Scoping study on the equine industry in Scotland

Rural Policy Centre Research Report

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Contents

1. Acknowledgements ........................................................................................................... 3

2. Executive Summary .......................................................................................................... 4

3. Introduction ....................................................................................................................... 6

4. Aims and Approach .......................................................................................................... 6

5. Horse population, geographic spread and sector value .................................................. 7
   5.1 Horse Population in Context ....................................................................................... 7
   5.2 Horse Numbers and Density Estimates and their Geographic Distribution ............ 9

6. The Economic Value of the Equine Industry ................................................................. 17

7. Environmental Impacts ................................................................................................... 18

8. Equestrian Activities ....................................................................................................... 19
   8.1 Leisure .......................................................................................................................... 19
   8.2 Ownership, breeding and equine welfare .................................................................... 24
   8.3 Sports and racing .......................................................................................................... 27
   8.4 Governance of the equestrian industry and quality assurance .................................. 28
   8.5 Equestrian training and development ....................................................................... 29
   8.6 Ancillary Industries and Services ............................................................................... 30

9. Key issues from industry stakeholders ........................................................................... 31
   9.1 Collaboration between equine industry sectors ......................................................... 31
   9.2 Regulation of the industry .......................................................................................... 32
   9.3 Barriers to entry/growth ............................................................................................ 32
   9.4 Staff training and retention ....................................................................................... 34
   9.5 Equine registration, passports and legislation .......................................................... 35

10. Recommendations .......................................................................................................... 36

11. Bibliography .................................................................................................................... 38
1. Acknowledgements

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2. Executive Summary

This report provides a snapshot of the equine industry in Scotland, assessing the scale and geographic distribution of the sector and discussing the key future challenges and opportunities the sector is facing. The work draws on evidence from existing literature and statistics, and interviews conducted with key stakeholders. The report concludes by making a number of recommendations to assist the development of the equestrian industry.

Current trends in the sector point to a continued increase in horse numbers and riding activity in all geographical areas of Scotland and across a wide cross section of society. The expenditure on direct upkeep averages £3,105 per horse per annum\(^1\).

The evidence suggests that there is a lack of regulation and coordination in terms of breeding and keeping in the industry. There is currently no national register of horse owners or breeders, nor any requirement for owners or breeders to demonstrate any knowledge of horse care or management to own or breed horses. While more regulation would be an additional cost to the industry, the lack of regulation underpins an absence of unity and cooperation across the sector. Without an enhanced identity, support for the equine industry will remain fragmented.

The increase in the horse population across the UK has resulted in an unprecedented number of equine health and welfare issues, including an epidemic of equine obesity and welfare cases, most notably in England, where existing charities that handle welfare cases and take on unwanted animals are already operating at maximum- or over-capacity. In Scotland, the scale of the welfare problem is not currently at a point of crisis but some agencies are concerned about a displacement of issues from England. Obesity is particularly common amongst leisure and companion horses, frequently associated with grazing on improved agricultural land.

Alongside an increase in horses and riding as a leisure activity, the number of equestrian businesses is increasing in Scotland, both as farm diversification projects and as independent small businesses, particularly around large population centres. However, there are restrictions in planning and additional costs involved in setting up, running and developing equestrian businesses and associated land that are often prohibitive. Moreover there is little information available on the wider economic or environmental impacts of the recent increases in horse populations or indeed of projected increases.

There is a lack of recognition of the health and wellbeing benefits that equestrian activities in Scotland provide to a wide demographic, in both physical and psychological terms. Information about such benefits is used to a much greater extent to strengthen the need for industry support and grant funding in England, for example. This report identifies the need to improve equestrian access to the countryside and road safety to encourage greater participation in outdoor recreation and sports.

The report makes a number of recommendations which relate to the equine industry, local authorities and the Scottish Government to maximise the potential economic and social contribution of the industry, including: a need for better regulation and collaboration between the different activities across the sector; addressing barriers to sector entry and growth; addressing business and land management support issues; quality assurance; and staff training and retention.

Implementing these changes would help the equine industry to address potential legislative changes such as the introduction and management of an equine database; or new requirements for certification or accreditation.
3. Introduction

In Scotland, there is a lack of robust information on the number and geographic distribution of horses. This means that monitoring the sector, for example, in terms of its importance or impacts, is difficult. Having accurate information on horse numbers and their location is also important because it enables the equestrian industry to better monitor equine diseases, promote effective breeding programmes, address welfare concerns, and improve the coordination and efficiency of the industry.

Evidence at a UK-wide level suggests that the equine sector has important local, regional and national economic impacts as well as benefits to health, wellbeing and quality of life. Much of the data about Scotland’s equine industry can only be extrapolated from sources available at UK-wide level such as the British Equestrian Trade Association’s National Equestrian Survey, which does not adequately reflect the geography, land use or economic circumstances of Scotland. In order to better understand the ways in which the equine sector impacts on rural economies and communities, and to provide better information to policymakers seeking to support the sector, it is necessary to provide accurate information about the number of horses in Scotland, their geographic distribution, and about the key characteristics of the equine industry, including the challenges and opportunities it is facing. This report discusses all of these issues and highlights areas where more research is required. It makes recommendations for changes in policy to maximise the contribution of the equine industry.

4. Aims and Approach

The report has five broad aims:

1. To explore and collate data on the equine industry in Scotland, including about the number of horses and their geographic distribution.
2. To explore the different characteristics of the key activities within the sector and the challenges and opportunities facing these activities.

2 Horses, ponies, donkeys and hybrids are all referred to as horses in this report.
3. To make suggestions about ways to overcome the identified challenges and make the most of the opportunities.

4. To highlight policy implications and make recommendations so that the equine sector can be appropriately supported in the future.

5. To highlight areas where further research is required in order to build up a better picture of the size and importance of the equine sector in Scotland.

Information for this scoping study was gathered through a desk-based review of reports, websites and statistics, and through six interviews with equine businesses. These businesses were selected to represent a variety of activities across the sector, including riding tuition, livery services, equestrian tourism, racing and a large welfare organisation. The interviews were partially transcribed and the content was analysed thematically. Findings from both the desk-based research and the interviews provide the basis for this report.

5. Horse population, geographic spread and sector value

5.1 Horse Population in Context

Equine identification regulations in Scotland and the rest of the UK have been reviewed numerous times since 2004. In the last ten years, new horse passport legislation has been introduced, which has led to the creation of 72 passport issuing organisations and a national equine database that has come and gone. The equine registration system, has, as a result, become difficult to track and enforce. This has been raised as a Europe-wide issue by the European Commission because equines, in particular horses, are very mobile compared to other livestock, and in many cases represent high economic and emotional value.

Major disease outbreaks in cattle, sheep or pigs can be more readily contained as the animals are traceable by statute. However, as horses are not recognised as meat animals in the UK there is a lack of traceability, for example in the event of a major disease outbreak. The outbreak of a major equine infectious disease in the UK would therefore have devastating consequences on the industry as a whole.

All equines are required by law to have a passport in order to make sure animals treated with certain medicines do not enter the food chain for human consumption and to prevent the sale

http://ec.europa.eu/food/animal/liveanimals/equine/index_en.htm
of a stolen horse, pony or donkey, as the passport proves its identity. Whilst passports are required by law in the UK, the difficulties of tracing 72 different passport issuing organisations is reflected in the lack of accurate and complete data, making it impossible to determine with certainty the total number of equines, and how many are vaccinated.

The lack of traceability in the equine sector arguably contributed to the ‘The Food Fraud’ that emerged in January 2013 when food inspectors announced that horsemeat had been found in frozen beef burgers made by firms both in the UK and the Irish Republic and sold by a number of UK supermarket chains, including Tesco, Iceland, Aldi and Lidl.

The UK is one of only three European Union (EU) member states (out of 28) not to have a central equine database. In September 2014, the EU Standing Committee on the Food Chain and Animal Health announced that by 2016 every member state has to have its own central database and that it must store information on the centralised database. All horses born after July 2009 have to be micro chipped before a passport can be issued. The information will be stored on the animal’s passport so their records can be checked and updated⁴.

A National Equestrian Database for all equines was set up in the UK in 2006 by the Department for Environment, Food and Rural Affairs (Defra) as an EU requirement. The Database was the only central source of information for over a million horses in the UK, but its closure in 2012 due to funding cuts resulted in a loss of central information on equine numbers and their geographic distribution. However, World Horse Welfare (2014)⁵ has reported that the UK is to establish a new central equine database as part of the more robust and enforceable equine identification (horse passport) system required by EU member states’ endorsement of the proposals for stronger regulations. Chief Executive of The Horse Trust, Jeanette Allen, who is Chair of the UK Equine Sector Council for Health and Welfare⁶, said:

“The Equine Sector Council welcomes these proposals which will be a big step forward for horse welfare in the UK and Europe. The new regulations are a triumph for Britain’s horse sector and Defra who have worked closely and collaboratively together to ensure a better system for equine identification. More robust standards of documentation and a central

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database in every European country will help to reduce fraud and improve traceability, owner accountability and disease control planning across the European Union – so helping to protect the valuable horse sector."

5.2 Horse Numbers and Density Estimates and their Geographic Distribution

5.2.1 Horse numbers

The challenges outlined above regarding collecting and recording accurate data on horses are a reflection of the unregulated nature of the industry. This section of the report demonstrates that although data is available, it is taken from different sources, each of which uses different criteria, definitions and measurements. This means that we only have a partial picture of the size and distribution of the equine sector. The introduction of the new central equine database in the UK will help to address this problem.

British Equestrian Trade Association research in 2011 estimated that there were 900,000 privately owned horses, 88,000 professionally owned horses and 451,000 horse owners in Britain\(^8\). However, an article in the BMC Veterinary Research Journal in 2012\(^9\) suggested that the likely maximum estimate of the horse population in Britain was considerably higher than this at 1,350,000 (i.e. over 350,000 more horses than the British Equestrian Trade Association estimate). In Scotland, an estimate was made in 1999 of 96,622 equines\(^10\). A recent estimate from Horse Scotland suggested that there were 100,000 equines in Scotland in 2014\(^11\).

Focusing on the change in horse numbers in recent years, we can demonstrate how the number of horses on registered agricultural holdings in Scotland has increased using data from the Agricultural Census. The Census does not include horses kept on private non-

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registered holdings or liveries (and therefore the numbers are lower than the Horse Scotland estimate, for example).

*Figure 1: Population of horses in Scotland (1983-2013)*

Figure 1 shows that the horse population on agricultural holdings in Scotland in 1983 was just under 15,000 growing to just under 20,000 in 1993 and to 25,000 by 2003. In 2013, over 35,000 horses were reported on agricultural holdings, indicating the greatest growth has occurred in the last 10 years, although the graph does illustrate steady growth since 1983 (i.e. over the last thirty years) by around 20,000 horses (with the exception of 2000 when there was a decline). This indicates that more farmers are keeping horses and that a larger proportion of land on agricultural holdings is being used to graze horses. Within the total number of horses, the proportion of horses used for agricultural purposes has remained relatively low and stable.

Further studies support the increase in the number of horses shown in Figure 1. For example, a recent study reported 13,228 horses on agricultural holdings of less than 10ha in Scotland (35.9% of total horses) in 2011. Between 2000 and 2011, the number of registered

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12 Horse data is extracted from the 2013 June Agricultural Census. Parishes with fewer than five holdings with horses in 2013 or where two holdings contribute more than 85% of the total horses have been excluded for disclosure requirements.
holdings of less than 10ha increased by 13.3%, and the number of horses on these small holdings grew by 42.1% (or 3,919 horses). This study demonstrated an increase across all geographic regions, but particularly so in Dumfries and Galloway, the Shetland Islands, the Western Isles, Caithness and Sutherland and Ross and Cromarty (i.e. in rural regions, rather than in areas surrounding urban centres). As horse numbers increase, the pressure for equine facilities, such as grazing, stables and outdoor and indoor arenas also rises. This will have implications for the environment, landscape and planning, particularly in the areas where the greatest horse population increases occur.

5.2.2 The geographic distribution of horses in Scotland

The comparative maps in Figure 2 below show BMC Veterinary Research and National Equine Database data on horse density per 10km².

While the National Equine Database records owner locations, the BMC study indicates horse locations. Across Scotland, both sources identified 0-25 horse owners per 10km² in most areas; in fact, the maps show little spatial variation across Scotland. The BMC Veterinary Research identified a slightly higher level of 26-50 horse owners per 10km² in the Perth and Edinburgh areas. The lower densities of horses in Scotland are usually assumed to relate to the lower population density in much of Scotland when compared to most other parts of the UK. The Database is thought to exclude many leisure horses and older horses not affiliated to stakeholder organisations, which probably explains the apparent regional differences.
Figure 2: A comparison of Horse Density per 10km² between BMC Veterinary Research (BMC) and the National Equestrian Database (NED) (2012)\textsuperscript{13}

Data from the Agricultural Census can be used to show the number of horses recorded on registered agricultural holdings mapped at parish level. Horses kept on private non-registered holdings or liveries are excluded from the Agricultural Census data.

Mapping the number of horses on registered holdings at parish level (Figure 3) provides a more fine grained analysis than Figure 2 and shows their varied geographical distribution across Scotland. There are higher numbers of horses around urban locations such as Aberdeen, Inverness and the Central Belt. There are smaller concentrations of horses in the

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14 Horse data is extracted from the 2013 June Agricultural Census. Parishes with fewer than five holdings with horses in 2013 or where two holdings contribute more than 85% of the total horses have been excluded for disclosure requirements.
Borders, the north Highlands and Shetland. Generally, there is a higher density of horses on agricultural holdings in the east of Scotland than in the west.

Figure 4: Horses per Holding (2013)\textsuperscript{15}

Given that the small holdings study mentioned earlier demonstrated increasing horse numbers on small holdings (of <10 ha) in the south west and Highlands of Scotland

\textsuperscript{15} Horse data is extracted from the 2013 June Agricultural Census. Parishes with fewer than five holdings with horses in 2013 or where two holdings contribute more than 85% of the total horses have been excluded for disclosure requirements.
particularly\textsuperscript{16}, it may be that these areas will ‘catch up’ with the rural areas with higher numbers of horses as evident in Figure 3. While Figure 3 showed the distribution of horses on agricultural holdings across Scotland, Figure 4 shows the number of horses per holding in Scotland. It illustrates that higher numbers of horses per holding can be found in rural areas surrounding urban centres, in the Central Belt and on the east coast of Scotland.

However, the data presented here from the Agricultural Census does not take into account equines in peri-urban or semi-rural environments. It is known that many, and perhaps increasing numbers of, horses are kept in these locations, even though activities such as competing, breeding and riding necessitate a more rural environment, and the primary products of straw and feed for example, are produced in rural locations. The basics required to sustain horses, such as fields and yards, are being established to support urban and suburban dwelling horse owners and riders.

Figure 5 shows the locations of holdings from 3-10 ha in Scotland which are either crofts or possible hobby farms. These identified holdings reported no employees (outside of the household) and were assessed as having a Standardised Labour Requirement (SLR) of 0.3 Full Time Equivalents (FTEs) or less. A considerable proportion of these holdings is in the Highlands and Islands, which may therefore be crofts. However, it is evident from the image that small holdings are otherwise commonly peri-urban, particularly surrounding the cities of Inverness, Aberdeen, Glasgow and Edinburgh. There are implications for land use, planning and the environment of local increases in equine holdings, as discussed below. There is potentially a link between the increase in horses and the increase in small holdings but the data needs further analysis.

\textsuperscript{16} Sutherland, L., Matthews, K., Buchan, K., & Miller, D. (2012) \textit{What is happening on Scotland’s small ‘farms’?}, James Hutton Institute.  
Figure 5: Crofts and Possible Hobby Farms (2010)\textsuperscript{17}

\textsuperscript{17} Map reproduced from Sutherland, L., Matthews, K., Buchan, K., & Miller, D. (2012) \textit{What is happening on Scotland’s small ‘farms’?}, James Hutton Institute. 
5.2.3 Summary

This section has presented some of the existing evidence on horse numbers, density and geographic distribution across the UK and Scotland. It has demonstrated that, while data is available from different sources, it presents only a partial picture of the size and distribution of the equine sector in the UK, and particularly Scotland. This partial picture makes it impossible to gain a complete understanding of the industry and its characteristics. When the new central database is introduced in the UK this will help to alleviate this challenge and enable the formulation of more effective policy and practice responses, as much more consistent, up-to-date data on all equines will be available.

6. The Economic Value of the Equine Industry

The equestrian industry is thought to be the second biggest employer in the rural environment in the UK, after agriculture\(^1\). LANTRA (2011) identified that out of 19,000 UK-based equine businesses, 1,330 (7\%) are in Scotland, and out of 41,220 people employed in the industry, 2,061 (5\%) are in Scotland (see Table 1). The horse population is increasing across Scotland, especially on farms (by approximately 10,000 equines on agricultural holdings between 2003 and 2013). It is expected that employment in equine businesses will grow, and the economic contribution of the equine industry, both to agriculture and the wider economy, is likely to increase significantly in the coming decades. The implications of this increase on the structure of the equine industry, horse ownership, and equine welfare are key areas of interest and concern to Scotland’s equine welfare organisations.

Table 1: UK Equine businesses and employment\(^2\)

<table>
<thead>
<tr>
<th>Nation/Region</th>
<th>Equine Businesses</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>190</td>
<td>1</td>
</tr>
<tr>
<td>Scotland</td>
<td>1,310</td>
<td>7</td>
</tr>
<tr>
<td>Wales</td>
<td>1,030</td>
<td>5</td>
</tr>
<tr>
<td>England</td>
<td>16,340</td>
<td>87</td>
</tr>
<tr>
<td>UK</td>
<td>19,000</td>
<td>100</td>
</tr>
</tbody>
</table>

\(^2\) LANTRA, 'Equine factsheet 2010-2011'. [http://www.lantra.co.uk/getattachment/bf1d8f0f-f7ec-4110-a118-bc34ff1aacb/Equine-v2-(2010-2011).aspx](http://www.lantra.co.uk/getattachment/bf1d8f0f-f7ec-4110-a118-bc34ff1aacb/Equine-v2-(2010-2011).aspx)
BETA estimated in its 2011 survey that £2.8 billion is spent annually on the direct upkeep and care of horses (i.e. feeding, stabling, and veterinary health). This equates to £3,105 per horse per year\textsuperscript{20}. This survey also estimated that the equine industry contributed £3.8 billion annually overall to the UK economy, with an additional £3.7 billion from racing and £6 million from other equestrian events, giving a combined annual figure of £8.1 billion.

7. Environmental Impacts

The total horse population and the geographic distribution of horses have wider implications for land and environmental management: horses graze and are managed differently to other farm livestock because they are not managed to gain weight for food production. Horses can be kept on approximately one acre, however, when horses are kept at high densities on small parcels of improved land, usually without rotation, the grassland becomes overgrazed. Many plants are grazed out, leaving an impoverished sward, often with unpalatable “weed” species such as dockens, ragwort and buttercups. Furthermore, this type of management results in soils becoming compacted and damaged, and as droppings are removed to keep fields “clean” for horse grazing, organic matter and nutrients are depleted. The negative impact of increased horse numbers on farmland and soils is widely recognised but could be addressed and reduced in Scotland through appropriate land and grazing advice and management. On the other hand, horses are increasingly used for “conservation grazing”, for example, on semi-natural habitats such as the Loch of Strathbeg\textsuperscript{21} which are managed for nature conservation and where agricultural grazing management is not appropriate or commercially viable. Horses thrive on poor quality and rough grazing and can help enhance these habitats.

Further research is required on the land use and environmental impacts of horses and how an increasing horse population would result in more, or a different pattern of, land use and environmental impacts in future. It would also be interesting to explore how land management could be better integrated to accommodate horses.

\textsuperscript{20} British Equestrian Trade Association (BETA), 2011, Market Information. For more information, please see: \url{http://www.beta-uk.org/pages/industry-information/market-information.php}.
\textsuperscript{21} RSPB Neighing for Nature, 2011. For more information, please see: \url{http://www.rspb.org.uk/news/277104-neighing-for-nature}.  

8. Equestrian Activities

There are four main distinctive aspects of the equine industry, each of which contributes to the local economy in different ways: recreation and leisure; ancillary services; sports; and racing. This section identifies the main activities, the supporting organisations, employment opportunities, other benefits, and current issues and challenges, for each of these sectors.

The British Equine Trade Association’s National Equestrian Survey identifies that leisure orientated activities include the provision of riding lessons, trekking and tourist attractions\(^{22}\). The activities geared toward professional riders (i.e. sport and racing) include commercial breeding and affiliated sports such as dressage, show jumping, eventing, training and racing.

The peripheral part of the industry comprises providers of goods and services to the core industry. From the professionals earning a living through equine industries, to those who ride purely for leisure, lie many semi-professional riders and participants whose interest is split between earning a living and pursuing an interest or passion. Each of these components provides employment to significant numbers of people often in a rural community (see Table 1) where alternative opportunities may be limited. Horse activity also contributes a significant amount to the economy through the provision of employment and ancillary services.

8.1 Leisure

Leisure and recreation activities include pony clubs, riding schools, hacking, trekking, breeding and showing societies, such as the Highland Pony Society. Dealing, breeding, schooling and livery yards form the industry and infrastructure that supports the equine leisure and recreation industries.

The popularity of riding for recreation and its associated health benefits, and the importance of equine tourism, are explored in this section. The section also explores the increase in horse ownership and breeding which has supported the expansion of the equine recreation industry and associated social and economic benefits, but has also led to welfare and health and safety concerns for horses.

8.1.1 The popularity of riding for recreation

In the UK in 2011, taking part in horse riding was the 35th most popular activity amongst the wide variety of other sports and leisure activities. It was less popular than cycling and gymnastics but more popular than fishing, sailing or rowing. If supporting horseracing is included, horse riding becomes the 20th most popular leisure and sporting activity, more popular than skiing and rugby and one place behind golf23.

Recent research shows that there are around 100,000 regular riders, drivers and vaulters in Scotland but to this total can be added an estimated 110,000 occasional (less often that once a month) riders24.

The recreation and leisure side of the equine industry is supported through a number of organisations, including The British Horse Society (BHS). However, in the late 1990s, equine activity became more fragmented, with British Eventing, British Showjumping and British Dressage becoming independent of the BHS. This has reduced the influence of individual organisations as well as linkages and cooperation between the different activities.

8.1.2 The health benefits of riding

The psychological and physical health benefits of riding and caring for horses are well documented25, and the benefits of participating in horse riding activity can generally be divided into two categories: physical and psychological26.

Research conducted on behalf of the BHS27 found that out of 1,248 recreational riders surveyed, 39% had taken no other form of physical activity in the last four weeks, and 37% of the female respondents were above 45 years of age. This suggests the importance of horse

riding as an activity which appeals to individuals that may otherwise be sedentary, and that encourages physical activity amongst women of all ages.  

Horse-riding has resulted in considerable physical gains in posture, balance, arm and leg coordination, as well as back and neck strength among individuals with a physical disability who have participated in horse riding therapy. Studies have shown that riding therapy can help to alleviate depression, anxiety, anger and boost self esteem in individuals, both in those who suffer with psychological difficulties and those who do not. In addition to physical and neuromuscular benefits, the horse can provide companionship, non judgmental acceptance, an opportunity to develop responsibility, and the chance to master new skills. There are many international examples of equine-assisted therapy used in rehabilitation programmes and this form of therapy is made available through some centres across the UK, particularly in England, including for addiction treatments.  

Riding for the Disabled (RDA) is a charity that provides therapy, achievement and enjoyment to people with disabilities across the UK. RDA relies on donations, volunteers and legacies to deliver equine activities to up to 28,000 people a year in the UK, including across three regions in Scotland: Edinburgh & Borders; West & Central Scotland; and Grampian & Highland, each with a number of associated centres.  

Horse therapy or equine assisted psychotherapy has been shown to be a highly effective therapy, such as provided by HorseBack UK, a charity created to provide a safe and secure environment to aid those serving, or those who have served, in the UK armed forces. There are many anecdotal cases of the work that individuals and groups have done that has benefited children or students with physical, mental or psychological challenges, or with troubled home lives. However, opportunities for many target groups or individuals, such as those with mental health problems or under privileged children, to experience equine activities, are not widely available in Scotland.  

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8.1.3 Equestrian tourism

Equestrian events play an important role in the local rural communities in which they take place through providing a source of local employment in supporting events and through attracting tourists.

Blair International Horse Trials is the largest international equestrian event in Scotland which has been running for over 25 years. The event attracts over 40,000 people and 200 trade stands to its country fair over the four days. In September 2015, for the first time Blair will host the European Federation Equestre Internationale (the international governing body of equestrian sports) Eventing Championships with 16 nations taking part, providing European nations with a final chance to qualify for the 2016 Rio Olympic Games\textsuperscript{32}.

Another equestrian event in Scotland, The BHS Borders ‘Festival of the Horse’ was held annually from 2001-2014. The festival started with the aim of using the horse for rural regeneration in the wake of the 2001 Foot and Mouth disease outbreak. It was sponsored by Scottish Enterprise\textsuperscript{33}. In 2014, the festival was supported by the Forestry Commission and LEADER\textsuperscript{34} and linked with many local tourist facilities. It was estimated that the 2014 festival involved 1,200 horses and was attended by approximately 10,000 people.

When similar equestrian events have been cancelled for various reasons, estimates have been produced on the loss of income. For example the Country Land and Business Association estimated around £30 million was lost in the cancellation of Badminton Horse Trials in 2012; £4.5 million from the Great Yorkshire Show after it was cancelled on the first day in 2012 and £5 million from the Suffolk Show, cancelled on the second day in 2012\textsuperscript{35}.

Equestrian tourism opportunities can also provide farms with a diversification opportunity, thereby adding value to an agricultural business. A survey concerning the business activity

\begin{footnotesize}
\begin{enumerate}
\item Blair Castle 2015 FEI European Eventing Championships. \url{http://www.blair2015.com/}
\item The Berwickshire News, ‘Events planned for unique horse festival’, 27.02.03. \url{http://www.berwickshirenews.co.uk/news/local-news/all-local-news/events-planned-for-unique-horse-festival-1-241832}
\item LEADER is a bottom up method of delivering support for rural development through implementing Local Development Strategies. It has been running since 1991 and is part of ‘Pillar 2’ of the Common Agricultural Policy. LEADER is a French acronym which can be described in English as ‘links between activities developing the rural economy’. For more information, please see: \url{http://www.gov.scot/Topics/farmingrural/SRDP/LEADER}.
\item Country Land and Business, ‘Cancelled Countryside Events Cost Rural Economy more than £150 million’, 09.01.14. \url{http://www.cla.org.uk/your-area/north/regional-news/cancelled-countryside-events-cost-rural-economy-more-%C2%A3150million}
\end{enumerate}
\end{footnotesize}
on Scottish estates reported that equestrian enterprises accounted for 9.3% of estate income after farming (30.4%), housing (13.1%), and agricultural lettings (12.6%).

A number of agricultural diversification projects were funded through the Scotland Rural Development Programme (SRDP, ‘Pillar 2’ of the CAP in Scotland) between 2009 and 2013 supporting a range of equestrian proposals. Examples include: the expansion of national hunt race training facilities; the provision of livery and teaching facilities, including the restoration of vernacular buildings; and the purchase of farm machinery to provide grassland management services to small equestrian units.

Access to the countryside through riding and other popular equine activities is an important aspect of leisure riding and this is encouraged in some areas through trails, TREC ‘Technique De Randonnee Equestre De Competition’ and endurance riding. The South of Scotland has 350km of horse trails and is a popular equestrian destination year round.

Equestrian Tourism is a growing niche opportunity. The BHS Scotland and Farm Stay UK offer an accredited Bed & Breakfast (B&B) “Horses Welcome” service for horses and riders to encourage long distance riding and make it easier for people to bring their horse on holiday. This is recognised by Visit Scotland as a quality assured B&B for Horses, showing that accommodation providers have reached a level of quality and safety in accommodation provided for visiting horses, from grazing to stables, as well as quality assurance for people.

8.1.4 Access to the countryside and safe off-road riding

A concern for all riders, including tourists, is diminishing access to safe off-road riding. Most riding accidents happen on minor roads in the countryside. With increasing numbers of horses and riders requiring access to the countryside, more formal access to off-road riding will be a priority in areas considered of higher risk. The BHS helps educate riders in road safety in order to minimise the risk involved when riding on the roads through the Riding and Road Safety Test. The test is available to all riders from 12 years of age and is supported by

http://www.scottishlandandestates.co.uk/images/stories/EconomicContributionofEstatesinScotland.pdf
37 British Horse Society, ‘B&Bs for horses – Do you and your horse need a getaway?’ 01.09.14.
http://www.bhs.org.uk/enjoy-riding/horses-welcome-bandbs
39 British Horse Society, Road Traffic Accidents Reported to the BHS 2000-2010.
http://www.bhs.org.uk/~media/BHS/Files/PDF%20Documents/Road%20Accident%20Stats%202000%202010.ashx.

23
the Department for Transport. However, it is not mandatory for horse riders using public roads.

In 2003 with the implementation of the Land Reform (Scotland) Act, horse riders received the same rights of responsible access to the countryside as walkers and cyclists\textsuperscript{40}. Every local authority is required to adopt core paths and their management and development should be multi-use, to include all forms of non-motorised recreational users, including horse riders.

The BHS Scotland, as the sole body concerned with equestrian access in Scotland, states that a combination of lack of access enforcement and irresponsible behaviour on behalf of horse riders, combined with some land managers not understanding their duties to uphold access rights, has led to a situation where equestrians are locked off strategic access to safe off-road riding on local paths and tracks. The equine industry is working through The BHS Scotland in collaboration with the National Access Forum and Scottish Natural Heritage (SNH), National Farmers’ Union for Scotland (NFUS), Scottish Land and Estates (SLE), and SRUC to address these issues through local workshops to encourage understanding and cooperation.

8.2 Ownership, breeding and equine welfare

In the 1980s and 1990s the horse ownership trend grew enormously with livery availability and financial accessibility putting horse ownership within reach of significantly more people and leading to widely increased access to horse ownership and activity, including breeding. The increase in ownership has led to issues around equine welfare resulting from the reduced value of horses, over-breeding, and/or lack of knowledge and understanding of equine needs.

There is no requirement for horse owners to have knowledge of horse care. It is legal to own and ride a horse with no knowledge of its health, safety and welfare. A horse owner’s certificate is run by The BHS, and offered at four levels for first time owners and parents of horse owners. However uptake of the certificate is low compared to the increase in horse owners.

\textsuperscript{40} Scottish Outdoor Access Code, ‘Horse Riding’.\url{http://www.outdooraccess-scotland.com/Practical-guide/public/horse-riding}
Rising costs during the recent economic downturn resulted in many equines being re-homed (although more so in England and Wales than in Scotland\(^\text{41}\)). World Horse Welfare (WHW) reported the following UK statistics:

- On average 180 horses are taken into WHW care every year – some years this can be as high as 230.
- There are around 300 horses in WHW Rescue and Rehoming Centres at any one time.
- WHW rehome over 200 horses and ponies of all types each year.
- WHW have around 1600 horses, ponies and donkeys out on loan in the UK through the Rehome a Horse scheme.
- WHW field officers and rehoming officers do about 3300 visits to rehomed horses every year\(^\text{42}\).

Equine-related charities have taken responsibility for supporting the welfare consequences of the recession. Organisations such as WHW and The BHS have been working closely to provide support for unwanted horses. The situation has been exacerbated by the continuation of breeding which is flooding the market. The BHS, working with the National Equine Welfare Council (NEWC), is promoting responsible rehoming. Existing charities are also concerned that recent legislation on ‘fly grazing’ in England and Wales which promotes more responsible ownership and management of horses and allows for early and swift intervention when horses are abandoned or left on land without consent, will displace problems north of the border because no similar legislation exists in Scotland.

After the Animal Health and Welfare (Scotland) 2003 Act was introduced, Scotland was the first devolved administration in the UK to produce a Code of Practice for the Welfare of Equidae, which contains a duty of care placed on a horse owner or keeper based on the ‘Five Freedoms’:

- **Freedom from Hunger and Thirst** - by providing ready access to fresh water and a diet to maintain full health and vigour.
- **Freedom from Discomfort** - by providing an appropriate environment, including shelter and a comfortable resting area.

\[^{41}\] Personal communication with BHS (2014).
• **Freedom from Pain, Injury or Disease** - by prevention or rapid diagnosis and treatment.

• **Freedom to Express Normal Behaviour** - by providing sufficient space for habitation and exercise, proper facilities and company, as appropriate.

• **Freedom from Fear and Distress** - by ensuring conditions and treatment, which avoid mental suffering.

The Code provides basic information and guidelines for horse ownership and is admissible in a court of law.

Amongst leisure horses, several sources, including WHW\(^{43}\) and British Equine Veterinary Association (BEVA)\(^{44}\) report an equine obesity epidemic: up to 50% of horses are obese and affected by associated debilitating metabolic diseases such as equine metabolic syndrome, equine cushings and laminitis.

Many horses, especially native breeds such as the Highland and Shetland ponies, are adapted to extensive grazing on poor vegetation, covering many kilometres in search of food. Because of their hardiness and grazing habits, native ponies are used for conservation grazing on semi-natural habitats. However most leisure horses are kept on improved or semi-improved grasses with high sugars, which, combined with lack of exercise and over-rugging, can disrupt the natural metabolism of the horse and lead to obesity and associated metabolic illnesses.

In terms of breeding trends, a member of a breed society interviewed for this study observed that the number of foals being registered had taken a slight dip between 2010 and 2013 compared to previous years, but had started to increase again since then. In addition, until recently, the majority of foals registered were from a small number of large breeders, but now there are many smaller breeders registering a small number of foals. The BHS “Think before you Breed” campaign\(^{45}\) aims to tackle the problem of over-breeding through public education. In response to the oversupply of horses and associated welfare implications, monitoring of the number and geographic distribution of horses is required.


8.3 Sports and racing

Equestrian sports disciplines include: show jumping; dressage; eventing; vaulting; endurance; showing; breeding; hunter trials; team chasing; polo and other ball sports, and hunting. Scottish riders have represented the UK at all levels from junior to senior, and been part of gold medal winning teams at Olympic, World and European level on five occasions in the last three years. According to Horse Scotland\textsuperscript{46}, the equestrian sports industry contributes £228 million each year to the Scottish economy (excluding racing).

The racing model is different to the other sectors in the equestrian industry, due to its more specialised and capital intensive structure. There are five racecourses in Scotland: Ayr; Hamilton Park; Kelso; Musselburgh; and Perth\textsuperscript{47}. The racing industry is generally well regulated with data being collected and databases maintained and the regulation of all trainers. It is governed by the British Horseracing Board. Passports are strictly observed in racing with horse transportation, horse training and veterinary treatment recorded within a horse’s passport as a mandatory requirement essential to operating within the industry. Racing has been proactive in improving safety and welfare in recent years.

Betting injects finance into the sport, and is accompanied by press interest which provides the public relations businesses require for continuation and expansion. The racing industry is international with an export market overseas. Ownership of racehorses is country-wide, with some owners living in excess of 300 miles from the racing yard.

The main strengths of the racing sector in comparison to other equine industries are that it is well regulated and well supported financially. Of the various equestrian disciplines, it is the activity which is most inclusive, involving large sections of the population indirectly and creating a broad spectrum of employment opportunities. Many ex-racehorses enter the leisure sector and are re-trained for a range of other activities.


\textsuperscript{47} Scottish Racing, ‘Welcome to Scottishracing.co.uk’. \url{http://www.scottishracing.co.uk/home.asp}
8.4 Governance of the equestrian industry and quality assurance

Horse Scotland is the national organisation for all equestrian sports and activity in Scotland and was founded in 1998. Horse Scotland acts as an umbrella body for member organisations in Scotland and is responsible for the management and delivery of certain training and development programmes and sports grants. The key outcomes for Horse Scotland in terms of Scottish equestrianism are to:

- increase the overall levels of participation and equestrian activity in Scotland;
- enable Scottish riders, drivers, vaulters and equines to excel on the world stage;
- support Horse Scotland member bodies to flourish by working collaboratively.

The BHS Scotland is Scotland’s largest equine membership organisation with around 5,700 members. The BHS Scotland co-ordinates The BHS training, exams, welfare, access work and safety. The BHS also provides a quality assurance system via an approval process for riding schools and livery yards. The Trekking and Riding Society of Scotland (TRSS) is the governing body for equestrian tourism and approves recreational riding and trekking centres.

As a risk sport, the equestrian industry takes standards very seriously and there are a number of quality assurance schemes including: The BHS; The Association of British Riding Schools (ABRS); and the TRSS. Equestrian businesses can become accredited with these organisations, facilitating cross- and inter-sector marketing and knowledge transfer.

Hoof is the British Equestrian Federation’s (BEF) Olympic and Paralympic legacy campaign which aims to encourage more people to take up horse activities. Hoof represents an important part of the BEF’s plans to achieve increased participation through attracting new people into the sport, as well as maintaining opportunities and raising standards for those already enjoying riding. Across England, Hoof has business networks supported by County Sport Partnerships (CSPs) which aim to:

- offer advice, guidance and support on the opportunities for equestrian businesses to grow and raise standards;
- consult with local equestrian businesses to understand challenges within the industry and find solutions;

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48 Horse Scotland, ‘What is horsescotland?’. http://horsescotland.org/about-us/what-is-horsescotland/
49 The British Horse Society, ‘Welcome to the BHS Scotland website’. http://www.bhsscotland.org.uk/
50 Association of British Riding Schools. http://www.abrs-info.org/
51 Hoof, ‘What is Hoof?’. http://www.hoofride.co.uk/page.aspx?sitesectionid=403&sitesectiontitle=What+is+Hoof%3f
• provide a local equestrian forum from which to raise awareness, share good practice and gain support.

There is no equivalent business network in Scotland. The BHS run annual equine establishments conferences: one of the few examples of provision of business development advisory work. The BHS also offer advice to The BHS-approved centres as part of a package. Although good examples of constructive partnership working can be seen in The BHS Scotland initiatives, including a joint proprietors’ conference, with TRSS and working with Scotland’s Rural College (SRUC) on knowledge transfer workshops52, there is scope for more effective networking across equestrian businesses.

8.5 Equestrian training and development

Equestrian qualifications systems provide recognised standards that encourage participation in the industry, training and development. There are many college-based courses focusing on horse care and equine business management that are aimed at equipping students for industry employment53.

The main equestrian teaching qualifications are the internationally recognised, quality assured and externally verified BHS exams. There are currently 170 instructors on the professional register held in the UK by The BHS. In addition, coaching certification, managed by Sports Coach UK called UKCC54 is also used widely across the UK. There is also a register of UKCC coaches held by Horse Scotland.

Many students who are aiming to undertake practical exams as BHS riding instructors or UKCC coaches, train as a working pupil in return for instruction and riding. However, as many working pupils receive instruction in return for work, there is wide variation in pay and conditions, as well as in training standards.

Apprenticeship Scotland, which aims to create youth opportunities, stimulate the demand for apprenticeships, and bring employers and young people together, has some links to the equestrian industry. Although there is no set pay rate for 16–24 year olds, the cost of training is met by a contribution from Skills Development Scotland and the employer. The scheme also encourages the minimum wage for apprentices.

52 For more information, please see: http://www.sruc.ac.uk/news/article/551/grassland_management_for_horses
53 LANTRA, ‘Canter into an equine career’. http://www.lantra.co.uk/Lantra/media/General/Scotland/CareerPathways/Lantra-Equine.pdf
8.6 Ancillary Industries and Services

The British Equestrian Trade Association is the representative body in the UK for the equestrian manufacturing, wholesale and retail trade, recognised by Government and leading riding organisations. It has over 800 members which span the spectrum of companies that support or service the equestrian industry as a whole, from retailers, wholesalers and manufacturers, to dealers and service-based businesses. Ancillary services that benefit from the equine industry through employment and economic activity include:

- Veterinary
- Farriery
- Physiotherapy
- Dentistry
- Other alternative practitioners, e.g. massage, aromatherapy, reiki
- Feed merchants
- Riding instructors and coaches
- Saddlers
- Clothing suppliers
- Course builders

Infrastructure includes:

- Arenas
- Horse walkers
- Equine swimming pools
- Stables, shelters, fencing & stables for hire
- Spectator viewing & seating facilities
- Toilet facilities
- Online booking technologies
- Accommodation facilities
- Multi-use paths
- Cross-country courses
- Facilities to improve access for riding for the disabled and para equestrian activities
- Artificial insemination (A.I.) and fertility infrastructure

Each of these services includes many small and medium sized enterprises which are critical to local economies and are dependent on the equine industry. Ancillary industries offer local
employment and support to a significant number of people. Many live and work in rural communities and are part of the socio-economic fabric of these areas. The final section of this report summarises the key themes emerging from the interviews with stakeholders.

9. Key issues from industry stakeholders

To obtain an overview of the key issues currently facing the equine industry in Scotland, a number of stakeholder businesses were interviewed. The interviews undertaken were partially transcribed and then the content analysed for key themes. Discussion of these themes forms the basis of this section, with the text describing the points raised by interviewees. A number of current and future issues facing the equine industry were raised including: a lack of collaboration between equine industry sectors; a lack of regulation; barriers to entry and growth; staff training and retention; and equine registration, passports and legislation.

9.1 Collaboration between equine industry sectors

There are trade bodies and support organisations for different sectors of the equine industry, and a lack of knowledge exchange between these industry sectors. The lack of connectivity between different equestrian sectors and a lack of available data about horses makes it difficult to quantify the characteristics of the industry as a whole.

Some businesses recognise that it is essential for relationships to be improved and developed and channels of communication to be opened further. This will help to facilitate the implementation of best practice in health and welfare as well as common standards in education and training.

Stakeholder interviewees acknowledged that individual equine organisations may compete for membership, but that, if this could be overcome, opportunities exist for greater collaboration and in maximising the economic benefits to equestrian organisations from across the different industries.

Developing and strengthening relationships between equine sectors could facilitate better information sharing across the industry, and the collection and availability of better quality equine data. This could result in improved collaboration between leisure, racing, sporting and service providers. Adopting approved standards and practices in health and welfare and in education and training, could assist in improving recognition and support and ultimately lead to efficiencies in the industry.

### 9.2 Regulation of the industry

The equestrian industry in general is well regulated and structured for businesses that choose to be fully involved and compliant. Businesses and individuals who self-regulate or operate unregulated have an impact on businesses that are voluntarily compliant. The Riding Establishments Act (1964) states that no equine can be used for hire or reward without a licence. Licenses are granted by local authorities and include veterinary inspection.

An important issue for the industry is that no licence or qualification is required to run an equine livery (as opposed to kennels and catteries). An equine establishments working group, consisting of representatives from many organisations, is seeking to amend this anomaly.

While many equestrian businesses offer quality assurance through voluntary approval processes, there is an overall lack of regulation of riding establishments, trainers and employees. Several interviewees in this study suggested that licensing and further regulation for equine businesses such as studs and liveries could boost businesses that already operate to a high standard and identify good and bad practice. Additionally, more responsibility needs to be taken by horse owners for their horses’ welfare and for economic reasons, as many unwanted or retired horses end up being cared for by welfare organisations.

### 9.3 Barriers to entry/growth

Interviewees felt that the value of the industry to Scotland’s economy and social fabric is unrecognised and unsupported through the agricultural sector, local authorities and the business sector. For example, several interviewees identified the cost of tackling the complexities of setting up small businesses, along with the need for financial and planning input, as an enormous challenge which is not supported by advice and access to agricultural
grant funding. The application of business rates and planning restrictions also negatively affects small equine businesses. A further concern is that riding establishments, as with all employers, will have to provide workers with a workplace pension scheme by law over the next few years.

Stakeholders suggested that local authorities lack knowledge and enthusiasm for equestrian developments and do not provide effective support. An example given by one interviewee was regarding planning. For farm buildings to be used principally for livery or equestrian facilities, there is a planning requirement for change of use. Difficulties and time delays in receiving planning permission for equestrian facilities were reported. One local authority development plan forced an equestrian business to relocate. As location is critical to the successful operating of equestrian businesses this added costs and resulted in a loss of revenue during development. In this case, compensation was paid only to landowners who were losing income, not the tenants.

Increased traffic and work on the road infrastructure has resulted in reduced access to safe off-road hacking, and without suitable alternatives provided, there will be reduced opportunities for businesses to provide important and safe equestrian access to the countryside.

Another issue relates to agricultural land, and that is that horses are not considered to be agricultural livestock and so any land grazed exclusively by horses has not been regarded as eligible for Pillar 1 payments in Scotland. Further, agricultural land and buildings are exempt from business rates, however, changing use to an equestrian business removes the exemption from that part of the farm and the land used for the equestrian business. This leads to additional costs and administration for equestrian businesses.

There are a number of organisations who could provide general support and training to equine businesses, such as Business Gateway or SAC Consulting, but the accessibility of specialist business support is viewed as limited or fragmented. Amongst the equine businesses interviewed for this study (while only a small sample), there was a general lack of awareness of the availability of advice or public funding for equestrian businesses.

A recent Country Land and Business Association (CLA) report identified that many of these issues are similarly encountered in England. The report highlighted the ways in which the equine industry is being held back by restrictions on planning, insurance and tax.\(^\text{56}\) The CLA

report states that the costs for equine businesses can be prohibitive and calls for simplification of planning and business rates as well as making the same point regarding the lack of eligibility for Single Farm Payment. Implementing these changes would make it cheaper, simpler and more streamlined for these small businesses to realise their potential.

In this report, some businesses indicated that they were unsure of how to access advice and funding, but welcomed assistance with financial, business and other advisory support. In particular, respondents were unaware of eligibility in relation to EU Common Agricultural Policy (CAP) Pillar 2 funding (for Rural Development projects) for small businesses that they may be able to access.

Changes to CAP Pillar 2 funds in the programming period 2015-20, for which equine businesses could potentially be eligible includes £86m LEADER funding and £6m for footpaths[^57]. Many equine projects could contribute to the rural development priorities set out in LEADER Local Development Strategies. Access to targeted financial and operational support could enable equestrian businesses to become more structured and commercial as well as enhance aspects of environmental and landscape management.

Increased liaison between equine sectors and other enterprises can increase audiences and spend to both equestrian and other interests. For example, one business interviewed for this study noted that a polo match had been held after a racing event which had been a success in terms of larger numbers of people attending. On another occasion, a pop concert was held at the conclusion of a racing day, which an interviewee reported had resulted in an increase in attendees, more income from the event and increased awareness of the sport among local residents. This indicates the potential for combined equestrian events to increase numbers and types of spectators, thereby injecting public interest in the wider equestrian industry. However, support and event management expertise and input are required to organise and host successful joint activities.

### 9.4 Staff training and retention

It was felt by one business that there are a range of equestrian courses which encourage more people to access and achieve equine-based qualifications, but that the standards of courses vary, making some more achievable than others and leading to inconsistencies in

practical experience across the training system. Anecdotal information suggests that many riding instructors will leave the industry by the age of 25 due to low wages and a shortage of affordable accommodation. Many unaffiliated or non-accredited riding establishments can provide cheaper services which undercut those businesses that provide recognised standards of health and safety, welfare and customer care.

These issues support a case for improved coordination across the industry in formal training and development as well as accreditation, business management and industry standards, and apprenticeships, to work with equestrian employers and training providers to advise and assist with recruitment.

9.5 Equine registration, passports and legislation

All health and welfare policy pertaining to equines is devolved to the Scottish Government including passports, disease and duty of care. EU legislation concerning equines\(^{58}\) is interpreted and enforced by The Scottish Government Rural Payments and Inspections Directorate (SGRPID). However, it was felt by some interviewees that equine legislation is inconsistently enforced across Scotland.

The current passport system is not fit for purpose. Although every equine has required a passport by law since 2005, there is no means of obtaining accurate numbers of registered horses in Scotland. There are six Scottish based passport issuing organisations (PIO’s) all of which work closely with the Scottish Government, however, these only account for the registered native breeds of Scotland.

Scotland has a relatively new government run Equine Stakeholders Group, the main government forum for equestrian issues, which meets regularly to look at policy issues affecting the industry. The group is chaired by the Chief Veterinary Officer and comprises all the major equine organisations in Scotland.

An Equine Establishments Working Party was formed in 2009 to take forward secondary legislation pertaining to the Riding Establishments Act and Livery Yards from the Animal Health and Welfare Act, and is made up of organisations including The BHS Scotland, World Horse Welfare, the British Equine Veterinary Association, the SSPCA, local authorities and insurance companies. This cross industry group has consistently campaigned for the

licensing or registration of all equine establishments including livery yards, studs and dealers. However, the current priority for the Working Party is the rapidly changing equine identification regulations, as well as animal health legislation from Europe, which might make central equine holdings registration mandatory.

New equine identification regulations voted through Europe in September 2014 require Scotland to put new domestic regulations in place by 1st January 2016. It is likely that Scotland could have its own database that is fully integrated into a UK one. This could be created by government and run in conjunction with industry but it very much depends on finance. There will be a formal consultation and impact assessment later in 2015. The issues of PIO standards and retrospective microchipping of all equines, including those born before 2009, are also under discussion.

10. Recommendations

Based on the data and literature reviewed, and the information collected through the stakeholder interviews, the report concludes by making a number of recommendations to the equine industry, local authorities and the Scottish Government to maximise the potential economic and social contribution from the equine industry. Improved co-ordination and consistency is required at all levels to provide efficiencies and greater consistency for the equine industry.

10.1 Policy

1. A practical and co-ordinated national horse registration process is needed to provide traceability of horses. Scotland should consider a practical and affordable Scottish equine database.

2. Basic certification for horse owners and premises managers is required to ensure minimum welfare standards are met and regulations understood.

3. The introduction of basic licensing for breeding and liveries is needed to provide some regulation for currently unlicensed equine businesses to help improve industry standards and reduce welfare issues associated with over-breeding.
4. Assistance for local authorities regarding planning and regulation to provide a clearer framework for the licensing, planning and development of equestrian businesses.

5. Continued national and local support for improved, responsible off road, multi-use access to the countryside to encourage better access for all non motorised recreational users, including horse riders.

6. Increased recognition of the national and local economic contribution and health and wellbeing benefits the equestrian industry provides, to encourage wider investment and support for equestrian businesses (such as through LEADER).

7. Increased access for equestrian businesses to coordinated business management and environmental advice and funding to facilitate new businesses to develop in a sustainable way.

10.2 Further Research Needs

We can also make a number of suggestions for research work that could be undertaken to improve our knowledge and understanding of the equine industry:

1. Further research is required within and between sectors to assess how best to improve industry efficiencies, collaboration and communication.

2. Further research is needed to improve understanding of issues arising in the industry, including a more detailed analysis of its economic contribution.

3. Further research is required into ways in which equine assisted therapies can benefit society, how these benefits can be measured, and how they can be more widely integrated into treatment programmes at a national and local level.
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