

The equine industry primarily includes riding schools, livery yards, racing, training and competition yards, equine welfare, breeding and stud businesses, producing, breaking and schooling and horse sales businesses. This factsheet provides an analysis of data for the equine industry collected by Lantra and taken from official sources.

Overview

It should be noted that Lantra's work also covers farriers and paraprofessionals which are identified as a separate industry. As such there may be a small overlap between the data presented here, and that in our factsheet for farriery.

Equine is covered by several SIC (Standard Industry Classification) codes and therefore it is difficult to ascertain an accurate size of the industry. In 2010, Lantra conducted primary research into the equine industry¹ including the size of the industry to try and address this challenge, however there still are 'hidden' equine businesses that are not included in our figures.

Business figures:

- Lantra primary research indicates that there are 19,000 equine businesses in the UK¹.

Employment figures:

- Lantra primary research indicates that there are 41,000 equine employees in the UK¹.

Businesses by size:

- Equine businesses have a slightly smaller than average business size; 85% have fewer than ten members of staff, and 14% have between ten and 49 employees compared with 83% and 14% across all businesses in the UK¹.

	Equine UK ¹	All sectors UK ²
0-4 employees	59%	68%
5-9 employees	26%	15%
10-49 employees	14%	14%
50+ employees	1%	3%

Size and scope

Nation/Region	Businesses ^{1,3,4}		Employment ^{1,3,4}	
UK	19,000	100%	41,220	100%
Northern Ireland	190	1%	500	1%
Scotland	1,310	7%	2,210	5%
Wales	1,030	5%	1,570	4%
England	16,340	87%	36,550	90%
East of England	2,450	15%	6,560	18%
East Midlands	1,580	10%	2,720	7%
London	430	3%	1,450	4%
North East	590	4%	1,170	3%
North West	1,500	9%	2,620	7%
South East	3,910	24%	9,720	27%
South West	2,650	16%	4,710	13%
West Midlands	1,580	10%	4,150	11%
Yorkshire and the Humber	1,640	10%	3,450	9%



Workforce demographics^{1,4}

Gender			
Male	30%	Female	70%
Age band			
16-24	30%	45-54	14%
25-34	27%	55-64	7%
35-44	19%	65+	3%
Employment			
Full-time	67%	Part-time	33%
Ethnicity			
White	94%	Non-white	6%
Paid/unpaid staff			
Paid	93%	Unpaid	7%
Occupations			
Managers and senior officials (e.g. practice managers)	23%		
Professional occupations (e.g. veterinary surgeon)	18%		
Administrative, clerical and secretarial occupations	4%		
Skilled trade occupations	24%		
Sales and customer service occupations	6%		
Other	25%		

- Lantra primary research into the equine industry found that 83% of businesses produced turnovers in the last 12 months of £250,000 or less
- 42% of businesses said turnover had decreased in the last 12 months and 38% of businesses expected turnover to increase in the next 12 months.

Principal activity			
Riding school	38%	Producing ^{***}	5%
Livery yard	26%	Trekking	4%
Training/competition yard*	9%	Breaking/schooling	2%
Welfare ^{**}	6%	Horse sales	1%
Breeding/stud	6%	Other	4%

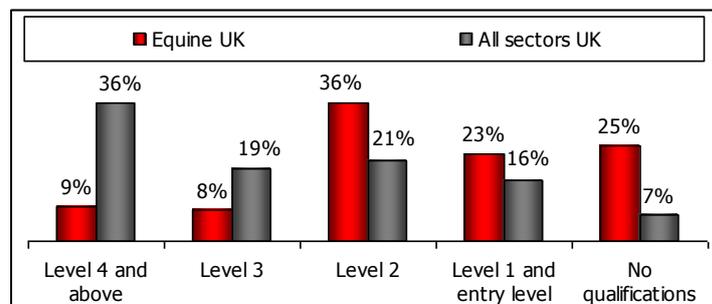
* Includes racing

** 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.

Qualifications⁵

- The equine workforce is highly skilled but is often developed through non-accredited training methods, rather than full-accredited qualifications and is frequently not officially recognised
- Official statistics show 9% of the workforce are qualified to Level 4 and above (compared to 36% across all sectors in the UK) and 25% have no qualifications (compared to 7% across all sectors in the UK).



Learning supply

- Around 1350 apprentices undertook a framework in equine related studies in 2007-08 in the UK
- An estimated 13,000 learners enrolled on qualifications or courses delivered by FE colleges/work-based learning in equine related studies in the UK in 2008-09⁶; popular qualifications include the NVQ in Horse Care and the BTEC National Diploma in Horse Management
- The industry had an estimated 1,350 learners undertaking related qualifications at Higher Education Institutions in the UK in 2008-09⁷.

Employment projections 2010-20^{8,10}

- In the next ten years (2010 to 2020) the sector will need a minimum of 10,000 more people
- The largest need for people is expected to be for managerial occupations (2,000), skilled trades occupations (2,000), sales and customer service occupations (2,000) and elementary occupations (2,000)
- Over the period 2010-20, the following amount of people will be needed:
 - 2,000 people at Level 4 (graduate)
 - 2,000 people at Level 3 (A Level)
 - 2,000 people at Level 2 (GCSE A-C)
 - 2,000 people at Level 1 (GCSE D-G)
- Forecasts suggest that 1,000 people without qualifications will be needed.

Incidence of skills shortage vacancies

12% of equine businesses had a vacancy at the time they were surveyed.

	Equine industry ¹	Lantra sector ⁹	All sectors ⁹
% of businesses with a vacancy	12%	7%	12%
Vacancies as a % of employment	3%	2%	2%
% of businesses reporting a hard-to-fill vacancy (HtFV)	8%	3%	3%
HtFVs as a % of total vacancies	71%	43%	22%

- The most common reasons for HtFVs given by businesses were 'applicants lacked required skills/experience' (23%) and 'lack of interest in this type of job' (18%)
- The most common skills employers felt were lacking in applicants were 'technical, practical or job specific skills' (18%) and 'common sense' (17%)
- 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.

Incidence of skill gaps

- The incidence of skill gaps reported in the UK equine industry is low at 2%, compared to 15% for the land-based and environmental sector in England
- Of businesses 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 among their staff members
- The main cause attributed by employers for skill gaps among 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.



Economic conditions

- Impact of the recession (e.g. costly veterinary expenses, licences, rates, insurance, reduced income)
- Understanding/responding to change in demand
- Additional business costs e.g. fuel/energy/feed/bedding and equipment.

Impact on skills

- Increased awareness and training for business diversification opportunities
- Business advice, guidance and support
- Business and risk management skills
- Sales and marketing; ICT and commerce.

Lack of recognition for industry

- Lack of awareness/recognition of industry's contribution to the economy
- Diverse industry with lack of strong/unified voice.

Impact on skills

- Improve awareness and understanding of the equine industry's major contribution to the economy
- Improve awareness of reports and research
- Campaigning skills to demonstrate the wider contribution equine businesses bring to the economy.

Legislation

- Compliance with existing legislation
- The need for new legislation.

Impact on skills

- Increased understanding of transportation regulations
- Increased awareness of the potential requirements of the licensing of equine establishments
- Awareness of the Code of Practice for Livery Yards.

Access to funding

- Lack of funding and access to training for equine specific qualifications, especially 19+
- Funding for Welsh and Scottish students studying in England then returning to a Welsh/Scottish employer.

Impact on skills

- Better business management and campaigning skills
- Training support which values employees of all ages and UK-wide funding opportunities
- Ensure qualifications are on the Qualifications Credit Framework to improve chances of attracting funding
- Better information dissemination on funding available.

Labour supply

- Attracting skilled new entrants of all ages
- Succession planning by industry
- Providing opportunities for progression/development.

Impact on skills

- Promote benefits of training staff and offering progression opportunities
- Bite-sized employer/business management courses bespoke to equine businesses
- Improve employer awareness of the benefits of Equine Apprenticeship
- Increased opportunities for new equine business owners; business start up support and training
- Improve 'fit' of higher level provision to industry
- Better careers advice and guidance for all
- Proper recognition of competence for all
- Integrated frameworks to support lifelong learning and Continued Professional Development (CPD).

Training issues

- Poor 'fit' of mainstream skills development, training and work-based learning with industry requirements
- Inappropriate targeting of skills development funding
- Impacts on recruitment and retention of staff.

Impact on skills

- Increase awareness and understanding of National Occupational Standards, Qualifications and Credit Framework and Apprenticeship Frameworks
- Improve fit of provision to industry requirements for bespoke/project-based skills development initiatives
- Student destination information needed.

Exotic diseases

- Increasing threat of exotic diseases with increased transportation of horses and climate change
- Lack of disease management procedures in place.

Impact on skills

- Increased awareness/knowledge of exotic diseases and disease prevention/management
- Industry applying appropriate management practices and biosecurity in order to mitigate exposure
- Increase awareness of Horse Betting Levy Board Codes of Practice on Equine Diseases
- Disease identification, control and biosecurity skills.

Equine health and welfare

- Horse owners turning to cheaper 'livery' alternatives
- Increase in horses being taken to sanctuaries
- Horses become more difficult to sell
- High fuel/energy costs led to high feed/bedding costs
- Higher standards required of all people handling animals i.e. animal welfare and enforcement officers.

Impact on skills

- Access to training for horse owners
- Campaign for licensing or registration of all equine establishments to improve standards
- Improve awareness of the Equine Industry Welfare Guidelines Compendium
- Training for equine welfare and enforcement officers
- Training around sanctuary fundraising/marketing
- Skills relating to horse handling and care
- Improve knowledge of pasture management and feeding systems
- Recognition of competence i.e. Equine Skills CV.

Increasing costs

- Increasing insurance costs due to risk of litigation
- High business rates compared to turnover.

Impact on skills

- Information and training on risk management skills
- Awareness for health and safety enforcement officers
- Campaigning skills to lobby to reduce business rates
- Introduction of employer representation organisation.

Sources and information

- 1 A study into the Business and Skills Requirements of the UK Equine Industry, Lantra 2010
- 2 Inter-Departmental Business Register (IDBR) 2010
- 3 Figures have been rounded to the nearest ten and may not add up to the total due to the rounding of percentages used when calculating figures. Figures quoted for the nine English regions make up the England total
- 4 Percentages may not add up to 100% due to rounding
- 5 Labour Force Survey (LFS) 2009-10
- 6 Data Service (England), DCELLS (Wales), Skills Development Scotland/Scottish Funding Council (SDS/SFC), DARD/DEL (Northern Ireland)
- 7 Higher Education Statistics Agency (HESA)
- 8 Lantra Model for Employment Forecasting (LMEF) 2010. Figures represent estimates of minimum job openings to satisfy replacement and expansionary demand. This may be higher or lower depending on future conditions.
- 9 National Employer Skills Survey (NESS) 2009.
- 10 Figures have been rounded to the nearest 1,000

More information about Lantra research can be found at:

www.lantra.co.uk/research

Telephone 02476 69 69 96

www.lantra.co.uk/research

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