

UK Riding Centres Health Check



Objectives

- understand the capacity situation within equestrian centres in early 2022
- explore the findings in context of Covid-19 pandemic, Brexit and cost of living crisis
- discover whether the type/size of centre affects the challenges they are experiencing
- examine how centres are coping with these challenges and looking to the future.

Member Bodies involved

British Horse Society (BHS), the Association of British Riding Schools (ABRS+), The Pony Club (PC) and Riding for the Disabled Association (RDA),

Timeframes

- survey launched 7 March 2022 and fieldwork lasted to end March.

Respondents:

- 311 equestrian centres across the UK, as identified right (survey sent to total circa 1700)



Summary – current capacity and delivery

- **Currently centres are operating on average at three quarter capacity**
- Two thirds are struggling to accommodate enquiries and offer new members places: **they are operating waiting lists, with an average of 52 names on the list**
- Capacity issues are being driven by the **high number of enquiries** combined with **lower workforce** and **horse availability and affordability**
 - 70% agree these issues have been further exacerbated by the pandemic
- 48% of centres stated they do not have sufficient paid staff and are struggling to find paid workforce with appropriate levels of skills or willingness to commit
- Alongside these issues, other significant challenges include; increasing costs, reduced income and licensing demands
- Most centres agree they struggle to adapt to meet demand and do not struggle to attract riders.

Summary - participants and provision

- On average centres deliver to **122 participants per week**, with numbers ranging from four to 1000
- 77% of centres offer **disability sessions** - on average, 24% of delivery within centres is with disabled people
- Overall centres offer equal provision across private 1:2:1, small and large groups sessions
- Since the pandemic - when sessions were delivered to smaller groups - customers expect this to be the 'new norm', which has a knock-on effect on their margins
- 9 in 10 centres generate **income outside of lessons**, most commonly through livery
 - Two thirds also received additional funding from various other sources, e.g. local authorities, government, charities, clients and retailers
- The **average number of horses** available at centres is 20, with numbers ranging from 0 to 84
- Over 8 in 10 centres have indoor arenas, with half having outdoor arenas and classrooms
- Half of centres were affected by the closure related to **Covid**
 - 41% said their finances were impacted, 34% had their capacity impacted, 35% said their customer experience was affected, with many fearful of the long-term implications

Factors influencing riding centres' capacity for growth

High impact

Low impact

Staffing / Workforce

- Lack of qualified, affordable staff / volunteers
- Attitude of staff / volunteers- less reliable
- Matching availability with demand
- Increased staffing needed due to changed legislation
- Reduced resource for training and development

Increasing costs

- Staff costs (minimum wage / pension contribution)
- Business rates
- Running costs
- Cost of new horses
- Fewer underwriters pushing up insurance cost

Reduced income

- Reduced participants per session
- Increased cancellation from COVID no cancellation fee charged
- Reduced participation due to financial constraints
- Too much local competition (although some centres have been badly affected by closure of nearby centres)

Licensing requirements

- Rising costs associated with licensing requirements
- Paperwork / admin time linked to licensing

Facilities

- Number and age of horses
- Availability and cost of suitable horses
- Lack of indoor facilities
- Cost of maintaining / updating facilities

Infrastructure around centre

- Road condition
- Road works
- State of bridleways
- Increased, heavy traffic

Weather

Increased demand due to reduced supply (closure of other local centres)

Ageing workforce, without replacements

Having time / resource to seek additional funding

Seasonality of horse riding

Perception of who riding is for

Impacts of Covid-19

Impact on finances

Average 62% reduction in income (range 10% - 100%)

Overall loss between £5,000 and £300,000

- Impacted by inability to provide lessons / reduced numbers allowed in lessons when reopened
- Fewer people attended once reopened
- Impact depended on facilities within centre (indoor/outdoor)
- Some spent significant sums on building outdoor facilities to ensure income

Impact on capacity

Average 67% reduction in capacity (range 10% - 100%)

- No clients during closure
- Limitations on reopening:
 - Children only
 - 1:2:1 lessons only
 - Group sizes limited to six
 - Lower coach : participant ratio
- Cost more to run lessons than income earned
- Volunteers unable / unwilling to attend
- Increased cancellations

Impact on customer experience

- Reduced riding opportunities
- Bad experiences
 - Lack of social interaction
 - Bad weather impacting ability to ride outside
- Spectators not allowed
- Disabled riders
 - Not allowed / scared to attend
 - Find it difficult to ride outside, especially visual or hearing impairments, sensory overload
 - Impact on mental and physical fitness
- Increased prices
- Loss of clients
- Fear of bad customer reviews

Impact on equine welfare

- Lack of exercise leading to obesity, mental stress, physical stiffness and death
- Field injuries to sport horses
- Not used to outdoor lessons - bad behavior
- Indoor horse movement is restricted
- Indoor ventilation and disinfection requirements are higher, which will have a certain impact on horses

Other

- Loss of riders / volunteers
- Cost of upkeep without income
- Cannot afford the rates
- Impact on customer equality (children allowed, adults not)
- Increased cancellations and customer dissatisfaction
- Registered as a school - so some limited provision continued

In summary

- **It's been an incredibly challenging time for centres, who've shown remarkable resilience**
- Centres are returning to full capacity, **but they're not there yet:** on average running at 75% capacity, due to:
 - Quality and extent of delivery impacted by lack of staff (paid or volunteer) or quality of staff
 - Inability to find / afford new horses
 - Centres have limited facilities
 - Customers not willing to pay higher costs / still in smaller group sizes (reducing income and capacity of centre)
- **Many have high levels of demand, which they're not in a position to capitalise on**
- **However, there is an underlying frustration causing people to fall out of love with the sector due to:**
 - Significant staffing issues (48% of centres don't have enough paid staff, 31% have insufficient volunteers)
 - Concerns around long term sustainability of centres due to continually increasing costs
 - Impact of minimum wage / pension
 - Running costs (incl. utility bills)
 - Old facilities which need updated, but no money or time to do it
 - High levels of frustration with licensing requirements
- For many with waiting lists, there is more than enough demand for equestrian activity, so BEF need to work collaboratively across the sector to ensure centres can convert interest into income.
- Many (especially larger centres) **are** positive about the future