



A Study into the Business &
Skills Requirements of the
UK Equine Industry

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The project team at Lantra included: Kate McCarthy, Amy Cosgrove and Aaron Zelmer.

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Contents

Executive summary	1
Introduction to research.....	1
Industry characteristics	1
Recruitment and skills gaps	2
Training activity and development.....	2
Employee survey	3
1. Introduction.....	5
1.1 Research context	5
1.2 Research aims and objectives.....	6
1.3 Structure of the report.....	7
2. Methodology	9
2.1 Research methods and process.....	9
2.2 Mapping the size of the industry	10
2.3 Sample frame.....	13
3. Industry size and structure	19
3.1 Industry profile.....	19
3.2 Industry performance.....	24
3.3 Industry challenges	29
4. Workforce characteristics.....	33
4.1 Working status	33
4.2 Paid/unpaid staff	34
4.3 Gender	36
4.4 Age	37
4.5 Ethnicity	38
4.6 Occupation levels.....	39
5. Recruitment and skills issues	41
5.1 Recruitment	42
5.2 Employment vacancies	44
5.3 Skills challenges.....	46
5.4 Skills gaps.....	53
6. Training activity and development.....	57
6.1 Training activity	57
6.2 Barriers to training	60
6.3 Future training needs	62
7 Equine employee survey.....	65
7.1 Respondent characteristics.....	66

7.2	The industry	67
7.3	Employment characteristics.....	69
7.4	Development and training activities	70
7.5	Membership bodies.....	71
8.	Key findings	75
8.1	Industry characteristics	75
8.2	Skills challenges	76
8.3	Training.....	76
8.4	Membership associations.....	77
8.5	Employee opinions.....	77
8.6	Recommendations	78
8.7	Further research.....	79
Appendix A – Equine employer questionnaire.....		81
Appendix B – Employee questionnaire.....		95
Appendix C – Equine business issues		99

Executive summary

Introduction to research

The following report provides an up-to-date overview of the UK equine industry. The equine industry is one of a range of industries within the Land-based and Environmental sector footprint, as defined under the Lantra remit.

The evidence provided within this report is based primarily upon a comprehensive Equine Labour Market Information (LMI) survey of 421 UK equine businesses, which was conducted at the beginning of 2010. 355 were businesses based in England; eight were based in Northern Ireland; 32 in Scotland and 26 in Wales. The survey was conducted between February and April 2010 via telephone. Pye Tait Consulting was contracted to carry out the data collection. A robust sample size was achieved for the equine industry at the UK level. Results for England, Northern Ireland, Scotland and Wales are indicative. In addition to this, focus groups were conducted in all four nations (i.e. England, Northern Ireland, Scotland and Wales) to give additional evidence. A supporting online survey aimed at employees was available from December 2009 – June 2010, which received responses from 250 employees. Results from this survey are not robust but are powerful indicators of the opinions of equine industry employees.

For the purposes of this research, the equine industry is recognised as covering a number of sub-industries including livery yards, competition yards, trainers, racing and riding schools.

Industry characteristics

The UK equine industry comprises around 19,000 equine businesses; the majority of which are located in England, with the highest proportion based in the South East region. There are 41,000 workers employed in the industry. The industry is dominated by micro businesses (those that employ fewer than ten people), these account for around 85% of businesses. The majority of businesses report that their principal activity is in the riding school sub-industry, however they may also offer other equine related activities.

Nearly two in ten businesses generated turnovers in excess of £250,000 in the last 12 months with the average turnover being £50,000-£100,000. Two-fifths of UK equine businesses reported their turnover to have decreased in the last 12 months. 'Economic conditions' were reported as the major challenge facing the industry in the coming year.

The equine industry employs a slightly younger workforce than that of the Land-based and Environmental sector as a whole. Nearly six in ten workers are under the age of 34, compared to three in ten across the sector. The industry's workforce is predominantly in full time employment (67%), female (70%) and identify themselves as from a white ethnic background (94%).

Employment is concentrated in 'other' occupations, which accounts for 25% of all employment. Workers within 'manager' (24%) and 'skilled' occupation (23%) levels also feature highly.

Recruitment and skills gaps

The UK equine industry workforce numbers have slightly increased in the past 12 months by around two percentage points. Businesses reporting to have employment vacancies are comparatively low, 12% of businesses report having a vacancy. Around two-thirds of the vacancies that do exist are reported to be hard to fill; this is largely due to a lack of skills and/or experience from applicants.

Around one-quarter of employers reported that when looking for new recruits they found problems identifying people with the right skills and/or experience. However, skill gaps remain low within the UK equine workforce; 98% of businesses reported that their current staff have the skills required to perform proficiently in their role. Of the few businesses that did report skill gaps, skills found to be lacking most often in staff were technical, practical or job-specific skills. The most frequent course of action taken to overcome skill gaps was to increase training activity/spend and increase/expand trainee programmes (28%).

Training activity and development

Around 58% of the UK equine workforce has received some form of training within the previous 12 months.

The most common mode of training arranged was off the job training courses (62% of businesses arranged these for staff members). The main barrier to training identified by equine businesses was a lack of funds, 22% of businesses reported this.

Looking ahead, one-quarter of businesses said they would continue to offer the same training that they are offering at present. The most frequently reported specific future skill need was first aid training (15%), National Vocational Qualifications (NVQs) and British Horse Society (BHS) qualifications (13%), and Health and Safety (9%).

Employee survey

91% of respondents were female, and one-quarter were between the ages of 21 and 25. This does not reflect the demographic of the industry due to the nature of the survey. This is discussed further in the report. Overall respondents were positive about working in the industry with the main negatives being hours of work and pay. The job role most frequently cited was yard and stable duties (39%) followed by training and competing horses (12%) and facilities maintenance (12%).

Over half of respondents (54%) had been working in the industry for over five years and one-fifth had been working in the industry for over 15 years. Three-fifths (62%) of employees felt they would continue to work in the industry for the rest of their career, 7% were actively looking to leave.

Nearly two-thirds (64%) did not have a written contract of employment and 74% did not have an annual review. The evidence suggests that training is organised on an ad hoc basis.

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1. Introduction

The following report provides an up-to-date overview of the UK equine industry. The equine industry is one of a range within the Land-based and Environmental sector footprint, as defined under the Lantra remit. The evidence provided within this report is based primarily upon a comprehensive Equine Labour Market Information (LMI) telephone survey with employers in the industry, which was conducted between February and April 2010.

1.1 Research context

Previous to this study, the LMI currently available for the equine industry was in need of updating. The latest figures held by Lantra were produced by Experian in 2008.

The research will act to support Lantra's developmental activities, which aims to fill gaps in existing industry knowledge through primary research. Lantra is committed to undertaking reviews of each of its industries.

For the purposes of this research, the equine industry is recognised as covering a number of sub-industries including livery yards, competition yards, trainers, racing and riding schools.

The diverse nature of the business activity within the equine industry has prohibited the possibility of conducting top-down research through the use of national statistics. This is largely due to the fact that the equine industry is not covered by a single coherent SIC (Standard Industrial Classification) or SOC (Standard Occupational Classification) code. Instead, the industry appears in parts amongst agricultural and sport codes, which makes the specific data impossible to distinguish from other industries and sectors. Due to the shortcomings in national data sources a bottom-up research approach was adopted for the research project.

1.2 Research aims and objectives

The main aim of the project was to identify the current skill needs and challenges within the equine industry across the UK. In doing so the following objectives needed to be addressed:

- To identify the employment numbers of those businesses operating within the equine industry
- To identify the size of businesses by staff numbers (e.g. 0-4, 5-9, 10-24, 25-99 and 100+ employment)
- To identify key workforce characteristics of those employed within the industry (characteristics to include workforce gender, age, ethnicity, employment status)
- To quantify the number of employees within specific occupational profiles (there are nine broad occupational categories or SOC groups, although not all are likely to be relevant to the equine industry)
- To identify the extent of employment vacancies within and across the industry (specific interest to be targeted towards assessing extent of skill shortages and hard to fill vacancies)
- To identify the extent of skill gaps within the current workforce (i.e. the number of staff who lack proficiency in their role)
- To identify the level of training activity within and across the industry (to include both actual training provision/funding, as well as employer opinions with regard to training and future training needs)
- To assess how employment numbers will change and have changed (expansion and replacement demand)
- To measure the economic value of the industry (measures to include Gross Value Added and turnover); and
- To identify the key issues and drivers for change within the industry.

1.3 Structure of the report

In the subsequent section, the report includes an explanation of the challenges surrounding gaining an accurate sample size for this research. Following this, the methodology of the project will be outlined and then the report will set out and discuss the main findings from the analysis of the Equine LMI survey (2010). Specifically, the analysis will include information on the profile of the industry; workforce characteristics; recruitment and skills challenges; and training activity and development. This will be supplemented by information gained in discussions with employers at four focus groups conducted in England, Northern Ireland, Scotland and Wales and findings from an online employee survey which was conducted alongside this research.

The survey findings will be supplemented, where necessary and in order to provide further context and understanding, by data identified in Lantra's latest Skills Assessment 2009¹.

Following the data analysis and discussion, the report will progress towards formulating the overall conclusions from the findings and present Lantra's recommendations based on the research findings.

¹ Available at <http://www.lantra.co.uk/Research/Skills-Assessment.aspx>

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2. Methodology

The research programme comprised a four stage mixed methods approach. The first stage involved gaining an accurate size of the industry. Experian was commissioned to undertake this task. Experian used a range of sources to ascertain the size of the industry including the Annual Business Inquiry (ABI); Inter-Departmental Business Register (IDBR); National Business Database (NBD) and the Labour Force Survey (LFS). The second stage involved a quantitative telephone survey of a sample of UK employers within the industry conducted by Pye Tait Consulting. The third stage involved Lantra running qualitative workshop discussions in each of the four nations, the majority of which comprised of equine employers. The final fourth stage involved an online employee survey that ran from December 2009 to June 2010. This received 250 responses and was designed to supplement the employer survey with opinions from employees. This survey was not statistically robust but provides indicative evidence from the view of employees.

2.1 Research methods and process

Lantra developed a questionnaire (see appendix A) for stage two of the research and an external contractor, Pye Tait Consulting, was commissioned to conduct this via a telephone survey. The content of the questionnaire was aimed at covering the project objectives, as listed in Section 1.2. The questionnaire was compiled with input and feedback sought from representatives of the equine industry. This industry expertise was beneficial in helping to keep the questionnaire content and language both accessible and salient to the prospective respondents. Figure 2.1 sets out the main sections of the questionnaire.

Figure 2.1 Questionnaire sections

Section	Topic area covered
A	Business information
B	Workforce characteristics
C	Recruitment
D	Skills issues amongst current workforce
E	Training activity and development
F	Industry performance
G	Membership associations

A full version of the questionnaire can be found in appendix A

Pye Tait Consulting conducted the data collection phase of the telephone survey with 421 equine employers. Contact details for equine employers were obtained from the Experian National Business Database². This database incorporates business data from the Yellow Pages and Thomson directory. Lantra purchased 2,750 business contacts from the B2B Prospector source.

Prior to conducting the survey in full, Pye Tait subjected the questionnaire to a rigorous piloting process. The pilot helped to identify and improve the questionnaire content so as to be as user-friendly as possible.

Measures were utilised in order to maximise caller response rates for the telephone survey. For example, prior to commencing the full surveying, the research was well publicised in several equine publications including online sources and consultants operated a three-time call-back mechanism, whereby each business was contacted three times before being dropped from the contact list for non-response. This technique gave all businesses equal opportunity to complete the survey.

The average length of the survey was 15 minutes, deemed an important time frame so as to firstly encourage participation but secondly to avoid early interview withdrawal or respondent fatigue.

The third stage of the research involved focus group discussions in each of the four nations; England, Northern Ireland, Scotland and Wales. Topics covered included current industry challenges, recruitment issues and skills needs, as well as assessing the level of training accessibility.

2.2 Mapping the size of the industry

There was an initial challenge of gaining an accurate estimate of the size of the equine industry. It was essential to the research that robust and accurate estimates of the sector's size and major characteristics could be reached as an accurate figure for the numbers of businesses and employees in the equine industry is not available through national statistics. Several channels were explored until a reliable method for ascertaining this was decided upon.

An initial mapping exercise was conducted by Lantra based on the 2007 SIC codes. This identified all four or five digit SIC codes that can be classified within Lantra's equine industry footprint. Table 2.1 details the SIC codes identified as including equine activities that fall within Lantra's equine remit. The final column shows the equine activities included in the footprint and which SIC code these are in.

² Experian National Business Database – B2B Prospector

Table 2.1 Equine activities by SIC code

SIC 2003	SIC 2007	Description	Equine activities included
9262/9	85.51/0	Sports and recreation education	Riding schools, activities of riding academies, instructors of sport, sports and recreation education
9262/9	93.12/0	Activities of sport clubs	Pony club, jockey club, trotting club
5123/0	46.23/0	Wholesale of live animals	Horse sales/dealer
9261/9 and 9262/9	93.11/0	Operation of sports facilities	Racecourse operation, Newmarket Heath
9262/1	93.19/1	Activities of racehorse owners	Racehorse owner
9262/9	93.19/9	Other sport activities not elsewhere classified (n.e.c.)	Hunt, riding, racing and training stables, jockeys and trainers
9133/0	94.99/0	Activities of other membership organisations n.e.c.	Shire horse association, horse breeding society
9305/1 and 9305/9	96.09/0	Other personal service activities n.e.c.	Horse clipping
0122/0	01.43/0	Raising of horses and other equines	Horse farming and breeding
7121/1 and 7121/9	77.39/0	Renting and leasing of machinery, equipment and tangible goods n.e.c. (inc. animal rental)	Renting of herds, racehorses

The business and employment numbers for each of these activities needed to be extracted from each relevant SIC code to give an accurate estimate of businesses and employment numbers for Lantra's equine footprint. Two full 2007 SIC codes (Activities of racehorse owners and Raising of horses and other equines) were within Lantra's equine footprint and therefore no data from these needed extracting, just the business and employment numbers were required.

Experian was contracted to undertake this task and was split into three phases.

Experian – Phase 1

Phase 1 made use of Experian's National Business Database (NBD). The NBD is the UK's largest and most detailed database of commercially active organisations – from single-person businesses working at home, to multi-subsidary corporations and uses information from 'Companies House', 'Yell.com' and the 'Thomson Directory'. It includes information on 4.9 million business records. Whilst most publically available data only counts businesses which have reached the VAT threshold, the NBD offers far greater granularity as it includes all businesses, right down to sole trader businesses.

This phase involved mapping the SIC codes provided by Lantra against the 'Yell Directory' and 'Thomson Directory' classification variables available in NBD. The NBD runs off 1992 SIC codes and therefore a thorough check of the directory classifications was undertaken to ensure no relevant elements of the sector were omitted.

Experian – Phase 2

Phase 2 involved downloading employment and business counts of the relevant 1992 SIC codes from the Annual Business Inquiry (ABI) 2007. From their analysis of the NBD, Experian discovered that very few businesses (an estimated 12) in the equine sector employ 100 or more people. Therefore care had to be taken not to exaggerate numbers of businesses and especially employees in the sector. The employee counts for these large businesses were therefore summed separately and the relevant equine sector proportions of each SIC code were applied to the ABI counts for businesses employing one to 99 employees only.

As the ABI does not include data on those people who are self-employed, data from the Labour Force Survey (LFS) which uses Standard Occupational Classification (SOC) codes was used to estimate the numbers of self-employed people within the sector. It was assumed in calculations that every self-employed person was responsible for one business. This supplemented the overall data set.

Experian – Phase 3

Phase 3 involved updating the figures using the 2008 and revised 2007 ABI employee figures when they were released in December 2009.

2.3 Sample frame

Lantra sets itself stringent targets in terms of acceptable survey sample sizes within its research projects. This is in order to obtain results that are representative of the population/industry being researched and also produce statistically robust and credible findings. Specifically, Lantra aims to achieve a confidence interval of +/- 5% (at a probability level of 95%) for the UK in their survey research. Table 2.2 details the sample of employers required in each nation to reach this confidence level.

Table 2.2 Sample frame required and achieved

Nation	Population (no. of establishments)	Proportion (%)	Sample required to meet +/- 5% confidence interval	Sample achieved
England	16,340	86	375	355
Northern Ireland	190	1	127	8
Scotland	1,315	7	297	32
Wales	1,035	5	280	26
UK Level	19,005	100	377	421

Population figures have been rounded to the nearest five. Figures do not add up exactly due to the rounding up of numbers when calculated from percentages

Although Lantra set initial sample targets along statistical confidence definitions and levels, each sample must be assessed on a case-by-case basis. Therefore, when sampling from small population sizes or minority industries it is important to treat sample targets with a certain amount of realism. For example, in looking at Table 2.2, in order to achieve the +/- 5% confidence level for the Northern Ireland sample, 127 out of a total sample of 190 would need to be achieved to hit the confidence level. This is a wholly unrealistic target due to the small number of businesses in Northern Ireland.

The 'Sample achieved' column highlights that the achieved sample enables statistically robust analysis to be conducted at a UK level. Data for England is close to this confidence level but must be interpreted with care, and data for Northern Ireland, Scotland and Wales is indicative only.

Table 2.3 breaks business and employee figures down by nation and region. These figures are approximate as they were calculated using the national and regional percentages.

Table 2.3 Lantra's footprint (calculated using %)

Region	Number of establishments	%	Number of employees	%
East	2,450	13	6,560	16
East Midlands	1,580	8	2,715	7
London	430	2	1,445	4
North East	595	3	1,170	3
North West	1,500	8	2,625	6
South East	3,910	21	9,720	24
South West	2,655	14	4,710	11
West Midlands	1,580	8	4,150	10
Yorkshire and the Humber	1,645	9	3,450	8
England	16,340	86	36,545	89
Northern Ireland	190	1	495	1
Scotland	1,315	7	2,210	5
Wales	1,035	5	1,570	4
UK	19,005	100	41,220	100

Numbers of establishments and employees have been rounded to the nearest five. Figures do not add up exactly due to the rounding up of numbers when calculated from percentages

Table 2.4 shows the breakdown of businesses by SIC code. Businesses with over 100 employees are so few that these have not been attached to a SIC code. This shows that the majority of equine businesses are within SIC code 0143 'Raising of horses and other equines.'

Table 2.4 Businesses by SIC code

2007 SIC Code	Description	% within equine footprint	ABI % count 1-99 employees	LFS self-employed
0143	Raising of horses and other equines	100	15,205	2,304
4623	Wholesale of live animals	0.25	1	0
4939	Other passenger land transport n.e.c.	0.43	16	6
4941	Freight transport by road	0.92	307	125
5229	Other transport support activities	1.59	82	59
9311	Operation of sports facilities	1.15	71	26
9319	Other sports activities – riding schools	3.49	374	144
9319	Other sports activities – trainers/stables	6.49	193	78
9499	Activities of other membership organisations n.e.c.	0.01	1	0
Total			16,250	2,743

In addition to these figures, 12 businesses were identified from the NBD which employed over 100 employees. As only 12 such businesses were identified these could not be categorised by a SIC code. Table 2.5 shows the complete totals of businesses and the data sets that Experian sourced these figures from.

Table 2.5 Business totals and sources

	Source	Total
Total employees (using SIC code proportions with 1-99 employees)	ABI/IDBR	16,250
Employees at businesses with 100+ employees	NBD	12
Self-employed	LFS	2,743
TOTAL		19,005

Table 2.6 shows the breakdown of employees by SIC code. Employees working for businesses with over 100 employees are so few that these have not been attached to a SIC code. This shows that the majority of equine employees are employed within SIC code 0143 'Raising of horses and other equines.'

Table 2.6 Employees by SIC code

2007 SIC Code	Description	% within equine footprint	ABI % count 1-99 employees	LFS self-employed
0143	Raising of horses and other equines	100	30,410	2,304
4623	Wholesale of live animals	0.25	6	0
4939	Other passenger land transport n.e.c.	0.43	131	6
4941	Freight transport by road	0.92	1,499	125
5229	Other transport support activities	1.59	758	59
9311	Operation of sports facilities	1.15	1,045	26
9319	Other sports activities – riding schools	3.49	1,594	145
9319	Other sports activities – trainers/stables	6.49	772	77
9499	Activities of other membership organisations n.e.c.	0.01	9	0
Total			36,224	2,743

In addition to these figures, Experian identified a further 2,255 employees from the NBD. These employees were identified as working at businesses which employed over 100 employees, however these could not be categorised by SIC codes, and therefore are added to the totals in Table 2.7. Table 2.7 shows the complete totals of employees and the data sets that Experian sourced these figures from.

Table 2.7 Employee totals and sources

	Source	Total
Total employees (using SIC code proportions with 1-99 employees)	ABI/IDBR	36,224
Employees at businesses with 100+ employees	NBD	2,255
Self-employed	LFS	2,743
TOTAL		41,222

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3. Industry size and structure

Chapter summary

- The UK equine industry is comprised of around 19,000 equine businesses; the majority of which are located in England, with the highest proportion based in the South East region.
- There are around 41,200 workers employed in the industry.
- Around 85% of businesses are micro businesses, employing fewer than ten people.
- The majority of businesses operate in the riding school sub-industry.
- Eight in ten businesses generated turnovers of less than £250,000 in the last 12 months.
- 42% of UK equine businesses reported their turnover to have decreased in the last 12 months.

The equine industry covers a wide range of business activities such as riding schools, livery yards, training yards etc. and structures such as the racing industry. Farriers and paraprofessionals are also often included under equine industries, however under Lantra's footprint farriers, equine dental technicians and barefoot trimmers are identified as a separate industry, therefore this report excludes these businesses and focuses upon core equine businesses.

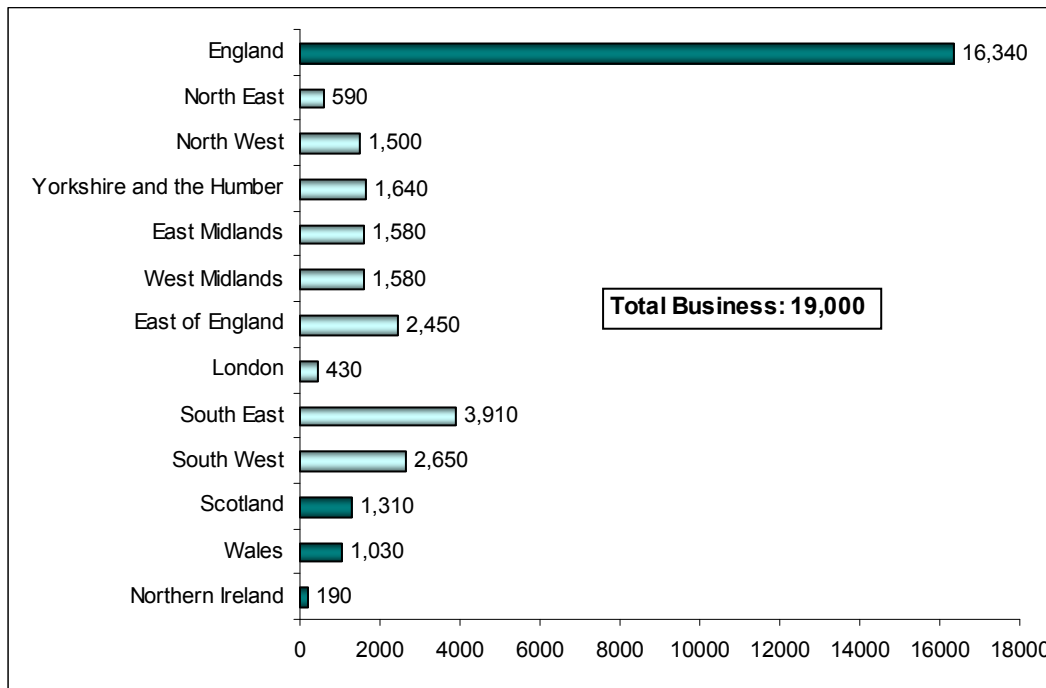
The following section looks to provide an overall profile of the industry, reporting specifically on the business numbers, type, activity and performance.

3.1 Industry profile

According to estimates provided by Experian, there are currently around 19,000 equine businesses in the UK. Lantra estimates that this represents approximately 7.7% of the total businesses operating in the UK Land-based and Environmental sector.

Figure 3.1 provides a useful summary chart of the regional breakdowns of business numbers within the industry.

Figure 3.1 Business numbers by nation/region



Numbers have been rounded to the nearest ten. Figures may not add up to the total due to the rounding of percentages used when calculating figures. Figures quoted for the nine English regions (i.e. light blue bars) make up the England total.

The majority of equine businesses are based in England and regionally in the South East of England.

Experian estimated that there are around 41,220 employees in the equine industry. Lantra estimate that this represents around 1.8% of the total employment in the UK Land-based and Environmental sector. The business and employee figures suggest an average of two employees per business.

As a Sector Skills Council, Lantra is required to gain a robust figure from reliable data sources. The business count is of core equine businesses and excludes farriers, equine dentists and equine paraprofessionals. Data available prior to this business count was 3,450 businesses employing 20,700 workers³. Evidence from industry indicated that these figures were very low compared to the actual size of the industry, therefore the new data is a more accurate representation of the size of the industry. This verifies that primary research and systematic data collection is vital for industries such as equine. Although these figures cannot capture every equine business, each time the exercise is conducted more businesses are captured giving a more accurate figure.

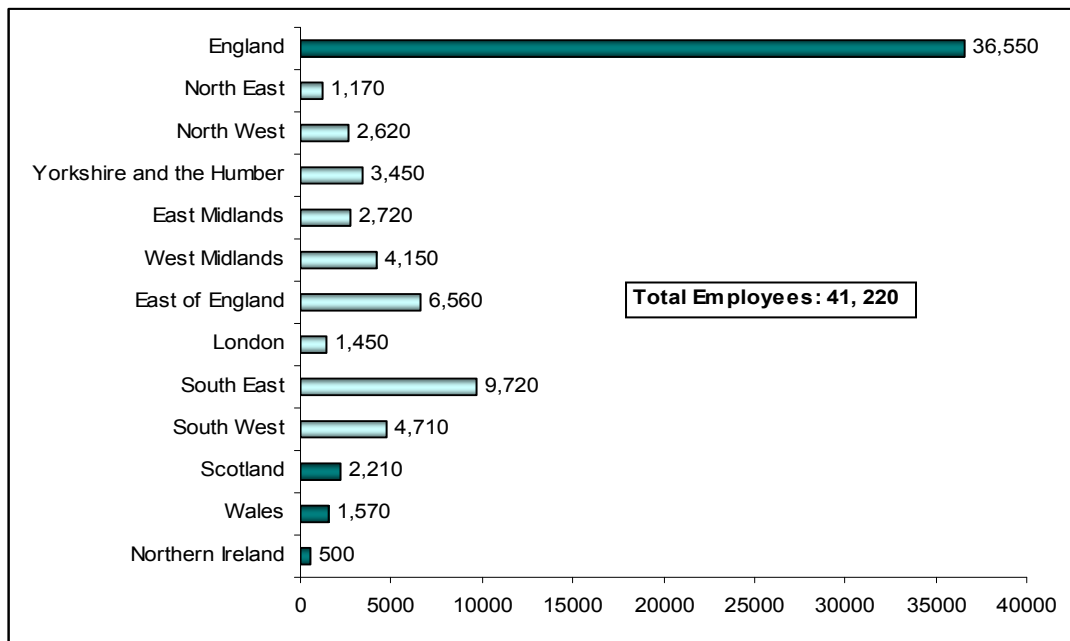
³ National Surveys Database (2008), Experian

Evidence from focus groups and industry representatives suggest that the new figures for the size of the industry are still low. As the equine industry is very diverse, a large number of businesses are 'hidden' (i.e. not counted in any national data sources) and this should be recognised when quoting Lantra's business and employment figures. It is likely that estimates given are lower than the actual figures. For validity reasons, only reliable and robust sources were used to give these estimates. This was highlighted by a focus group member:

'There are a lot of hobby businesses out there, my business is undermined on a daily basis by businesses who are under the radar and doing it as a hobby, so I think the figures reflect that.'

We can obtain reliable figures for certain areas of the industry such as racing, which is strictly regulated. In 2008, there were 592 licensed trainers working in racing with the racing industry sustaining over 18,600 Full Time Equivalent (FTE) jobs⁴. As such very few racing businesses go uncounted. However, other areas of the industry such as livery and competition yards are less regulated and therefore may have much larger numbers of businesses operating un-registered. This also needs to be taken into account for the figure quoted for the number of employees working in the industry. The data in Figure 3.2 provides a further breakdown of the UK equine industry by regional location. Although some equine businesses may operate nationally the location indicates where they are based.

Figure 3.2 Employment numbers by nation/region



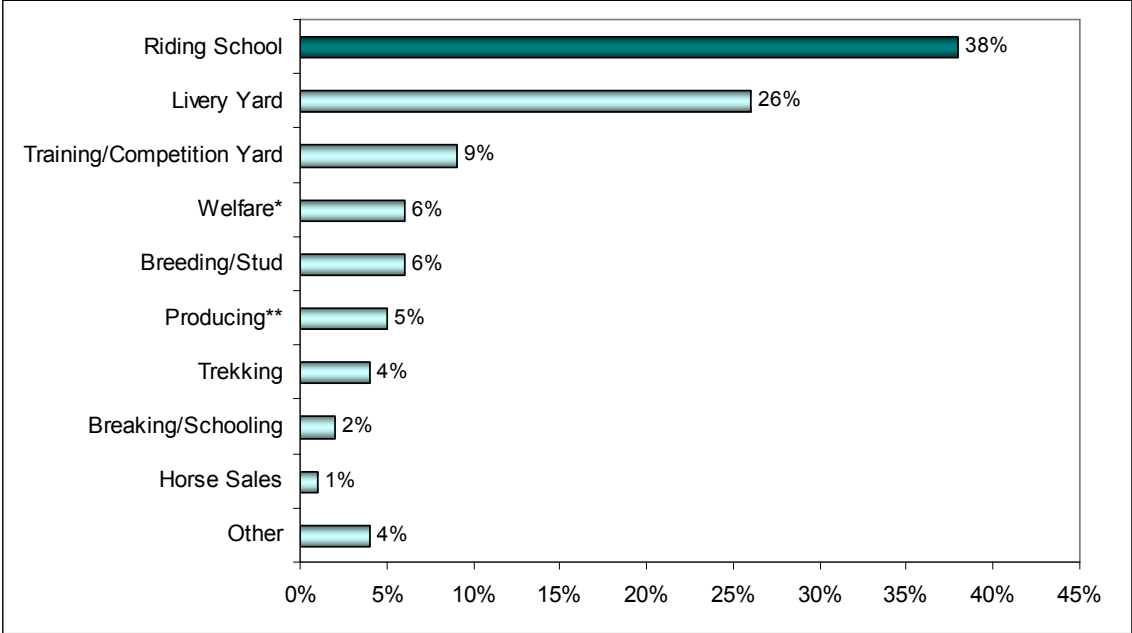
Numbers have been rounded to the nearest ten. Figures may not add up to the total due to the rounding of percentages used when calculating figures. Figures quoted for the nine English regions (i.e. light blue bars) make up the England total.

⁴ British Horseracing Authority – Economic Impact of British Racing, 2009

89% of businesses are located in England with around 20% in the South-East of England. A similar number of businesses operate in the North West and West Midlands (1,500 and 1,580 businesses respectively), however, businesses in the West Midlands employ significantly more employees. This suggests that businesses in the West Midlands are larger and perhaps have a higher income than businesses in the North West.

Figure 3.3 provides an indication of the diversity by sub-industry activity amongst UK equine businesses as recorded by the equine LMI survey.

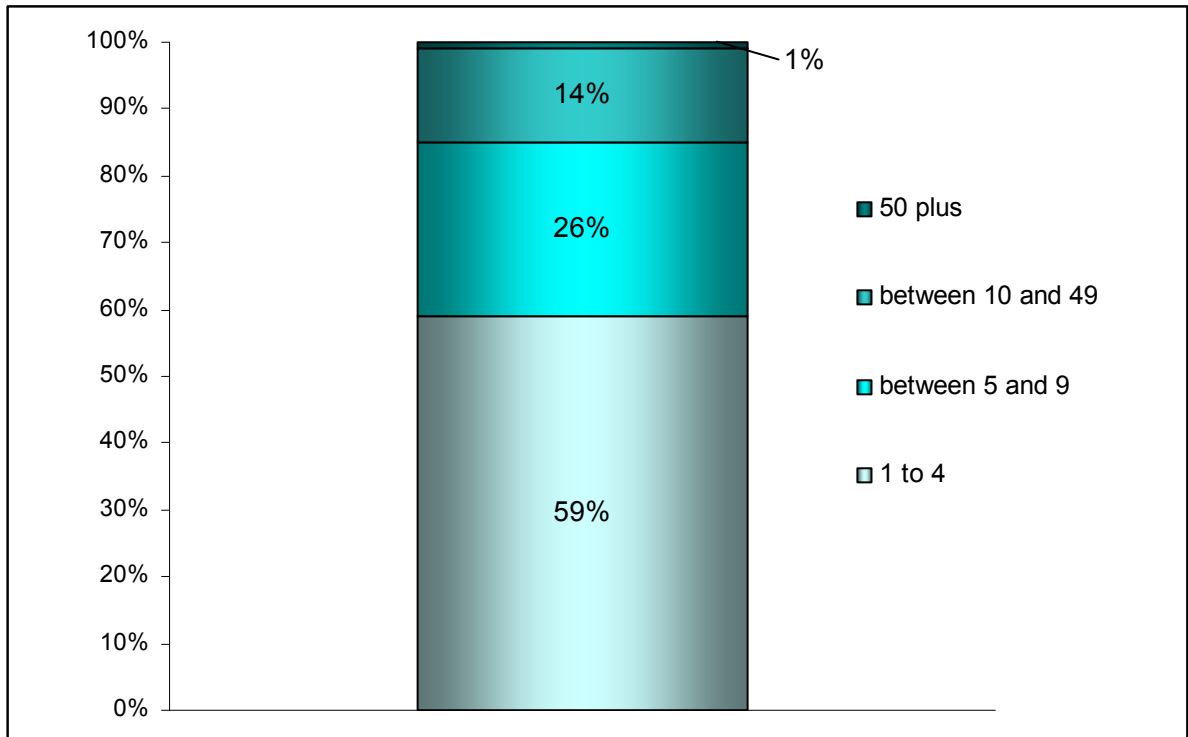
Figure 3.3 Breakdown of UK equine industries by principal activity



Sample base = 421; seven did not state a response; UK weight applied. * Welfare refers to equine sanctuaries and other equine welfare businesses; ** Producing refers to businesses that buy and/or breed horses to bring on and sell.

The data pinpoints 'riding schools' as the foremost business operation, where nearly two-fifths (38%) of businesses report this as their principal business activity followed by just over one-quarter (26%) operating as 'livery yards' and 8% as 'training yards'. Only 1% of businesses reported their primary activity as 'competition yard'. Although this is a very low percentage it is important to note that this question specified 'principal activity'. Therefore a business may be more well-known for a certain activity but this may not be their main source of income. Evidence from Lantra's Equine Industry Group approved this split of equine businesses and suggested that although equine businesses are focussed on one principal activity they often diversify into several other areas.

Figure 3.4 Business size by employment band



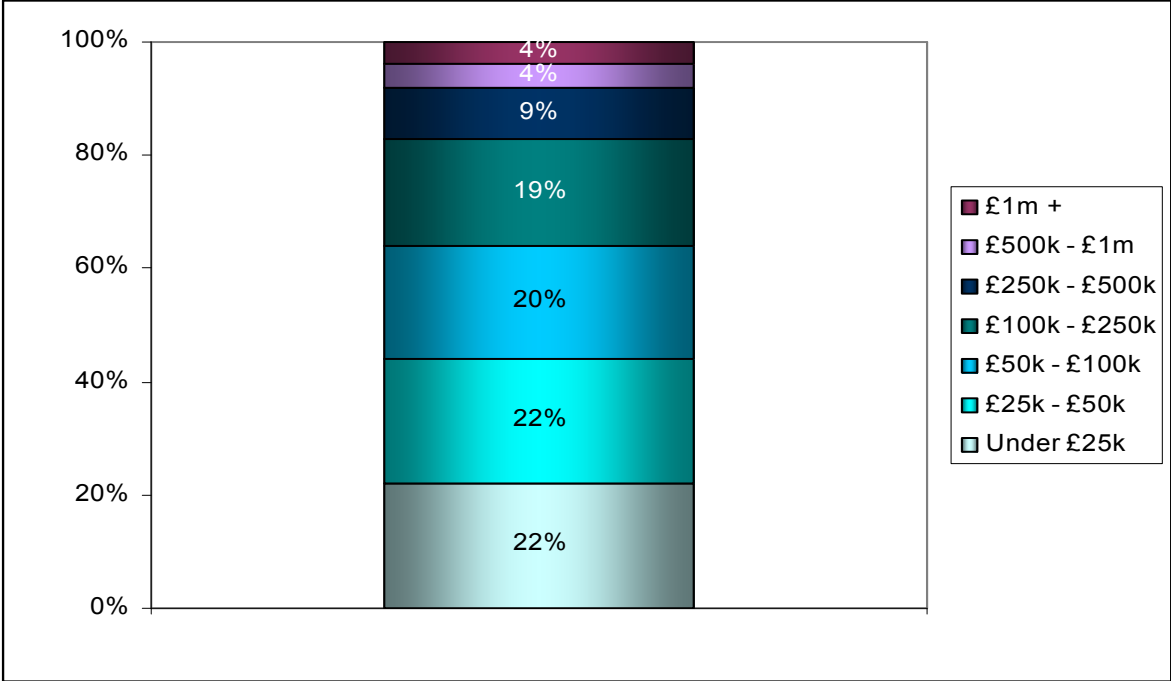
Sample base = 421; ten did not state a response; UK weight applied

Figure 3.4 reveals that the composition of the UK equine industry is dominated by micro businesses, specifically by businesses employing fewer than ten members of staff (85% are accounted for in this band). At the opposite end of the scale, around 1% of businesses employ 50 or more members of staff.

3.2 Industry performance

Figure 3.5 presents a breakdown of the UK equine industry by turnover bands.

Figure 3.5 UK equine industry breakdown by business turnover

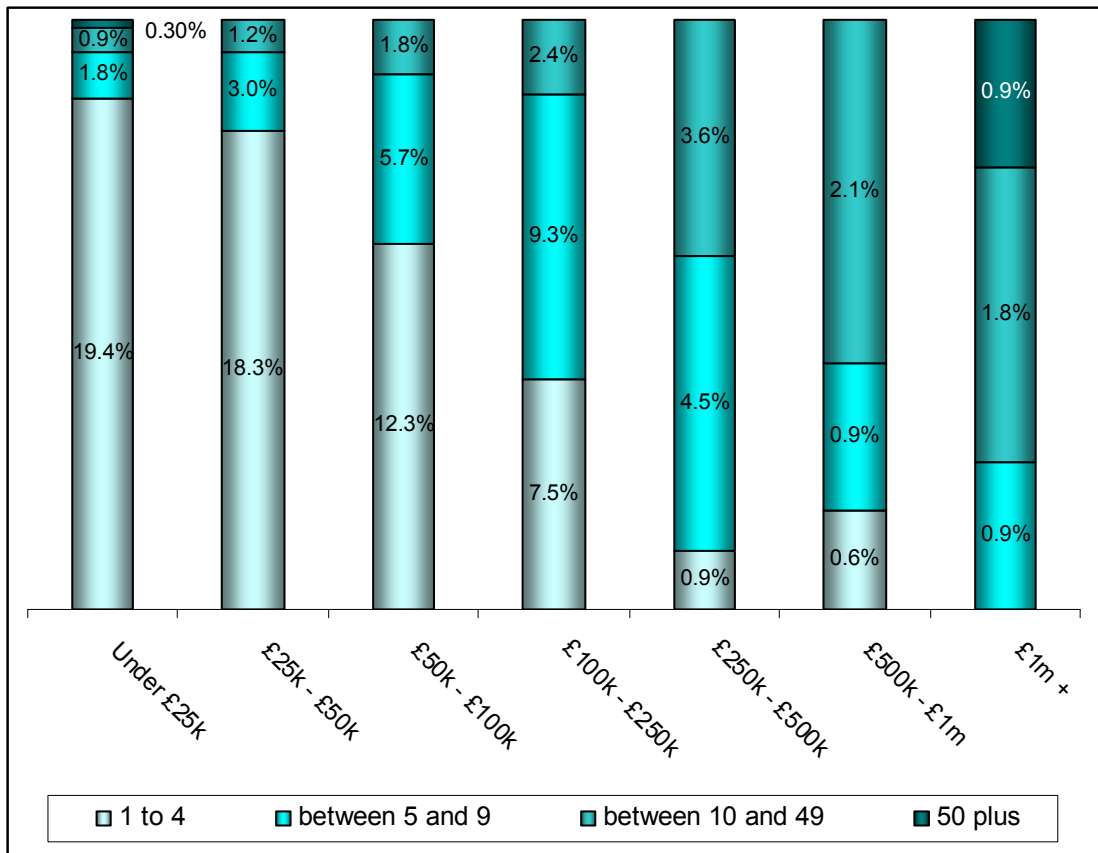


Sample base = 421; 85 did not state a response; UK weight applied

The data in Figure 3.5 reveals that 83% of businesses produced turnovers in the last 12 months of below £250,000. 4% of businesses produced turnovers of more than £1 million.

Figure 3.6 investigates turnover in more detail showing that a greater percentage of businesses are smaller and how these businesses are divided by turnover.

Figure 3.6 Business size by turnover

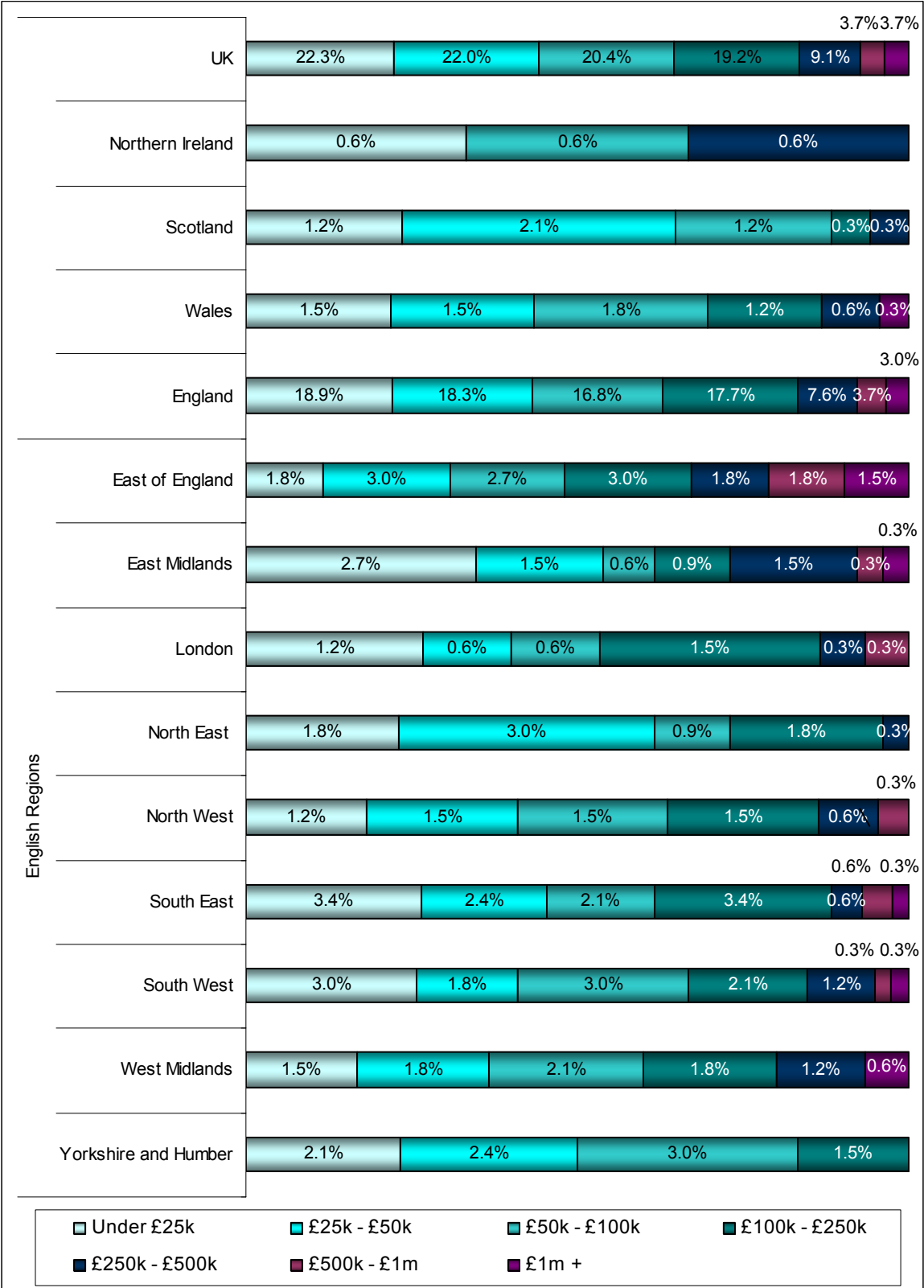


Sample base = 421; 88 did not state a response; UK weight applied

This highlights that the smaller the business, the more likely it is to have a low turnover. Nearly 20% of businesses employ one to four people and have a turnover of less than £25,000 whereas nearly 1% of businesses employ more than 50 people and have a turnover of more than £1,000,000.

Figure 3.7 shows the percentage of businesses which fall into each location and turnover and the proportion that these make up for each location.

Figure 3.7 Turnover by location



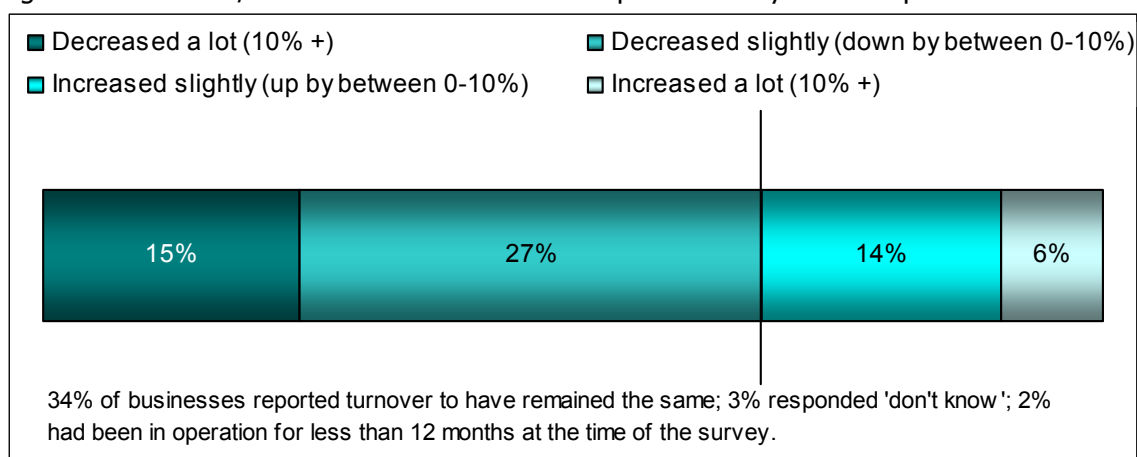
Sample base = 421; 92 did not state a response; UK weight applied

This indicates that of the regions, businesses in the East of England are more likely to have a turnover of over £100,000 followed by London and the South East. Conversely, businesses in the East Midlands are most likely to have a turnover of less than £25,000 and businesses in Yorkshire and the Humber and the North East are most likely to have a turnover of less than £100,000.

1.5% of equine businesses in the UK that have a turnover of more than £1,000,000 are in the East of England and 3.4% of the equine businesses with a turnover of less than £25,000 are in the South East. This may be linked to the high number of equine businesses in the South East and therefore the higher level of competition. Please note that these results are indicative as the sample for the nations and regions was not large enough to be considered statistically robust.

The data in Figure 3.8 assesses the level of business performance over the last 12 months.

Figure 3.8 Increase/decrease in turnover of the equine industry over the past 12 months

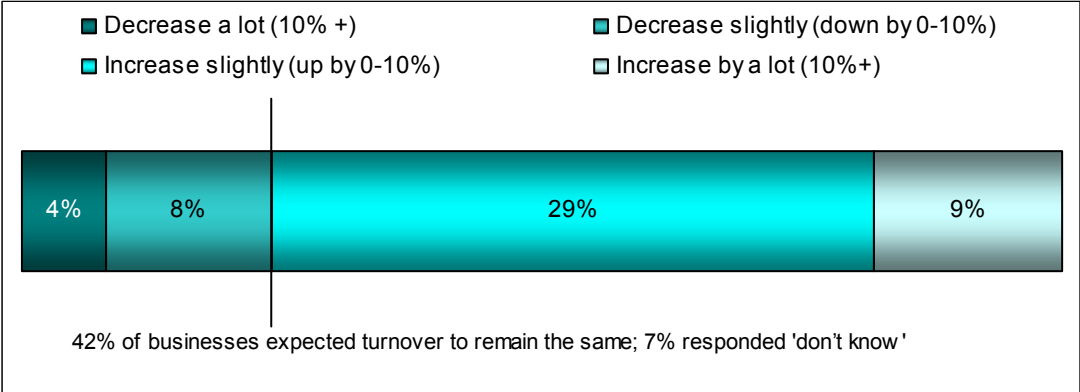


Sample base = 421; 19 did not state a response; UK weight applied. Percentages may not add up due to rounding.

42% of businesses reported turnover to have decreased and 15% reported turnover to have decreased by more than 10%.

UK equine businesses were also asked to project their expected turnover for the next 12 months as demonstrated in Figure 3.9.

Figure 3.9 Expected increase/decrease in turnover in the next 12 months



Sample base = 421; 22 did not state a response; UK weight applied. Percentages may not add up due to rounding.

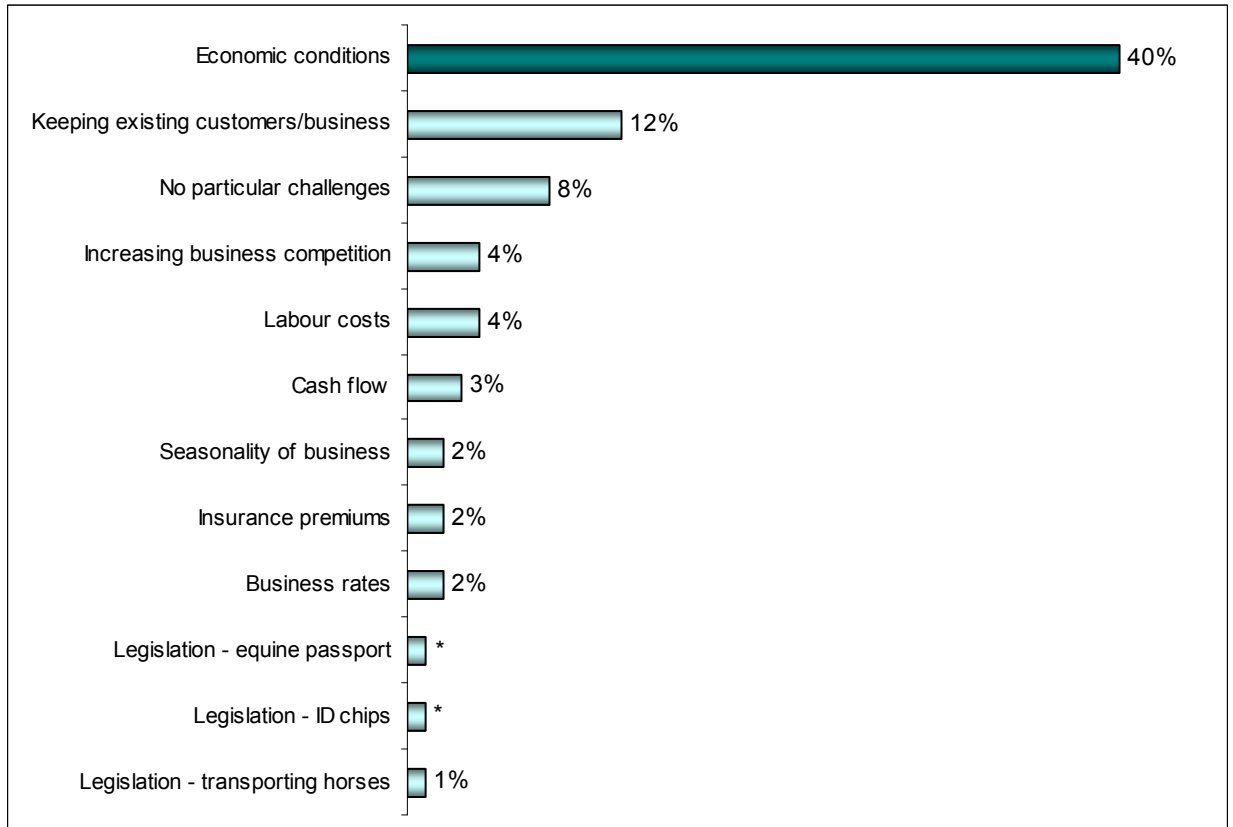
In contrast to Figure 3.8, only 12% expected their turnover to decrease in the coming year. The remaining 88% expected turnover to stay the same (42%), increase slightly (29%), or increase by more than 10% (9%). The business types most likely to have experienced a decline in the last 12 months were competition yards, breeding and stud businesses and breaking/schooling businesses.

This evidence suggests that the industry feels optimistic about the future of their businesses. However, this was not echoed by industry representatives in focus groups who indicated that due to economic conditions leading to an increase in costs for fuel, feed, fertiliser, insurance and rates, turnover would, at best, stay the same.

3.3 Industry challenges

'Economic conditions' were cited as the key challenge faced by businesses over the next 12 months, as detailed in Figure 3.10.

Figure 3.10 Key challenges identified by the UK equine industry for the next 12 months



Sample base = 421; seven did not state a response; UK weight applied. Percentages may not add up due to rounding. * denotes responses greater than 0% but less than 1%

Although optimistic with regards to their projected turnover in the next 12 months, 40% of UK equine businesses felt that 'economic conditions' were a challenge to their business in the next 12 months. 12% felt that keeping existing customers/business was a challenge and 17% stated 'other'. Other challenges identified in discussions with employers include the future of the British Equestrian Federation and the threat of exotic diseases (i.e. African horse sickness; equine infectious anaemia etc.). Riding schools, producing and trekking were slightly more optimistic than other businesses but not by a significant margin.

Evidence from focus groups supports this with economic conditions and the recession being the major challenge quoted. Further key challenges and threats to business were identified such as unregulated competition and bureaucracy. These challenges were articulated by focus group attendees as follows:

'Profitability and ability to compete goes back to the number under the radar that are operating unofficially, unregulated competition.'

'There is a lot of unnecessary, fragmented red tape.'

Additionally, the sustainability of upcoming legislation (i.e. environmental, waste management, transport), the rising cost of insurance, fuel, feed, fertiliser and rates, lack of clarity of transport regulations, and lack of regulation of livery yards were discussed. The following quotes from focus groups explain the need for regulation:

'There has to be some regulation of the industry as those who are trying to comply and do it right are now getting hammered.'

'There has to be either a carrot or a stick for these people who are under the radar because they are going to ruin our industry if we don't bring them on board.'

The issue of rates for equine businesses compared to agricultural businesses was raised. Farmers can access Rural Development Programme (RDP) money to diversify their farming activities and some open livery yards. They do not tend to pay the same level of rates as existing yards, thereby creating an uneven playing field for that part of the industry. Employers also felt that equine businesses were not taken seriously by authorities. Furthermore equine businesses felt they faced challenges such as competition and planning laws. These were articulated by focus group members as follows:

'I find that the authorities have a very dismissive attitude towards equine (businesses), as though it's a hobby sport.'

'Competition from colleges acting as competition venues, and they don't pay rates.'

'Unfair planning laws, agricultural development doesn't have this problem but we aren't classed as agriculture. They can put up sheds, we can't.'

This was also highlighted as an issue in Northern Ireland in the Department of Agriculture and Rural Development (DARD) report 'Research on the equine sector in Northern Ireland'⁵ in which it was suggested that local planning offices need to become more attuned to the needs of equine businesses and recognise the importance of the industry to the local and national economy.

Focus groups highlighted that equine welfare is also suffering as a result of the current economic climate. This was described by one focus group member:

'My biggest issue is thin horses... because the food has been so dear and maybe they didn't produce good haylage or something and I have big issues with that.'

⁵ <http://www.dardni.gov.uk/equine-report.doc>

Horse owners are turning to cheaper 'livery' alternatives and those who are not able to afford the upkeep of their horses are turning to sanctuaries which are becoming saturated. This is more prevalent in Northern Ireland than the other nations. Racing has also been affected as horses become more difficult to sell. High fuel and energy costs have meant an increase in the price of feed and bedding.

Although not discussed in the questionnaire or focus groups, there is an increasing threat of equine infectious anaemia in the UK with increased international transportation of horses and climate change. This has become more of an issue since the research was conducted and therefore businesses will need to have an increased awareness and knowledge of equine infectious anaemia, how to recognise it and procedures for prevention of disease spread. Therefore, short courses on disease prevention and management i.e. *The Open College of Equine Studies, short course in Equine Injury, Disease and Recovery* may be increasingly required to ensure staff have the skills to care for horses and follow the correct procedures in disease management.

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4. Workforce characteristics

Chapter summary

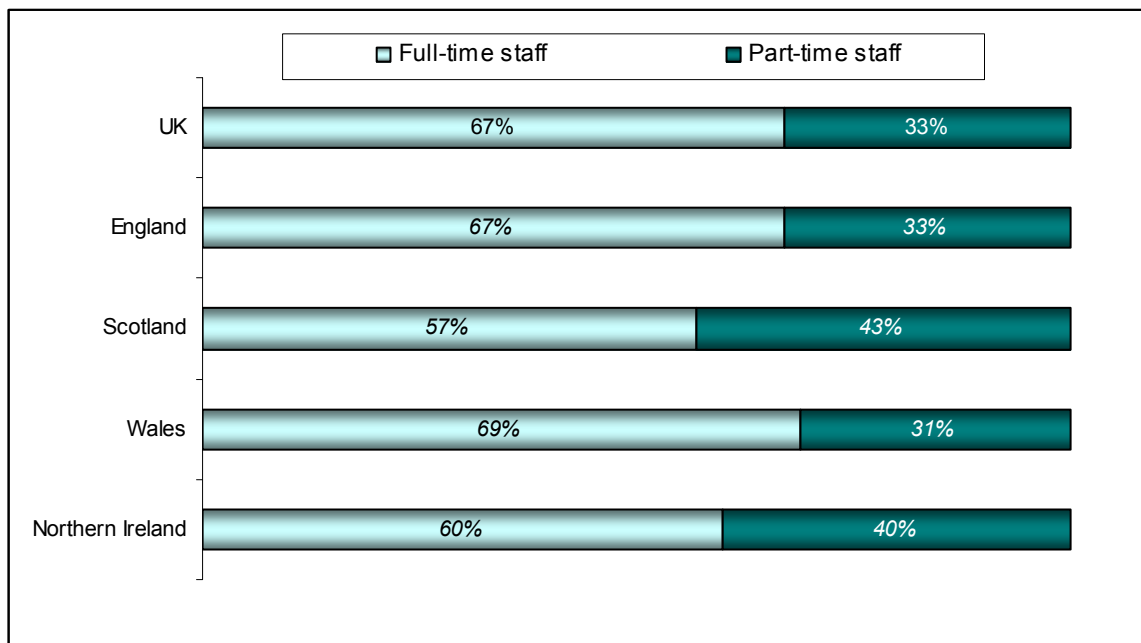
- The equine industry employs a slightly younger workforce than that of the Land-based and Environmental sector as a whole. Nearly six in ten workers are under the age of 34, compared to three in ten across the sector.
- The industry's workforce is predominantly in full time employment (67%), female (70%) and identify themselves as from a white ethnic group (94%).
- Employment is concentrated in 'other' occupations including apprentices, assistants, stable staff and yard workers accounting for 25% of all employment. Workers within 'manager' (23%) and 'skilled' occupation (24%) levels also figure largely.

This section provides an analysis of the UK equine industry workforce. The following analysis looks specifically at the workforce structure in terms of working status, gender, age, ethnicity and also occupation levels.

4.1 Working status

Figure 4.1 shows the working status of UK equine staff.

Figure 4.1 Working status of UK equine staff



Sample base for UK = 421; England = 355; Scotland = 32; Wales = 26; N. Ireland = eight
Data in italics should be treated with care as it is based on small samples below the +/-5% confidence interval and so is indicative.

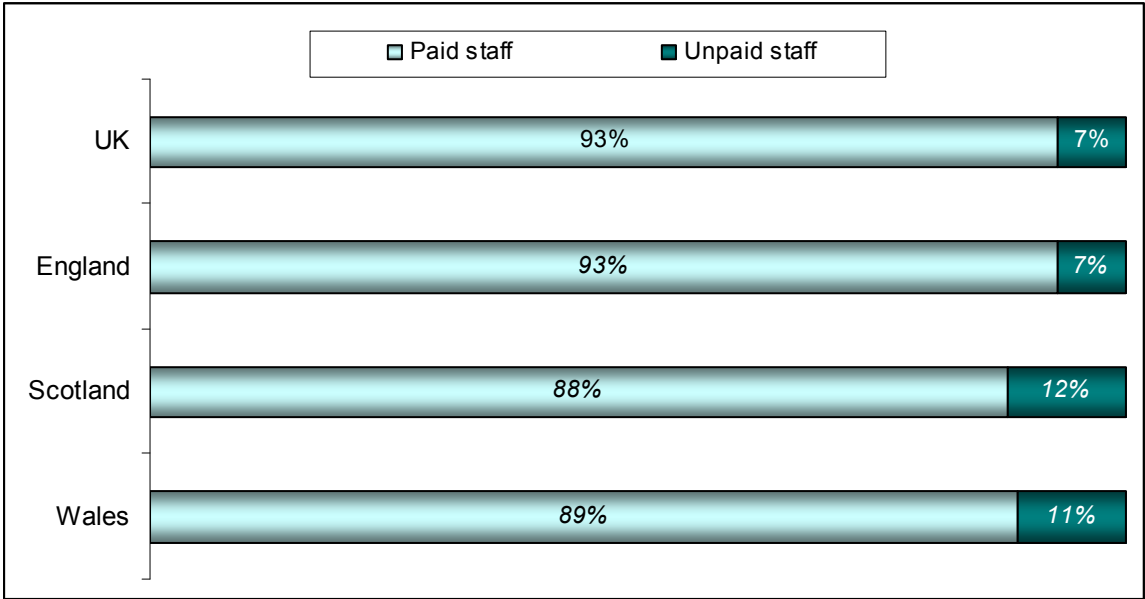
Figure 4.1 indicates that two-thirds of UK equine staff are employed on a full time basis and one-third are employed on a part-time basis. This could be largely due to the size of the equine businesses. Many micro and sole trader businesses may require part-time instructors or grooms but are unable to employ full time members of staff.

When viewed in the context of the total Land-based and Environmental sector, equine businesses employ a slightly lower proportion of full-time staff. Data from the Labour Force Survey⁶ indicates that 79% of employment within the sector is full-time. This compares to 75% within the UK economy as a whole. Again this may be due to the size of equine businesses; micro businesses and sole traders cannot afford to take on full-time members of staff. Moreover the nature of a working day with horses may mean staff are only needed in the morning and evening to feed and muck out, and in evenings and at weekends to instruct.

4.2 Paid/unpaid staff

Figure 4.2 highlights the split of paid staff with staff that are unpaid.

Figure 4.2 Percentages of paid and unpaid staff



Sample base for UK = 421; England = 355; Scotland = 32; Wales = 26; N. Ireland = eight
Data in italics should be treated with care as it is based on small samples below the +/-5% confidence interval and so is indicative. Please note: Response rates from Northern Ireland were too low to include in this question

6 ONS – Labour Force Survey 2008

The vast majority of staff in all nations were paid, though with a significant number being unpaid, often as volunteers.

12% of UK equine businesses employ freelancers or self-employed staff; 6% have apprentices and 8% employ a working pupil. Traditionally, a working pupil is the term used for a young person who works for a small wage (usually less than minimum wage) in return for training and sometimes accommodation. They tend to work more in competition yards than riding centres etc. Although many businesses employ a working pupil within the law and provide good training, there have been reports of employers exploiting working pupils due to the lack of specified training requirements and these conditions are linked to the title. Therefore the British Grooms Association (BGA)⁷ has been working to abolish this term by promoting their Equine Employers' Handbook,⁸ a guide dedicated to issues involved with employing staff in the equine industry.

During focus groups with industry employers, working pupils were discussed and it was widely felt that this practice is not as prevalent as it once was and is slowly being phased out. It was felt that this practice is still out there, mainly with smaller businesses working at a lower level and that it was not viewed as good for the industry. Focus groups mentioned this as a regulatory issue for grooms, with the need to educate grooms on their rights as workers⁹. It was suggested that a course or bite size courses for those in the industry could be developed which focusses on employee issues such as contracts, minimum wage, working conditions and workers' rights etc.

Additionally to this, Lantra has promoted the benefits of employing young people as apprentices. Under this scheme young people are protected by the legal requirements of the term 'apprentice' and its framework and receive training and work experience alongside being paid a small wage.

Evidence from focus groups suggests that employers feel there are few Apprenticeship places due to the financial commitment and paperwork for the employer. Those who did take on apprentices were reluctant to give them time off for training at college as they felt it was more important to be trained by the employer and be hands on, than lose a member of staff for a period of time to be trained at a college. However, employers did feel Apprenticeships were better at giving learners practical experience than full-time college courses. Members of the focus groups describe this powerfully:

'Apprentices have more skills, they might not have the academic skills but they go further than the guys who are coming in from the colleges.'

7 <http://www.britishgrooms.org.uk/home>

8 <http://www.britishgrooms.org.uk/equine-employers-handbook>

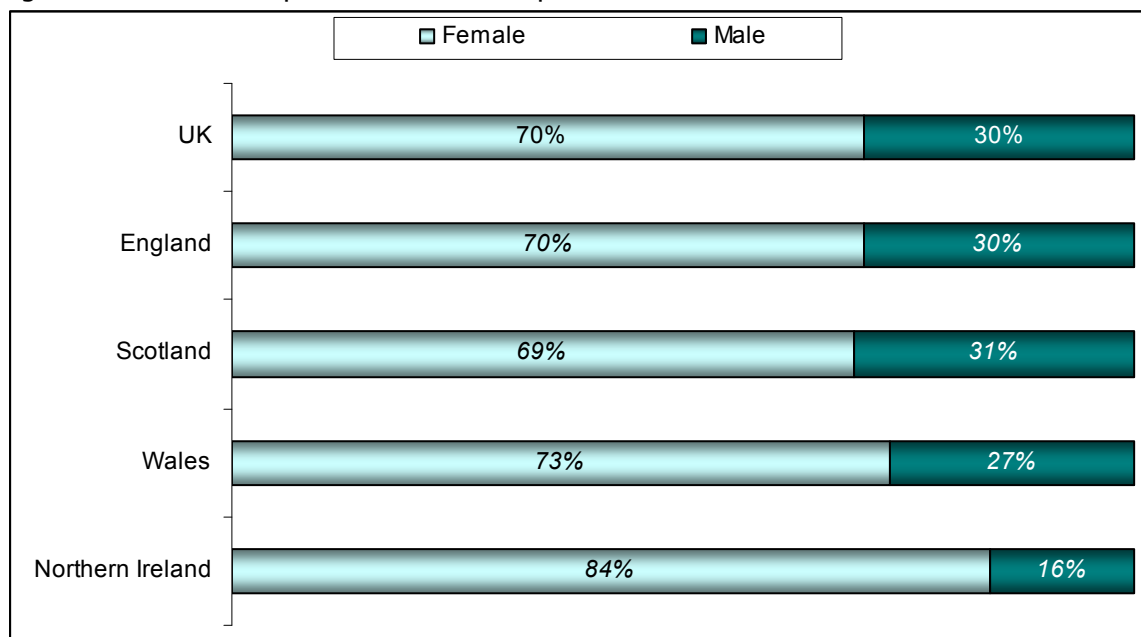
9 The BGA gives advice to employees and employers on rights and issues in their publications and on their website. However courses on employee's rights and issues are not currently offered by any institutions.

'The advantage of work-based [training] is that you get much more one to one opportunity in terms of the training; you get more time to spend with the young person whoever it is and you can take the time... they also get a wider experience in terms of different horses that they are handling and dealing with clients. That's a huge thing you would never get in a residential course.'

4.3 Gender

The industry is dominated by women as demonstrated in Figure 4.3.

Figure 4.3 Gender composition of the UK equine workforce



Sample base for UK = 421; England = 355; Scotland = 32; Wales = 26; N. Ireland = eight
Data in italics should be treated with care as it is based on small samples below the +/-5% confidence interval and so is indicative.

At the UK equine level, females account for 70% of total employment with males accounting for 30% of total employment. As Figure 4.3 depicts, the data for individual nations varies slightly with Northern Ireland having the highest number of female employees (84%) and Scotland having the lowest (69%).

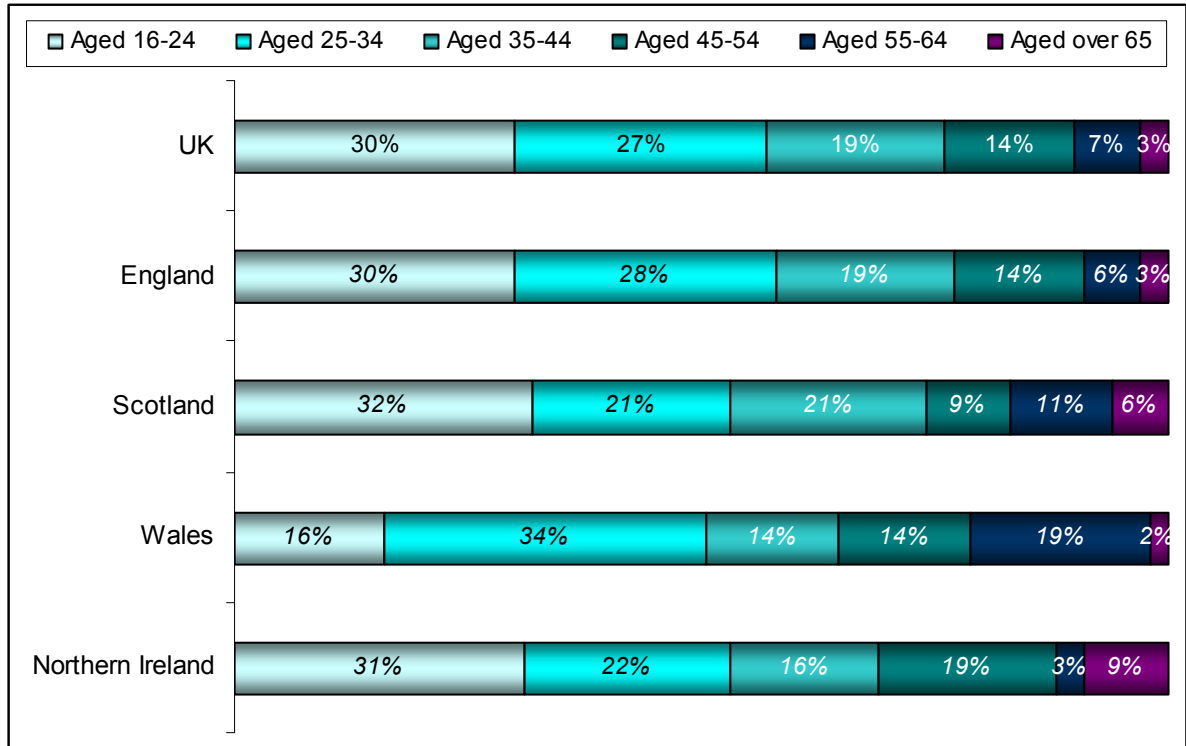
When viewed against the Land-based and Environmental sector overall, equine businesses employ a far higher proportion of female staff at 70%. Data from the Labour Force Survey¹⁰ indicates that 31% of employment within the Land-based and Environmental sector is female. This compares to 46% within the UK economy as a whole.

¹⁰ ONS – Labour Force Survey 2008

4.4 Age

At a UK level, the age range of the workforce tends to be younger, as shown in Figure 4.4.

Figure 4.4 Age composition of the UK equine workforce



Sample base for UK = 421; England = 355; Scotland = 32; Wales = 26; N. Ireland = eight

Data in italics should be treated with care as it is based on small samples below the +/-5% confidence interval and so is indicative.

Around 57% of the UK equine workforce is aged between 16-34 years of age, compared to 30% across the sector¹¹.

There are slight variations in the age band proportions across the other UK nations, although the overall trend remains similar to that of the UK. Equine businesses in Wales are likely to have a slightly older workforce with 50% over the age of 35. This is not specific to the equine industry, overall the Land-based and Environmental sector has an older workforce and this is especially prominent in Wales compared to all sectors.

Overall, data suggests that the UK equine industry employs a slightly younger workforce than that across the Land-based and Environmental sector as a whole. Nearly six in ten workers are under the age of 35, compared with three in ten across the sector. Around 48% of staff within the Land-based and Environmental sector are aged 45 or above¹² compared with 24% in the equine industry.

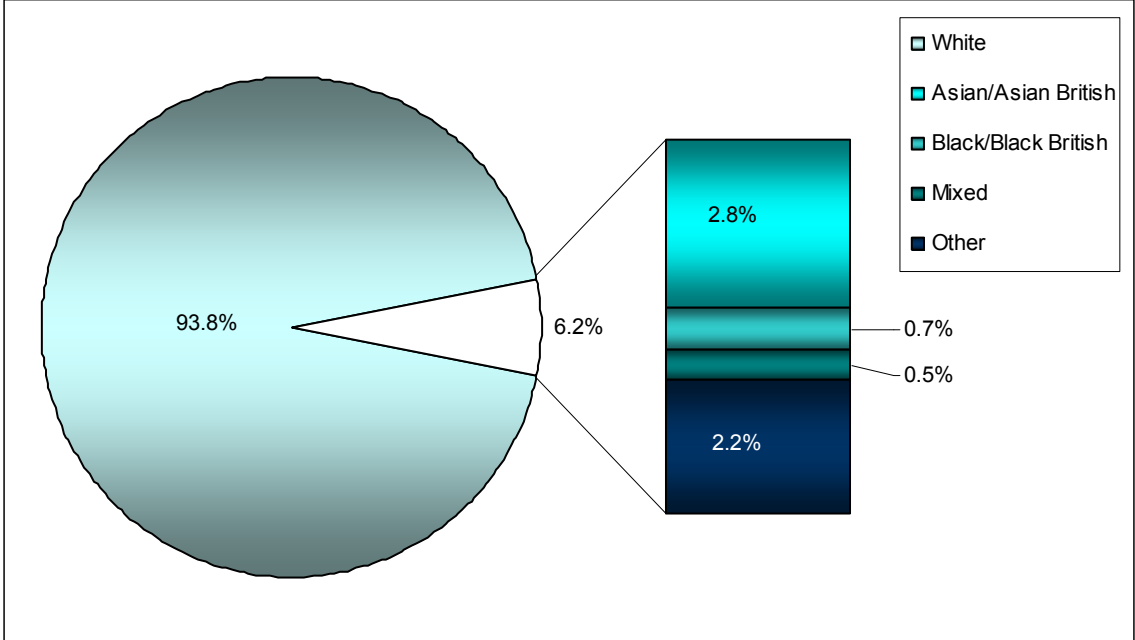
¹¹ A Skills Assessment for the Land-based and Environmental Sector UK Report 2009, Lantra

¹² ONS – Labour Force Survey 2008

4.5 Ethnicity

The majority of the workforce within the UK equine industry is made up of employees from a white ethnic background.

Figure 4.5 Ethnicity composition of the UK equine workforce



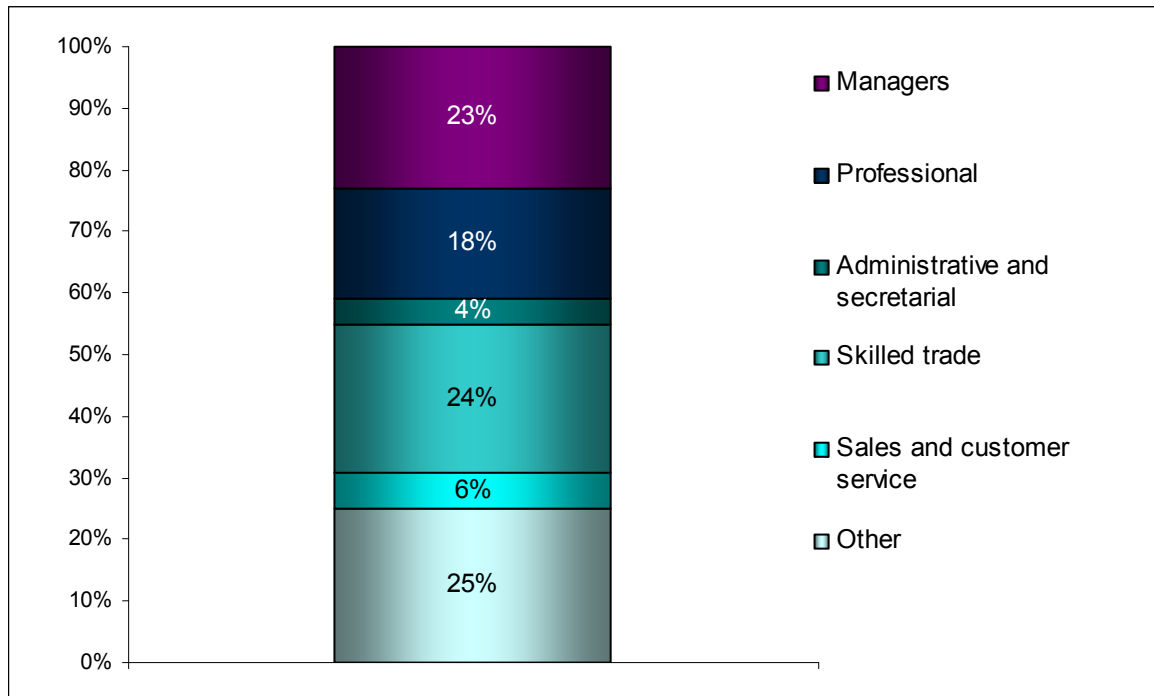
Sample base=421; weight applied

93.8% of the workforce is made up of employees from a white ethnic background. The remaining 6.2% of workers are comprised of Asian/Asian British ethnic background (2.8%); black/black British ethnic background (0.7%); mixed ethnic background (0.5%); and other ethnic backgrounds (2.2%).

4.6 Occupation levels

Figure 4.6 aims to classify the UK equine industry workforce in terms of job level.

Figure 4.6 Occupation level composition of the UK equine workforce



Sample base = 421; UK weight applied

The job levels are defined in line with the Standard Occupational Classifications (2000)¹³. The data suggests that employment within the UK equine industry is concentrated across four main levels:

- 23% of staff are employed within manager level occupations (i.e. yard manager), these occupations account for 11% of staff across the Land-based and Environmental sector (15% across the UK economy).¹⁴
- 18% of staff are employed within professional occupations (i.e. instructor), these occupations account for 3% of staff across the Land-based and Environmental sector overall (13% across the UK economy).
- 24% of staff are employed within skilled trade occupations (i.e. grooms, riders), these occupations account for 33% of staff across the Land-based and Environmental sector overall (11% across the UK economy).
- 25% of staff are employed within 'other' occupations (i.e. administration, customer care).

¹³ ONS – Standard Occupational Classification codes (2000)

¹⁴ ONS – Labour Force Survey 2008

The data in Figure 4.6 indicates that the equine industry employs a higher proportion of staff in professional and managerial occupations. This is likely to be due to the size and nature of the businesses. Most equine yards will have a yard manager even if they only employ one person as that would be their role and riding centres would need a qualified instructor. A relatively high number of employees are employed in the 'other' occupation category. It may be that in some instances grooms were included in this category instead of in the 'skilled trade' category.

The distribution of job skills is typically in line with occupational levels; with those occupations at the top of the hierarchy requiring more skills and qualifications than those at the bottom (e.g. managers require more skills than staff in elementary roles)¹⁵. At the opposite end of the scale given the higher proportion of manager-level occupations within the equine industry compared to the Land-based and Environmental sector (11%), the demand within the industry for high qualification levels (Level 4) will be greater proportionally than across the sector overall.

There are approximately 82 accredited equine qualifications¹⁶ currently listed on the National Database of Accredited Qualifications¹⁷ (NDAQ). These cover England, Northern Ireland and Wales, with levels 1 to 5 being delivered (where level 1 is the lowest level and 5 is the highest level). These are split as follows:

Table 4.1 Current provision of equine qualifications

Level	Number of qualifications (approximate)
5	2
4	1
3	34
2	30
1	15

As can be seen in Table 4.1 the majority of courses offered are at levels 2 and 3. There are very few courses at levels 4 and 5, however as this data does not include Higher Education institutions, the number of qualifications quoted for level 4 and 5 will be low. Please note that with the introduction of the Qualifications and Credit Framework (QCF), these figures will change from January 2011.

¹⁵ Skill, Knowledge and Organisational Performance (SKOPE) 2007 - Skills at work 1986-2006

¹⁶ This does not include courses delivered at Higher Education institutions or those delivered in Scotland and therefore is indicative.

¹⁷ NDAQ (2010) <http://www.accreditedqualifications.org.uk/index.aspx>

5. Recruitment and skills issues

Chapter summary

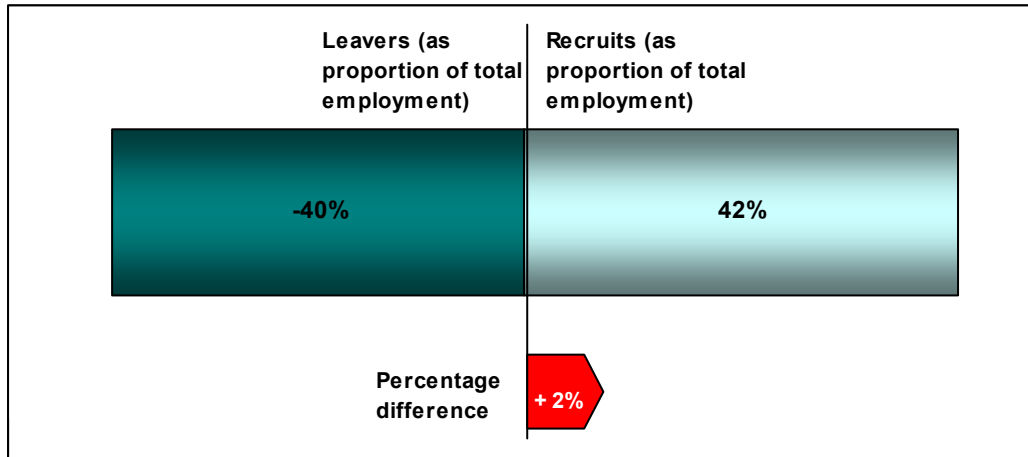
- Workforce numbers have slightly increased in the past 12 months; an increase of around two percentage points.
- Businesses reporting to have employment vacancies are lower than for the sector as a whole; 12% of businesses report having a vacancy. Over two-thirds of the vacancies that do exist are reported to be hard to fill; this is largely due to a lack of skills and/or experience from applicants.
- Around a quarter of employers reported that when looking for new recruits they found problems identifying people with the right skills and/or experience.
- Skill gaps are low within the UK equine workforce; 98% of businesses reported that their current staff had the skills required to perform in their role.
- Of the few businesses that did report skill gaps, skills found to be lacking most often in staff were *technical, practical or job-specific* skills.
- One-third of businesses reported a lack of employee experience or staff have recently been recruited as the main cause underlying skill gaps.
- The most frequent course of action taken to overcome skill gaps was to increase training activity/spend and increase/expand trainee programmes (28% of businesses with skill gaps reported this); a further 25% of businesses reported to have taken no action.

The following section of the report develops an overview of the UK equine industry's recruitment activities from the previous 12 months. Discussion also takes in the skills challenges currently faced by industry employers. The topics covered include staff turnover, existing vacancies, skill gaps (i.e. skills lacking in current workforce), and skills shortages (i.e. skills lacking in applicants).

5.1 Recruitment

Figure 5.1 shows that the number of workers leaving UK equine businesses has been slightly over-replenished by the number of new recruits taken on. This has led to a slight increase in the workforce in the past year.

Figure 5.1 Employment change within UK equine industry workforce (last 12 months)



Sample base = 421; UK weight applied

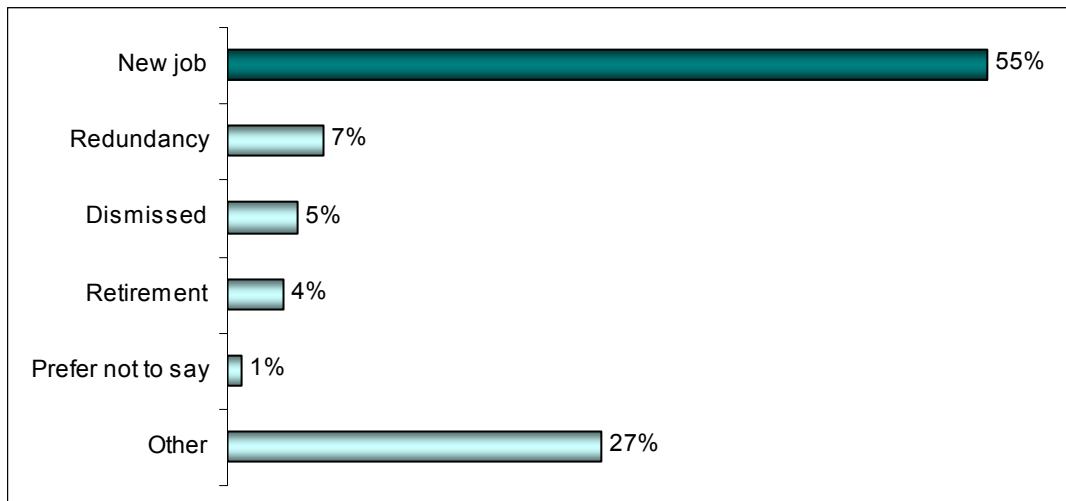
The data indicates that over the last 12 month period the UK equine workforce has increased by around two percentage-points on previous levels. This suggests that there is a fairly high staff turnover but that the number of employees leaving the industry is being balanced by new entrants. This has an impact on skills and training as the industry is losing a high number of skilled staff and these are replaced with employees who will potentially need additional training. Contrasting this, employers in focus groups felt there were many yards not replacing staff or doing with one less member of staff due to their reduced income. This was articulated by two focus group members:

'I think the economic climate at the minute, we are all making do with one person less, and the industry's not well known for paying.... for some reason we feel it should be done for nothing, that's the attitude within the horse industry because most people do it as a hobby, why should I pay to have my horse ridden? ... So that's the whole attitude but it's across the whole board the attitude needs to change that I'm getting a service therefore I pay for that service.'

'At the minute everyone's just sitting and holding their breath (with regards to recruiting).'

Figure 5.2 highlights why employees left the industry.

Figure 5.2 Reasons for leaving the industry

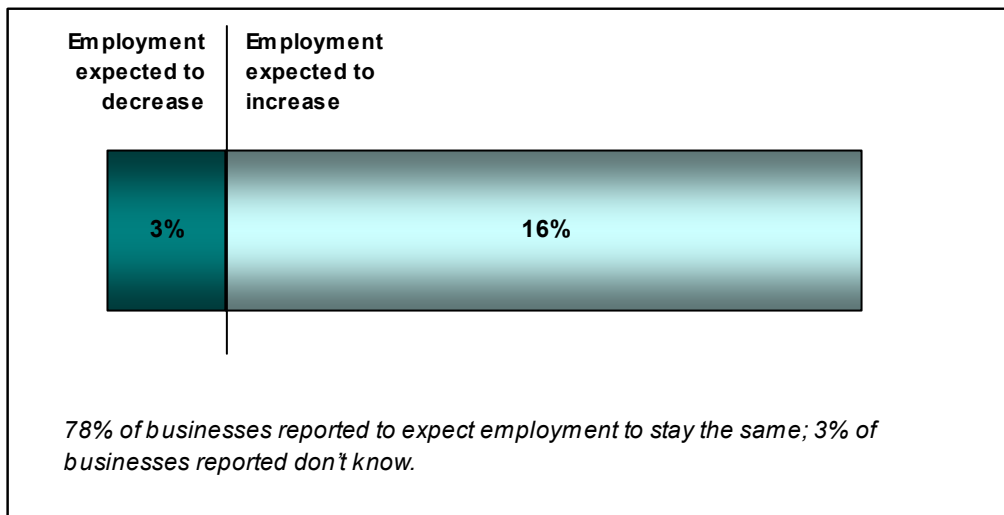


Sample base = 421; UK weight applied

As can be seen for over half of leavers the reason given was getting a new job. Other reasons could include working conditions, hours, type of work, pay and lack of future progression opportunities.

Figure 5.3 shows the percentage of employers who expected employment to increase, decrease or to stay the same.

Figure 5.3 UK equine workforce employment expectation levels over the next 12 months



Sample base = 421; UK weight applied

Over the next 12 months the majority of employers within the UK equine industry expect the number of staff to remain at their current levels; this was reported by 78% of businesses. However 16% of businesses reported more optimistic outlooks for their workforce numbers expecting to see an increase in staff levels over this period.

5.2 Employment vacancies

The data in Table 5.1 indicates that a significant number of employers currently have employment vacancies.

Table 5.1 Employment vacancies in the UK equine industry

	Equine industry	Land-based and Environmental Sector¹	All sectors in economy¹
% of businesses reporting a vacancy	11.6	7	12
Vacancies as a % of employment	2.6	1.8	1.7
% of businesses reporting HtFV*	7.6	3	3
HtFV as % of total vacancies	71.2	43	22

*HtFV = Hard to Fill Vacancies

1. Data taken from the National Employer Skills Survey (NESS 2009); data for England only

11.6% of businesses reported having an employment vacancy. Across the Land-based and Environmental sector around 7% of businesses reported having a vacancy; this compares with 12% across the UK economy as a whole.

The data from the National Employer Skills Survey¹⁸, which covers England only, is included in Table 5.1 to provide a context from which the equine industry results can be set. There is no single UK level source for this data.

7.6% of businesses within the equine industry report having a hard to fill vacancy. At the Land-based and Environmental sector level, 3% of businesses report having a vacancy that is hard to fill, the same as at England's economy level.

Over two-thirds of the vacancies reported are rated by UK equine employers as hard to fill (71.2%). The high proportion of hard to fill vacancies is a sector-wide problem; the proportion of vacancies that are considered hard to fill within the Land-based and Environmental sector is 43%. This compares to only 22% across the English economy as a whole.

Figure 5.4 below indicates the reasons given to explain businesses having vacancies that are proving hard to fill.

¹⁸ UK Commission for Employment and Skills (UKCES) – National Employer Skills Survey (NESS) 2009

Figure 5.4 Reasons for hard to fill vacancies

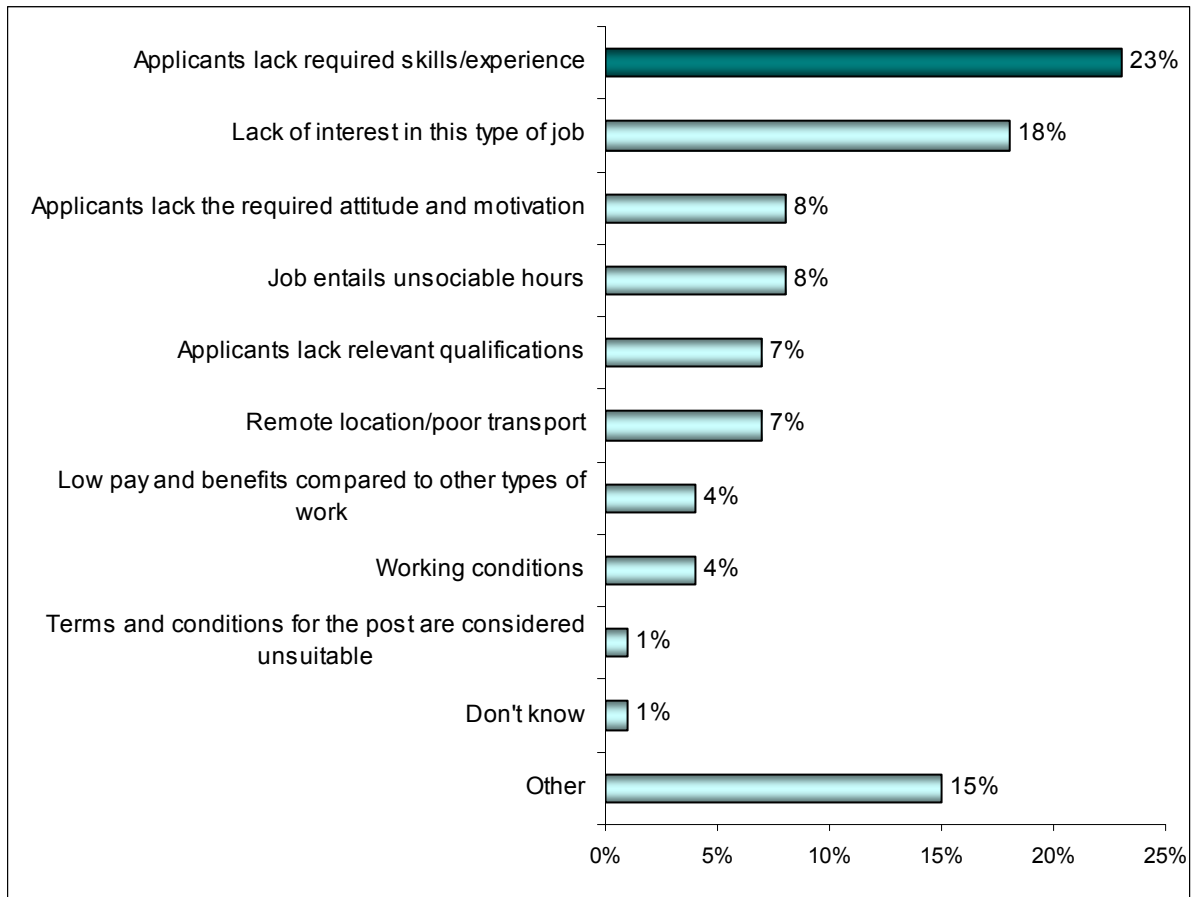


Figure notes: Sample base = 71; filter applied to include only businesses reporting having HtFVs. This was a multiple response question format.

Other includes age, lack of understanding of requirements, live-in position, cannot get visas, not enough hours offered, time of year and the work is hard.

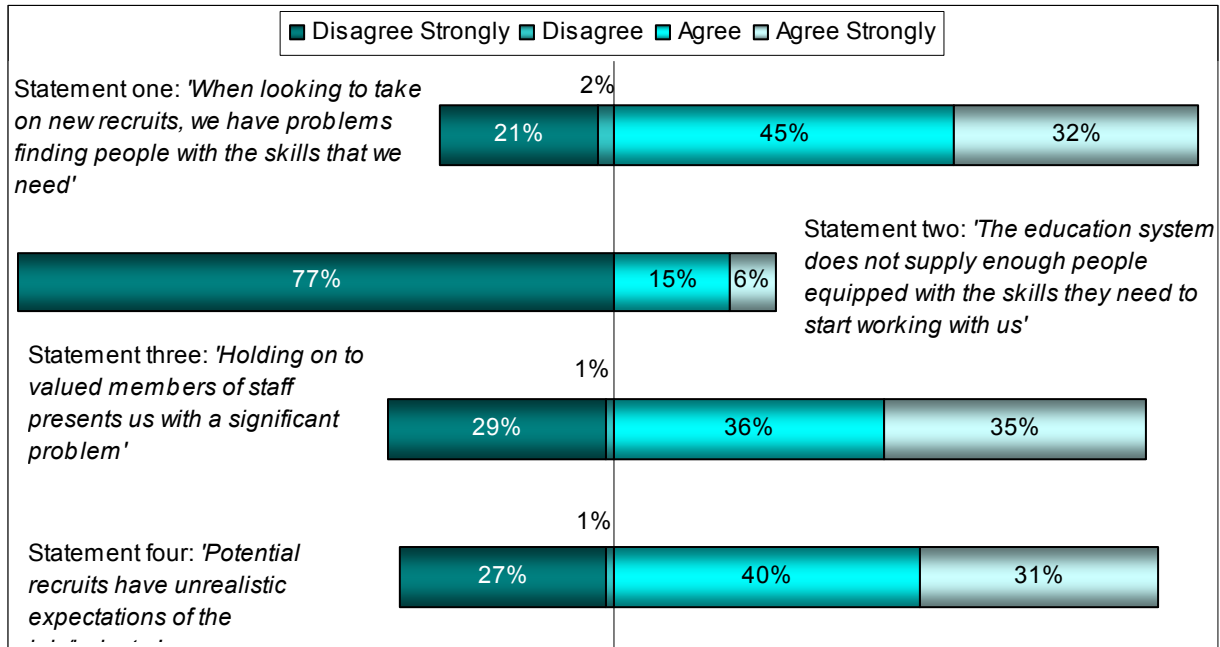
An applicant lacking the required skills and experience was mentioned by nearly one-quarter of businesses and lack of interest in the type of job by nearly one-fifth of employers as reasons for their hard to fill vacancies. No employers felt that vacancies existed due to too much competition from other employers and limited career progression and prospects. Focus group discussions highlighted that employers often feel students are coming out of residential and full-time equine courses without relevant qualifications, with very little practical experience with horses and with unrealistic expectations of the job role they will have. Employers stressed that hands on experience alongside qualifications is vital, otherwise an employee would be perceived as unemployable, as the quote below emphasises:

'Actual hands on basics, really learning the basics and skills of real hands on, for example handling the horses. They know all the theory behind it but they can't put it into practise day to day when they have animals to look after.'

5.3 Skills challenges

Figure 5.5 presents employer opinions in response to four skills and workforce retention related statements.

Figure 5.5 Employer opinions on staff skills and retention in the UK equine industry



Sample base = 421; UK weight applied. Percentages may not add up to 100% due to rounding.

The first statement continues the link from the previous section covering recruitment. 77% of employers reported to agree that 'when looking to take on new recruits' they had found problems identifying people with the appropriate skills needed to perform in the role (32% strongly agreed). 21% of businesses disagreed strongly with this statement.

The findings suggest that recruiters within the UK equine industry appear, in the main, to face problems in identifying people with the right skills needed to perform in equine job roles.

The second statement in Figure 5.5 looks to assess the adequacy of the education system to equip staff with the skills required to start work in the equine industry. Just over one-fifth (21%) of respondents agreed or strongly agreed with the statement 'the education system does not supply enough people equipped with the skills they need to start working with the employers'. Over three-quarters of respondents (77%) disagreed with the statement indicating that they are happy with the skills provided by the education system.

Focus groups highlighted a difference in satisfaction with colleges, the BHS and British Racing Schools. Employers felt that residential and full-time courses were often too academic and do not provide the practical skills to the level that is required within the industry, as the following quotes highlight:

'From a racing point of view, that the perception we have of residential colleges [not British Racing School or Northern Racing College] is the next best thing to university. They are not teaching anybody what we want to see when they come in to work for us, they certainly aren't hands on. The various people I've had come for interviews with me are incapable of understanding how to put tack on, certainly racing saddles or exercise and they've had three years of education. They might be able to use a computer but they have simply no idea how to work in a racing yard. So as far as I'm concerned and I'm sure the majority of people in racing would agree, the residential courses are a complete waste of time, they are a university under another name, that's all they are.'

'Residential courses and full-time courses are a different ball game to those which are work-based. I think some of the work-based college courses are quite good but the residential courses tend to miss the mark.'

'What people don't understand, people who would prefer to spend money on funding is the fact that anyone coming into any kind of equine business needs to understand a) what a horse looks like; b) how to handle it; and c) how to ride it. If you can't do that then you're not going anywhere. And 90% of people who go to university/residential colleges can't do any of those three.'

'I think that the government would be far better setting up centres of excellence that are work based where people have small micro colleges based on a work based environment where they send small groups of students to fulfil their courses rather than having mass facilities.'

'Working in a riding school is hard, hard work and it's a labour of love, but I know that there are a lot of riding schools that won't entertain having a college student.'

Employers felt that courses serve a purpose in providing education and development but should not be marketed as a route into practical employment and perhaps should not receive the government funding they now do, unless they are drastically altered to produce individuals who are practically competent. Focus group members described this as follows:

'It's a waste of money from a government point of view as they invest in training from the college and it doesn't achieve expectations.'

'It's a god-given opportunity with the change of government to really start lobbying and saying there's so much money going into equine training but it's not coming out the other end to meet the needs of the industry.'

'I often get people coming to me because they've dropped out of college when they didn't want to come to me [on an Apprenticeship] in the first place. I think as an employer I would like to see the training needs for colleges much more focussed on the end result of what job these people are going to be in.'

Opinion was split regarding higher education equine based courses. Focus group members voiced their opinions as follows:

'You get people coming out with equine degrees and they've got no concept that an hour spent doing a stable immaculately has just cost xyz amount of money and they don't relate that to the business and that's a very frightening thing that they have no economic sense.'

'The higher level courses potentially give people more of a career option in the equine industry as they can demonstrate A-level or academic achievement which will help them if they can find the right position to make more of a career in the longer term in the industry.'

Additionally, one employer in a focus group highlighted the money spent by parents on their children's education and the student loans taken out by students:

'The disappointing thing is that people make that choice to go to college and either drop out and do something else or do three years and then find they've got a loan to pay back as well as not being able to get a job and being dismissed as not very useful. There's a missed opportunity and they've been misled.'

Focus groups felt that college courses are too academic and not practical enough and many employees coming out of college were lacking basic stage one skills. This was described by a focus group member:

'They come to us and they can't tack up and they can't do points.'

This seemed to be a particular issue with small colleges. Overall, members of the focus groups highlighted that employers feel that many college courses do not meet employer's needs. This was articulated by members:

'I tend to find [residential courses] too academic, not enough practical and the practical is inappropriate to the type of practical that is useful.'

'They don't have a range of horses at a college that's realistic and reflecting the workplace. They have one type of horse which is safe for academic children in higher education to ride, they never come across young stocks or stallions.'

'Business and client liaison is missed wholeheartedly in courses especially the business aspect.'

Focus groups suggested that many riding schools will not employ college pupils as those who come from colleges are not skilled to ride competition horses. It was felt that pupils from other countries are much better equipped to work in the industry and this in part is due to the industry being regulated over there. A focus group member described this as follows:

'Comparing kids trained in England and Ireland compared to kids trained on the continent and England and Ireland are so far behind in colleges it's unbelievable. I can pull girls off the continent that have been to college say in Finland or Sweden and they have one hour every day with an Olympic rider and they're told before they leave the college that they're not good enough to get a riding job. They are hammered down and told you go out and work your way up, don't go out and expect things. But that's the calibre of person that's coming in and this is what our kids are competing against.'

However, it was recognised that the quality of training depends upon the college and how practical their courses are.

The third statement posed to UK equine businesses concerned the ability of employers to hold on to valued members of staff. Nearly three-quarters of employers either agreed or agreed strongly with the significance of staff retention as being a problem across the UK equine industry. This supports Figure 5.1 which highlights a high staff turnover. This is supported by evidence from focus groups. Employers felt that staff retention to some extent depended upon the employee's level of training. Those who were educated to level 2 were more likely to leave and work in other industries than those who had stayed on to level 3. This is due to the increased investment in time and effort those who had completed to level 3 had put into the industry. Those who moved on to level 3 training would be more definite about their decision to work in the equine industry.

Focus group attendees suggested contributing factors to low retention to be financial constraints, the widening variety of jobs available within the equine industry and interchangeable skills within the training framework resulting in more job opportunities outside the equine industry.

Employers attending focus groups were asked if they felt that retaining employees once they had finished their training was a challenge to the industry. Responses were mixed, although the majority of employers felt this was a challenge to some extent although less so for those completing their level 3 as they had decided to stay in the industry already. This was described by focus group members as:

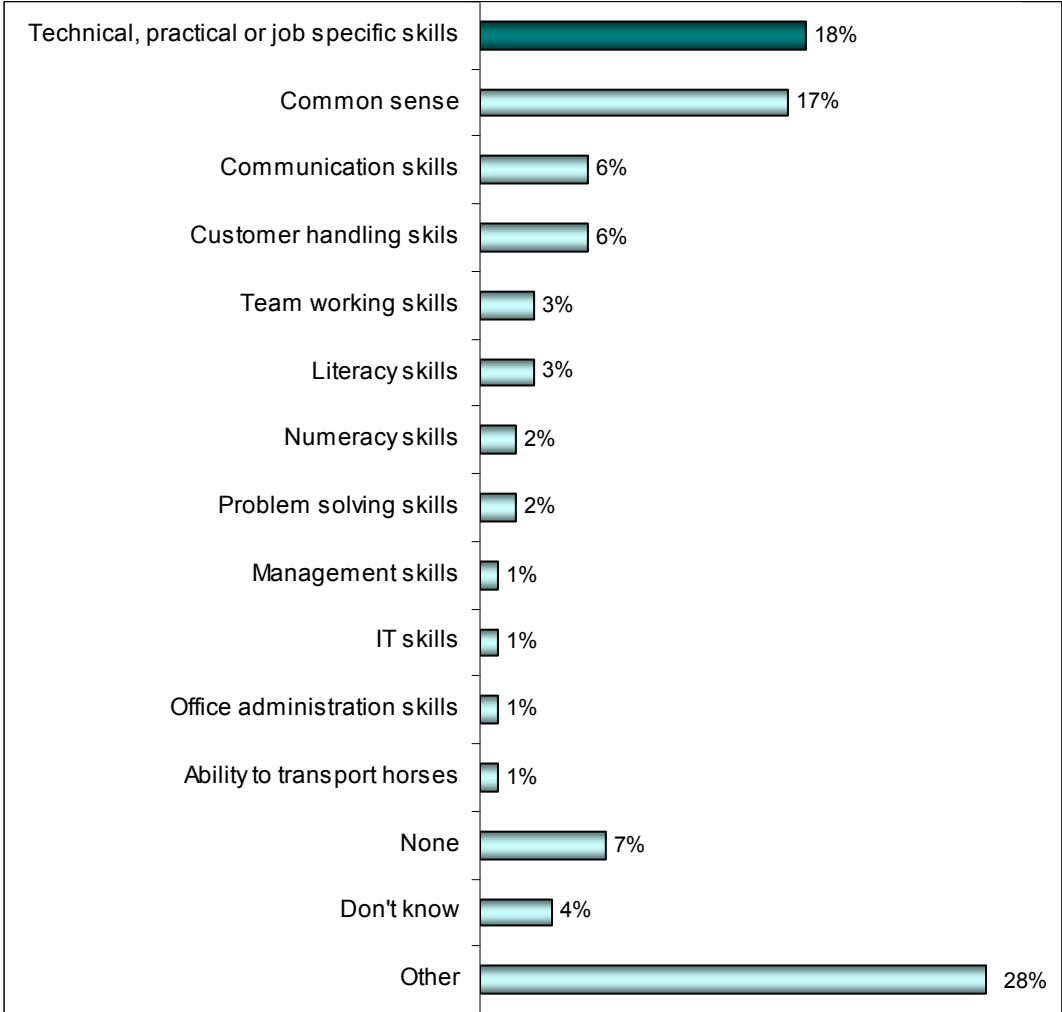
'On completion the challenge is to find the correct incentive to remain.'

'Yes because of financial constraints and also due to the widening variety of jobs available within the equine industry.'

A further reason suggested involved the lack of progression opportunities for employees. Employers felt that once qualified, there are not as many opportunities for employees as not all positions are well-paid. This leads to difficulties maintaining a certain standard of living. Employees are required to work long hours and employers are often not in a financial position to be able to promote employees. Furthermore, employers' opportunities to expand their businesses can be limited by competitors, location and ambition.

The most common skills employers felt were lacking in applicants were 'technical, practical or job specific skills' and 'common sense' as shown in Figure 5.6.

Figure 5.6 Skills lacking from applicants



Sample base = 421; UK weight applied

Figure 5.6 shows that almost one-fifth of employers felt that technical, practical or job specific skills (18%) were lacking and 17% felt common sense was lacking. The highest response to this question was other, the majority of which related to work ethic including commitment, enthusiasm, motivation, attitude, dedication, reliability and punctuality. Experience and riding skills were also mentioned. The following quotes from focus group attendees articulate this:

'From the competition yard angle... I am looking for people to come in that are fit to ride, ride young horses and produce them. And a number of kids from colleges come in and they're so used to riding a high class riding school animal that you put them on a competition horse and they haven't a clue, and it's a safety issue as well because I know the colleges have to be ever so careful but it's a lot better for them to learn in that environment than be thrust into a yard where they're put on a young horse that's maybe

been ridden twice and be expected to cope. So I find it difficult to find riders, and they come out with great expectations, a lot of them do.'

'A lot of the riding schools say that college students don't want to work, that they want to swan in, do whatever it is and then swan out again and that they don't want to be hands on and doing any of the menial jobs. Most riding schools need somebody who's a jack of all trades that can hammer a nail, can shovel all day, do everything. And they say that they find that equine taught people have high opinions of themselves and they don't want to come in to do this work.'

'We are trying desperately to get qualified staff but we can't get them.'

Focus group members emphasised that teaching is a core skill required within the industry, and is in short supply. Riding schools need qualified instructors to meet insurance (and best practice) requirements, and are finding it very hard to find them, this was described by a focus group member as follows:

'There isn't enough instructors to go around; everyone is fighting over them.'

The industry recognised qualifications are those awarded by the BHS. The cost to become a qualified BHS assistant instructor is high at £722¹⁹ (this includes exam fees for stages 1, 2 and 3 and the Preliminary Teaching Test [PTT], this does not include training or additional expenses), especially as the majority of instructors start their career in their mid or late teens. BHS exams will cost several hundred pounds to take, not including the cost of training.

Employers feel that if some degree of subsidy were provided, this would greatly increase access to this key provision, increase access to jobs, and generally improve the industry through the provision of instructors with greater knowledge, professionalism and opportunity for further development. Employers feel that most funding goes to colleges but they are failing students by not properly equipping them practically or with realistic expectations to work in the industry. This was expressed by focus group employers:

'The BHS exams are expensive and to get someone their stage 1, stage 2 and their PTT is a lot of money and quite a lot of students simply can't afford it, and that is the biggest barrier I see.'

'If you come out with a ND (National Diploma) plus your stage 2 plus your PTT then you're an extremely employable commodity but we simply can't fund the students to sit their exams.'

Employers feel that they are also being failed as colleges are not producing good grooms or practical horse people. Employers felt the industry is losing lots of talented young people through colleges by not equipping them with basic skills such as how to handle and ride a

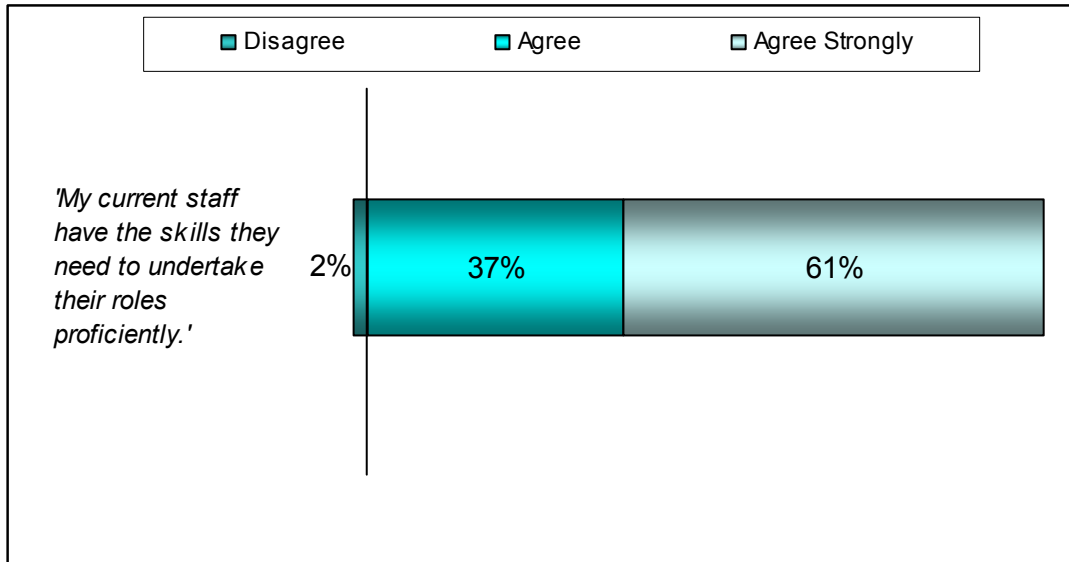
¹⁹ http://www.bhs.org.uk/Training_and_Qualifications/BHS_Examinations_and_Qualifications/Stage_1/Exam_Fees.aspx

horse. The focus groups felt that employers needed to work and communicate more effectively with colleges to achieve courses which equip students for working in the industry.

5.4 Skills gaps

Having addressed the skills challenges faced by employers looking to recruit new staff members, the following analysis investigates the skills gaps and challenges amongst the current staff members.

Figure 5.7 Level of current staff proficiency



Sample base = 421; UK weight applied

UK equine employers were asked to report their level of agreement as to whether their current staff members had the skills they required to undertake their roles proficiently. 98% of employers agreed to some extent that their current staff did have the skills necessary to perform their roles proficiently. 61% agreed strongly with the statement. The incidence of skill gaps reported in the UK equine industry is low at 2%, especially when viewed against the figures for the Land-based and Environmental sector overall. No single UK data source is available for skill gap levels though according to data for the sector in England, 15% of business establishments reported having a skill gap amongst staff members²⁰.

²⁰ LSC – National Employer Skills Survey (NESS) 2009

Of those employers reported to disagree with the statement in Figure 5.7, of those which felt current staff did not possess the required skills to be fully proficient, around 22% of responses reported 'technical, practical or job specific skills', 12% reported 'communication skills' and 8% reported 'IT skills' to have been the skill types that were lacking amongst their staff members.

The main cause attributed by employers for skill gaps amongst their workforce is 'lack of experience or staff have been recently recruited'. This was cited by a third of employers (33%). 'Staff lack the right attitude and motivation' and 'failure to train and develop staff' were also commonly cited. It may be that the latter cause, 'failure to train and develop staff' is more common than it appears due to employers not recognising that their staff need training or not wanting to admit to this. These may also be contributing factors to why employers do not train staff. The suggestion here is that time spent in work rather than time spent in training will likely resolve a large proportion of current skill gaps. This is supported by the views from focus groups detailed in section 5.3 that full-time college based courses are not providing students with the practical hands on experience required to work in the industry.

Focus groups discussed training needs for employees as being customer care skills, health and safety training, generic business and management skills and training in legislation.

Training needs for employers were also considered during focus groups, these included business and management skills, health and safety, provision of induction packs, contracts of employment, interview skills and website and email training. One focus group member described this:

'Some of the business owners need training. We need management training, we need business training, we need IT skills.'

It was felt that people running equine businesses often have not had any formal training and lack knowledge of where they can get information from. Focus groups emphasised that middle management in equine businesses is often weak and a course focussed on equine management is required. An equine business proprietor's level 4 qualification would be welcomed by employers as this is currently a gap in qualification provision. This was explained by a focus group member:

'There could be a business level 4 qualification for business proprietors for riding schools because at the moment you can be a proprietor without any qualifications. So you could develop more of the business aspects there is no such level 4 qualification available. If they are going to bring in licensing of all livery yards it might be a requirement that before you can open a livery yard, you have some sort of qualification.'

It was felt that employers have very little time to undertake training and therefore short evening courses need to be offered. One focus group attendee described this:

'We could compartmentalise those bits [of a course] into short courses over two hours of an evening or do as a one off kind of thing.'

The impact of skill gaps on businesses can vary greatly. For the equine industry, the most frequently cited impact of having a skill gap is to increase the workload for other staff members (32%). Difficulties were also faced in losing business or customers to competitors (16%). A stretched workforce is not sustainable and often leads to a decline in either quantity of work taken on or quality of work completed. However, 17% of equine employers reported no problems in this area.

In regards to the actions employers take to overcome or nullify the effects of staff members lacking job role proficiency, the most common response reported by employers is to increase training activity/spend or increase/expand trainee programmes (28%). However 25% of employers said they were taking no action.

Having presented the data on the skill challenges currently facing the UK equine industry, the report will now switch to look at the training activity and development currently occurring in the industry.

A summary of skills issues discussed in this section are presented in appendix C. This is organised by the main drivers and business issues and the impact this has on skills and business requirements.

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6. Training activity and development

Chapter summary

- Around 58% of the UK equine workforce has received some form of training within the previous 12 months.
- The most common mode of training arranged was off the job training courses (62% of businesses arranged these for staff members).
- The main barrier to training identified by equine businesses was a lack of funds, 22% of businesses reported this.
- Looking ahead, the most frequently reported specific future training need was first aid training, NVQ and BHS qualifications and health and safety training.

The following section reports on the extent to which training is a feature within the UK equine industry. The section investigates a number of key factors around training activity and involvement including training provision, budget planning and funding, whether any barriers to training exist and also establishing future training needs.

6.1 Training activity

Table 6.1 shows the level of training activity among UK equine businesses.

Table 6.1 Level of training activity among UK equine businesses

	UK equine industry	Land-based and Environmental Sector¹	All sector economy¹
% of businesses that give all staff an annual performance review	33.5	30	64
% of businesses that have a training budget	8.8	21	36
% of businesses that have arranged training for staff in previous 12 months	57.5	58	68
% of businesses that formally assess impact of training*	34.3	47	64

*Filtered out businesses that have not arranged training in previous 12 months

¹ National Employer Skills Survey, 2009 – data for England only

Looking at the organisation of training within equine businesses, the data reveals that one-third (33.5%)²¹ of businesses give all their staff an annual performance review (an additional 3.5% gave some staff an annual performance review). Fewer than one in ten businesses incorporate a set budget for training expenditure. The implication here is that training is arranged on an ad hoc basis as and when a particular need arises. Focus groups supported this, discussing the present lack of funding for equine qualifications for those not on a college course. Therefore, due to costs, training can frequently only be arranged as and when the need for it arises. This may be more likely to happen in micro businesses where staff have closer relationships with the business and where the business is less likely to have a rigid training structure in place.

Data in Table 6.1 confirms that across the sector 21% have a training budget (36% across the economy as a whole). The sector and economy comparisons are based on data for England, as no single data source for the UK exists.

Over the previous 12 months 57.5% of equine businesses have arranged training of some type for their staff members. Reading across the data in Table 6.1, this proportion is similar to that of the Land-based and Environmental sector in England overall, where 58% of businesses arranged training in the last 12 months. Across all sectors in the economy (England only), the proportion is higher at 68%. Please note that the data given for the Land-based and Environmental Sector and all sectors of the economy is taken from the National Employers Skills Survey 2009 and therefore is for England only.

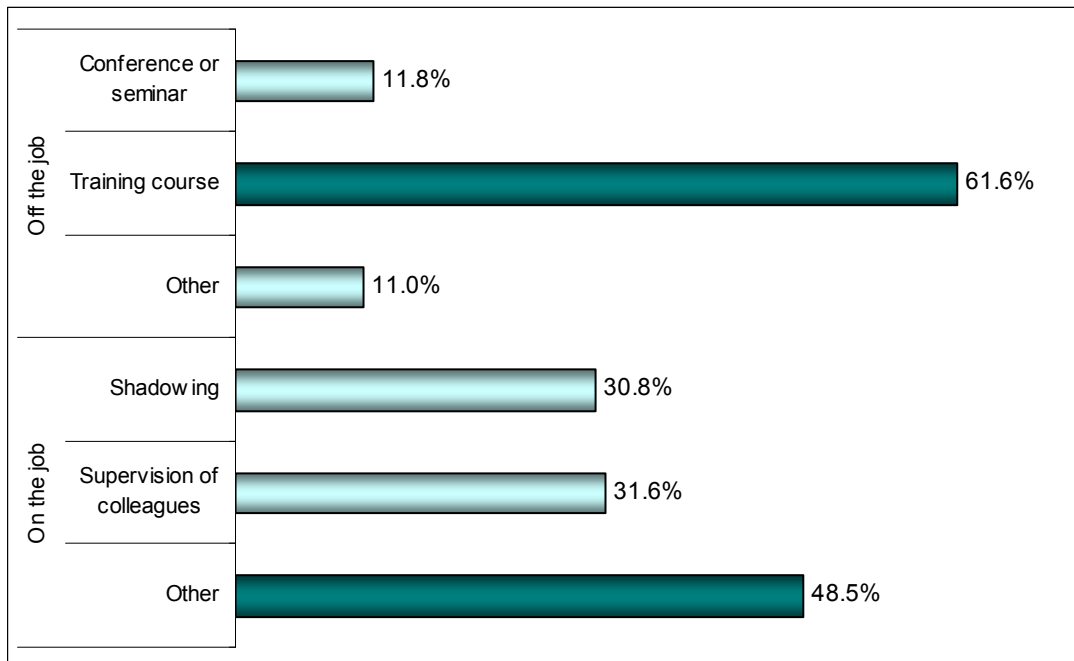
Of those businesses that arranged training for staff members over the previous 12 months, 34.3% formally assessed whether the training and development received by an employee had an impact on their performance. The proportion is lower than the equivalent across all sectors of the economy in England.

Of those UK equine businesses that had not arranged training for staff members over the previous 12 months, the main reason given to explain the lack of provision was that all staff were already fully proficient; around 64% of such businesses reported this.

21 Data is controlled to exclude one-person businesses

Figure 6.1 presents the type of training arranged for UK equine staff over the last 12 months.

Figure 6.1 Training arranged over the last 12 months



Sample base = 421; UK weight applied

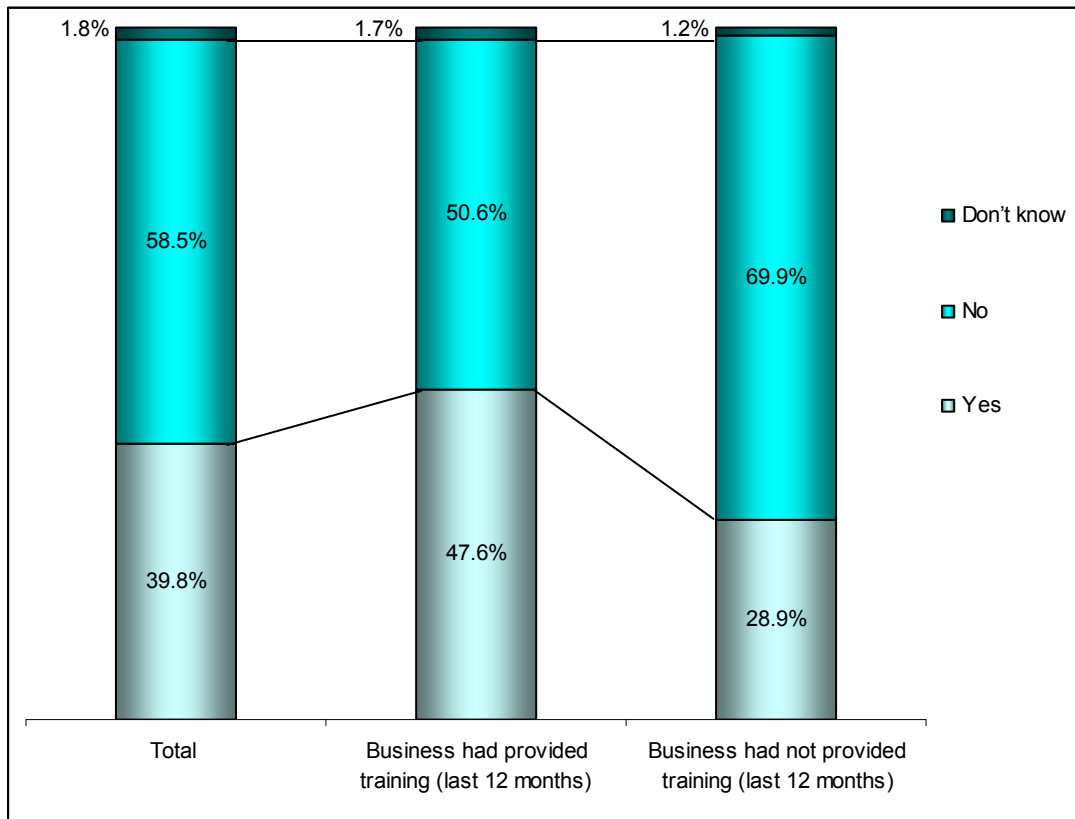
Of those equine businesses that had arranged some form of training, the two most prominent forms of training arranged were an off the job training course (62% arranged this type) or some other form of on the job training (49%). 'Other' includes first aid courses, health and safety, NVQ and riding lessons.

Discussions with employers highlighted that they did not feel that training was meeting their business needs (as detailed in section 5.3). The general feeling from employers was that it is better to be trained by an employer than to attend a college course. It was felt that the British Horse Society (BHS) set good standards for training and more funding needs to be available for this. It was felt that college students lack practical skills.

6.2 Barriers to training

Businesses were asked whether if they could have done, would they have provided more training for their staff over the previous 12 months than had been arranged.

Figure 6.2 Businesses that would have liked to have provided more training in last 12 months



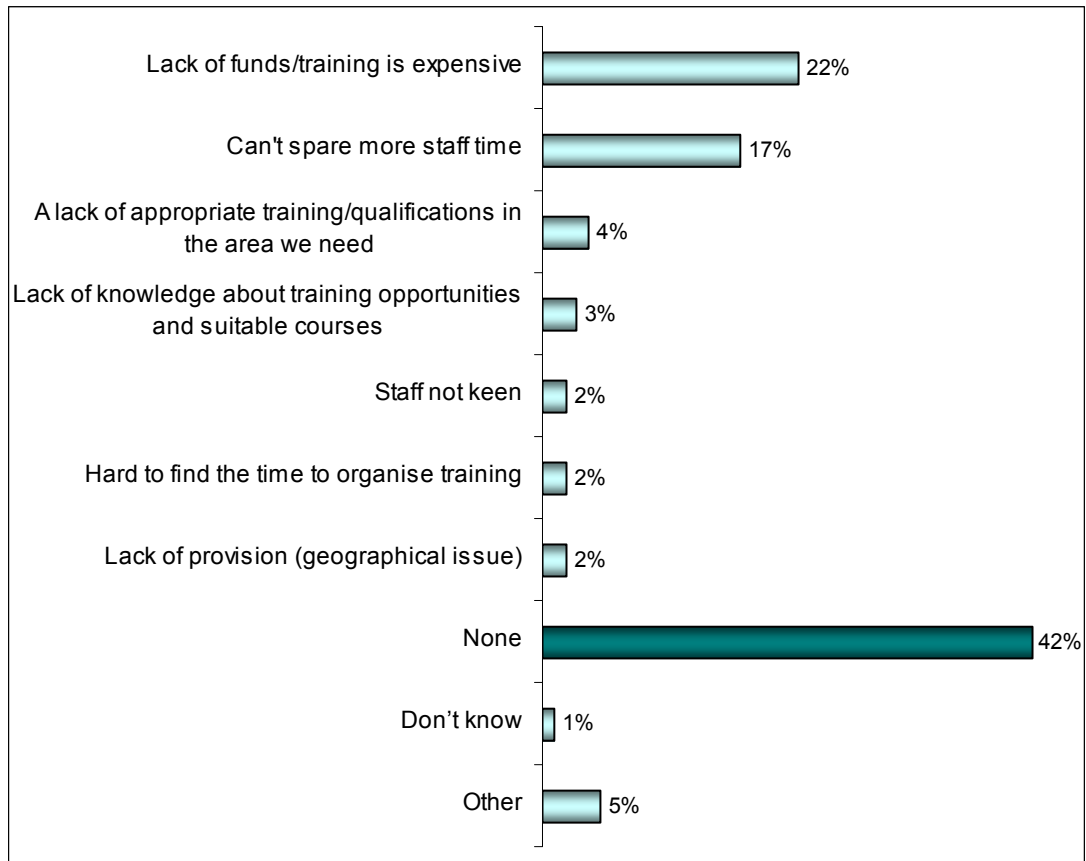
Sample base = 421; UK weight applied

Figure 6.2 presents the data separated by whether the business had provided training over the last 12 months. The data suggests that businesses that provided training over the previous 12 months were more likely to have wanted to increase the amount of training that they had arranged. This indicates that those who are inclined to train their staff recognise the value of this and the benefits to their business. Therefore they are more likely to want to increase the training that they offer, whereas those who do not offer training are less likely to recognise the benefits.

Around 48% of businesses that provided training in the previous 12 months would have liked to have provided more; this compares with only 29% of those businesses that did not provide any training at all.

According to the data presented in Figure 6.3, 22% of businesses reported that a lack of funds or the training was considered to be too expensive was the barrier preventing them from arranging more training.

Figure 6.3 Barriers to training provision



Sample base = 421; UK weight applied

This is supported by evidence from focus groups who discussed the lack of funding and financial limitations of employers, as discussed earlier in the report. Employers felt there was a lot of training available but that funding was scarce. Of the funding available, eligibility is often dictated by the age of the student as more funding tends to be available for younger people. Paperwork for funding can also be an issue for employers.

Focus group attendees also mentioned the cost of losing an employee for a set amount of time to complete training and the difficulties they faced leaving the business to complete training themselves such as loss of income, reduced staffing levels and a fear of *'things going wrong'* in their absence with no-one to manage the situation.

Time constraints (17%) were the next most commonly reported training provision barrier. However, 42% of employers felt that there were no barriers to their training suggesting that either they are accessing training already or the lack of accessing training is an employer decision unaffected by barriers.

Employers from focus groups were asked if there was any training they would like to do but cannot access. A common response was:

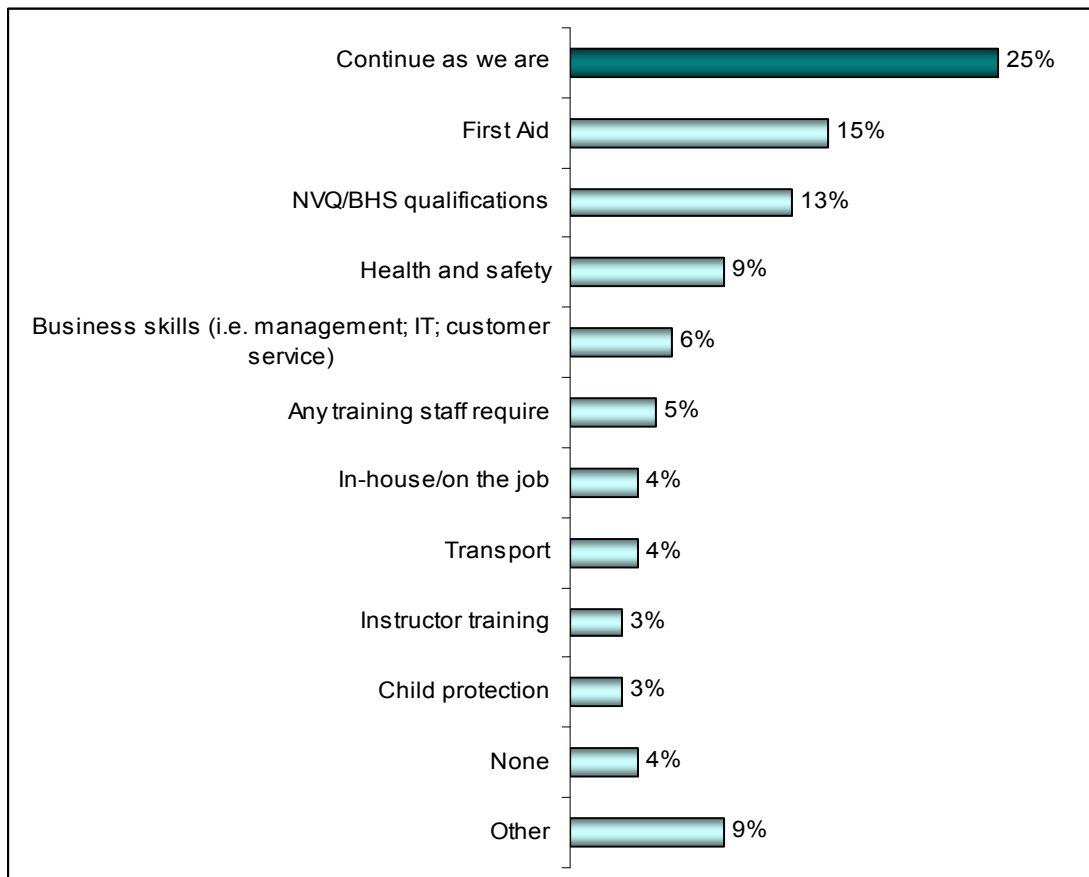
'I think leadership and management skills for a business owner are very important.'

Training on stewarding at events, certificate of competence in lorry driving, health and safety, induction skills and how to complete forms, BHS, proprietor courses and legislative courses were also mentioned. For employers who don't undertake training, focus groups suggested that incentivising employer involvement would encourage them as well as good quality work experience as a compulsory part of every course and help to cover time when a trainee is on day release. Focus groups also highlighted that a lack of regulation amongst equine businesses is one of the causes of a lack of training and the cost of training to small businesses such as BHS courses and exams. For students, increased pay, incentives and responsibility would encourage them.

6.3 Future training needs

Figure 6.4 presents the training that UK equine businesses expect to need over the next 12 months.

Figure 6.4 Future training needs



Sample base = 421; UK weight applied

Of the responses reported, one-quarter said they would continue as they were, offering the same training.

The second most common response from employers regarded 'first aid' as training likely to be required in the next 12 months; this category accounted for almost 15% of total responses.

Current provision of equine courses is detailed in Table 4.1.

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7 Equine employee survey

Chapter summary

- Respondents were typically female (91%), younger than the average workforce, British, and had been working in the industry for over five years (54%).
- Employees were positive about working in the industry with the main issues being hours and pay.
- 39% of employees stated their main job as being yard/stable duties.
- Two-fifths (42%) of employees had received training in the past 12 months and just over two-fifths (44%) felt there was training they needed.
- 7% of employees stated that they were a working pupil and 2% were on an Apprenticeship.
- Nearly two-thirds (62%) of employees said they would like to stay in the equine industry for the rest of their career.

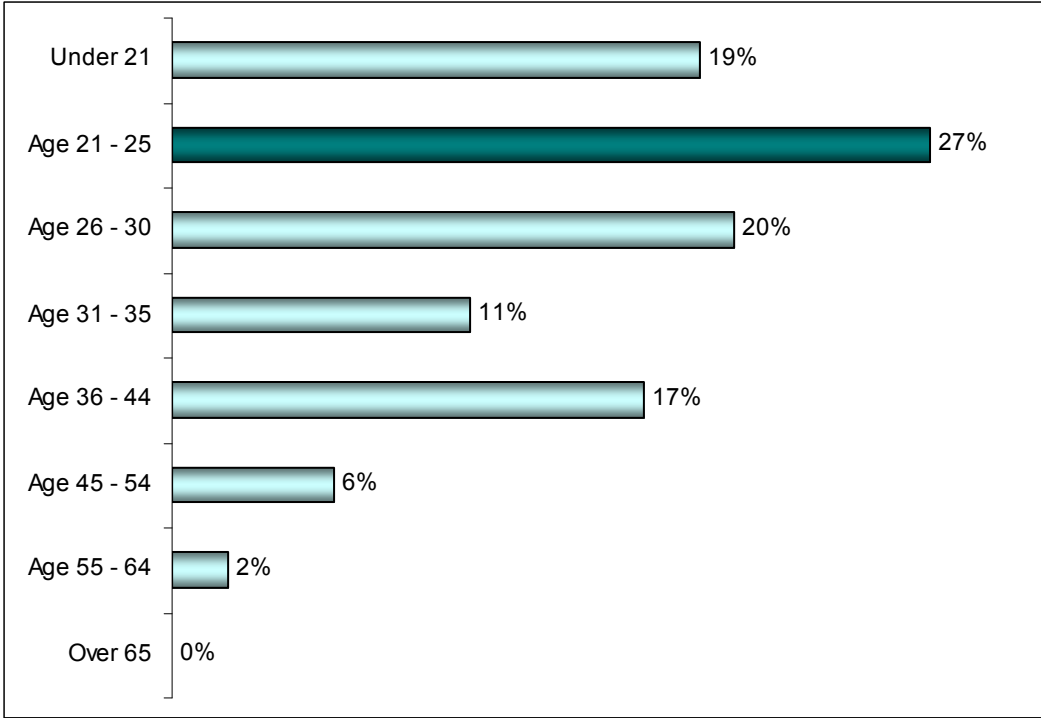
This chapter summarises the findings from the employee survey. This was available online from December 2009 until June 2010 and was publicised in various equine publications and on websites. It was designed to be a supplementary exercise to the main research project. 250 employees completed the survey, therefore the results are not statistically robust or representative of the sector and are more an indication of the trends of employees in the equine industry. Data regarding location of employees was not gathered as a high response rate was not anticipated and splitting responses by location would have made the results less reliable. Please note that a certain type of employee may be more inclined to fill in an online survey.

7.1 Respondent characteristics

91.4% of respondents were female and 8.6% male. This is significantly higher than the 70% female 30% male split indicated by the employer survey. This may be due to the type of employees inclined to respond or the employers over-estimating male employment.

Figure 7.1 details employee age categories.

Figure 7.1 Employee age categories



Over a quarter of respondents were aged 21–25, supporting employer evidence that this industry tends to have a younger workforce. Although smaller categories were used in the employee survey, when compared to the employer’s account of their workforce, the employees show a trend of being much younger. Again this may be due to the type of employees who would complete and/or have access to an online questionnaire. The pattern followed is broadly the same showing a young workforce, although this survey shows a higher number of employees aged 36-44.

Respondents identified with a fairly wide range of nationalities, however as anticipated, the vast majority of the respondents were British. This is shown in Table 7.1.

Table 7.1 Employee nationalities

American	2
British	211
Canadian	1
German	2
Irish	2
New Zealander	1
Polish	1
South African	1
Swedish	1

Nationalities were not asked for in the employer survey, however the focus groups discussed the rising employment of Eastern European and Asian staff in their industry due to them being better trained and more motivated to undertake the more practical aspects of working with horses. This is not reflected in this employee survey, however this may be, in part, due to computer access and access to publications where the survey was promoted.

7.2 The industry

Employees were asked what they liked and disliked about working in the equine industry.

Employees felt that the positive aspects of working in the industry were working with horses, working in a job that is their passion, working outside, sense of achievement/rewarding/satisfying, learning new skills and developing horses and others, freedom and flexibility.

Some typical responses to this question are detailed below:

'A really strong interest in my industry – a lifestyle not just a job.'

'Always something new to learn and each day brings a new challenge and a different routine.'

'Being outside and with horses, in control of my own career, using my knowledge and qualifications to help people and horses.'

'Outdoor physical work where you know you have really achieved something whilst keeping fit. Also that amazing feeling when a horse learns something new because of you especially when it's to trust a human again after abuse.'

'The people and amazing horses I get to work with. I find it very rewarding, although nothing is achieved easily, which makes the end result more special.'

'Working with horses. As well as it being very hard work, it is extremely rewarding, seeing that the horses you look after are happy and healthy. No matter what the weather, working with horses is worth putting your wellies on.'

Employees felt that the negative aspects of working in the industry were pay, hours of work, lack of respect from employers/employer attitude, bad weather and seeing horse neglect. Hours and pay are issues echoed by discussions with employers who felt these issues contributed to their problems with finding and retaining good employees.

'I think it's mostly pay, because folk I think are tuned into the fact that it's not 9 to 5 Mon to Fri so I don't think that's a barrier but I think that pay is.'

'It's like yards expecting because they get up at 4 o'clock in the morning to go to a competition that their staff should but not get paid anything more for it and be there until 10 o'clock at night and I say to them it's no wonder they don't want to work for you!'

'Young people get worn out. I have an NVQ student in a big competition yard doing her stage 3 and she was so busy with the yard she could not do the work. There's a lot of paperwork with the level 3 and she was worn out and she had to drop out because it was a really busy yard and they were going all over the world. She had to be in a competition yard but they wouldn't give her time to do her work. That's common place.'

Employers also suggested that this was perhaps due to unrealistic expectations of working in the industry, employees did not fully consider all aspects of the industry before choosing it as a career. Some typical responses to this question are detailed below:

'Sometimes have to work long hours, with no reward... the lack of recognition and representation that our profession receives.'

'The lack of respect shown towards groom, many regard the career as unskilled, manual labour that requires no expertise.'

'Wages are too low and make it difficult to get by, especially the wages for the Apprenticeship scheme.'

'Working in unsuitable conditions: badly maintained arenas, unsafe equipment, no proper rest rooms for staff. No overtime pay, no sick pay, no proper holiday pay (we were paid half-daily rate for every holiday day).'

'Adverse weather conditions and lack of time off.'

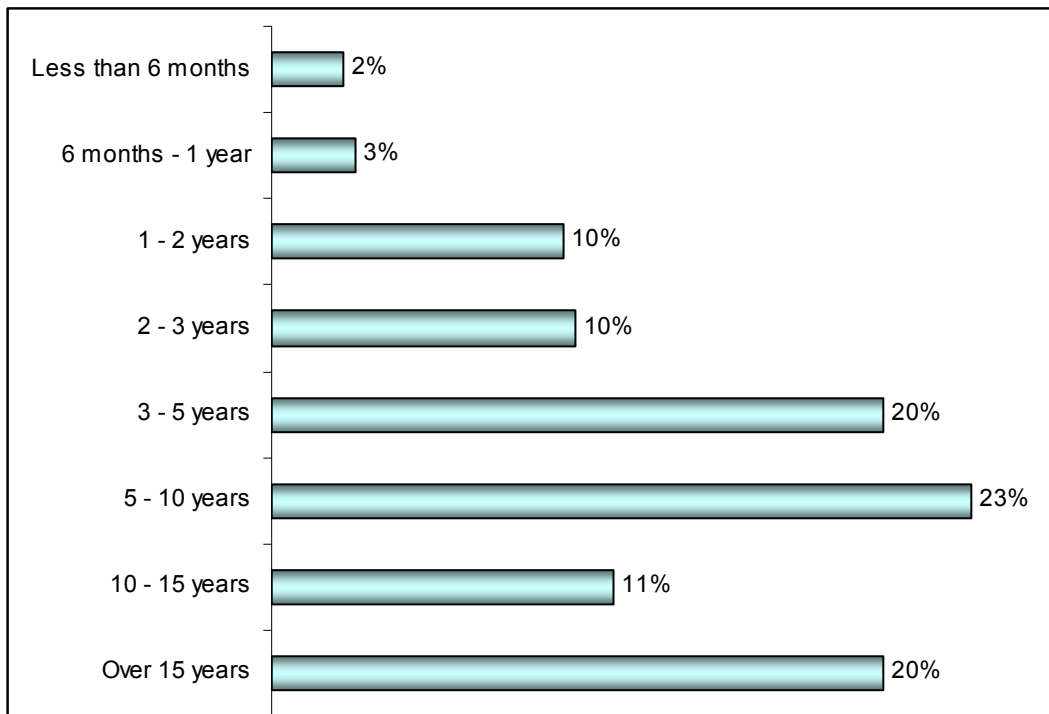
'I least like seeing the injuries and psychological problems that horses can get through neglect or too much hard work.'

'Lack of respect from some employers, employment laws not being followed, working conditions.'

7.3 Employment characteristics

67% of those who responded were an employee, 29% were self-employed and 4% identified as both. For one-third of respondents (34%) accommodation was included with their post. Figure 7.2 shows the length of time employees had been working in the equine industry.

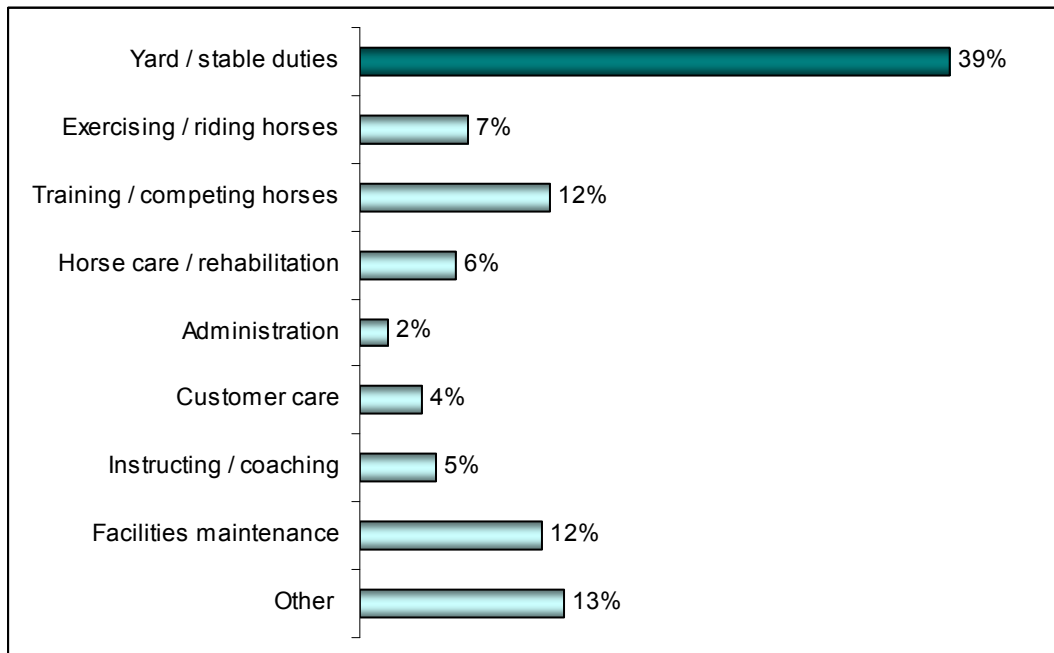
Figure 7.2 Length of time in the equine industry



54% of respondents had been working in the industry for over five years and one-fifth had been working in the industry for over 15 years. This suggests a good retention rate in the industry.

The majority of employees worked in 'yard/stable duties' as highlighted in Figure 7.3.

7.3 Employee's main job



Nearly two-fifths (39%) of employees stated their main job was yard and stable duties, with 'other' (13%), 'training/competing horses' (12%) and 'facilities maintenance' (12%).

7.4 Development and training activities

One-third of employees (33%) had a written contract of employment, 3% did not know if they had and 64% did not. This is a significant number and concerning to the industry. Although contracts of employment are not compulsory, a 'written statement' is. This is less detailed than a contract of employment and is there to provide the minimum under the law. A contract of employment contains more detail to govern the relationship between the employer and the employee. This suggests that as an industry, written contracts of employment need to be more closely regulated. It is unlikely that employees would always be aware of the difference of these and therefore this figure is worrying.

19% of employees said they had an annual performance review, 74% said they did not and 8% did not know. This is a challenge within the industry that needs to be addressed.

42% of employees had received training in the last 12 months showing that although not planned, a significant number of employees are being trained. Training received varied greatly, with the majority being riding lessons, BHS exams, NVQ and first aid. Also mentioned were Heavy Goods Vehicle (HGV) licenses, Preliminary Teaching Test (PTT), shadowing, sales, quad bike (ATV), Post Graduate Certificate in Education (PGCE) and child protection courses. 44% of employees felt there was training that they needed, examples given include; trailer/HGV, riding lessons, business skills, then various including handling horses, veterinary nursing training, first aid and new media. This highlights the breadth of skills which are useful for working in the industry.

7% of employees who responded said they were a working pupil and just 2% of employees are enrolled on an Apprenticeship Scheme, supporting evidence from the employer research. More information on working pupils and Apprenticeships is given in section 4.2.

17% were currently enrolled on a course with a college or training provider. Courses being undertaken included NVQs, a range of degrees relating to the equine sector, national diplomas relating to the equine sector and also respondents doing courses as diverse as maths, psychology and PE A-levels, postgraduate Equine Shiatsu and sign language.

7.5 Membership bodies

Employees were asked if they were members of any membership bodies. This was an industry-specified question to ascertain how wide-reaching membership bodies were amongst employees and which associations were most popular amongst employees. The most popular associations were the British Grooms Association (29 employees as members); the British Horse Society (28 employees as members); British Eventing (21 employees as members) and British Dressage (20 employees as members).

Employers were also asked if they were members of any membership bodies and if they would be likely to join an equine employers' association. These questions were requested by industry to be included as the introduction of an employer representative organisation is an issue that has been debated by industry representatives. The industry is very diverse and some employers feel this has led to the equine industry lacking a strong and unified voice. This was articulated by one focus group member:

'The ability to have a larger voice that we can access to a general market.'

It has been suggested that such an organisation would improve support and structure, providing a similar role to the role the British Horseracing Federation (BHF) provides to the racing division of the equine industry. As Lantra is seen as the voice of employers by many employers in the industry they viewed this as an issue to be raised by the research to gather evidence to contribute to discussions surrounding this. The equine employers' association would not be a Lantra venture as much of the role would fall outside of Lantra's skills remit, and would need to be independent and employer funded in the first instance.

Over one-third of employers (36%) are members of the British Horse Society (BHS). This reflects the findings that 38% of businesses who responded were riding schools and therefore would be more likely to become members of the BHS and/or the Association of British Riding Schools (ABRS). A quarter of employers said they were a member of another membership association. Those who stated 'other' specified a wide variety of membership associations, the majority of which were non-equine specific including the Federation of Small Businesses; Country, Land and Business Association and the National Farmers Union.

Employer opinions as to whether they would be interested in joining a specific equine employers' association were split almost exactly. 43% felt they would be interested in joining, 42% specified they would not, 13% did not know and 2% did not state. Business types most likely to join an equine employers' association were breaking/schooling businesses, riding schools, competition yards and horse sale businesses.

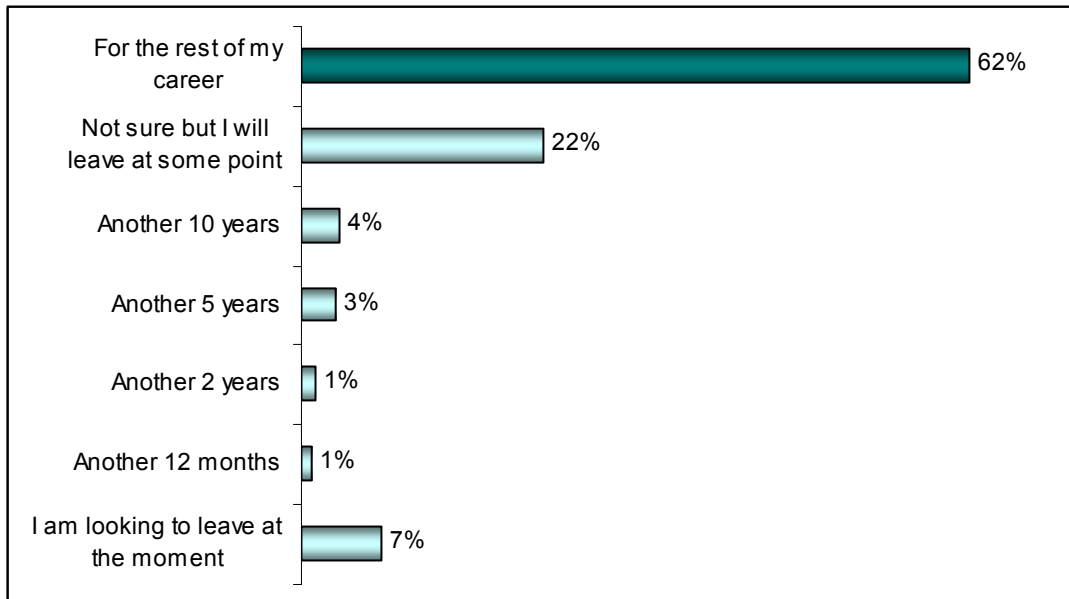
In discussions with employers in focus groups, employer's views were also split. It was felt that one voice was needed to speak out for the equine industry and that at present there is nowhere for equine employers to go if they are a non-racing business. It was suggested that there is a great need for a National Federation of Equine Proprietors to act practically, and lobby effectively. One focus group attendee described this as:

'I think people would be more interested if they knew it would be practically effective with lobbying.'

Those who did not consider such a membership association as necessary felt that there would be problems with an equine employers' association. It was suggested that the UK Federation of Small Businesses was available for legal issues and although this is not equine specific, there could be an equine department or arm within this set up.

As shown in Figure 7.5, nearly two-thirds (62%) of employees said they would like to stay in the equine industry for the rest of their career. 7% were actively looking to leave at present.

Figure 7.5 Length of time anticipated to stay in the industry



Employees were asked if they felt they had the opportunity to progress from their current job. Responses were fairly evenly split, however the majority (55%) felt they did not have this opportunity, with 45% feeling they did.

Employer focus groups discussed this topic; some employers felt that opportunities to progress did exist, for example, with more qualifications. They felt that with the correct qualifications (as opposed to just experience) there are many more jobs available but these are qualification led. This suggests that industry needs to better disseminate and better understand career progression routes. Continuing Professional Development (CPD) also needs to be more widely recognised. However, other employers felt that progression opportunities were limited if the facility employees work at cannot expand. These employers felt that not a lot of opportunities exist once qualified to progress. Additionally, as not all equine industry jobs are well paid, it can be an unsuitable industry to work in to maintain a certain standard of living. Employers also felt that if you are not self-employed it is a difficult industry to work in for a long period of time due to long hours. It was also highlighted that it can be financially difficult for employers to promote employees.

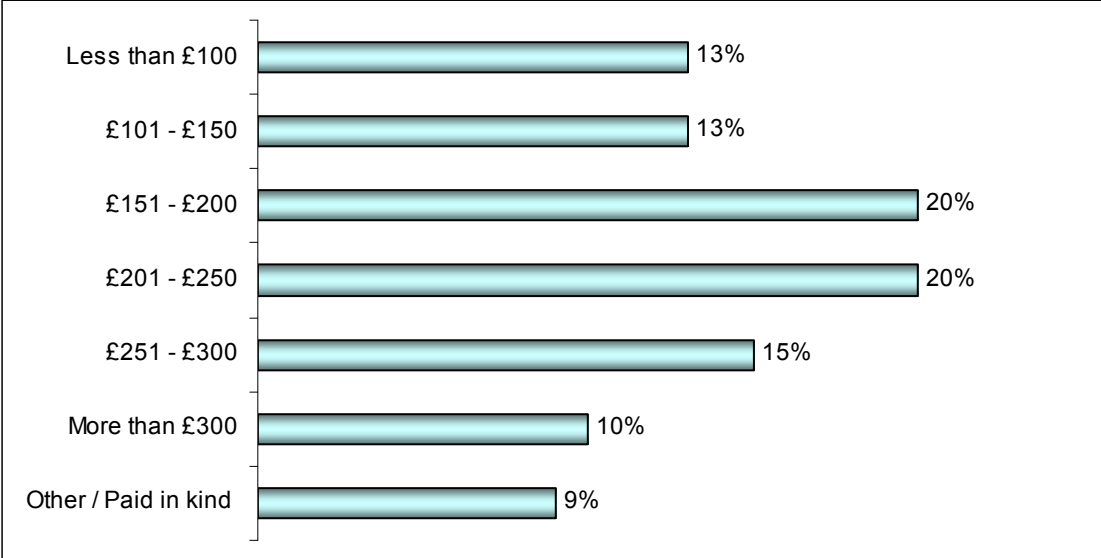
Focus groups were asked if they felt that retaining employees once they had finished their training was a challenge to the industry. This was described by a focus group attendee as:

'On completion the challenge is to find the correct incentive to remain.'

Responses were mixed, although the majority of employers felt this was a challenge to some extent; although less so for level 3s as they had decided to stay in the industry already. (Also, interchangeable skills within the Scottish Vocational Qualifications (SVQs) framework results in more job opportunities outside the equine industry.)

Figure 7.6 details employees' salaries. Over one-quarter (26%) earn less than £150 per week after tax deductions. However, care must be taken with these figures as a small number of respondents worked part time hours and therefore these may have skewed the figures.

Figure 7.6 Employee salaries per week



For 60% their pay met their salary expectations. Hours of work ranged from ten – 90 hours per week, with the majority responding that they worked 40-60 hours per week. Due to the nature of the industry many people commented on the huge range of hours they did depending upon the season. For example, if an employee was at a competition or shows, they would work significantly more hours and in some job roles the number of hours worked is dependent upon the number of clients an employer has.

Almost half of employees (49%) had their tax and national insurance paid by their employers, over one-third (37%) paid it themselves and 14% did not know.

Over half (52%) of respondents had a Personal Accident Policy, 38% did not and 10% did not know. Of those who did have a Personal Accident Policy, 65% paid for this themselves, 20% was paid for by their employer and 15% did not know.

8. Key findings

The main aim of this project was to identify the current skill needs and challenges within the equine industry across the UK; to achieve this aim a number of objectives were set, all of which have been completed.

8.1 Industry characteristics

The equine industry is dominated by micro businesses, those that employ fewer than ten members of staff. Businesses may often be small, but their work practices are quite varied as most businesses tend to diversify their operations across more than one equine sub-industry.

The workforce within the UK equine industry is largely full time, female and from a white ethnic group. Those working in the equine industry tend to be younger than the UK workforce as a whole. The job levels of the workforce are largely divided between two main standard occupational classification groups: managers and skilled trades as well as those which fall under 'other' such as administration and facilities maintenance roles.

The majority of businesses see the 'economic conditions' as likely to be the key challenge facing the equine industry over the next 12 months. This is supported by the number of businesses that have reported falls in their turnovers in the previous 12 months and by evidence from the focus groups.

Many businesses maintain an optimistic outlook for the next 12 months, citing expectations that both turnover and employment numbers look set to increase or at least stabilise. The number of vacancies currently available and the extent to which these are hard to fill in the industry implies that a stabilisation of workforce numbers is the more likely of the two.

The evidence suggests therefore that the equine industry's positivity may be slightly optimistic and is dependent upon factors outside of the industry's hands.

8.2 Skills challenges

Employment vacancies are relatively low in the industry. However, of those that do exist nearly three-quarters are reported to be hard to fill, which is largely due to applicants lacking skills and/or experience. Around three-quarters of employers reported that when looking for new recruits they found problems identifying people with the right skills.

Skill gaps amongst the equine workforce are very low. The main cause attributed to the occurrence of skill gaps was a lack of technical, practical or job-specific skills. One-third of businesses attributed this to a lack of employee experience or staff having been recently recruited. In accordance with this, the main course of action taken to overcome skill gaps was to provide more training to staff. Over two-thirds of businesses felt that retaining staff was a significant problem.

8.3 Training

Training levels are higher than those for the Land-based and Environmental sector but lower than those for the all sector economy as a whole. 58% of staff have received some form of training over the past 12 months. Of those businesses that provided training in the past 12 months, nearly half would have like to have provided more. The main barrier to training identified by equine businesses was a lack of funds (22% of businesses reported this). To emphasise this barrier, fewer than one-third of businesses give employees an annual performance review and fewer than one in ten have a training budget. This implies that training is arranged on an ad hoc basis.

However, two-fifths of employers felt that there were no barriers to their training suggesting that either they are accessing training already or the lack of accessing training is an employer decision unaffected by barriers. This is supported by evidence that one-quarter of businesses will continue as they are instead of offering more training in the next 12 months.

With wider economic conditions likely to continue to pose significant threats to many small businesses, the case for developing an efficient core workforce has never been stronger. To do this, equine businesses will need to stay on top of the skill gaps in the current workforce to make these core workers effective. The challenge here is to overcome the main barrier to training, that being to improve knowledge of and access to funding assistance schemes.

Short courses on disease prevention and management; i.e. *The Open College of Equine Studies, short course in Equine Injury, Disease and Recovery* may be increasingly required to ensure staff have the skills to care for horses and follow the correct procedures in disease management.

Specific training courses required for equine welfare officers was suggested as well as increased access to training for finance management, business management and planning especially in relation to equine welfare charities and equine proprietors. Equine sanctuaries would benefit from training around fund raising and marketing.

8.4 Membership associations

Employer membership of equine associations varied greatly. Just over one-third of employers were members of the British Horse Association, significantly more than any other membership association.

There was almost an exact split between employers who felt that they would be interested in joining a specific employers' association and those who would not. This was echoed anecdotally, again with an almost exact split. Therefore, there are a significant number of employers who support the idea. Consequently, further research into the popularity of this idea is recommended as one association speaking as the voice of the industry may have significant value to equine businesses.

8.5 Employee opinions

Conducting an employee and employer survey concurrently has provided a balance of views. This has demonstrated corroboration between the views and wants of employees and employers.

Almost three-quarters of employees had worked in the industry for over three years and one in five had worked in the industry for over 15 years. Three-fifths of employees felt they would stay in the industry for the rest of their career. This finding may go some way towards alleviating employer's fears that people no longer want to stay in the industry.

Employees tended to feel positive about a variety of aspects of working in the industry including working with horses and working outdoors. Feeling that their job was rewarding was a strong theme. Aspects of working in the industry that employees did not like tended to be very much focussed around pay and working hours, an issue also highlighted by employers in focus groups. However, over half of employees felt they could progress in their career and for three-fifths their salary met their expectations. This suggests that employees are not as unhappy with their wages as initially thought. However, this may also reflect the demographics of the sample.

As the majority of employees who responded to the survey were young, it may be that salary becomes more of an issue as employees get older and have more responsibilities.

Nearly two-thirds of employees do not have a written contract of employment and three-quarters do not have an annual performance review. This echoes the results of the

employer survey and suggests that a formal training plan is not a high priority amongst employers. Two-fifths of employees had received training in the last 12 months suggesting that training may often be ad hoc.

Findings in this research have indicated that employees are happier in the industry than perhaps employers thought, however staff turnover is high, and contentment with working in the industry may be more to do with the satisfaction gained by working with horses than through the working conditions of the job.

8.6 Recommendations

64% of employees did not have a written contract of employment therefore the reasons for, and benefits of this, need to be promoted to industry and to employers.

Focus groups highlighted the need for Lantra, employers and the industry to work more closely with careers advisors to promote the industry realistically to young people. It was felt that careers advisors need to clearly tell young people the best ways in which to enter the industry and to promote practical experience alongside theoretical knowledge. Furthermore, employers suggested that careers services need to explain to young people the positions they can expect to gain once they have finished their training and how to move up the career ladder.

The research shows a mismatch between where government funding is provided and results required by the industry. Focus group discussions highlighted that employers feel government money is being wasted funding certain equine college courses which do not produce students with the correct skills and training.

This money would be better spent either on college courses that meet these needs, Apprenticeships or providing employers with funding for ad hoc training courses for staff.

There is a need for employers to work with colleges more closely to provide a realistic overview of positions students can expect to work in once they graduate from their course. In turn, colleges need to manage students' expectations.

Employers spoke about the need for a Business Proprietors level 4 qualification to skill employers in how to run an equine business. As many employers work their way up to becoming a proprietor they do not necessarily have all the business and management skills needed. A qualification such as this would fill this gap.

8.7 Further research

A destination survey of equine college leavers was discussed by focus groups as research that would be of great importance to the industry. This is articulated by one focus group member:

'What the riding schools are looking for are teachers, people with the teaching exam and I know that a lot of my riding schools at the moment, the ones that I've had on board, about ten employees did the NVQ level 2 so then they could move sideways to do the teaching and they're all within the riding school. Then I go out and they say we need employable teachers, now having said that, they need to pay them properly and historically riding schools don't pay but I'd like to know where all these students are going when they finish.'

Lantra is undertaking an Assessment of Current Provision at present; this will look into data available for the destinations of leavers from higher education courses in the Land-based and Environmental sector.

A study investigating why students do not complete equine courses was also discussed as research which would be useful to the equine industry. A longitudinal study of an equine year group was also suggested. This would be of great value to the industry as employer representatives feel there is a high dropout rate and so reasons for this could help refine courses and influence the industry.

Value for the industry could be gained by conducting further small-scale research into the viability of an equine employers' association.

Additionally a study into the image of the industry would assist in understanding why people join and do not join the industry and why they often leave the industry early.

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Appendix A – Equine employer questionnaire

Equine industry study

Telephone survey

INTRODUCTION:

Good morning/afternoon. Is this <INSERT NAME OF EMPLOYER>?

My name's <INSERT NAME> and I'm calling on behalf of Lantra who are conducting some important research into the UK equine industry.

The main aim of this research is to identify skills needs and challenges within the equine industry, and the findings are expected to feed back into industry training policies and the development of qualifications that will ultimately benefit employers in the future.

The interview will take fifteen minutes or so. Would it be convenient to talk now?

[IF NOT CONVENIENT] Your views would be extremely valuable to us. When would be a good time to call you back? [then arrange a time]

[IF CONVENIENT] Thank you. The information and views you provide will be treated in the strictest confidence.

[IF CONTACTING A BUSINESS IN WALES] First of all, may I ask if you have a preference for completing this interview in Welsh? **[If yes – explain that we will arrange for a colleague to call them back within the next few days]**

[IF NECESSARY] Lantra is the Sector Skills Council for the Land-based and Environmental sector, and is licensed by government to boost skills levels and productivity across the UK. Their role is to help support businesses like yours by ensuring that training provision meets your needs.

Contact at Lantra is Kate McCarthy if they would like more information about the background and purpose of the research. 024 7669 6996 ext 237

RECORD ALL REFUSALS ON A SEPARATE SHEET

SECTION A. BUSINESS INFORMATION

A0. [Record the location of the business]

East	1	South West	7
East Midlands	2	West Midlands	8
London	3	Yorkshire and Humber	9
North East	4	Scotland	10
North West	5	Wales	11
South East	6	Northern Ireland	12

A1. Which ONE of the following best describes the PRINCIPAL activity of your business for income purposes?

READ OUT IF NECESSARY - CODE ONLY ONE

Riding School	1	Producing for Competition/Show/Sale	7
Livery Yard	2	Hunting	8
Training Yard	3	Horse Sales/Dealer	9
Competition Yard	4	Trekking/Holidays	10
Breaking/Schooling	5	Private Equine	11
Breeding/Stud/Insemination Centre	6	Welfare and rehabilitation	12
		Other	13

If 'Other' please specify: _____

A2. What challenges do you anticipate your business will face over the next 12 months?

DO NOT READ OUT – CODE ALL THAT ARE MENTIONED

Economic conditions (e.g. effects of recession)	1	Keeping existing customers/business	10
Increasing business competition	2	Legislation changes: Equine Passport	11
Attracting appropriately skilled staff	3	Legislation changes: ID chips	12
Labour costs	4	Legislation changes: Transporting Horses (VOSA)	13
Geographic location	5	No particular challenges	14
Cash flow	6	Disease	15
Seasonality of business	7	Retaining Staff	16
Insurance premiums	8	Other (please state)	17
Business rates	9		

SECTION B. WORKFORCE CHARACTERISTICS

B1-12: IF EXACT NUMBER IS UNKNOWN PROMPT FOR AN ESTIMATE. IF ESTIMATED PLEASE INDICATE.

B1. Overall, how many people do you employ?
INCLUDE FULL AND PART-TIME STAFF BUT NOT OUTSIDE CONTRACTORS/ AGENCY STAFF

B2. How many of your staff are paid?

B3. How many of your staff are unpaid?

B4. How many of your staff are employed on a full-time basis?

B5. How many of your staff are employed on a part-time basis?

B6. How many of your staff are freelance/self-employed?

B7. How many of your staff are working pupils?

B8. How many apprentices do you employ?

B9. What is the gender split of staff at this business location?

Number that are female

Number that are male

B10. Approximately how many of your staff are aged:

16-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55-64 yrs	65+
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

B11. How many of your staff identify with each of the following ethnic groups:

White	Mixed	Asian or Asian British	Black or Black British	Chinese	Other ethnic group
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

B12. How many of your staff are employed in the following occupations?

[Select response based on the highest proportion of time spent per staff member]

READ OUT AND – CODE ALL THAT ARE MENTIONED.

Managers (i.e. yard manager)	
Professional occupations (i.e. instructor, jockey)	
Associate professional and technical occupations (i.e. therapist)	
Administrative and secretarial occupations	
Skilled trades occupations (i.e. farrier, groom)	
Sales and customer service occupations	
Other	

If 'Other' please specify: _____

SECTION C. RECRUITMENT

C1. How many new staff have you taken on in the last 12 months?

C2. How many people have left your employment in the last 12 months?

C3. Did these staff leave for any of the following reasons?

New job elsewhere	1
Retirement	2
Redundancy	3
Prefer not to say	4
Dismissed	5
Other	6

If 'Dismissed' or 'Other' please specify: _____

C4. In looking ahead to the next 12 months, how do you see your workforce changing in terms of numbers?

Increasing	1
Remaining the same	2
Decreasing	3
Don't know	4

C5a. Do you currently have any employment vacancies for either full-time or part-time roles at this business location?

Yes	1
No [go to C9]	2
Don't know [go to C9]	3

C5b. If Yes, how many vacancies do you have?

C6. For which occupations do you have vacancies?

READ OUT AND CODE ALL THAT APPLY

*SPECIFY THE **NUMBER** OF VACANCIES IN EACH OCCUPATION]*

Managers (i.e. yard manager)	
Professional occupations (i.e. instructor, jockey)	
Associate professional and technical occupations (i.e. therapist)	
Administrative and secretarial occupations	
Skilled trades occupations (i.e. farrier, groom)	
Sales and customer service occupations	
Other	

If 'Other' please specify: _____

C7a. Are any of these vacancies proving hard to fill?

Yes	1
No [Go to C9]	2
Don't know [Go to C9]	3

C7b. How many of these vacancies are proving hard to fill?

*[SPECIFY THE **NUMBER** OF VACANCIES IN EACH OCCUPATION BUT READ OUT ONLY THE CATEGORIES APPLICABLE AS PER RESPONSE TO C6]*

Managers (i.e. yard manager)	
Professional occupations (i.e. instructor, jockey)	
Associate professional and technical occupations (i.e. therapist)	
Administrative and secretarial occupations	
Skilled trades occupations (i.e. farrier, groom)	
Sales and customer service occupations	
Other	

If 'Other' please specify: _____

C8. If you have a hard to fill vacancy, what do you feel are the main causes?

PROMPT IF NECESSARY – CODE ALL THAT ARE MENTIONED

Too much competition from other employers	1
Lack of interest in this type of job	2
Terms and conditions for the post are considered unsuitable	3
Applicants lack the required skills/experience	4
Applicants lack relevant qualifications	5
Applicants lack the required attitude and motivation	6
Low pay and benefits compared to other types of work	7
Limited career progression/prospects	8
Working conditions	9
Job entails unsociable hours	10
Remote location/poor transport	11
Other	12
Don't Know	13

If 'Other' please specify: _____

C9. To what extent do you agree or disagree with the following statements?

READ OUT – CODE ONE ANSWER PER STATEMENT ONLY

	Agree strongly	Agree	Disagree	Disagree strongly
<i>"When looking to take on new recruits, we have problems finding people with the skills that we need"</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>"The education system does not supply enough people equipped with the skills they need to start working with us"</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>"Holding on to valued members of staff presents us with a significant problem"</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>"Potential recruits have unrealistic expectations of the job / industry"</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C10. What skills, if any, have you found lacking from applicants?

PROMPT IF NECESSARY – CODE ALL THAT ARE MENTIONED

None	1	Office administration skills	9
Management skills	2	Literacy skills	10
Technical, practical or job specific skills	3	Numeracy skills	11
Communication skills	4	Foreign language skills	12
Customer handling skills	5	Common sense	13
Team working skills	6	Ability to transport horses	14
Problem solving skills	7	Other	15
IT skills	8	Don't know	16

If 'Other' please specify: _____

SECTION D. SKILLS ISSUES AMONGST CURRENT WORKFORCE

D1. To what extent do you agree or disagree with the following statement?

READ OUT – CODE ONE ANSWER PER STATEMENT ONLY

	Agree strongly	Agree	Disagree	Disagree strongly
<i>"My current staff have the skills they require to undertake their roles proficiently"</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

D2. What skills, if any, do you feel your staff lack proficiency in?

READ OUT – CODE ALL THAT ARE MENTIONED

All staff are fully proficient [go to section E]	1	Office administration skills	9
Management skills	2	Literacy skills	10
Technical, practical or job specific skills	3	Numeracy skills	11
Communication skills	4	Foreign language skills	12
Customer handling skills	5	Common sense	13
Team working skills	6	Ability to transport horses	14
Problem solving skills	7	Other	15
IT skills	8	Don't know	16

If 'Other' please specify: _____

D3. What are the main causes of some of your staff not being fully proficient?

DO NOT READ OUT – CODE ALL THAT ARE MENTIONED

Failure to train and develop staff	1
Recruitment problems	2
High staff turnover	3
Inability of workforce to keep up with change	4
Lack of experience or staff having been recently recruited	5
Staff lack the right attitude and motivation	6
Other	7
Don't know	8

If 'Other' please specify: _____

D4. Which of the following outcomes result from staff not being fully proficient?

READ OUT – CODE ALL THAT ARE MENTIONED

Lose business or orders to competitors	1
Delay developing new products or services	2
Have difficulties in meeting quality standards	3
Increasing operating costs	4
Have difficulties introducing new working practises	5
Increase workload for other staff	6
Outsource work	7
No problems	8
Other	9
Don't know	10

If 'Other' please specify: _____

D5. What action, if any, is the business taking to overcome the fact that some of the staff are not fully skilled in their job roles?

DO NOT READ OUT – CODE ALL THAT ARE MENTIONED

Increase training activity/spend or increase/expand trainee programmes	1
Increase recruitment activity/spend	2
More staff appraisals/performance reviews	3
Implementation of mentoring/buddying scheme	4
More supervision of staff	5
Nothing	6
Other	7
Don't know	8

If 'Other' please specify: _____

SECTION E. TRAINING ACTIVITY AND DEVELOPMENT

E1. What percentage of your staff have an annual performance review? %

ESTIMATE IF NECESSARY

E2. Does your business have a specific budget for training expenditure?

Yes	1
No	2
Don't know	3

E3. Has your business arranged any training for staff in the last 12 months, whether on or off the job?

Yes	1
No [Go to E8]	2
Don't know [Go to E8]	3

E4. What type of on the job training was arranged for staff?

READ OUT - CODE ALL THAT APPLY

On the job training	
Supervision of colleagues	1
Shadowing	2
Other (state below):	3

PROMPT: Opportunity to add further elaboration on training provided:

E5. What type of off the job training was arranged for staff?

READ OUT - CODE ALL THAT APPLY

Off the job training	
Conference or seminar (please provide further details)	1
Training course (please provide further details)	2
Other (state below):	3

PROMPT: Opportunity to add further elaboration on training provided:

E7. Do you formally assess whether the training and development received by an employee has had an impact on their performance?

READ OUT – CODE ONE ONLY

Yes [Go to E9]	1
No [Go to E9]	2
Don't know [Go to E9]	3

E8. If you stated that you have not arranged/funded any training for your staff over the past 12 months, what are the main reasons for this?

PROMPT IF NECESSARY – CODE ALL THAT APPLY

All staff are fully proficient	1
The courses we're interested in are not available locally	2
Difficulty getting information about courses available locally	3
The quality of the course or course providers is not satisfactory	4
The start dates or times of the courses are inconvenient	5
External courses are too expensive	6
Employers can't afford to release staff for training	7
Managers/employers are too busy to organise or provide training	8
Employees are too busy to attend training	9
Other(please state)	10
Don't know	11

If 'Other' please specify: _____

E9. If you could have done, would you have provided MORE training for your staff than you were able to over the last 12 months?

DON'T READ OUT-CODE ONE ONLY

Yes	1
No	2
Don't know	3

E10. What barriers have there been preventing your business from providing more training to employees over the last 12 months?

PROMPT IF NECESSARY – CODE ALL THAT APPLY

Lack of funds/training is expensive	1
Can't spare more staff time	2
Staff not keen	3
Lack of provision (geographical issue)	4
A lack of appropriate training/qualifications in the area we need	5
Hard to find the time to organise training	6
Lack of knowledge about training opportunities and suitable courses	7
Other (please state)	8
Don't know	9
None	10

If 'Other' please specify: _____

E11. In looking to the future, what training do you envisage will be needed by your staff over the next 12 months?

SECTION F. INDUSTRY PERFORMANCE

The following information will enable us to estimate the value of the equine industry to the UK economy and to evaluate the industry's performance in light of the recent recession.

F1. Would you mind telling us in which of the following bands your business's turnover fell into for the last 12 month period, or your last accounting year?

READ OUT – CODE ONE ONLY

Less than £25,000	1	£250,000 to £500,000	5
£25,000 to £50,000	2	£500,000 to £1 million	6
£50,000 to £100,000	3	£1 million to £5 million	7
£100,000 to £250,000	4	£5 million +	8

F2. Over the last 12 months and after taking into account inflation, has your business's total sales turnover:

READ OUT – CODE ONE ONLY

Increased a lot (up by more than 10%)	1
Increased slightly (up by between 0-10%)	2
Remained the same	3
Decreased slightly (down by between 0-10%)	4
Decreased a lot (down by more than 10%)	5
Been in operation less than 12 months	6
Don't know	7

F3. Thinking about the next 12 months, and after taking into account inflation, do you expect that your business's turnover will:

READ OUT – CODE ONE ONLY

Increase by a lot (up by more than 10%)	1
Increase slightly (up by between 0-10%)	2
Remain the same	3
Decrease slightly (down by between 0-10%)	4
Decrease a lot (down by more than 10%)	5
Don't know	6

SECTION G. MEMBERSHIP ASSOCIATIONS

G1. Do you belong to any membership bodies, and if so, which ones?

READ OUT IF NECESSARY – CODE ALL THAT ARE MENTIONED

British Dressage	1	Association of British Riding Schools	12
British Eventing	2	British Equestrian Trade Association	13
British Show Jumping Association	3	Scottish Equestrian Association	14
British Horse Society	4	Riding for the Disabled (including carriage driving)	15
The Pony Club	5	British Horseball Association	16
British Equestrian Vaulting	6	Mounted Games Association of Great Britain	17
British Horse Driving Trials Association	7	UK Polo Cross Association	18
		British Driving Society	19
British Reigning	8	National Trainers Federation	20
British Grooms Association	9	Other	21
Endurance Great Britain	10	None	
Thoroughbred Breeders Association	11		

If 'Other' please specify: _____

G2. How might an equine employers' association be useful and beneficial to you and your business?

G3. If there was an equine employers' association, would you be interested in joining this?

DON'T READ OUT – CODE ONLY ONE

Yes	1
No	2
Don't know	3

That is the end of the questionnaire. Thank you for taking part in this survey. The information you provide will be treated with the strictest confidence.-END-

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SURVEY FOR EMPLOYEES WORKING IN THE EQUINE INDUSTRY

This survey is your chance to have your say about what it is like to work in the equine industry.

We want to be able to represent the equine industry as well as we possibly can, and to do this we need to know the types of people who are employed within the industry and their opinions.

The survey should only take you between 5 and 10 minutes and once you have completed it you will have the opportunity to be entered into a prize draw to win 2 tickets to the British Open Show Jumping Championships on Wednesday 7th April 2010 at the NEC in Birmingham.

If you have any questions about this research or the work that Lantra does, please contact Kate McCarthy on 02476 696996 extension 237 or at kate.mccarthy@lantra.co.uk

SECTION A: EMPLOYEE INFORMATION

A1. Are you...?

Male Female

A2. Which age group do you fall into?

Under 21 26 - 30 36 - 44 55 - 64
 21 - 25 31 - 35 45 - 54 Over 65

A3. What is your nationality?

A4. Are you...?

An employee Self-Employed / Freelance

A5. How long have you been working in the equine industry?

Less than 6 months 2 - 3 years 10 -15 years
 6 months - 1 year 3 - 5 years Over 15 years
 1 - 2 years 5 - 10 years

A6. What do you like best about working in the equine industry?

A7. What do you like least about working in the equine industry?



SECTION B: EMPLOYMENT INFORMATION

B1a. What is your main job?

- | | | |
|--|--|---|
| <input type="checkbox"/> Yard / stable duties | <input type="checkbox"/> Travelling competition horses | <input type="checkbox"/> Exercising horses |
| <input type="checkbox"/> Training/competing horses | <input type="checkbox"/> Rehabilitation | <input type="checkbox"/> Stud work |
| <input type="checkbox"/> Administration | <input type="checkbox"/> Instructing/coaching | <input type="checkbox"/> Facilities maintenance |
| <input type="checkbox"/> Other (please state) | <input type="text"/> | |

B1b. What discipline do you work in? (i.e. dressage; show jumping etc)

B2. Do you have an annual performance review/appraisal with your employer?

- Yes No Don't Know

B3. Do you have a written contract of employment?

- Yes No Don't know

B4. Do you have accommodation provided with your job?

- Yes No

SECTION C: SKILLS AND TRAINING

C1a. Have you received any training from your employer in the last 12 months?

- Yes No

C1b. If yes, what training was this?

C2a. Is there any training you feel you need?

- Yes No

C2b. If yes, what training do you feel you need?

C3. What qualifications do you currently have? (relevant to the equine sector)

C4. Are you a working pupil?

- Yes No Don't know



C5. Are you on an apprenticeship?

Yes No Don't know

C6a. Are you currently enrolled on a course with a college or training provider?

Yes No

C6b. If so, what course is this?

SECTION D: THE INDUSTRY

D1. Are you a member of any of the following membership bodies?

- | | |
|---|---|
| <input type="checkbox"/> British Dressage | <input type="checkbox"/> Endurance Great Britain |
| <input type="checkbox"/> British Driving Society | <input type="checkbox"/> Mounted Games Association of Great Britain |
| <input type="checkbox"/> British Equestrian Vaulting | <input type="checkbox"/> National Association of Stable Staff |
| <input type="checkbox"/> British Eventing | <input type="checkbox"/> Riding for the Disabled (including carriage driving) |
| <input type="checkbox"/> British Grooms Association | <input type="checkbox"/> Scottish Equestrian Association |
| <input type="checkbox"/> British Horse Driving Trials Association | <input type="checkbox"/> The Pony Club |
| <input type="checkbox"/> British Horse Society | <input type="checkbox"/> Thoroughbred Breeders Association |
| <input type="checkbox"/> British Horseball Association | <input type="checkbox"/> UK Polocrosse Association |
| <input type="checkbox"/> British Reining | <input type="checkbox"/> None |
| <input type="checkbox"/> British Show Jumping Association | <input type="checkbox"/> Other (please state) <input type="text"/> |

D2. How long do you plan to stay in the equine industry?

- | | |
|--|--|
| <input type="checkbox"/> For the rest of my career | <input type="checkbox"/> Another 2 years |
| <input type="checkbox"/> Not sure but I will leave at some point | <input type="checkbox"/> Another 12 months |
| <input type="checkbox"/> Another 10 years | <input type="checkbox"/> I am looking to leave at the moment |
| <input type="checkbox"/> Another 5 years | |

D3. Do you feel you have the opportunity to progress within your current job?

Yes No

SECTION E: FINANCIAL INFORMATION

E1. How many hours do you work per week?

E2. How much do you get paid per week (after tax deductions)?

- | | | |
|--|--|--|
| <input type="checkbox"/> Less than &#pound;100 | <input type="checkbox"/> &#pound;101 - &#pound;150 | <input type="checkbox"/> &#pound;151 - &#pound;200 |
| <input type="checkbox"/> &#pound;201 - &#pound;250 | <input type="checkbox"/> &#pound;251 - &#pound;300 | <input type="checkbox"/> More than &#pound;300 |
| <input type="checkbox"/> Other / Paid in kind (please state) | <input type="text"/> | |



E3. Before working in the equine industry, is this wage what you would have expected?

Yes No

E4. Who pays your tax and national insurance?

Your employer You Don't know

E5a. Do you have a Personal Accident Insurance Policy to protect you if you are injured at work?

Yes No Don't Know

E5b. If so, who pays for this?

You Your Employer Don't know

SECTION F: PRIZE DRAW

If you would like to be entered into a draw to win 2 tickets to the British Open Show Jumping Championships on the 7th April 2010 please complete your contact details in the boxes below:

Name: _____

Email: _____

Telephone Number: _____

THANK YOU FOR TAKING PART IN THIS SURVEY



Appendix C – Equine business issues

Business issue	Main issues	Impact on skills and business requirements
Legislation	<ul style="list-style-type: none"> • Compliance with/pro-active support for new legislation, e.g. with reference to the impending Livery Yard, Sanctuary licensing and Transport legislation (Vehicle Operational Standards Authority), equine passport. 	<ul style="list-style-type: none"> • Increased awareness and understanding of the potential requirements of a licensed livery yard and equine sanctuary. Awareness of the Code of Practice for Livery Yards²² produced by British Equine Veterinary Association (BEVA), British Horse Society (BHS), The Royal Society for the Prevention of Cruelty to Animals (RSPCA), International League for the Protection of Horses (ILPH) on behalf of the horse industry. • Ensure livery yard managers are equipped with appropriate knowledge and skills. • Increased understanding of VOSA regulations and certification required for transporting horses. • Transport Awareness course; Delivered by Road Haulage Association²³ (in association with Horse and Hound and the British Horse Society).
Economic conditions	<ul style="list-style-type: none"> • Negative impact of economic downturn on income from horse owners, riding centre clients and tourists; threat to riding centres, livery yards and trekking centres. 	<ul style="list-style-type: none"> • Increased awareness of business diversification opportunities and training available to support this. <ul style="list-style-type: none"> ○ Training opportunity with Business Link ○ Is4profit provides free small business advice and information. • Knowledge of how to offer Apprenticeships to give businesses a practical and effective way to develop staff without the need for expensive training courses or taking time away from the work place. • Marketing, risk management, financial and business management skills.

²² <http://www.newc.co.uk/advice/Codeofpracticeforliveryyards-Sept2006.pdf.pdf?PHPSESSID=65428578187e12e96812c8231474b9a6>

²³ www.rhaonline.co.uk/courses

<p>Contribution to the economy</p>	<ul style="list-style-type: none"> •Lack of awareness/ recognition of industry's contribution to the economy. •Diverse industry with lack of strong, unified voice. 	<ul style="list-style-type: none"> • Better collation and dissemination of information to secure improved awareness and understanding of the equine industry's major contribution to the economy (i.e. tourism, sport, leisure, trade associations, transport, competition/events/race meetings, betting etc.). • Knowledge of reports and research completed as a result of this; Economic Impact Study of British Racing, Scottish Equestrian Association Report, British Equestrian Trade Association Equestrian Survey. • Improved awareness/understanding and campaigning skills (including training) of the wider contribution individual equine businesses bring to the economy. • Lantra to strengthen links with Skills Active and People First to improve recognition of equine as a sport and leisure industry.
<p>Funding for training</p>	<ul style="list-style-type: none"> • Lack of funding and access to training for individuals wanting to achieve their equine specific qualifications, especially those aged 19+. This can pose a range of problems for equine businesses such as riding centres where qualified BHS instructors help businesses meet Health and Safety Executive (HSE), licensing and insurance requirements. 	<ul style="list-style-type: none"> • Improve business management skills and campaigning skills. • Training support which values employees of all ages. Utilise government back to work schemes to encourage businesses to invest in new staff. • Ensure qualifications in demand are on the Qualifications Credit Framework (QCF) to improve chances of attracting funding. • Better information dissemination on the range of funding available.
<p>Staff turnover</p>	<ul style="list-style-type: none"> • High staff turnover where the average age of employees is 16-34. • 71% of employers report difficulties in holding onto staff. • Employer vacancies are hard to fill mainly due to the applicants' lack of required skills and unrealistic expectations. 	<ul style="list-style-type: none"> • Business management and people management skills. • Promote the business benefits of the value of training staff and offering progression opportunities to employees. • Bite size employer/business management courses bespoke to equine businesses covering staff development, employment law, Health & Safety risk management.

		<ul style="list-style-type: none"> • Equine Apprenticeship.
Equine courses	<ul style="list-style-type: none"> • Poor 'fit' of mainstream skills development, training and work-based learning with industry requirements. • Inappropriate targeting of mainstream skills development funding, e.g. college diplomas not matching industry requirements. • Impacts on recruitment and retention of staff. 	<ul style="list-style-type: none"> • Increased awareness and understanding of National Occupational Standards, QCF and Apprenticeship Frameworks. • Support to improve fit of provision to industry requirements in the interim for bespoke/project-based skills development initiatives. • Student destination information needed to support evidence of this. • Inform businesses and employers of courses and training opportunities available which are relevant and current (i.e. through Coursefinder).
Age of proprietors	<ul style="list-style-type: none"> • Average age of proprietors and equine business managers is 45 – 54. 	<ul style="list-style-type: none"> • Increased opportunities for new equine business owners; Business Start Up support and training. • Licensing of livery yards and sanctuaries; increase opportunity for younger people with higher level skills and qualifications to gain management positions. • Support to improve 'fit' of higher level provision to industry requirements.
Equine welfare	<ul style="list-style-type: none"> • Equine welfare suffering as a result of the current economic climate. • Horse owners are turning to cheaper 'livery' alternatives and those that are not able to afford the upkeep of their horses are turning to sanctuaries which are becoming saturated. This is more prevalent in Northern Ireland. • Racing has also been affected as horses become more difficult to sell. • High fuel and energy costs have meant an increase in the price of feed and bedding. 	<ul style="list-style-type: none"> • Access to training for finance management, business management and planning especially in relation to equine welfare charities and equine proprietors. • Livery yard licensing, improve standards, reduce welfare issues, awareness of the equine industry welfare guidelines compendium amongst equine business managers, horse owners and welfare officers. • Training courses required for equine welfare officers. • Equine sanctuaries would benefit from training around fund raising and marketing. • All equine businesses would benefit from bite sized, easily accessed (online or at premises) courses such as sales and marketing, quality and continuous improvement, leadership and management, finance management, change management,

		<p>customer service.</p> <ul style="list-style-type: none"> • Improve knowledge of pasture management to extend the grazing periods and reduce costs in additional feeding. • Knowledge of alternative feeding systems (hydroponics).
Equine infectious anaemia	<ul style="list-style-type: none"> • Increasing threat of equine infectious anaemia with increased international transportation of horses and climate change. • Lack of disease management procedures in place. 	<ul style="list-style-type: none"> • Increased awareness and knowledge of equine infectious anaemia, how to recognise and procedures for prevention of disease spread. • Industry applying appropriate management practices and biosecurity in order to mitigate any possible exposure. • Business and horse owners to refer to: <ul style="list-style-type: none"> ○ Equine Industry Welfare Guidelines Compendium for Horses, Ponies and Donkeys ○ Code of Practice for the Welfare of Horses, Ponies, Donkeys and their Hybrids (Defra). • Short courses on disease prevention and management i.e. <i>The Open College of Equine Studies, short course in Equine Injury, Disease and Recovery.</i> • Ensure staff have the skills to care for horses and follow the correct procedures in disease management. Training solutions may include: <ul style="list-style-type: none"> ○ <i>Level 2 Certificate, Extended Certificate and Diploma in Horse Care (0079-02)</i> ○ <i>Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma</i> ○ <i>BHS Stage 1 Horse Knowledge and Care</i> ○ <i>BHS Stage 2 Horse Knowledge and Care.</i>
Insurance costs	<ul style="list-style-type: none"> • Equine businesses are facing increasingly high insurance costs due to risk of litigation. • Equine businesses also face high 	<ul style="list-style-type: none"> • Information and training on risk management skills, health and safety: <ul style="list-style-type: none"> ○ <i>Level 2 Certificate in Safe Working in the Equine</i>

	<p>business rates compared to turnover making it hard to expand.</p>	<p><i>Industry (NPTC),</i></p> <ul style="list-style-type: none"> ○ <i>Livery Yard Management E, Lingfield Instructor Group</i> ○ <i>Businesses to refer to the British Equestrian Health and Safety Association.</i> <ul style="list-style-type: none"> ● Improved equine awareness for health and safety enforcement officers. ● Information collation and dissemination to lobby against business rates. ● Introduction of an employer representative organisation to improve support and structure of the industry as with racing.
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Lantra

Lantra is the Sector Skills Council supporting skills, training and workforce development for businesses in the environmental and land-based sector. We are committed to helping everyone access the training, qualifications, skills and knowledge they need for business success and to develop their career.

We are an independent, UK-wide organisation that is owned and managed by our industries, which are grouped around land management and production, animal health and welfare and environmental industries.

We lead the way in understanding our industries' future skills and business needs. We work together with trade organisations, unions, training providers, governments and many more to maximise investment in skills.

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