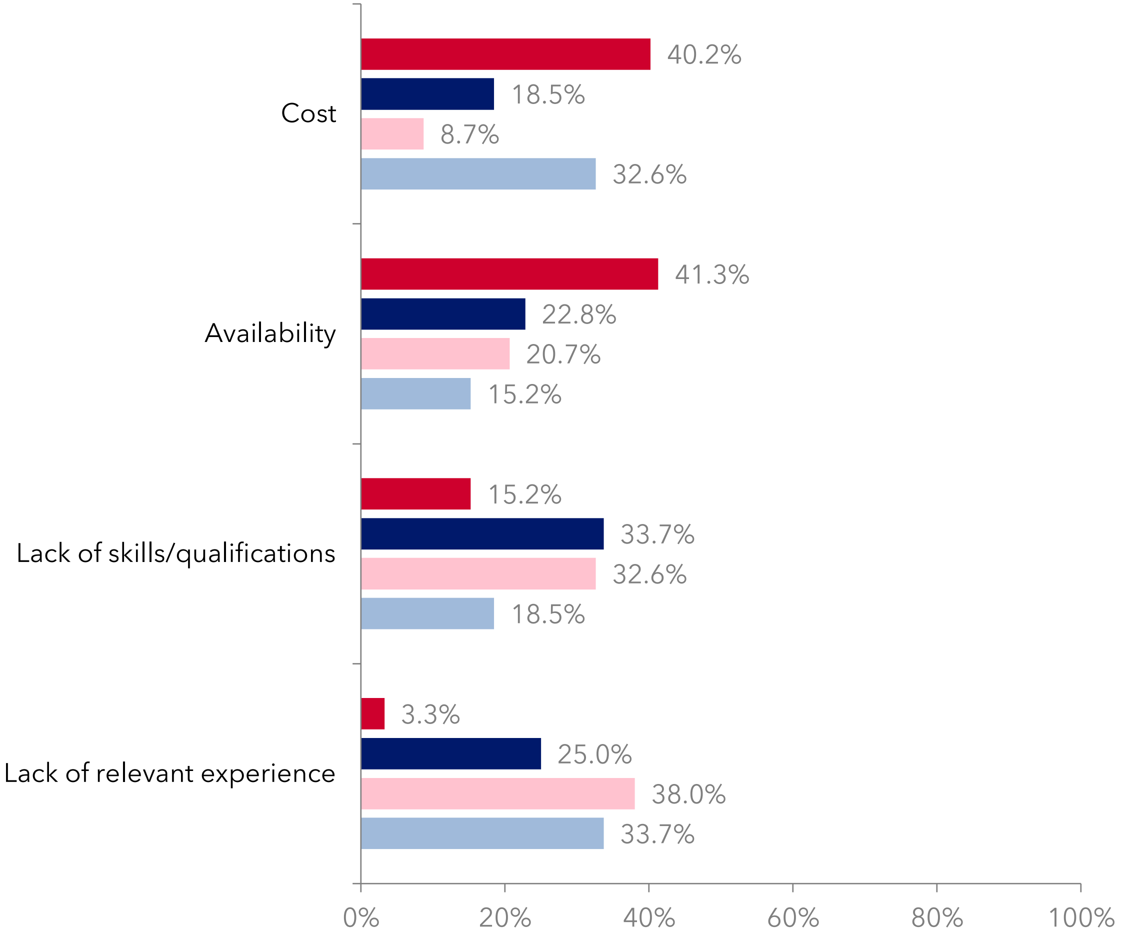
Barriers to recruitment of paid workforce

When asked to rank barriers to recruitment the most significant barrier was **availability of staff** (41%)

A similar proportion of centres (40%) stated that costs were their most significant barrier

Lack of skills and lack of experience were relatively lower priorities



Respondents were asked to rank these for factors in the impact they had on recruitment, with one being the greatest, four being the least.

Spotlight: Volunteer shortage

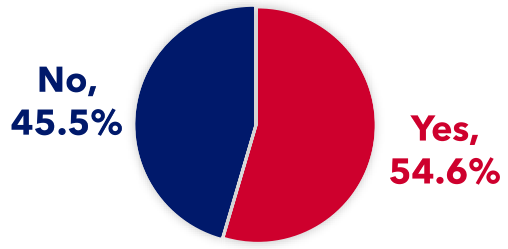
Centres have also reported a shortage of volunteers

71% of centres reporting a shortage of volunteers would like between one and five more volunteers

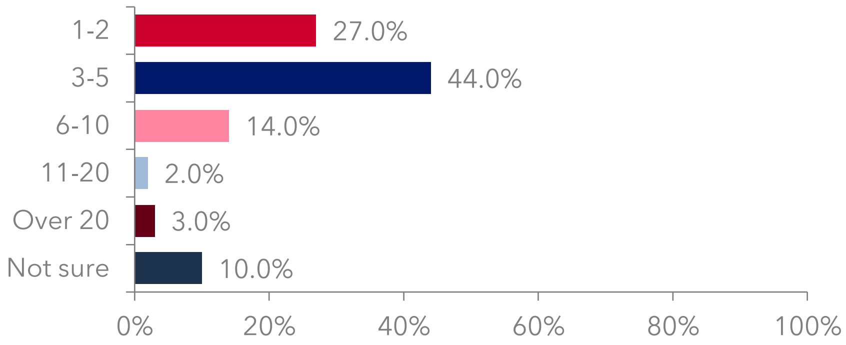
50% of centres with capacity issues also reported a shortage of volunteers – compounding the wider workforce issue

As an industry, we must be careful with how we recognise and reward volunteers

Do you have enough volunteers helping out at your centre?



How many more volunteers would you like to recruit?



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Spotlight: Horsepower shortage

Although horsepower is frequently mentioned as a barrier it Is less of an issue than workforce

56% of centres said they would **IDEALLY** like more horses/ponies

There were 4,746 horses across the centres responding to the survey – around 78% are owned by the centres

Centres are finding ways to deliver despite the lack of horses

There is no clear relationship between the number of horses and the need for more horses – centres of all sizes are affected by this issue

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Spotlight: Waiting lists

50% of centres have a waiting list with an average of 20 people on them

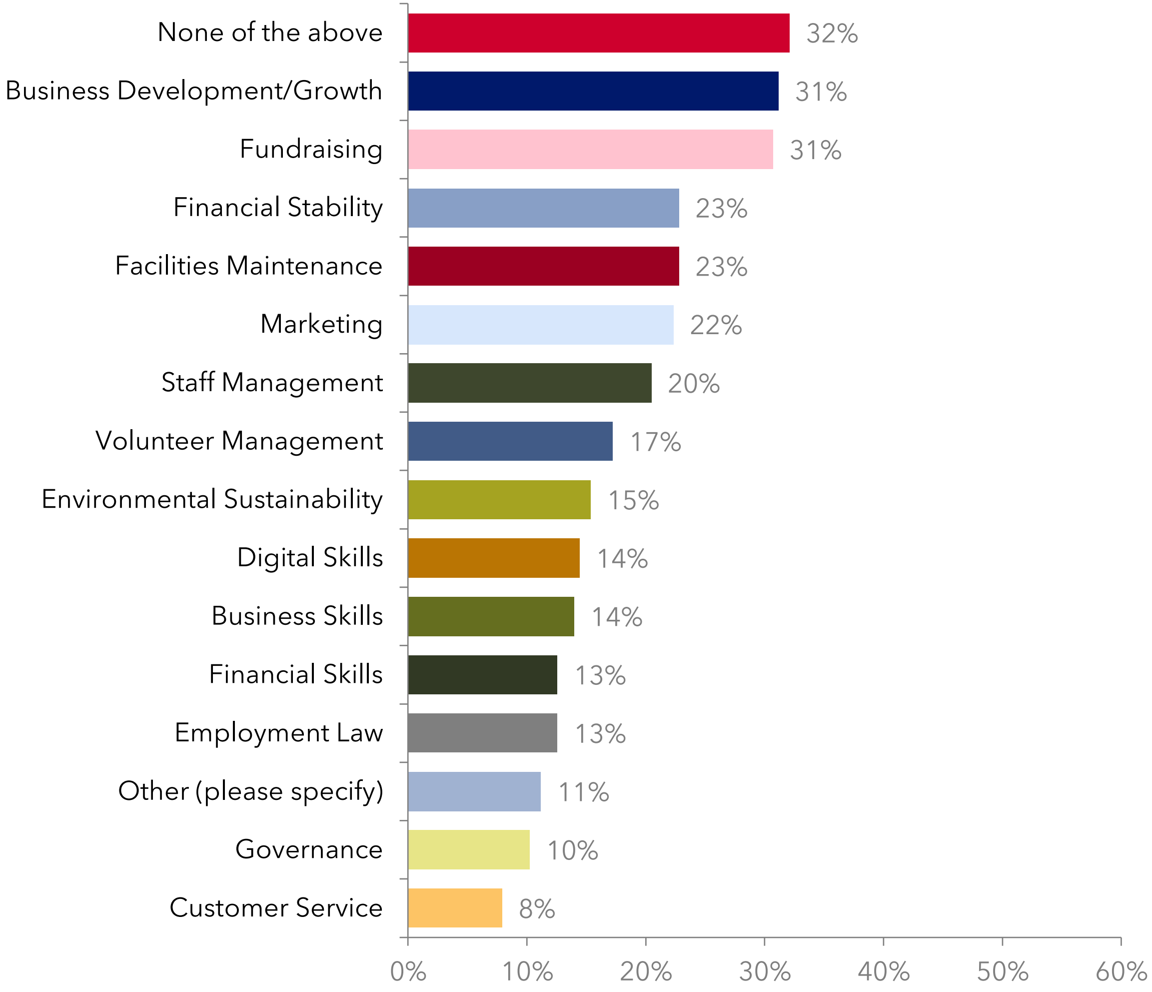
Responding centres had c.33k weekly customers, so we estimate an additional 15% of the current customer base are on waiting lists

Around 25% of centres have waiting lists of more than 40 people - these centres are more likely to report capacity issues, struggling to convert waiting lists to paying customers

Although there isn't a strong correlation between size of centre and scale of capacity issue, centres with more than 200 weekly participants rarely reported capacity issues

Areas of support centres/yards have requested

- 60% of the centres that reported capacity issues also indicated their desire for support for their business
- The main areas of need across all centres were:
    - fundraising - especially those in need of urgent support
    - business development/growth
    - financial stability
    - facilities maintenance
    - marketing
    - staff management



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