The British Horse Society (BHS) is Britain’s largest equestrian charity representing more than 94,000 members. Our principal charitable aims are education, horse welfare, equestrian safety and access to the countryside for horse riders and carriage drivers. Additionally, the BHS runs an approvals scheme for riding schools and livery yards. At present there are 779 BHS Approved yards in Britain, the vast majority of which are in rural areas and many could be classed as tourist attractions, including those that offer pony trekking. Furthermore there are 48 BHS Approved “Horses Welcome” bed and breakfast establishments. These businesses allow riders to take their horses on holiday with them in order to explore new areas on horseback.

The equestrian industry is vast. According to The British Equestrian Trade Association’s (BETA) 2015 National Equestrian Survey, £4.3 billion pounds is spent by consumers annually on a wide variety of equestrian goods and services. This has increased significantly since 2011. Given the obvious geographical bias of equestrian pursuits, it is clear how vital they are to the rural economy. Furthermore the BETA survey estimates that 3 million people had taken a riding holiday in the 12 months prior to the survey. This will include holidays abroad but does highlight the enormous potential for rural tourism via equestrianism.

Q1. Marketing. How well do agencies promote rural destinations across England?

It is beyond our purview to answer this question in its most general terms. However we would suggest that destination promotion should be more proactive in ensuring attention is brought to the equestrian facilities and opportunities that a destination offers. Presently Visit Britain does provide some links to such attractions but these are few and far between. We would also encourage equestrianism to be promoted through all sub-sectors of tourism including health tourism, tradition and heritage, cultural tourism and adventure.

Q2. What more should the Government do to support this work?

Many rural businesses, equestrian or otherwise, are small and specialist concerns that may lack expertise in more corporate disciplines such as marketing. Such enterprises need support to understand how to market their businesses and make connections to advertising agencies without incurring prohibitive costs. Cost is certainly as the primary deterrent to equestrian enterprises with regard to marketing. In a recent survey by the BHS, 77% of businesses relied on word of mouth and social media as their primary sources of marketing. Such methods are unlikely to reach tourists visiting the area for a short period. Most pertinent, 55% of all survey participants stated that they would like to participate in marketing workshops with a further 35% believing that their businesses would benefit from participating in communications seminars. We would urge the Government to facilitate such events to the benefit of small businesses and therefore the rural economy. We believe that many small businesses would benefit from assistance in communicating beyond their usual target markets by “thinking outside the box”.

A wider understanding of, and greater clarity to, the purpose and benefits of the Gov.uk website and phone line for business advice and support would provide the foundations for entrepreneurialism and expansion of equestrian tourism.

Q3. Access. What, if any, changes are needed to give people better access to the coast and countryside?
There is frequently controversy about horse riders on the road. However, equestrians actually prefer to use the Rights of Way Network (ROW), bridleways and byways or other safe off road riding opportunities. Sadly, in many areas the ROW network is fragmented and poorly maintained requiring the rider to use the road network. At present, horse riders have access to just one-fifth of the 112,000 miles of public paths and very limited access to the three million acres of open access land or the newly created 2,800 miles of coastal access.

Equestrians, alongside walkers and cyclists, are vulnerable road users. This is acknowledged in rule 204 of the Highway Code which states that the most vulnerable road users are pedestrians, cyclists, motorcyclists and horse riders. Equestrians desperately need safe off road places to ride and drive their horses. Better road surfacing of minor roads to reduce the number of pot holes will encourage the use of narrow lanes; with a reduction in speed limit for these roads which form part of the ROW network. Public footpaths that are 2-3 meters wide should be automatically upgraded to bridleways rather than their status being based on historic evidence. This would significantly reduce red tape.

Endurance and Trec competitions rely heavily on the ROW network to provide suitable routes when orienteering. However this has proved difficult for some organisers as their desired routes have been blocked due to poor maintenance. In effect this stops use of the rural network and discourages riders from using these routes in the future.

Another consideration to encourage rural tourism and use of the countryside is the provision of parking for horse transportation in areas of interest such as the coast and areas of outstanding natural beauty. Access to information both before rides and during would aid and increase participation; for example routes should be available on parish websites with distances on all finger posts on routes.

Open access land is only legally open to walkers. If all existing tracks (whether carrying public or private rights) across open access land were to be made available to horse riders and cyclists it would be a major incentive for those user groups to visit and explore the wilder area of countryside. As well as encouraging rural tourism it would reduce the potentially dangerous mix of vulnerable users and motor vehicles on rural roads.

An outstanding opportunity to increase rural tourism has been missed by creating the England Coast Path for walkers only. Every effort should be made to upgrade suitable sections (we acknowledge that it would not be possible for the whole route) so that horse riders and cyclists can use it too.

Extending access to land for horse riders will ensure better, safer access for individual equestrians and support equestrian enterprises by providing a point of focus to promote tourism. In addition this will support a more productive, sustainable and responsible equestrian sector by boosting the economic performance of small to medium enterprises.

Q4. Funding and fiscal policies. How can public funding be best targeted to get new rural tourist businesses off the ground and keep them going?

At present the equestrian industry is excluded from a significant selection of grants and funding. We would also welcome better promotion of the funding that is already available through a network of advisors and access to free business resources in support of this. The reality is that small business owners (whether equestrian or otherwise) rarely have the time or expertise to search for and apply for funding. The BHS has assisted a number of our members with this achieving great success but Government assistance would be hugely beneficial and lead to a boost to the rural economy.
We would also urge the Government to promote innovation by equestrian businesses to “think outside the box” and see themselves as a point of destination for tourism. The BHS would be delighted to work with Government on this as in tandem we could facilitate an understanding that equestrian services could provide a significant attraction to the visitor and tourist community thus increasing turnover and expanding the business without necessarily needing to go through the expensive process of upscaling. We need to broaden understanding of small scale tourism infrastructure funding in order to remove the barriers to business growth that are lack of investment and capital funding.

Q5, Are changes needed to tax levels and business rates?

Enormous discrepancies exist between riding centres when it comes to the issue of business rates. Both riding schools and livery yards regularly report to the BHS that the VOA will apply a different value to one property than it will to a very similar property in the same geographical location. There are also anomalies that occur when applying business rates to land based colleges and livery yards set up as farm diversification enterprises. In addition the cost of business rates are a barrier to business growth. This inequality is deeply damaging to small equestrian businesses. Whilst individually they may be low level employers and economic contributors, as a sector they form a vital part of the rural economy. To allow the rural economy to thrive it is vital that transparency and parity in the application process of business rates to equestrian businesses exists.

As a means of encouraging and increasing participation in long term use of rural equestrian businesses, all equestrian activities (including riding lessons) should be exempt from VAT with VAT on adult sized riding hats being reduced to zero in line with motorcycle helmets.

Planning and regulation. What, if any, changes are needed to planning and other regulations covering rural areas of special character, such as National Parks, to encourage sustainable tourism?

We would ask for consideration to be given to streamlining and simplifying the process of change of use for land from agricultural to equestrian use. At present this is a somewhat laborious and difficult process surrounded in red tape. Addressing this could lead to a reduction in the costs of establishment or expansion to equestrian businesses (and therefore potential tourist destinations) as well as the workload of local authorities.

The costs and planning restrictions pertaining to brown tourist signs are extremely prohibitive which is an enormous barrier to many small tourist enterprises, including riding establishments. This could be reviewed with the aim of permitting such enterprises to publicising their existence and location more straightforwardly. One option would be the introduction of a tiered system of payments based on income. It does not seem just that presently a small pony trekking business would have to pay the same amount for a sign as a colossus such as, for example, Alton Towers.

Infrastructure and skills. What measures are needed to ensure transport, housing and other infrastructure meets visitor needs?

Housing is a key issue in both rural and tourist areas as second/ holiday homes make local housing extremely expensive and beyond the reach of those working within the equestrian industry. The effect of this is that the industry survives on the employment of young adults that eventually leave to gain financial stability from better paid jobs.

How can the sector ensure there are enough people with the right skills to support customers and businesses?
The BHS provides world renowned qualifications for the equestrian industry. These include three specific qualifications for those involved in tourism. Thus there already exists excellent provision in the practical and customer service skills. We would be delighted to work with Government to increase the scope and take up of these qualifications.

However there is certainly a skills gap in some areas of the equestrian tourism industry. As discussed, equestrian enterprises are frequently small businesses. Many small business owners suffer from a lack of access to business skills development and training opportunities to make best use of common business tools for their companies such as SWOT analysis, PESTLE and business plans. Nearly 41% of people surveyed by the BHS have never used a business plan as a steering tool for their enterprises. Not only does this hamper sustaining a business in its current form, it is also a barrier to identifying ways in which a business could expand its provision to become more of a tourist destination and exploit that market.

Local environment and character. How can national and local policies get the right balance between growing tourism and enhancing the local environment and character?

This is perhaps an area upon which we do not have the expertise to comment in depth. However, we would emphasise the role if the horse in the culture and history of Britain and feel strongly that this could be better exploited to enhance the character of many rural areas, thus increasing tourism and trade.

Defra role. What more should the Department for Environment, Food and Rural Affairs do to ensure government departments (including Departments for Communities and Local Government, Business, Innovation and Skills, Culture Media and Sport and HM Treasury) support rural tourism?

We would ask Defra to encourage other Government departments to gain a greater understanding of the challenges presented to rural equestrian businesses and a greater appreciation of the cost (in terms of labour and finance) of maintaining high welfare standards within the industry. It appears that equestrianism is often viewed as a minority or elite pastime but the size of the industry is such that it is a very important contributor to the economy, particularly in rural areas. The estimated £4.3 million annual spend within the industry should not be overlooked. Neither should the employment that the industry generates nor the fact that 2.7 million British people ride. The importance of the industry is huge and as 96% of riders do so for pleasure (rather than professionally) the scope for tourism is enormous. Additionally riding is an outdoor pursuit with many physical and psychological health benefits and should thus be supported and encouraged.

Government must ensure that there is a level playing field between the equine industry and agriculture to ensure equestrian businesses are afforded the same opportunities. There are a number of unjust and confusing tax rules surrounding equestrianism and these must be reviewed in order to provide fairness and transparency and to encourage growth of the industry.

A more cohesive business support structure that is better advertised and promoted would benefit not only the equestrian tourism sector but also many other small businesses.

*September 2016*