

A PROFILE OF URBAN EQUESTRIAN CENTRES

- RESEARCH REPORT -

A summary of the research, analysis of findings from an investigation into the nature and profile of the operations of Urban Equestrian Centres.

British 
Equestrian

**SPORT+
RECREATION
ALLIANCE**

**SPORT+
RECREATION
ALLIANCE**

URBAN EQUESTRIAN CENTRE REPORT: EXECUTIVE SUMMARY.....	1
1.1 Introduction and Context.....	1
1.2 Project Objectives	1
1.3 Methodology: What we did.....	1
1.4 UEC Summary Table.....	2
1.5 Findings – What <i>is</i> a UEC?	3
1.6 Findings – Prevailing characteristics of UECs.....	4
1.7 Project Outcomes - what’s next?	5
 URBAN EQUESTRIAN CENTRE: SUMMARY REPORT	 6
1 Introduction	1
1.2 Project Objectives	1
2 Methodology: What we did	2
2.2 Sample Profile	2
2.3 Distribution of Sites.....	3
2.4 UEC Summary Table.....	5
3 Prevailing UEC operational profiles	6
3.2 Sources of Income.....	7
3.3 Connection between equines, facility capacity, and earning.	9
3.4 Workforce: staffing levels and ratios.....	13
3.5 Participants, activities, and horse usage	15
4 Key findings and prevailing trends amongst UECs.....	20
4.1 What are Urban Equestrian Centres? A background to UECs	20
4.2 UECs tend to be personality / mission driven.....	21
4.3 In general, UECs are typically effective in giving people access to horses and equestrianism who would not otherwise have the opportunity.....	21
4.4 Sites are typically operating at or close to capacity.	22
4.5 Securing suitable horses is a real challenge.	22
4.6 Most operational models are supported by additional funding / grants to some extent.	22
4.7 There is a general reliance on volunteer support.....	22
4.8 Expansion / duplication is a challenge for UECs.	22
4.9 Securing paid staff is difficult.	23
4.10 Administration often takes a back seat due to lack of resources.	23
4.11 Rising capital costs are being felt across the board.....	23

URBAN EQUESTRIAN CENTRE REPORT: EXECUTIVE SUMMARY

1.1 Introduction and Context

- 1.1.1 British Equestrian (BEF), the national governing body for the sport of equestrian in the United Kingdom, has commissioned the Sport and Recreation Alliance (S&RA) to conduct an analysis of the operational models of urban equestrian centres (UECs). Part of a broader body of work aimed at improving participation levels, this project seeks to support British Equestrian's desire to inspire more inclusion and accessibility within the sport.
- 1.1.2 This project comes within the context of Sport England's 'Uniting the Movement' strategy which emphasises the need for its 'system partners' to prioritise tackling inequalities in access and uptake to physical activity in England. By connecting people to riding centres, schools, clubs and equestrian sporting organisations, British Equestrian aims to help more people to discover horses, get fit, and improve their wellbeing. Due to their proximity to communities that experience inequalities in physical activity, UECs are central to British Equestrian's ability to meet these strategic objectives.
- 1.1.3 The information and data reported throughout this research was collected during visits to the subject group of urban equestrian centres between May 2022 and December 2022. All data reported within this document is accurate at the time of writing, but may have been subject to change since. Much of the financial and legal information on centres cited by the report is publicly available on Companies House unless reported otherwise by the centres during the research process.

1.2 Project Objectives

- 1.2.1 The intended outcomes of this project are as follows:
- To identify successful UECs operating in urban and near-urban areas.
 - To develop a detailed understanding of the business models of these urban equestrian centres.
 - To analyse and evaluate these operational models.
 - To create a 'suite' / framework of the operational models that can be used to develop recommendations that will assist and inform prospective proprietors or UEC owners, with the broad strategic aim of improving participation in equestrianism at a grassroots level across the UK.

1.3 Methodology: What we did

- 1.3.1 From a longlist of over 80 sites, a shortlist of 14 centres was selected. Shortlisting was based on the profile of 20 minute travel-time catchments; including population, ethnic diversity, index of multiple deprivation (IOMD), car ownership, and average household income and the project was then split into two stages – a survey and a site visit.
- 1.3.2 Consultations and visits took place between May and December 2022. In total, 13 centres were visited (with a small number of centres declining to take part in the project). Of the 13 total centres, six (46%) are in London, two (15%) in Liverpool, with the remaining five spread between Newcastle, Gloucester, Leeds, Manchester/Bolton, and Birmingham.
- 1.3.3 A summary of the centres and their distribution is provided below.

1.4 UEC Summary Table

Centre Name	Location	Status	Year Opened	Centre Land Size (acres) ¹	Number of Riding School Equines ²	Number of Paid Staff	Number of Volunteers
Cliffhollins Riding School	Bradford	Private limited company	2004	18	17	3	30
Ealing Riding School	London	Private limited company	1982	2.12	28	3	100
East Liverpool Riding for the Disabled	Liverpool	Charity	2017	8	8	1	11
Eastminster Riding School	London	Private limited company	1947	250 ³	55	18	5
Ebony Horse Club	London	Charity	2001	0.79	10	4	150
Lee Valley Riding Centre	London	Charitable social enterprise (on behalf of local authority on LA-owned site)	1976	26	63	34	20
Park Lane Stables RDA	London	Charity	2009	1	25	10	50
Park Palace Ponies	Liverpool	Private limited company	2016	4.33	9	4	15
Ryders Farm Equestrian Centre	Manchester / Bolton	Sole trader / family partnership	1992	52	35	14	7
St. James City Farm & Riding School	Gloucester	Charity	2010	0.9	3	4	60
Stepney Bank Stables	Newcastle	Charity	1992	1.2	20	14	80
Summerfield Stables	Birmingham	Private limited company	1970	4.9	28	1	100
Vauxhall City Farm	London	Charity	1982	1.3	3	2	32

¹ 'Land size' in this research refers to the main area of land upon which each centre and its key facilities are based. This has been calculated using mapping software in tandem with data collected from centre owners and directors. Multiple centres in this study have access to additional, often leased, land for grazing and turning out. However, this land is not always immediately accessible (i.e., within reasonable walking distance – Park Palace Ponies, for example, has turnout land less than 10mins walk from its centre that it uses for grazing; Park Lane Stables RDA turns its horses out at fields in Surrey that require equine transport). Where it is the case that this land is not in the local vicinity and easily accessible, the additional acreage has been omitted from these calculations to provide a clearer illustration of the immediate capacity at each UEC.

² 'Riding school equines' does not include horses housed exclusively in livery. However, equines that are loaned to riding schools by their owners have been included in these figures.

³ Eastminster Riding School has access to a total of 250 acres at its main site. However, this is not all directly owned by the centre proprietors and is instead spread across different landowners. The breakdown of land ownership equates approximately to 18 acres of leasehold, 25 acres leased from a third party, 80 acres of nature reserve, and over 100 acres of country park area.

1.5 Findings – What is a UEC?

- 1.5.1 Other than their placement within urban areas, these centres do not necessarily share operational characteristics that are unique or defining as UECs. This is not to say that there are no commonalities; rather, it points to the fact that the structures and status of each organisation varies between centres, often driven by the skillset and priorities of their founders, and shaped by the circumstances, challenges, and opportunities of their site and surrounding area. However, they are all linked by their ability and desire to bring horse riding and equestrian activities to those in cities, towns, and urban areas.
- 1.5.2 Centres with access to more land tend to have a larger number of arenas and open spaces for riding, greater number of horses, and scope to take on a wider range of activities and rider abilities. Where space is at a premium, UECs within this sample were often limited to having reduced-sized arenas or no arena at all, instead using surrounding public ground for their riding activities. Small centres are often more limited in their offer, with space and staffing limitations sometimes meaning they can only offer beginner-level sessions. Those with more space and access to land offer more complex and advanced activities for more confident riders, such as showjumping. Many UECs are successful in maintaining high levels of demand and providing a range of opportunities and classes to those who want to take part.
- 1.5.3 Secondary activities may include private events, ‘pony parties’, equine-assisted services, corporate events, stable management sessions, among others. For some centres, particularly those operating as charities, private events either do not feature as an offer, or are lower down the list of priorities in comparison to private companies, who are more likely to present a broad range of alternatives for potential participants.
- 1.5.4 UECs often operate all year round, with special programmes sometimes offered during school holidays to facilitate periods of greater demand. Partnerships are also a feature of the UEC operational model, though not all centres have these connections or are able to take advantage of such opportunities. Where partnerships do exist, they may enable UECs to engage with charitable causes, those referred by the local authority, or schools and colleges in the area. These are not prescriptive examples, however, and each UEC will often connect with organisations or groups that best suits their aims.
- 1.5.5 The impact of UECs, though not quantitatively calculated in this study, was well-documented and frequently reported. A sense of community, social outcomes, and the benefits to physical and mental wellbeing were frequently cited. Each centre is successful in its own way, but they are all strong examples of the way that UECs function as key institutions within the areas they operate and provide a broad range of people with several benefits.
- 1.5.6 The importance of people, especially founders/site managers is central to the success of UECs in this study. Some owners have backgrounds in equestrian, others have business as their career focus, while others operate in the charity and third sector. This background tends to be highly determinate in regard to the operational model the UEC adopts.
- 1.5.7 What connects them as a common attribute is the passion and desire to make a difference through horse riding; each knew the strengths, weaknesses, and opportunities at their site and how their own abilities would be best harnessed to maximise the success of their centres and the facilities at their disposal.

1.6 Findings – Prevailing characteristics of UECs

1.6.1 Following the site visits and the collation of all the data from this study, there are a few common areas where centres face challenges and may appreciate support, which will likely be useful to any centres starting the venture into equestrianism. The key findings below are examples of some of these commonalities found throughout the project.

UECs tend to be personality / mission driven.

1.6.2 Each UEC is unique in its operational model, but many of them have a driving mission behind them, often linked to the director or proprietor. Centre directors are people who come from equestrian backgrounds and, where they do not, they tend to have charitable reasons at the heart of their work, and may offer sessions at subsidised costs or no cost at all. No centre in our sample had been opened for purely financial reasons.

In general, UECs are typically effective in giving people access to horses and equestrianism who would not otherwise have the opportunity.

1.6.3 Operating in and around cities means that the UECs in this study are largely able to provide a regular service to those who are not typically able to reach ‘traditional’ riding schools; particularly for those from disadvantaged or marginalised groups, ease of access by virtue of location is crucial in enabling them the chance to get to the centre. Good transport links and strong relationships with the local community are essential to this, as is a strong connection to the local community are common success factors.

Sites are typically operating at or close to capacity.

1.6.4 Many centres reported being heavily oversubscribed or unable to meet the demand within their area following another rise in popularity of horse riding and equestrianism post-pandemic. Virtually all UECs in this project had a waiting list of some sort, and are able to fill sessions with relative ease in light of this. Programming schedules are often full, though, and horses are at their working capacity for the day. All of which means UECs are not in a position to increase their ‘supply’ to meet the level of demand from their communities.

Securing suitable horses is a real challenge.

1.6.5 The horse market is currently experiencing a wholesale rise in prices. This, coupled with a growing number of sellers attempting to take advantage of these increases, has made obtaining horses for use in riding schools all the more difficult. A large majority of the centre directors and operators that were spoken to in this study expressed that they had seen three-to-fivefold rises in the cost of horses since the start of the pandemic.

Most operational models are supported by additional funding / grants to some extent.

1.6.6 Across the sample of centres visited, there are very few who are able to operate without the use of grants and additional funding, even among privately-run companies. The extent of this funding varies, with some centres receiving smaller grants for individual projects, while others have regular contracts with local authorities to support schools and other charitable organisations within their local catchment areas.

General reliance on volunteer support

- 1.6.7 All UECs in this project have volunteers as part of a ‘blended’ workforce. The numbers vary significantly from centre to centre; some centres are heavily reliant on volunteers not only to support the care of horses, but to run the day-to-day activities at the centre.

Expansion / duplication is a challenge for UECs.

- 1.6.8 Without readily available access to land, expansion for UECs is a challenge. Many centres in this study either reached the limits of their existing land or had looked at other spaces to expand, only to be priced out. Operating in a city, where open land is already at a premium, makes this all the more difficult. Yet moving out runs the risk of removing access for their existing cohorts.

Securing paid staff is difficult.

- 1.6.9 Staffing is one of the biggest challenges faced by all centres. Climbing staff costs and a smaller pool of talent means that it is increasingly becoming difficult for centres to not only find people to join their teams, but also the right people who will be committed to the job for an extended period of time. This is not a regionalised issue, but one that affects all centres.

Administration often takes a back seat due to lack of resources.

- 1.6.10 Many centres have small staffing teams, with the majority of those staff members involved in maintaining the centres on a day-to-day basis and ensuring horse care remains the priority. This means many are pressed for time or do not have consistent or regular capability to manage areas of the business such as administration. Some centres are fortunate to have staff who are able to do this for them, either in-house or externally, or have volunteers who are able to assist with this process. On the whole, however, employing someone to solely manage this area of the business is not always viable. This has an effect on two key areas: applications for funding and grants, and licensing. Additional resources or support in these areas, whether that’s capacity or access to a database of funders and resources, would be useful to many centres.

Rising capital costs are being felt across the board.

- 1.6.11 Along with horse costs, the impact of rising capital costs is being felt by many centres. Horse care, including bedding, hay, and feed, have all gone up recently, along with energy prices. Where capacity is already limited, without support or additional funding, there is likely going to be a tightening of the gap between income and expenditure. This may become critical for centres already operating close to the margins.

1.7 Project Outcomes - what’s next?

- 1.7.1 A key objective of the project was to create a ‘suite’ / framework of the operational models that can be used to develop recommendations that will assist and inform prospective UEC owners/operators.
- 1.7.2 British Equestrian staff and/or prospective founders will be able to identify their ‘nearest neighbours’ using four exercises provided at the end of the report. In undertaking these exercises, stakeholders can use the detailed profiles of each of the 13 centres to identify which model, or blend of models, might suit the subject opportunity.
- 1.7.3 This should be considered as a key tool in narrowing the operational and business model options available to prospective UECs, enabling the establishment of more centres, and a larger, more diverse participant and volunteer base for equestrian into the future.

URBAN EQUESTRIAN CENTRE: SUMMARY REPORT

1 Introduction

- 1.1.1 British Equestrian (BEF), the national governing body for the sport of equestrian in the United Kingdom, commissioned the Sport and Recreation Alliance (S&RA) to conduct an analysis of the operational models of urban equestrian centres (UECs). Part of a broader body of work aimed at improving participation levels, this project seeks to support British Equestrian's desire to inspire more inclusion and accessibility within the sport.
- 1.1.2 The creation of Sport England's Uniting the Movement strategy seeks to change lives and communities through access to sport following the Covid-19 pandemic. This is particularly key for those whose access to sport has been most limited, as these are the people who are likely to benefit from the introduction to, and regular participation in, sport and physical activity the most.
- 1.1.3 There is a recognition that participation in equestrianism is not entirely representative of the different communities across the UK, particularly in urban areas. As the national governing body, British Equestrian wants to make a concerted effort to tackle inequalities within equestrianism and make it more open and reflective of the make-up of UK society. By connecting people to riding centres, schools, clubs and equestrian sporting organisations, British Equestrian hopes to help more people to discover horses, get fit, and improve their wellbeing.
- 1.1.4 The following study includes data collected and collated through meetings and visits with UECs across the UK. This information has been used to create detailed case studies, with view to utilising this information to support the creation of new riding centres by 'matching' them to UECs with a similar profile. Across the UECs in this study, there are a range of approaches adopted, with each having its own idiosyncratic attributes often dependent on the location of the centre, the objectives of the owners and directors, or the resources available.
- 1.1.5 The data not only provides key quantitative information around each of the centres, but also qualitative experiences, including successes and challenges that may form important points of reference for any prospective centre owners. The findings speak to the diversity of operational models that exist among UECs, but also to trends and commonalities between them.
- 1.1.6 The information and data reported throughout this research was collected during visits to the subject group of urban equestrian centres between May 2022 and December 2022. All data was accurate at the time of writing. However, this may have changed in the intermediate period between the completion of visits and publication of this document. Much of the financial and legal information on centres cited by the report is publicly available on Companies House unless reported otherwise by the centres during the research process.

1.2 Project Objectives

- 1.2.1 The intended outcomes of this project are as follows:
- To identify successful UECs operating in urban and near-urban areas.
 - To develop a detailed understanding of the business models of UECs
 - To analyse and evaluate these operational models.
 - To create a 'suite' / framework of the operational models that can be used to development recommendations that will assist and inform prospective proprietors or UEC owners, with the broad strategic aim of improving participation in equestrianism at a grassroots level across the UK.

2 Methodology: What we did

- 2.1.1 The BEF, in consultation with the S&RA, created a longlist of 80 potential UECs for this project, based on a range of 20-minute travel time catchment characteristics, including population, ethnicity, index of multiple deprivation (IOMD), car ownership, and average household income. A shortlist of 15 centres was selected, and the project was then split into two stages – a survey and a site visit. The created survey asked for information around several themes, including:
- Workforce and volunteers.
 - Activities and programmes offered.
 - Patterns of delivery of sessions.
 - Participant profiles and main customers.
 - Finances, including income and expenditure.
 - Facilities and the horses at the centre.
- 2.1.2 This survey provided the foundation for discussions during the subsequent site-visit, enabling semi-structured interviews to be conducted with the contacts at the respective centres.
- 2.1.3 Initially take-up on the survey was low; in virtually all instances, contacts at each centre preferred to discuss the survey questions in person rather than complete them online. However, this did not impact the ability to collect the required information; the contacts met at each centre were in senior positions (all were centre directors, founders, or yard managers), all of whom possessed an understandably comprehensive knowledge of their business.

2.2 Sample Profile












- 2.2.1 The selected centres were contacted via email and phone, with visits taking place between May and December 2022. Information was sent out with details of the project and a request for them to complete the survey, and a back-up list was generated to replace those unable or unwilling to participate. In total, 13 centres were visited. To ensure a broad coverage, scope was given to a diversity of locations around England and Wales, with a split between London – where a significant number of UECs are located – and other major cities in the UK. Many of the centres were known to the BEF team in some capacity prior to the project.
- 2.2.2 Of the 13 total centres, six (46%) are in London, two (15%) in Liverpool, with the remaining five spread between Newcastle, Gloucester, Leeds, Manchester/Bolton, and Birmingham. Centres in Wales were contacted but were unable to take part. UECs were also classified based on their primary organisation type, with six charities (46%) and seven private companies (54%). Within this latter group, however, there are centres who operate as private limited companies with charities attached, sometimes by virtue of an RDA group that operates out of the same location, as well as centres who started off as private limited companies and have since become charities. This project focuses on each business's stated primary function.
- 2.2.3 The number of young people in the catchment areas of centres showed relative similarity between each of the UECs, with the highest around Cliffhollins Riding School in Leeds (29%) and lowest around Ebony Horse Club in London (23%). Overall, this averaged out to just over a quarter of catchment populations (26%) classified as 'young people' (i.e., aged 5-to-24) across the data. Ethnic diversity figures, defined in this instance as those from a non-White British background, averaged out to 26%, albeit with a far greater variance in respective areas, ranging from as low as 5% in the area around East Liverpool RDA to as high as 50% around Lee Valley Riding Centre in London.

2.3 Distribution of Sites

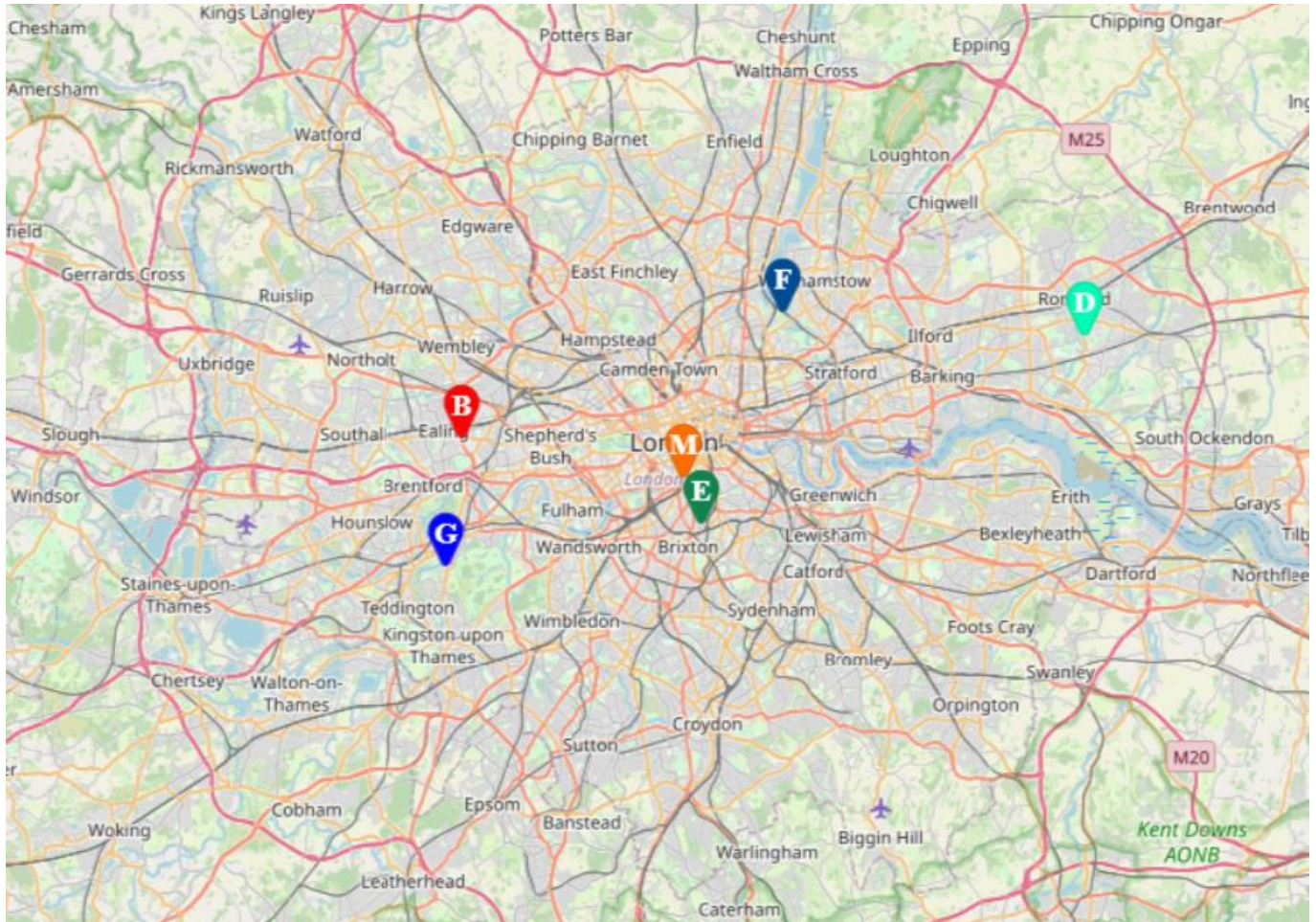
2.3.1 Map of sites across England








Source: Mapline

- | | |
|---|---|
|  CLIFFHOLLINS |  PARK PALACE PONIES |
|  EALING RIDING SCHOOL |  RYDERS FARM |
|  EAST LIVERPOOL RDA |  ST JAMES CITY FARM |
|  EASTMINSTER RIDING SCHOOL |  STEPNEY BANK |
|  EBONY HORSE CLUB |  SUMMERFIELD STABLES |
|  LEE VALLEY |  VAUXHALL CITY FARM |
|  PARK LANE STABLES RDA | |

2.3.2 Map of sites in London



Source: Mapline

- ▶  EALING RIDING SCHOOL
- ▶  EASTMINSTER RIDING SCHOOL
- ▶  EBONY HORSE CLUB
- ▶  LEE VALLEY
- ▶  PARK LANE STABLES RDA
- ▶  VAUXHALL CITY FARM

2.4 UEC Summary Table

Centre Name	Location	Status	Year Opened	Centre Land Size (acres) ⁴	Number of Riding School Equines ⁵	Number of Paid Staff	Number of Volunteers
Cliffhollins Riding School	Bradford	Private limited company	2004	18	17	3	30
Ealing Riding School	London	Private limited company	1982	2.12	28	3	100
East Liverpool Riding for the Disabled	Liverpool	Charity	2017	8	8	1	11
Eastminster Riding School	London	Private limited company	1947	250 ⁶	55	18	5
Ebony Horse Club	London	Charity	2001	0.79	10	4	150
Lee Valley Riding Centre	London	Charitable social enterprise (on behalf of local authority on LA-owned site)	1976	26	63	34	20
Park Lane Stables RDA	London	Charity	2009	1	25	10	50
Park Palace Ponies	Liverpool	Private limited company	2016	4.33	9	4	15
Ryders Farm Equestrian Centre	Manchester / Bolton	Sole trader / family partnership	1992	52	35	14	7
St. James City Farm & Riding School	Gloucester	Charity	2010	0.9	3	4	60
Stepney Bank Stables	Newcastle	Charity	1992	1.2	20	14	80
Summerfield Stables	Birmingham	Private limited company	1970	4.9	28	1	100
Vauxhall City Farm	London	Charity	1982	1.3	3	2	32

⁴ 'Land size' in this research refers to the main area of land upon which each centre and its key facilities are based. This has been calculated using mapping software in tandem with data collected from centre owners and directors. Multiple centres in this study have access to additional, often leased, land for grazing and turning out. However, this land is not always immediately accessible (i.e., within reasonable walking distance – Park Palace Ponies, for example, has turnout land less than 10mins walk from its centre that it uses for grazing; Park Lane Stables RDA turns its horses out at fields in Surrey that require equine transport). Where it is the case that this land is not in the local vicinity and easily accessible, the additional acreage has been omitted from these calculations to provide a clearer illustration of the immediate capacity at each UEC.

⁵ 'Riding school equines' does not include horses housed exclusively in livery. However, equines that are loaned to riding schools by their owners have been included in these figures.

⁶ Eastminster Riding School has access to a total of 250 acres at its main site. However, this is not all directly owned by the centre proprietors and is instead spread across different landowners. The breakdown of land ownership equates approximately to 18 acres of leasehold, 25 acres leased from a third party, 80 acres of nature reserve, and over 100 acres of country park area.

3 Prevailing UEC operational profiles

- 3.1.1 UECs' data has been collated and used to create a set of metrics that provide an insight into the relative attributes of each centre. These metrics form the part of the analysis below, along with the raw and aggregated data obtained from the centres in this study.
- 3.1.2 To provide context and enable comparison between results and the different types of centres, the data collected has been aggregated and separated into two key groups: private companies and charities, which this report uses as the main categories for analysis in this research.
- 3.1.3 Private company, in this instance, refers to organisations who are owned privately and whose operation of their centres is predominantly used to generate or maximise revenue or a surplus through the sale of different services. These centres' main objectives may not be explicitly charitable, but they may operate for socially beneficial reasons. This group includes private limited companies, sole traders / family partnerships, and centres run by social enterprise organisations.⁷
- 3.1.4 Charities, on the other hand, are those registered with the Charity Commission who run purely for not-for-profit purposes. These centres draw heavily on sources like grants, fundraising, donations, or sponsorship for their income.
- 3.1.5 Though not the main analysis categories in this research, there is also an apparent split between centres with a large number of horses – those with 'high' capacity and over 20 horses – and those with a smaller number of horses, or a 'low' capacity, who have 10 horses or fewer. Within the group of centres in this research, there are five 'low' capacity centres and eight 'high' capacity centres.
- 3.1.6 Of the 'low' capacity centres with fewer than ten horses, four out of five are charities. These are also some of the smaller centres by land size, with the smallest five centres in this research all being registered as charities. Visual assessment of the surrounding areas during site visits to each UEC suggested that these smaller centres are located in areas with comparatively limited green space (the outlier being East Liverpool RDA, located on the outskirts of Liverpool near St. Helens). Though not prescriptive, and limited somewhat by sample size, this points to a connection within this subject group between charitable status and the 'urban-ness' of centres; in other words, the location of charities within densely built-up areas acting as a prohibitor for capacity and land size. This stands in comparison to larger capacity centres, who tend to use private models and appear to operate out of 'near-urban' sites on the edge of built-up areas that afford more space and access.

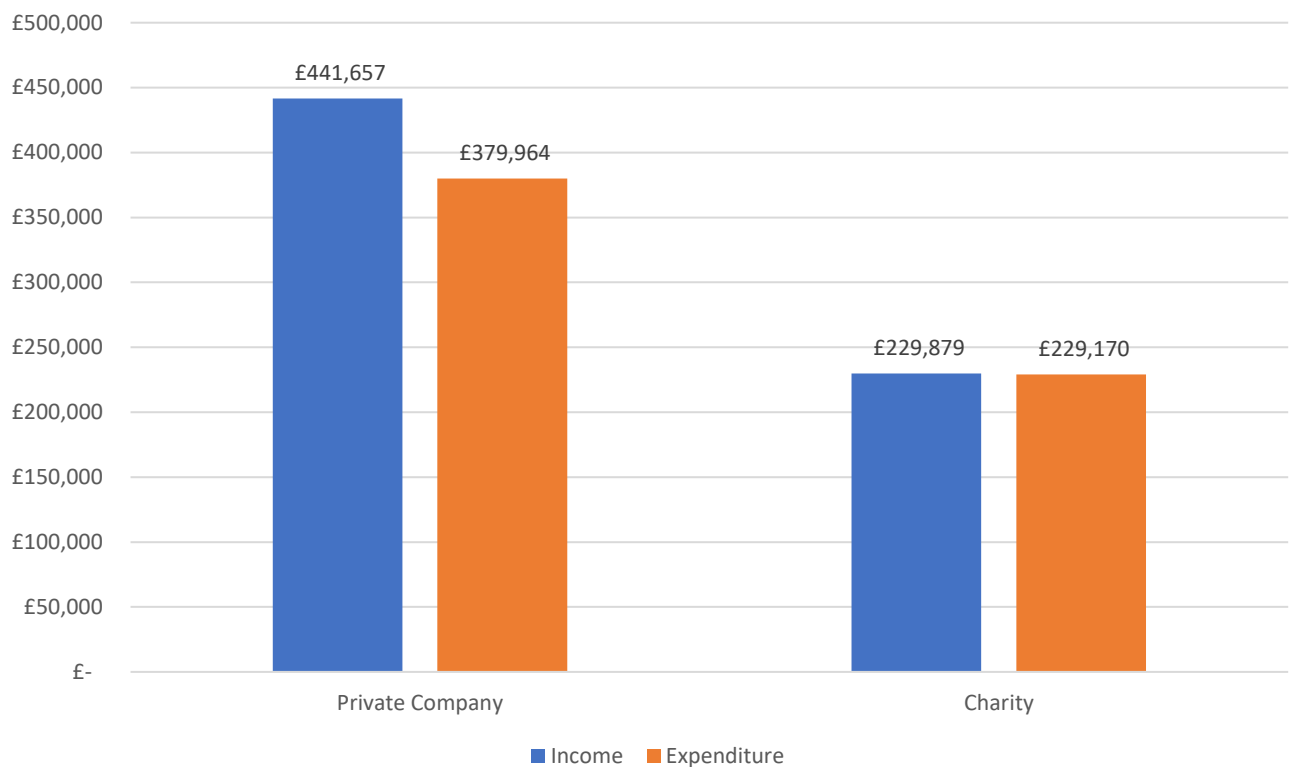
⁷ Lee Valley Riding Centre is a centre in this research that operates using a social enterprise model. It is run on behalf of the local authority by Better (also known as GLL), who employ the staff and are responsible for the day-to-day management of the centre. Better classify themselves as a 'charitable social enterprise' that operates on a not-for-profit basis and is owned by its staff. Though charitable in aims, this centre and model still relies explicitly on the sale of products and services for its revenue generation, with centre staff reporting little-to-no income from fundraising and donations. It is worth noting that this revenue is reinvested back into the organisation rather than taken as profit. However, the income generation model used by Lee Valley is more closely aligned with the other privately-owned companies in this study, hence Lee Valley's position in the 'private company' category.

3.2 Sources of Income

3.2.1 The most significant differences between private companies and charities are in the levels of income and income generation.

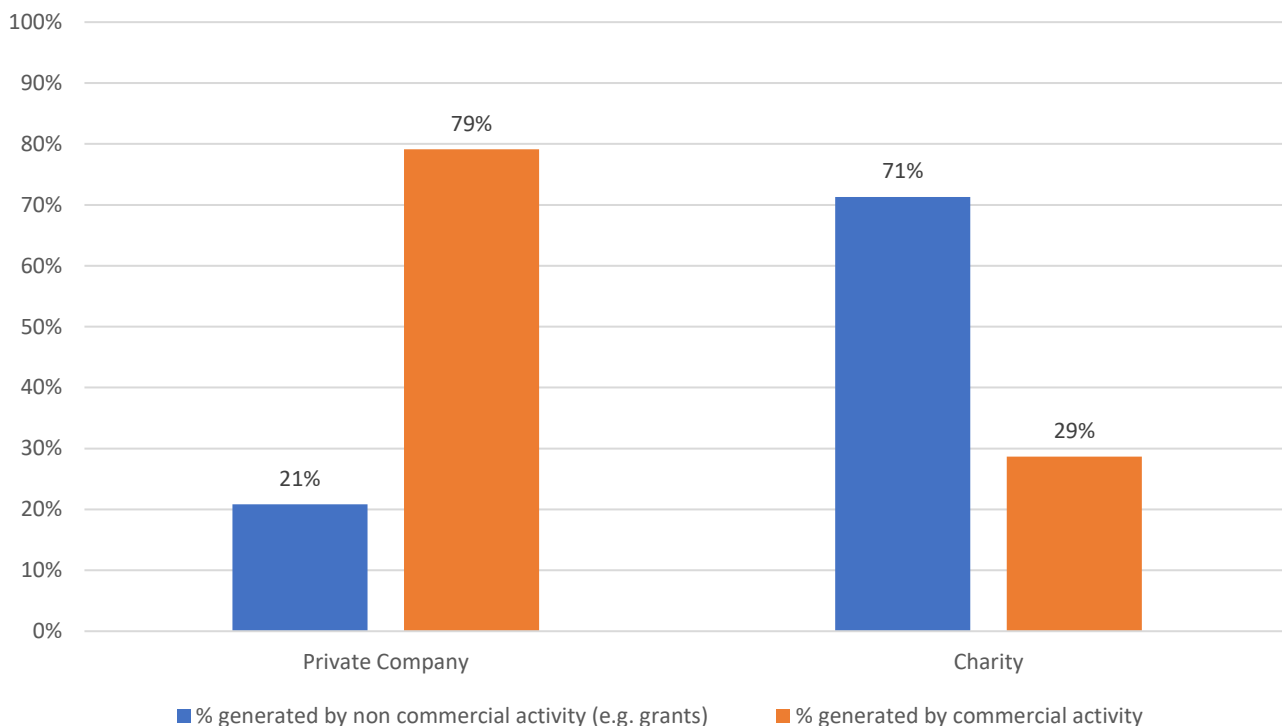
3.2.2 This first section focuses on income breakdowns received from each of the centres. Centres showed a broad range of income amounts in their reports, with only two expending and receiving greater than £500,000. As shown in Figure 1, below, private companies on average received a larger amount of income (£441,657) than charities (£229,879). However, they also expended more – £379,964, compared to £229,170 for charities. The data suggests that charities in this sample appear to be more likely to run closer to breaking even than generating a surplus, which broadly reflects the nature of a model that is likely to pursue general sustainability over financial gain.

Figure 1: Finances – average annual income and expenditure for private companies and charities.



3.2.3 UECs were also asked to estimate the proportion of their income that has come from ‘commercial’ sources and ‘non-commercial’ sources. This refers to the origination of the revenue – whether, in the case of ‘commercial’ income, it originated from the sale of sessions or services, facility rental, or merchandising; or, with ‘non-commercial’ income, revenue streams that represent charitable or not-for-profit inputs into an organisation. As may be expected, charities are heavily reliant on non-commercial income sources, drawing the majority (71%) of their income from these avenues, while private companies draw most of their income from commercial activity (79%).

Figure 2: Income sources - generation from commercial and non-commercial activity private companies and charities



3.2.4 These figures are linked to a range of factors identifiable in the discernible differences between the types of centres. Non-commercial income sources frequently take the shape of grants, charitable donations, and sponsorship. For the centres in this study, these streams tend to be relatively consistent due to the establishment of connections to funders or organisations who provide regular support. However, centre directors from charitable UECs observed that these amounts were limited in size and often restricted in terms of what they can be spent on, and that they were always seeking new opportunities from which they can benefit.

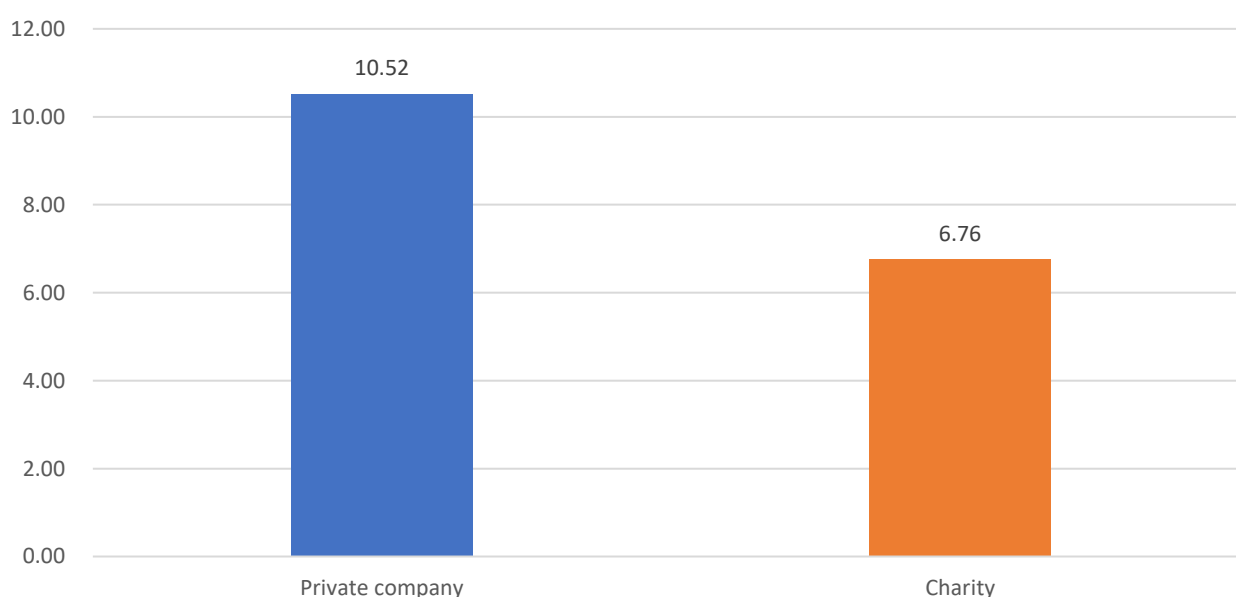
3.2.5 This difference must also be considered in the context of the ethos and motivations behind the creation of each centre. Directors and proprietors across all centres expressed similar reasoning for starting and running a riding school – specifically, a love of horses and a desire to provide access to others who share an interest. However, those in charge of charitable UECs notably placed greater emphasis on immediate community provision of riding access in their site visit interview responses. For example, the founders of East Liverpool RDA and St. James City Farm and Riding School, both charities, made explicit their desire to target specific, underprivileged demographics in the areas directly around their centres, many of whom do not get the chance to take part in the sport. This is often done through ease of access; riding sessions are not provided with the intention of making a surplus or sustaining the business directly and are offered at a largely subsidised cost or even no cost at all, limiting what can be earned directly from these sessions. As such, any earning power from lessons is effectively capped by consumer purchasing power where demand remains constant.

- 3.2.6 By comparison, privately-run UECs highlighted a range of diversified income sources, including the lease and rental of on-site facilities, in-house tack shops, private events, and other non-riding activity sessions, all of which contribute to their ability to make greater amounts of revenue and place less emphasis on riding sessions alone as the main source of income.
- 3.2.7 However, it is clear that commercial streams alone are not enough to run a centre. Though private company UECs draw the majority of their income from commercial activity, many still draw a degree of their income from other sources. This suggests that without the availability of substantial capital, a mixture of the two is required to maintain the business even when it is being run with the intention of making a surplus.
- 3.2.8 Eastminster School of Riding and Ealing Riding School, two of the more commercially orientated UECs in this study and both private businesses, generate income from a diverse range of streams, but suggested that a small proportion of their revenue still came from sources such as donations and other ‘subsidised’ sources, such as grants for specific programmes or educational work.

3.3 Connection between equines, facility capacity, and earning.

- 3.3.1 Access to capital, staffing and overall capacity play an important role in the ability of UECs to create income – and privately-run UECs typically possess larger capacities, and therefore a wider provision of facilities and services, than charities.
- 3.3.2 Land size, equine numbers, and facility capacity are major factors that are likely to play a key role in any decision to pursue the creation of a UEC. They also have an impact on existing centres’ patterns of income and expenditure. Large sites not only have much more land than small sites, but they also have more equines with which they can take advantage of that land.⁸
- 3.3.3 According to the data collected, UECs run by private companies (10.52 acres) tend to be larger than those run by charities (6.76 acres), as demonstrated in Figure 3, below.

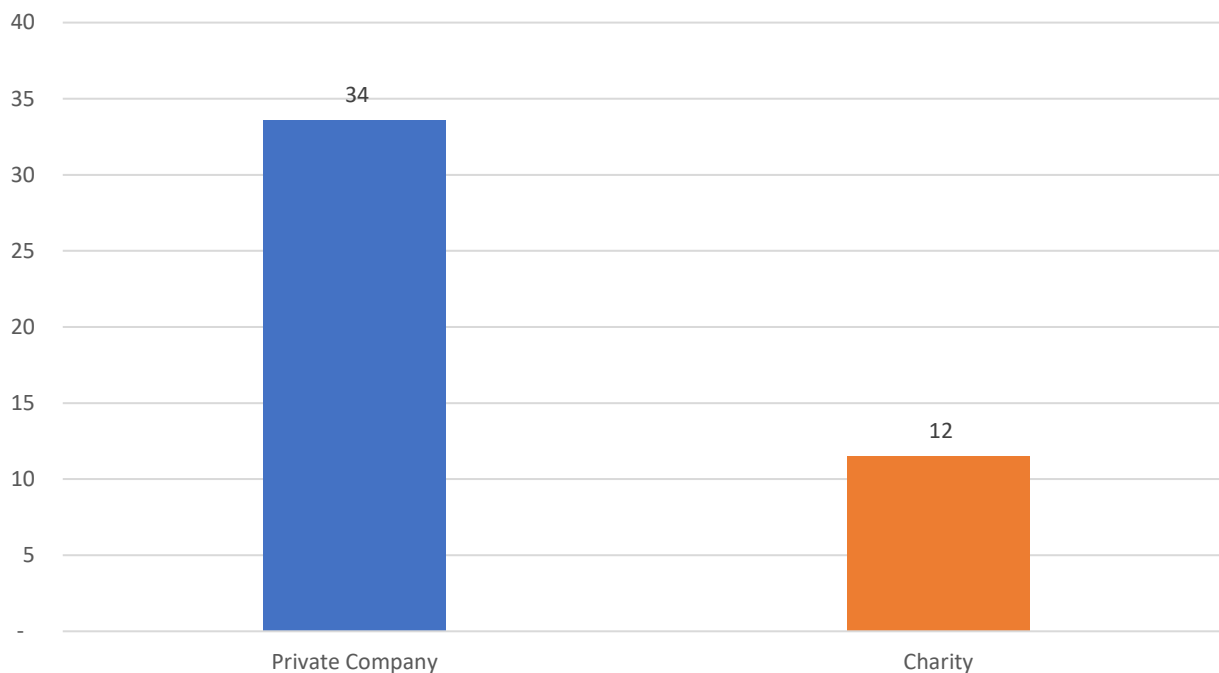
Figure 3: Measurement of land size in acres



⁸ The calculations in this section “Connection between equines, facility capacity, and earning” pertaining to “Measurement of land size in acres” and the metric “Acres per equine” for private companies have been completed with the omission of data from Eastminster Riding School. As noted earlier in this report, it is located on a site with access to 250 acres – five times larger than the next largest centre. Eastminster is, therefore, a statistically significant outlier among centres in this research and its removal avoids significant variation. This omission, it must be stressed, does not alter the key findings from this data.

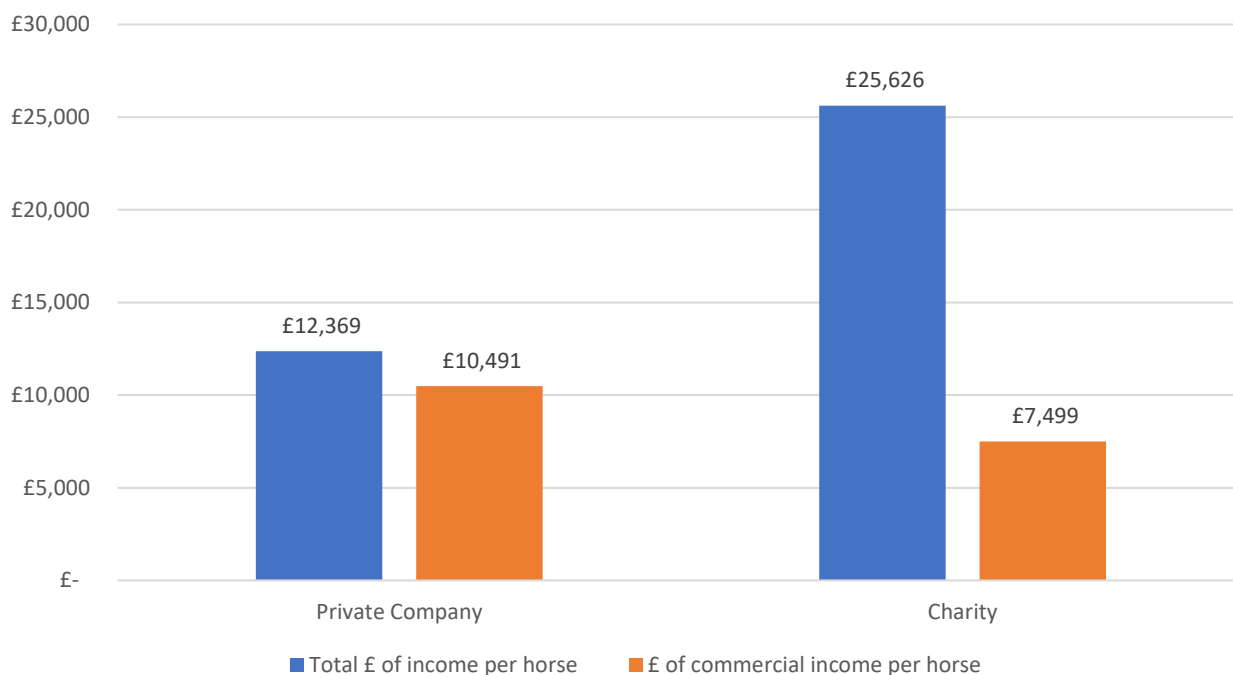
3.3.4 These attributes along with the relative percentages of income generation for commercial and non-commercial sources have a notable impact on the relative 'earning power' of each equine at any respective centre. Figure 4, below, illustrates the average number of equines at each centre. These figures refer to riding school horses only, as some centres possess livery horses that are not used for riding school activities. There is, at some centres, occasional overlap with livery and riding school horses where owners allow their horses to be used for riding school activities; these horses have been included. For the centres within this study, private companies (34 equines) have almost three times the number of horses as charities (12 equines).

Figure 4: Metrics – Average number of equines



3.3.5 Below, in Figure 5, the total income and the relative commercial income have been divided by the number of horses to produce a figure that shows the 'earning power' for each horse. Each equine at a charitable centre brings over double the amount of *total income* (£25,626) than at a privately-run UEC (£12,369). When calculating the *commercial income* obtained per horse, the figures at charity centres falls by 71% to £7,499, largely due to the high proportion of income from grants funding and other non-commercial sources. Privately-run centres, by comparison, obtain £10,491 of commercial income per horse – a 15% difference.

Figure 5: Metrics - £ of income per horse (annually)

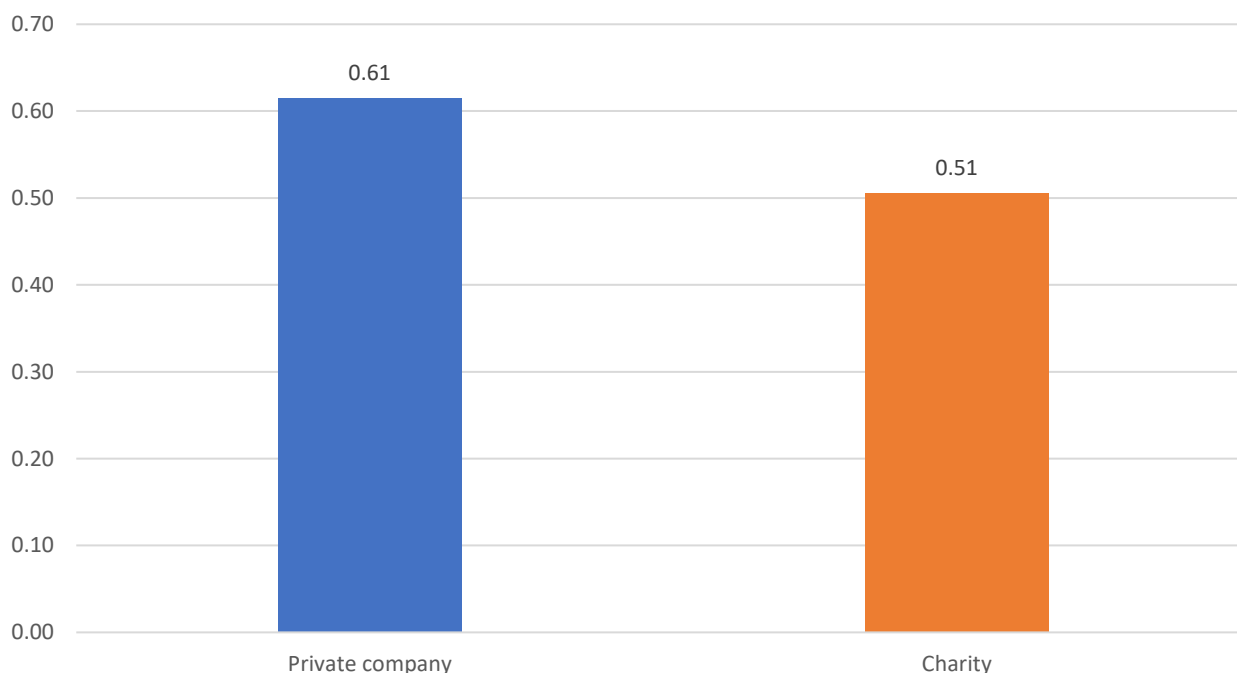


3.3.6 Smaller capacities at charities mean that each horse bears a greater overall income 'burden' in comparison to equines at privately-run centres, where there are more horses doing less work and effectively sharing this overall income 'burden'. This does mean, however, that UECs with smaller capacities are more exposed to negative financial impact if any of their equines become sick, injured, or are unable to take part in sessions. St. James City Farm and Riding School, when visited, had a horse that was partially lame and therefore limited in the number of sessions it could be used in. As a charitable centre that already heavily subsidises sessions, this leaves the centre with a reduced capacity to take on riders. This does mean, however, that if charity UECs are able to invest in horses, this may be the best method of increasing the earning potential – notwithstanding the additional work required to secure more funding and grants.

3.3.7 Privately-run UECs having more space and a greater range of facilities enables them not only to have a wider range of horses that cater to a broader customer base, but also to use this additional space to provide livery services. These livery horses also represent a relatively consistent stream of income, but can also be used to inflate the number of equines in a way that charity centres cannot afford. As mentioned, it is not uncommon for livery horses to be 'loaned' to the riding school which, in theory, makes each centre less reliant on individual horses to draw income. However, the larger proportion of *commercial income* that each horse brings in at private companies compared to *total income* also means that any major impact on the overall number of horses may be noticeable in overall revenue due to their general reliance on commercial income streams.

3.3.8 Dividing the available acreage by number of horses gives the “Acres per equine” metric, which highlights the relative space afforded per horse at a centre. Figure 6, below, shows that private companies remain slightly ahead of charities in this measurement. This suggests that not only do privately-run UECs have more horses and more land at their disposal, but they also tend to be able to provide space for these equines at a slightly better ratio than charities. A potential caveat would be that this figure includes all land on-site and does not consider the relative size of the area where horses would spend their time during ‘working’ weeks. Therefore, any figures should be understood as indicative rather than prescriptive, particularly as this is especially dependent on the location of each centre.

Figure 6: Acres per equine metric (calculated without Eastminster)

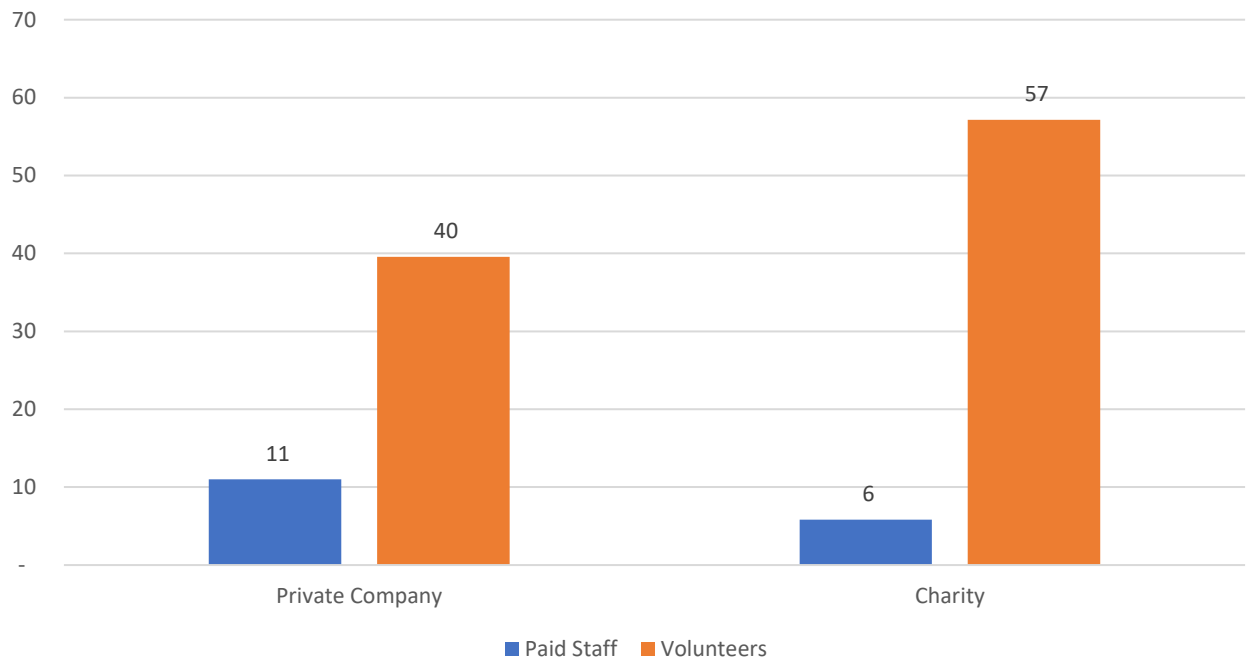


3.3.9 Interviews with centre directors and proprietors suggested that centres operating in urban settings – in the immediate vicinity of residential areas or in inner-city locations – were more likely to face issues relating to land access than those in near-urban locations, and the costs that come with these. This applies to both private companies and charities. Ealing Riding School, a privately-run centre in West London, highlighted their difficulty managing horse waste and keeping horses on rotation for turnout – an identical challenge to that expressed by the founder of the St. James City Farm and Riding School in central Gloucester, a charity. Both centres are in heavily built-up areas. Conversely, centres in near-urban settings – on the periphery of urban environments with more access to land, such as Ryders Farm Equestrian Centre and Cliffhollins Riding School – tend to not have these problems to the same extent. The majority of the ‘near-urban’ centres in this study, however, were private companies, and able to benefit from this extra land availability resulting from the additional distance from inner-city locations.

3.4 Workforce: staffing levels and ratios

3.4.1 Staffing models vary between centres and are often dependent on the business model assumed by the owner or director. All centres adopt a workforce profile that is based around a body of paid staff with volunteers who supplement day-to-day operations where possible. Figure 7, below, shows the difference in numbers between private companies and charities. Paid-staff, in this instance, includes both part- and full-time employees.

Figure 7: Workforce numbers - paid staff and volunteers



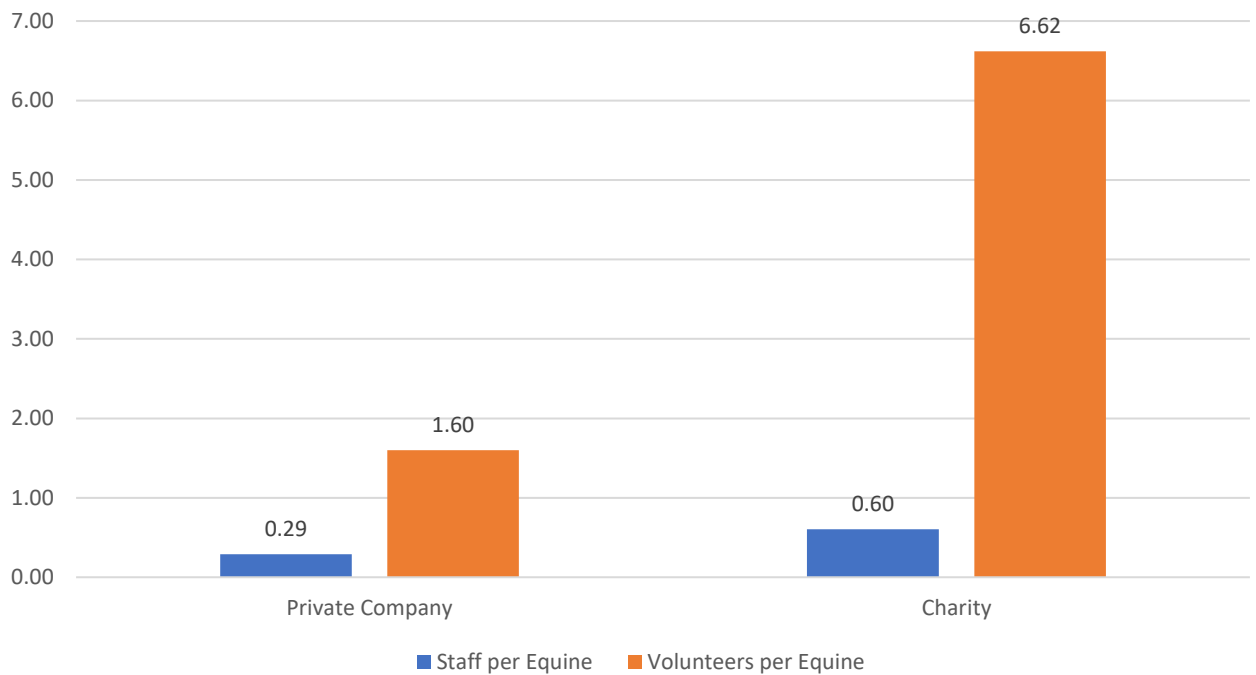
3.4.2 Private companies are, on the whole, more likely to employ almost twice as many paid staff as charity centres, with the latter having a slightly larger body of volunteers that are used to support their main workforce. However, it is clear that paid staffing numbers are not particularly high across both types of centres, and that each requires volunteers in some shape or form to assist with the running of a UEC on a day-to-day basis. This core body of staff is also often supplemented by a range of freelancer vets, farriers etc. who support with horse care and other additional activities. These auxiliary staff are not included in the above figures.

3.4.3 The high number of volunteers is heavily linked to the nature of riding school and UECs. Many staff and volunteers interviewed noted that UECs are hubs of community and a definitive 'third place' around which people are able to coalesce, socialise and meet others, and take part in an activity they enjoy, which partly explains the strong volunteer numbers for both types of centres. Many participants start out riding and go on to volunteer, and it is not uncommon for centres to offer incentives to encourage volunteers.

3.4.4 From an operational perspective, this does mean that centres who use a large body of volunteers are also more likely to experience issues with staffing and retention, as volunteers are less reliable as auxiliary staff due to the lack of any formally agreed contract. Centres do benefit, however, from the strong affinity that participants build with them and their horses, and many find that they have a core body of key volunteers whose commitment to helping often enables them to maintain their activities at a relatively consistent level.

3.4.5 Figure 8, below, shows how this breaks down when the number of equines is compared to paid staff and volunteer numbers.

Figure 8: Workforce ratios – paid staff per equine / volunteers per equine



3.4.6 Private companies, as previously mentioned, tend to have more horses by virtue of having larger sites and more capacity. But as they do not employ significantly more people than charitable centres, this translates into smaller “paid staff per horse” ratio. The data also shows that charitable centres have over double the number of paid staff per horse versus private companies – though this is still at a ratio of one staff member to two horses. The high level of volunteers at charities (6.62 volunteers per equine) compared to private companies (1.60 volunteers per equine) is also demonstrative of the overall dependency on this group to operate.

3.4.7 This data is only partly representative and is contextualised by the responses given in interviews and focus groups conducted during site visits. The diversity in answers to the topic of staffing and volunteers demonstrates just how differently the same area of operation is addressed in different organisations – and how any future centre may wish to adopt their own unique approach.

3.4.8 For example, Cliffhollins Riding School, a family-run private limited company in Bradford, has a pool of volunteers that come largely from the Pony Club that is run at the centre, with a small paid staffing team of three at the time of visit. Elsewhere, Vauxhall City Farm, a charity centre in London, has a strong, diverse body of volunteers from around the local area who support the running of the entire city farm, with a small staffing team who are designated staff for the riding school section of the organisation.

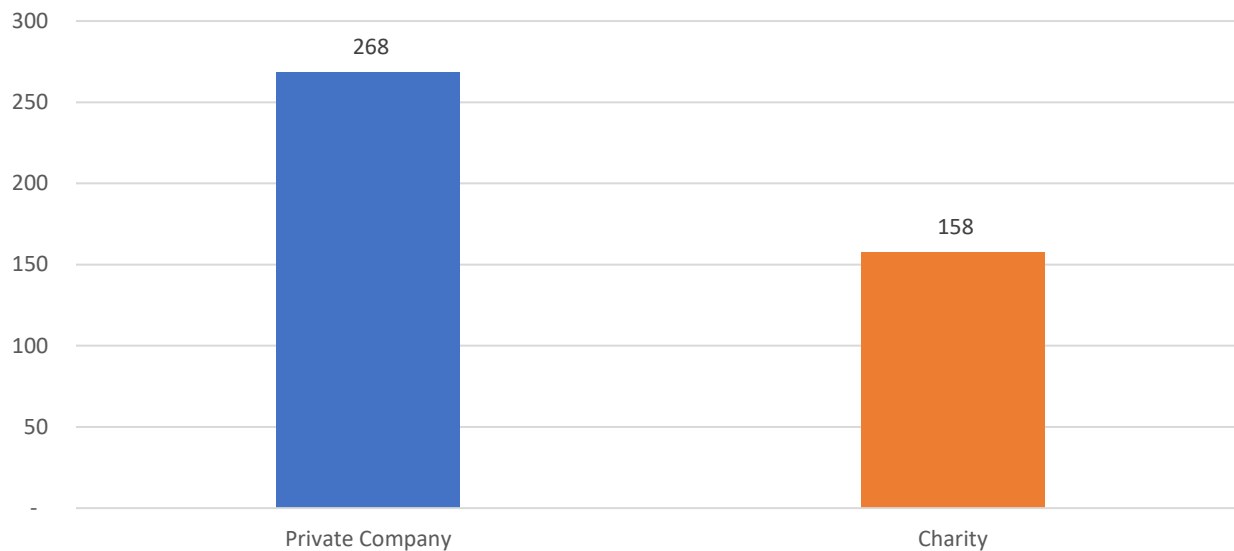
3.4.9 Other UECs, like Ryders Farm Equestrian and Eastminster Riding School, are also family-run private companies who have a strong and comparatively large paid staffing team, but few regular volunteers. The Ryders Farm team, especially, referred to their desire not to be overly reliant on volunteers who, for them, represent a temperamental source of labour. On the other hand, Ealing Riding School, is a privately-run centre that makes use of a strong volunteer base, many of whom are riders themselves, and a range of freelancer coaches.

3.4.10 These examples are by no means exhaustive; instead, they highlight the sheer diversity in approaches among UECs and illustrate the need for a tailored approach to any staffing model that suits the interests of the business or the aims and objectives of the director.

3.5 Participants, activities, and horse usage

3.5.1 All these factors affect UECs' ability to accommodate participants and activities, as well as the amount of 'active' time their horses spend in sessions.⁹ Figure 9, below, private companies take on significantly more participants (268) than charities do (158) each week – likely linked to each centre's horse capacity and size, with more space and more horses logically equating to the freedom to take on more riders.

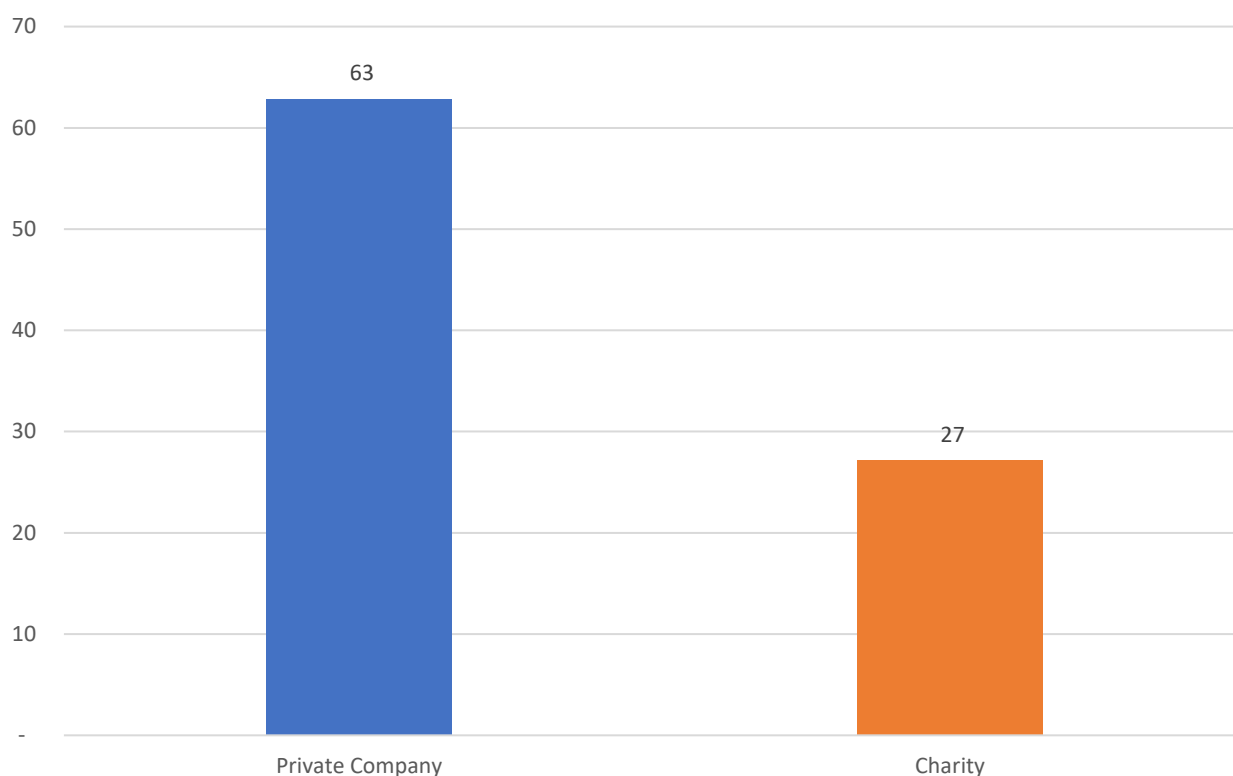
Figure 9: Number of riders at UECs (per week)



⁹ Two centres did not report figures for the number of riders: Ealing Riding School (a private limited company) and Vauxhall City Farm (a charity). Results have been adjusted to take this into account.

3.5.2 This translates to privately-run UECs offering more on-horse activity hours per week than charities – more than double in this case, as demonstrated below in Figure 10. This is calculated as the number of hours each week in which on-horse activity takes place.

Figure 10: On-horse hours offered at UECs (per week).



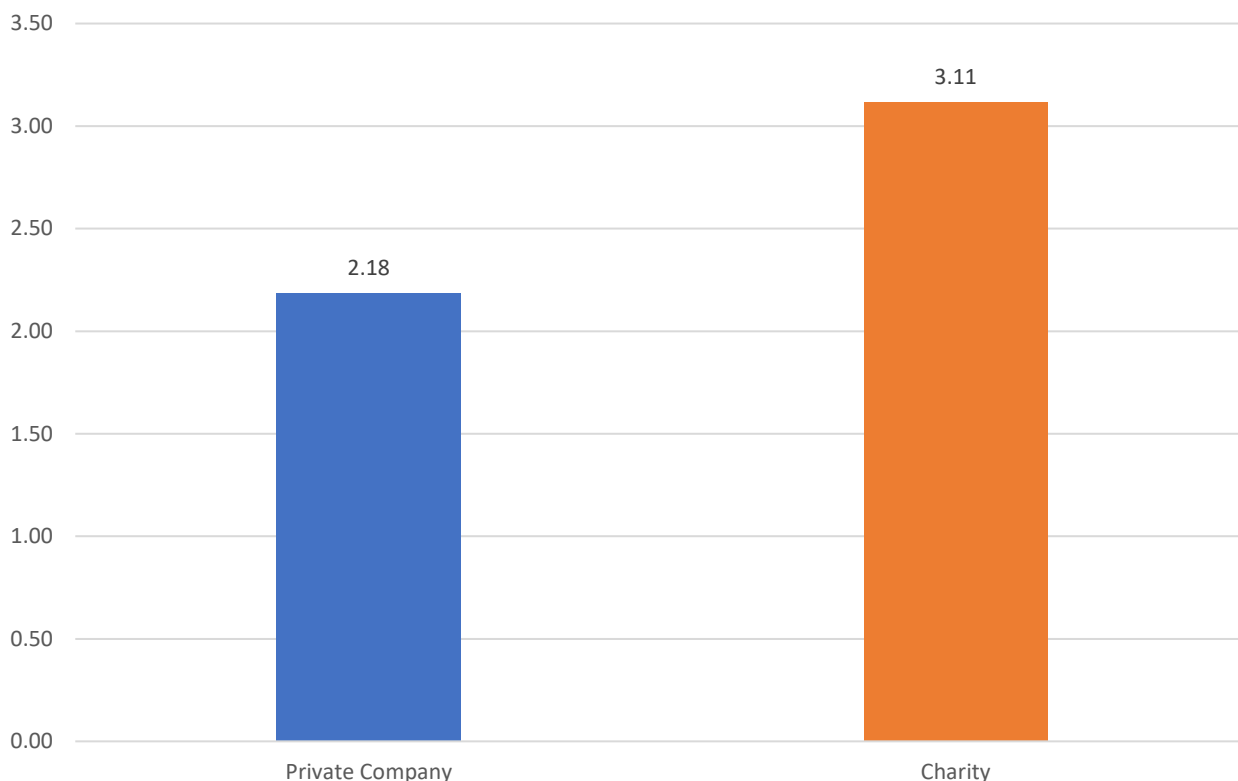
3.5.3 Along with the capital and resource factors, one characteristic that varies between centres that affects horse usage and riding hours are the hours of operation. Many charity centres, such as East Liverpool RDA, run for fewer hours or do not open every day of the week, compared to privately run UECs like Lee Valley Riding School, who are able to open up for longer and are not averse to running up to 12 hours days.

3.5.4 Some centres reported that this effect is more pronounced during winter, when it can get quieter; if a centre does not have access to facilities like a covered / indoor arena, opening hours are likely to be even further restricted during periods of bad weather, for example.

3.5.5 There is a general acknowledgement across UECs that horse care is paramount, and overworking equines should be avoided; virtually all centres stated that they attempt to restrict the number of hours that each horse spends being ridden each day, ideally to 2-3 hours per day at a maximum.

3.5.6 Having more horses enables the workload to be spread between them. Privately-run UECs are able to do this more effectively, as can be seen in Figure 11, below, which shows ‘on-horse’ hours per horse for each centre type.

Figure 11: On-horse hours (per day)



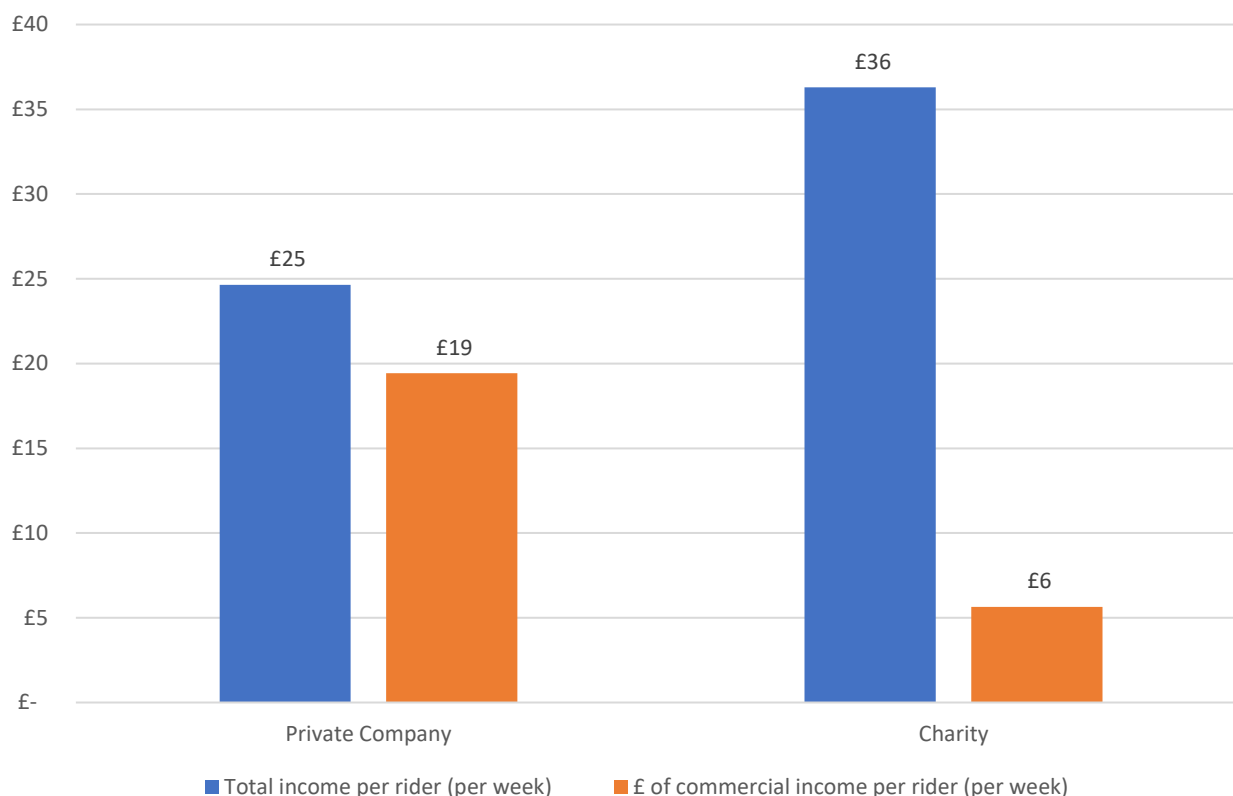
3.5.7 Despite attempts to ensure consistency, there is still a small likelihood that ‘on-horse hours’ as a measurement will have been interpreted slightly differently between centres. It may be that some UECs interpreted this as time spent directly on the horse, while others may have included time spent ‘around’ the horse engaging in activities such as equine-assisted services, in which a horse is heavily involved but may not be actively ridden, as opposed to stable management.

3.5.8 ‘Off-horse’ activities comprises a range of activities, with many centres presenting different offerings depending on their available facilities. All centres offered stable management either as part of their programmes or as a voluntary offering for those who wish to be around horses. Some centres, such as Park Lane Stables RDA, offer the aforementioned equine-assisted services as part of their work with those with additional needs and disabilities, which generally does not include riding. Others, like Ealing Riding School, offer several bushcraft, forestry, and nature classes for children and families, which occur on-site and sometimes – but not always – includes horses. Other centres indicated they had programme sessions that enabled people to learn about horses away from riding, as well as activities such as pony parties, themed events, and breakfast and dinners ‘with a pony’.

3.5.9 This goes some way to explaining this discrepancy and the differences in figures reported between centres. However, it does not change the key essence of usage data – that more horses can do more work collectively in a centre with more capacity, while each horse simultaneously does less work individually. This translates into an increase in usage in the time that horses at charities spend in sessions versus private company UECs.

3.5.10 Figure 12, below presents data illustrating the amount of income centres obtain per rider, per week for private companies and charities.

Figure 12: Metrics - £ of income per rider (per week)



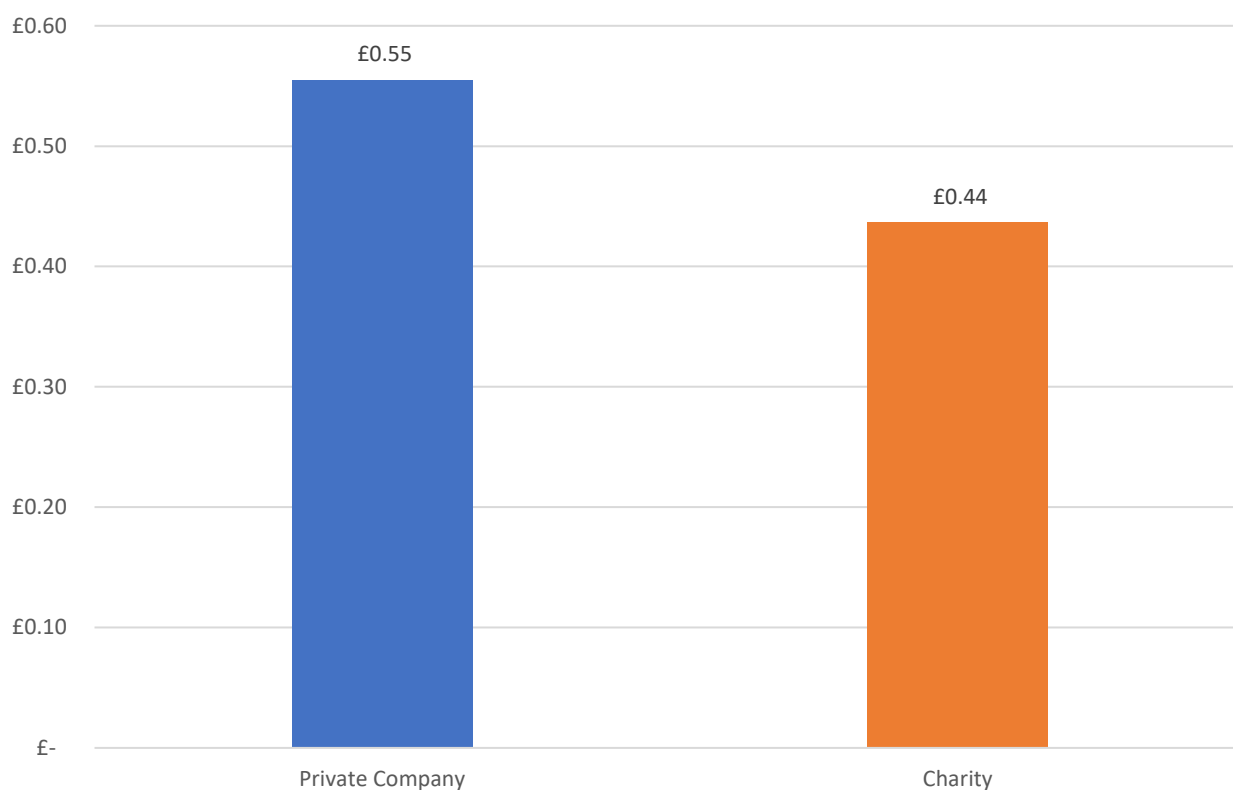
3.5.11 These findings suggest that riders are worth more to the total income of charities than they are to private companies. However, commercially, each rider is worth more to private companies, as may be expected considering their reliance on commercial sources of income.

3.5.12 The implications here are that a drop-off in rider numbers is likely to be felt more heavily by those who rely on participant numbers to draw income, which tends to be private companies. Each average participant brings in a relatively large amount of commercial income as a proportion of the total income per rider – 79% for privately-run UECs. As this commercial income is frequently their predominant revenue stream, this increases the risk and reduces the ability to insulate against shocks to participant numbers. Centres are often able to benefit from waitlists but, in light of rising costs of living, fulfilment of any gaps is likely to be dependent on those who can afford to pay.

3.5.13 If rider participation is less reliant on consumer income due to a funding-based model – where participants may pay low or no costs themselves – then centres with this model are likely to be better protected against a drop-off in participants. This tends to be the case at charities. However, if these centres have funding income that is tied specifically to participant numbers, a fall in the number of riders will have a significant impact.

3.5.14 There is increased generation of income per person in the catchment areas for private companies, which is shown in Figure 13, below. Catchment areas, in this instance, represent the area reachable within a 20-minute travel time.

Figure 13: Metric - £ of income generated per person in catchment area.



3.5.15 Private companies generate £0.55 per person in their catchment area – more than the £0.44 generated by charities. This suggests that privately-run centres are slightly more dependent on their immediate communities to generate income – likely due to the participant-based model.

3.5.16 Aggregation of the catchment data suggests that private companies tend to be located in areas with higher populations. This is quite heavily influenced by two centres – Ryders Farm Equestrian and Ealing Riding School – whose location places them in catchments areas of well over one million people. It does, though, make their ability to earn more money per participant more noteworthy, and perhaps speaks to the effectiveness of these types of UECs in taking advantage of their resources and maximising revenue.

3.5.17 The proportion of young people as a percentage of the total population is relatively similar between the catchments of the different types of centres; 27% at private companies and 24% at charities. Though this is not a huge difference, it would suggest that areas with marginally higher proportions of young people may benefit from access to this demographic, particularly as several centres noted that their predominant participants were children under the age of 18. Further analysis of the proportion of participant ages at each centre would be useful to examine whether these variations in the number of young people make a substantial difference.

4 Key findings and prevailing trends amongst UECs

4.1 What are Urban Equestrian Centres? A background to UECs

- 4.1.1 Urban equestrian centres, or UECs, are riding schools and equestrian centres that largely operate in and around urban areas across the UK. Urban equestrian centres represent a small proportion of riding schools and equestrian centres nationally, but they serve a significant population catchment due to the density of population in the locations in which they operate. In some areas, they may be the only opportunity for participants to access horse riding and related activities – particularly for those in marginalised groups, including ethnic minorities, people on low incomes, and those who live in more deprived areas.
- 4.1.2 Each of these centres has a unique set of circumstances that influences their operation. Other than their placement within urban areas, there are not many concrete characteristics across the sample size in this study that could be used to outline what defines a UEC. This is not to say that there are no commonalities; rather, it points to the fact that the structures and status of each organisation varies between centres, and each has a unique set of challenges and opportunities. However, they are all linked by their ability and desire to bring horse riding and equestrian activities to those in cities, towns, and urban areas.
- 4.1.3 Because of this variance, UECs come in plenty of shapes and sizes. Some of the centres in this study are located in densely populated areas within large cities, which limits the space and capacity. Others are situated in more peripheral, quieter parts of towns and cities. The knock-on effect of this is that centres have access to differing levels of facilities. Centres with access to more land tend to have a larger number of arenas and open spaces for riding, greater number of horses, and scope to take on a wider range of activities and rider abilities. Where space is at a premium, UECs within this sample were often limited to having reduced-sized arenas or no arena at all, instead using surrounding public ground for their riding activities.
- 4.1.4 The core body of sessions offered by UECs often focuses on riding across beginner, intermediate, and advanced levels. Depending on the type of centre, UECs may offer sessions to participants on a regular basis as part of a programme, or on a singular basis. The availability of differing session levels is often linked to the ability or capacity of the staff running the centres, as well as available facilities. What's also important is the skillset of the coaches, and their ability to provide higher standards of sessions to their participants. Small centres are often more limited in their offer, with space and staffing restrictions meaning they can only offer beginner-level sessions. Those with more space and access to land are able to take advantage of these to offer more complex and advanced activities for more confident riders, such as showjumping. However, many UECs are successful in maintaining high levels of demand and providing a range of opportunities and classes to those who want to take part.
- 4.1.5 Secondary activities may include private events, 'pony parties', equine-assisted services, corporate events, stable management sessions, among others. The opportunity for these, like regular riding sessions, is linked to the capacity and availability of facilities, as well as organisational objectives. For some centres – particularly charitable ones – private events either do not feature as an offer, or are lower down the list of priorities in comparison to private companies, who are more likely to present a broad range of alternatives for potential participants.

- 4.1.6 UECs often operate all year round, with special programmes sometimes offered during school holidays to facilitate periods of greater demand. Partnerships are also a feature of many UECs operational model, though not all centres have these connections or are able to take advantage of such opportunities. Where partnerships do exist, they may enable UECs to engage with charitable causes, those referred by the local authority, or schools and colleges in the area. These are not comprehensive examples, and each UEC will often connect with organisations or groups that best suit their aims.
- 4.1.7 The impact of UECs, though not quantitatively calculated in this study, was well-documented and frequently mentioned in a number of informal chats and discussions with proprietors and participants who ride on a regular basis. People often spoke of the sense of community and value that their local centre brings to them – both in terms of social outcomes, but also in terms of the physical and mental wellbeing improvements that being around horses and like-minded people brings. Each centre is successful in its own way, but they are all strong examples of the way that UECs function as key institutions within the areas they operate and provide a broad range of people with several benefits.
- 4.1.8 The importance of people is central to the success of UECs in this study. Some owners have backgrounds in equestrian, others have business as their career focus, while others operate in the charity and third sector. What connects them as a common attribute is the passion and desire to make a difference through horse riding; each knew the strengths, weaknesses, and opportunities at their site and how their own abilities would be best harnessed to maximise the success of their centres and the facilities at their disposal.
- 4.1.9 The trend here is one of individuality. The owners and proprietors of the UECs in this study each noted how the way that they ran their centre – from the sessions and timetables to the staffing arrangements, to the style of coaching – was a product of their own individual situations, capabilities, and circumstances.
- 4.1.10 Following the site visits and the collation of all the data from this study, there are a few common areas where centres face challenges and may appreciate support, which will likely be useful to any centres starting the venture into equestrianism. The key findings below are examples of some of these commonalities found throughout the project.

4.2 UECs tend to be personality / mission driven.

- 4.2.1 Each UEC is unique in its operational model, but many of them have a driving mission behind them, often linked to the director or proprietor. Centre directors are people who come from equestrian backgrounds and, where they do not, they tend to have charitable reasons at the heart of their work, and may offer sessions at subsidised costs or no cost at all. No centre in our sample had been opened for purely financial reasons.

4.3 In general, UECs are typically effective in giving people access to horses and equestrianism who would not otherwise have the opportunity.

- 4.3.1 Operating in and around cities means that the UECs in this study are largely able to provide a regular service to those who are not typically able to reach ‘traditional’ riding schools; particularly for those from disadvantaged or marginalised groups, ease of access by virtue of location is crucial in enabling them the chance to get to and from a centre. Good transport links are essential to this, as is a strong connection to the local community and, where possible, links to schools and the local authority.

4.4 Sites are typically operating at or close to capacity.

4.4.1 Many centres reported being heavily oversubscribed or unable to meet the demand within their area following another rise in popularity of horse riding and equestrianism post-pandemic. Virtually all UECs in this project had a waiting list of some sort, and are able to fill sessions with relative ease in light of this. However, programming schedules are often full, and horses are at their working capacity for the day – all of which means UECs are not in a position to increase their ‘supply’ to meet the level of demand from their communities.

4.5 Securing suitable horses is a real challenge.

4.5.1 The horse market is experiencing a wholesale rise in prices. This, coupled with a growing number of sellers attempting to take advantage of these increases, has made obtaining horses for use in riding schools all the more difficult. A large majority of the centre directors and operators that were spoken to in this study expressed that they had seen three-to-fivefold rises in the cost of horses since the start of the pandemic. Some centres have pursued other routes to obtain their horses, including rehoming horses from the RSPCA and sourcing from local or family connections – though this is not always an option.

4.6 Most operational models are supported by additional funding / grants to some extent.

4.6.1 Across the sample of centres visited, there are very few who are able to operate without the use of grants and additional funding, even among privately-run companies. The extent of this funding varies hugely, with some centres receiving smaller grants for individual projects, while others have regular contracts with local authorities to support schools and other charitable organisations within their local catchment areas. There was, in all 13 centres visited, only one who reported no major non-commercial funding – Lee Valley Riding Centre, whose model is unique in that they are overseen by a leisure management company and exist as part of a larger sporting complex and brand supported by the local authority.

4.7 There is a general reliance on volunteer support.

4.7.1 Regardless of status, all UECs in this project have volunteers as part of a ‘blended’ workforce. The numbers vary significantly from centre to centre; some centres are heavily reliant on volunteer assistance not only to support the care of horses, but to run the day-to-day activities at the centre. Privately-run centres may be less reliant on volunteers than not-for-profit centres, but it is often dependent on the centre and its activities.

4.8 Expansion / duplication is a challenge for UECs.

4.8.1 Without readily available access to land, expansion for UECs is a problem. Many centres in this study either had reached the limits of their existing land or had looked at other spaces to expand, only to be priced out by other buyers or renters. Operating in a city, where open land is already at a premium, makes this all the more difficult. Yet moving out into cheaper areas runs the risk of removing access for the target audiences or existing participants.

4.9 Securing paid staff is difficult.

4.9.1 Staffing is one of the biggest challenges faced by all centres. Climbing staff costs and a smaller pool of talent means that it is increasingly becoming difficult for centres to not only find people to join their teams, but also the right people who will be committed to the job for an extended period of time. This is not a regionalised issue, but one that affects all centres. Without the capital necessary to push wages up to attract those who really want to work in equestrianism but do not see it as viable, this problem will persist.

4.10 Administration often takes a back seat due to lack of resources.

4.10.1 Many centres have small staffing teams, with the majority of those staff members involved in maintaining the centres on a day-to-day basis and ensuring horse care remains the priority. This means many are pressed for time or do not have consistent or regular capability to manage areas of the business such as administration. Some centres are fortunate to have staff who are able to do this for them, either in-house or externally, or have volunteers who are able to assist with this process. On the whole, however, employing someone to solely manage this area of the business is not always viable. This has an effect on two key areas: applications for funding and grants, and licensing. Many application processes are time-intensive, with different requirements necessary for different funders. Similarly, there is little consistency between local authorities in the applications needed to secure a license, and under-resourced centres in areas with stringent regulations may face difficulties ensuring they have the time to deal with this. Additional resources or support in these areas, whether that's capacity or access to a database of funders and resources, would be useful to many centres.

4.11 Rising capital costs are being felt across the board.

4.11.1 Along with horse costs, the impact of rising capital costs is being felt by many centres. Horse care, including bedding, hay, and feed, have all gone up recently, along with energy prices. Where capacity is already limited, without support or additional funding, there is likely going to be a tightening of the gap between income and expenditure. This may become critical for centres already operating close to the margins.



**SPORT+
RECREATION
ALLIANCE**

Prepared on behalf of British Equestrian by Ricky Boardman
Head of Research and Development – Sport and Recreation Alliance

For Further information, please contact rboardman@sportandrecreation.org.uk

**SPORT+
RECREATION
ALLIANCE**