

A study of the key effects of the horseracing industry on the
North Wessex Downs Area of Outstanding Natural Beauty

March 2007



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Natural Beauty**

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Key findings and recommendations



Key effects and issues arising from the horseracing industry on the North Wessex Downs AONB

Extent of the industry and economic contribution

- The Lambourn area and North Wessex Downs AONB is second in its importance as a centre of activity for the horseracing industry only to Newmarket. It is an industry that defines and attracts visitors and businesses to the Area and the 'Valley of the Racehorse' in particular
- There are 103 businesses that make up the core of the horseracing industry within the AONB. A further 49 businesses were identified within the AONB as being or wanting to be associated with the racing industry. This is a large number of businesses which benefit from being in a horseracing industry cluster.
- About 10% of Britain's racehorse trainers are located in the AONB. There are approximately 3,737 racehorses at training yards, stud farms and liveryes within the NWD AONB.
- It is a significant employer and economic contributor to the local economy. The core businesses employ approximately 1,370 Full-Time Equivalent staff, just over 20% of employment in the agriculture and entertainment sectors in the Area.
- It is estimated that the horseracing industry in the AONB directly contributes £16-38 million per annum of direct Gross Value Added to the economy; however the total economic output of the industry in this area is £30-70 million per annum
- 51% of the core and associated businesses expected to expand in the next 5 years.

Landscape

The key actual and potential landscape effects are:

- Small scale changes to the smooth, rolling landform around new buildings, which cumulatively have an adverse effect on the character of the NWD AONB.
- Creation of new fields and paddocks on previously open downland.
- Loss of woodland and hedgerows, new planting inappropriate, replacement by fencing leads to 'suburbanisation' of landscape.
- Pressure to upgrade minor roads, leading to 'suburbanisation' and loss of sense of place.
- Loss of integrity of historic settlements/hamlets/farmsteads.

Environmental

- The main habitat affected by the industry is chalk grassland on the open downland. Loss or degradation of this valuable habitat is largely historic.
- There are few areas where racehorse activities are where there is the potential for current management practice to damage the biodiversity value.
- It is likely that the presence of the industry has contributed to biodiversity value of the NWD AONB.
- The biodiversity value of land managed as gallops and training areas is poorly known.
- Little information is available concerning the nature and extent of management practices adopted on gallops and training areas.
- The development of best practice guidelines for management, including the enhancement of peripheral areas on gallops and training areas, would help the industry to implement one of the recommendations of the Strategy for the Horse Industry in England and Wales.
- There is also a need to ensure that businesses such as trainers, stud farms and livery stables have access to information regarding practices for the storage, spreading and disposal of waste which minimise impacts on the environment.

Social and community

- Develop a racehorse industry code for motorists
- Carry out a healthcheck of the industry across the NWD AONB. The healthcheck should include a full housing need survey, including an assessment of the specific types of supported housing required. It should record the number of applicants there are for all types of affordable housing.
- Promote joint work with partners, such as Racing Welfare, to maximise the social and other advice channels.
- Carry out a survey to better understand the skills needs of the racehorse industry in the NWD AONB. Develop education and lifelong learning schemes for the industry.

Planning

- The main planning issues for gallops are: impact on landscape (notably railings), materials used and interaction with rights of way.
- The main planning issues for training yards and studs are change of use from training yards to another use, need for on-site accommodation, size and scale of buildings, materials used.
- Other issues are common to developments both rural and urban including accessibility, design and setting.
- There is a lack of consistent dialogue and a lack of evidence in at least some parts of the NWD AONB to support (or constrain) the horseracing industry.

Recommendations to support the horseracing industry

Landscape, biodiversity and the natural and historic environment

- Investigate the impact of the management and intensity of use of gallops primarily on chalk grassland.
- Guidance to horseracing businesses on best practice management of chalk grassland.
- Dialogue with the horseracing industry to identify design solutions to changing horseracing industry requirements which can minimise the impact on the AONB landscapes.
- Site specific studies to identify good and bad practice in conserving and enhancing the landscape.
- Further study to enable a better understanding of the effect of the horseracing industry on settlement pattern and form and to identify how best to accommodate new horseracing industry development within settlements.
- Issue a landscape design statement which local planning officers and applicants can refer to which outlines the development considerations in different landscape types and areas.
- Develop a strategy for better managing horse manure.

Social

- Carry out a health check of the industry to better understand the decision making of employees in the horseracing industry e.g., career plans, motives, training needs, further housing needs. This will help with the provision of suitable support for the industry.
- Produce a country code for the AONB to make visitors to the area aware of the horseracing industry and how to behave around horses.
- Provide greater support for bodies that deal with social issues related to the horseracing industry.

Planning

- Better training for planners on needs and idiosyncrasies of the horseracing industry, for example on training practices and the need for railings along gallops.
- Maintain a horseracing industry related planning database of planning applications and type and use of gallops.
- Compilation of a better evidence base to demonstrate need for development, especially in relation to housing, yard expansion and change of use. This should be developed with the landscape design statement and be available to both planners and the horseracing industry.

There are some clear benefits for encouraging the cluster of horseracing businesses in the North Wessex Downs AONB. The businesses benefit from specialist local services, such as feed suppliers, vets and Jockey Club gallops. The area gains from the employment and economic benefits that the industry brings as well as the less tangible benefits of being associated with a high profile, glamorous sport. Concentration and retention of the horseracing industry within the AONB will help considerably to retain the distinctive landscape character and settlement pattern of the downland areas. However if the nature of the horseracing industry changes to meet future economic demands, either through concentration into larger single units, greater proliferation, or relocation, there is likely to be a considerable effect on the landscape character of parts of the AONB, which will require careful consideration in planning policy and siting and design, and significant social and community effects, on child care, housing, training and skills development, and use of migrant workforce.

Report preparation and limitations

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West Berkshire Council
Wiltshire County Council

Duty of care, liability and responsibility

This report has been prepared for the NWD AONB Council of Partners. No duty of care, liability or responsibility will be accepted to any third party acting or refraining from actions as a result of any material in this report.

Views expressed

The views expressed in this report are those of the report's authors and do not necessarily reflect those of the NWD AONB Council of Partners except where expressly stated.

Information relied on

The authors relied on information and data extracted from various sources, which have been stated and assumed to be reliable. The information and data has been assumed to be true, correct and complete. It has been audited, tested and checked so far as possible.

Information confidentiality

All data used in this report is from publicly available sources apart from that collected through the survey. Survey data is presented in aggregated form to protect the identity and confidentiality of individual respondents.

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Introduction

The North Wessex Downs Area of Outstanding Natural Beauty (NWD AONB) Council of Partners commissioned a study to consider the economic, social and environmental effects of the horseracing industry on the NWD AONB.

The Study should consider current and potential future trends and make recommendations on how the NWD AONB Partnership can support a sustainable future for the horseracing industry i.e. in ways which help to conserve and enhance the natural beauty of the AONB landscape and meet the needs of the industry and communities within the AONB.

Horseracing is very important to the AONB, which contains an internationally renowned horseracing centre, in and around Lambourn. The economic contribution of this centre has been examined before (Price Waterhouse, 1999), as has the industry nationally (Deloitte, 2006). However, its social, environmental and community effects are only partially known. A better understanding of these dimensions will assist suitable economic development and planning policies to be drafted.

Purpose of project

The Study will have the following key outputs:

- A summary of the history of the horseracing industry in the NWD AONB.
- An analysis of the international and national context for the horseracing industry in the NWD AONB and its contribution to the regional and local economy, both directly and indirectly. The analysis will be extended to speculate on future trends in the industry and the potential effects on the NWD.
- A broad survey of the extent of the horseracing industry within the AONB.
- An analysis of the main effects of racehorse related development and activities on the AONB, including its landform, plants and animals, landscape character, landscape features and the history of human settlement, including historic landscape and archaeological features, rural farm buildings and existing towns and villages.
- Analysis of the key social and community problems and needs within the horseracing industry, including its employees.
- A review of the key national, regional and local policy guidance relevant to the NWD AONB (including planning policy), together with an assessment of the key effects of the planning system on the horseracing industry.
- A section setting out broad guidance to seek to ensure that the horseracing industry is a sustainable and vibrant economic and social resource within the NWD AONB.

This is the NWD AONB's initial project on the HRI, which is designed to identify gaps in knowledge and is likely to lead onto further studies.

Methodology

The following methods were used: literature review, a survey of horseracing industry businesses in January to March 2007 (see Appendix 2 for survey form), GIS analysis and two focus groups¹.

Each section of this report contains a brief description of the methodology used in that section.

The horseracing industry is difficult to define. The following businesses were assumed to make up the 'core' horseracing industry and its associated businesses, which were identified from the Thoroughbred Breeders Guide (2006).

Table 1 Core horseracing industry and its associated businesses

Core horseracing industry businesses
Training yards
Stud farms
Livery yards
Farriers
Horse feed and forage suppliers
Veterinary practices
Businesses associated with the horseracing industry
Accountancy and financial
Advertising, PR and video
Bedding
Bloodstock agencies
Computer software
Corporate hospitality
Country and riding wear
Education and training
Equine Therapy and Treatments
Property managers and surveyors
Fencing, Gates and Rails
Gallops and Riding Surfaces
Horseboxes and Trailers
Horse Clothing
Horse Walkers
Hotels and Restaurants
Insurance
Jewellery, Trophies, Gifts and Momentos
Jockey Coaching
Photographers
Racing colours
Recruitment Agency

¹ Planning focus group: 12 planning officers from the planning authorities within the AONB attended.

Social issues focus group: 6 attendees from the following organisations attended (Community Council Berkshire, Hampshire Community Action, Wiltshire Rural County Council, Community Action West Berkshire and Racing Welfare)

Riding Equipment
Saddlers
Sales Preparation
Solicitors
Stabling and Stable Equipment
Transport and Shipping
Travel and Tour Operators
Veterinary Supplies

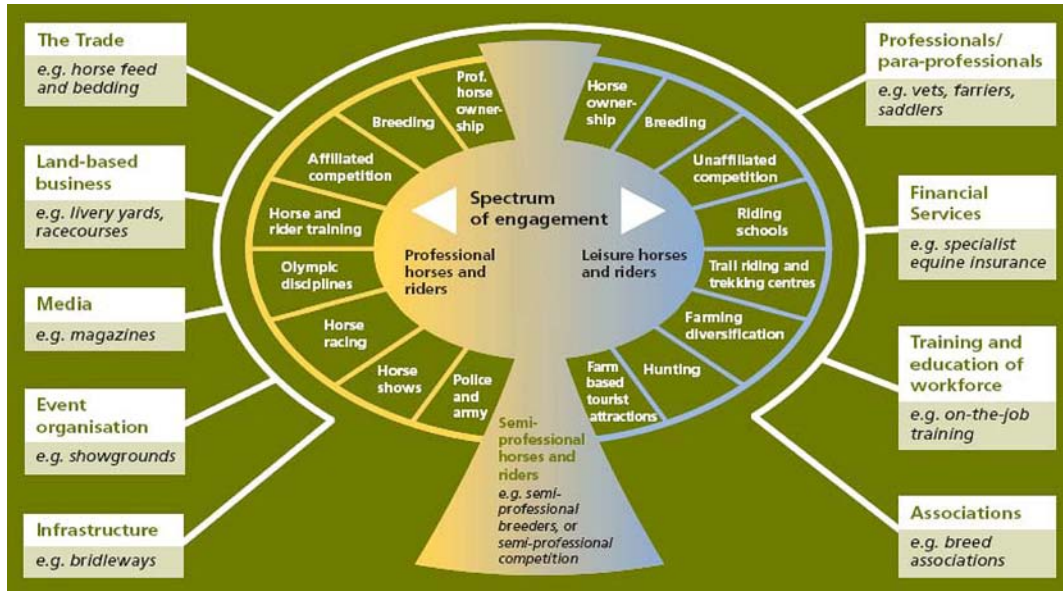
Table 2 Survey response rate by type of business

Type of business	Response	Response No response (%)	Grand Total
Trainer	30	55%	25
Stud	14	61%	9
Livery	6	67%	3
Farrier	1	14%	6
Horse feeds and forage	2	40%	3
Veterinary practice	2	50%	2
Other HRI related businesses	18	37%	31
Grand Total	73	48%	79

The overall response rate was very high for this type of survey, showing commitment from the industry.

Figure 1 sets the racing industry in the context of the wider British horse industry (Defra and the British Horse Industry Confederation, 2004).

Figure 1 The British horse industry



This demonstrates the wider network of interdependencies of the racing industry, the equine industries and the rural economy.

History of the horseracing industry in the North Wessex Downs

The horseracing industry in Britain

Racing in Britain is a sizeable industry, whether measured by employment or by income. Racing and breeding directly employ around 35,500 people, of which 12,000 are full-time (Vamplew and Kay, 2005). When indirect employment is considered, the racing and betting sector employs about 1/8th of the agricultural labour force. It is a highly important employer in the local economies of Lambourn, Epsom, Malton, Middleham and especially Newmarket.

The racing industry generates over £830 million of income including over £230 million from the five million or so visitors to race meetings each year. The visitors also spend £70m off site. It also generates over £150 million in tax (1999 figures; Vamplew and Kay, 2005).

The horseracing industry is inextricably linked to betting. About 28,000 betting industry jobs can be attributed to racing. In 1999 legal off-course betting had a turnover of £5bn, about 70% of betting in the United Kingdom. From this about £58m was returned to racing through the Levy Board (Deloitte, 2006).

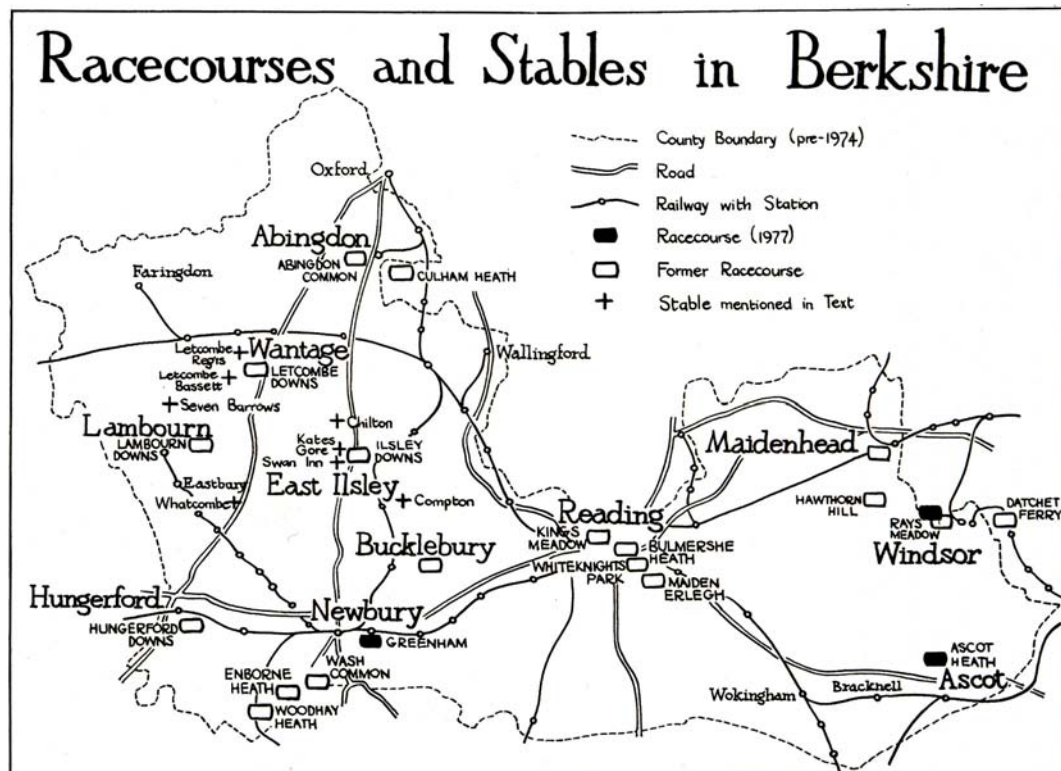
Racing is greatly affected by the state of the national economy, which determines the level of disposable consumer income either for betting or horse ownership. For example, Vamplew and Kay (2005) state that the economic recession between 1990 and 1993 led to an 11% fall in the number of horses in training.

The horseracing industry in the NWD AONB

Although the history of racing dates back several thousand years and the first recorded racing in Britain was at The Roodee, Chester, in 1540, most of its major development in England has taken place during the last three centuries.

In 1777 there were 18 racecourses in Berkshire, Oxfordshire, Surrey, Hampshire and Wiltshire. Two hundred years later, six remain of which three are in Berkshire (see Figure 1). Courses began to close as a lack of money and enclosure of common lands on which some of them were sited made holding the meeting less profitable. Maidenhead held its last meeting in 1787. Lambourn's last races were in 1803 as the Lambourn enclosure prevented further racing and Reading held its last meeting in 1814 (although it was revived in the 1840s). Hawthorn Hill, between Maidenhead and Windsor, survived until 1939.

Figure 2 Racecourses and stables in Berkshire (Reproduced with permission from *The Running Horses. A history of racing in Berkshire from 1740. David Boyd. Berkshire County Libraries. 1978.*)



The 1830s and 1840s revolutionised racing. Horses and spectators were transported to race meetings by carriage and by train. This greatly extended the distances that people could travel to racing. This was the death of some smaller meetings but the saviour of others, such as Ascot. During the 1840s two day meetings were held at Hungerford to the late 1860s when the meetings ended due to dates clashing with other major meetings elsewhere. At Windsor, the modern meeting began in June 1866.

Steeplechasing or national hunt racing was largely a creation of the 19th Century with the first steeplechasing calendar published in 1845. Chases were held at Newbury, Reading and Windsor and Maiden Erlegh.

In 1750 Reading held a three day meeting on Bulmershe Heath, and Lambourn also held annual meetings around this time. The 1771 May card had three £50 plates, one given by Lord Craven, the principal landowner of the area. Lord Craven also sponsored races on the Letcombe Downs near Wantage.

In 1805 a new racecourse was laid out at Enborne Heath at Newbury, but this only lasted until 1811, when the Enclosure Acts caused common land to pass into private ownership. Reading's Bulmershe Heath closed in 1816, Lambourn and Woodhay Heath Newbury closed 1815, and then there were only two racecourses in Berkshire – Ascot and Abingdon. Abingdon closed in 1875, ironically due to race goers travelling further afield as the railway network grew and dates clashed with other race meetings

elsewhere. At Windsor the modern meeting began in June 1866.

Rising costs and demands for newer and better facilities put pressure on independent racecourses and made many close. Racing at Ascot, Newbury and Windsor survived due to innovation in types of races and race meetings held, such as evening meetings and quality of races.

Racing stopped at Newbury in 1916 due to the First World War, during which it was used for many other things, including a prisoner of war camp and a munitions inspections depot. Racing resumed in 1919. During the Second World War, racing stopped from 1941 until 1949, after the Americans had used it as their Main British Supply Depot. Geoffrey Freer was called the course's saviour, as he restored it, and a race was renamed after him in 1969 as the Geoffrey Freer stakes. The Hennessey Gold Cup was moved to Newbury from Cheltenham in 1960.

Racehorse training

The area has been a famous training area for over 150 years, and is the second largest racehorse training area in Britain, after Newmarket. The Duke of Cumberland put Berkshire on the horseracing map in the mid 18th Century and kept racehorses at East Ilsley and also built a stud at Cranbourne Lodge, where he bred famous horses such as Eclipse and Herod.

Training stables were largely a product of the 1800s and it was many years before training racehorses was recognised as a profession (Boyd, 1978). The original trainers were training grooms employed by the owners and usually based at the owners' homes. By the end of the 19th Century, stables had been established all along the Berkshire Downs and in particular around Lambourn. Trainers were not licensed until 1905 but by 1900 it was becoming a respectable profession for gentlemen.

Training took place on the North Wessex Downs because of the free-draining springy chalk turf. This factor is still important but technological innovation around all-weather gallops is making alternative locations beyond the AONB more feasible.

Despite many nearby racecourses, at the time, the Downs were largely cut off from the main racecourses. Transport was a major limiting factor to the development of the training industry around Lambourn. The railway did not reach Lambourn until 1889 (Boyd, 1978).

Lambourn slowly grew - from a few public stables to its peak, with many stables established between 1850 and 1900. The Rothschild horses were the first to be trained at Russley Park in 1853 but the stables were also at one point the base for James Merry's horses, which had great successes until 1875. There were usually at this time around four stables using the Lambourn Downs at any one time, the Mandown Gallops being created by Mr Nugent who owned the land from the 1930s and allowed trainers to use them, thus attracting more trainers to the area. Other centres in the area developed at the same time so stables were established at Ilsley, Wantage, Letcombe Bassett, Compton, Chilton and Whatcombe, and wider afield in North Hampshire and East Wiltshire, where the racecourse at Marlborough was in use from 1730 until 1873. (Boyd, 1978). Alec Taylor developed and operated stables at Manton House between 1869 and 1927, which was later owned by Robert Sangster and is now occupied by Brian Meehan.

The first event that drew attention to Lambourn was when the 1855 Derby was won by Wild Dayrell but its reputation was cemented by the National Hunt trainers Fulke Walwyn and Fred Winter, who won a series of Cheltenham Gold Cups, Champion Hurdles and Grand Nationals; together they won over 3,500 races from their Saxon Yard and Uplands yards. The area also has a strong history of successful flat racing training, notably Peter Walwyn, Barry Hills, Jamie Osbourne, Brian Meehan, Marcus Tregoning and Henry Candy.

The training grounds in Berkshire received Royal approval in the 1960s, as six of the Queen's yearlings were brought to West Ilsley and trained under Dick Hern. In 1973 the Queen Mother's jumpers went to the Saxon House Stables of Fulke Walwyn in Upper Lambourn.

There are around 500 licensed trainers in Britain (National Horseracing Museum, 1999) and a further 200 permit holders, who may only train their horses or those of their immediate family. The main concentrations of trainers are at Newmarket (2,500 horses in training), Lambourn, and Malton and Middleton in Yorkshire.

Outside Newmarket, the greatest concentration of training yards is at Lambourn, known as the 'valley of the racehorse'. There were 23 training establishments in Lambourn in 1976. (There are now 25 trainers in and around Lambourn Ward (Smiths Gore et al survey, 2007)). The railway reduced in its importance to racing as motorised horse boxes were used. Horse box building became a major local industry for Lambourn. Vamplew and Kay (2005) claim that Lambourn has six all-weather tracks as well as over 600 acres of traditional turf. They claim that the 700-800 people are probably directly employed in racing in the immediate vicinity of Lambourn, which is about half the population, with a similar number providing services to racing.

The survey carried out for this report has identified 55 trainers in the AONB. It has also identified about 1,400 people directly employed by racing in the AONB (excluding those in 'associated' businesses) (see section on Extent of the industry).

In 2005, Jockey Club Estates Limited purchased the Mandown Gallops in Lambourn, including 500 acres of grass and all weather gallops and training areas, which they have been improving. These gallops are used by many local trainers, both regularly and occasionally.

The National Trainers Federation and The Stable Lads Association are based in Lambourn and the Jockeys Association is based at Newbury. The North Wessex Downs has played a major part in the history of horseracing in Britain.

Extent of the industry

The Lambourn area and North Wessex Downs AONB is second in its importance as a centre of activity for the horseracing industry only to Newmarket.

It is predominantly a training area but there are also breeding (stud farms) and livery businesses.

Due to the cluster of trainers, a large number and type of dependent activities have also focussed on the area. It is the headquarters for a major horse transport company, Lambourn Racehorse Transport, as well as farriers, large veterinary practices that specialise in equine work and horse feed merchants.

Number of businesses

There are 103 businesses that make up the core of the horseracing industry within the AONB.

Table 3 Number of core horseracing businesses within the North Wessex Downs AONB

Type of business	Number of businesses	Total number in Britain
Trainer	55	574
Stud	23	2,200
Livery	9	1,971 ²
Farriers	7	
Horse feed and forage suppliers	5	
Veterinary practices ³	4	
Total	103	

Source: Smiths Gore et al survey (2007); British Horseracing Board (2004)

Therefore about 10% of Britain's racehorse trainers are located in the AONB (see page 28).

A further 49 businesses were identified within the AONB as being or wanting to be associated with the racing industry as they advertised in the Thoroughbred Breeders Guide and so actively sought racing business. The types of these businesses are shown in Table 1.

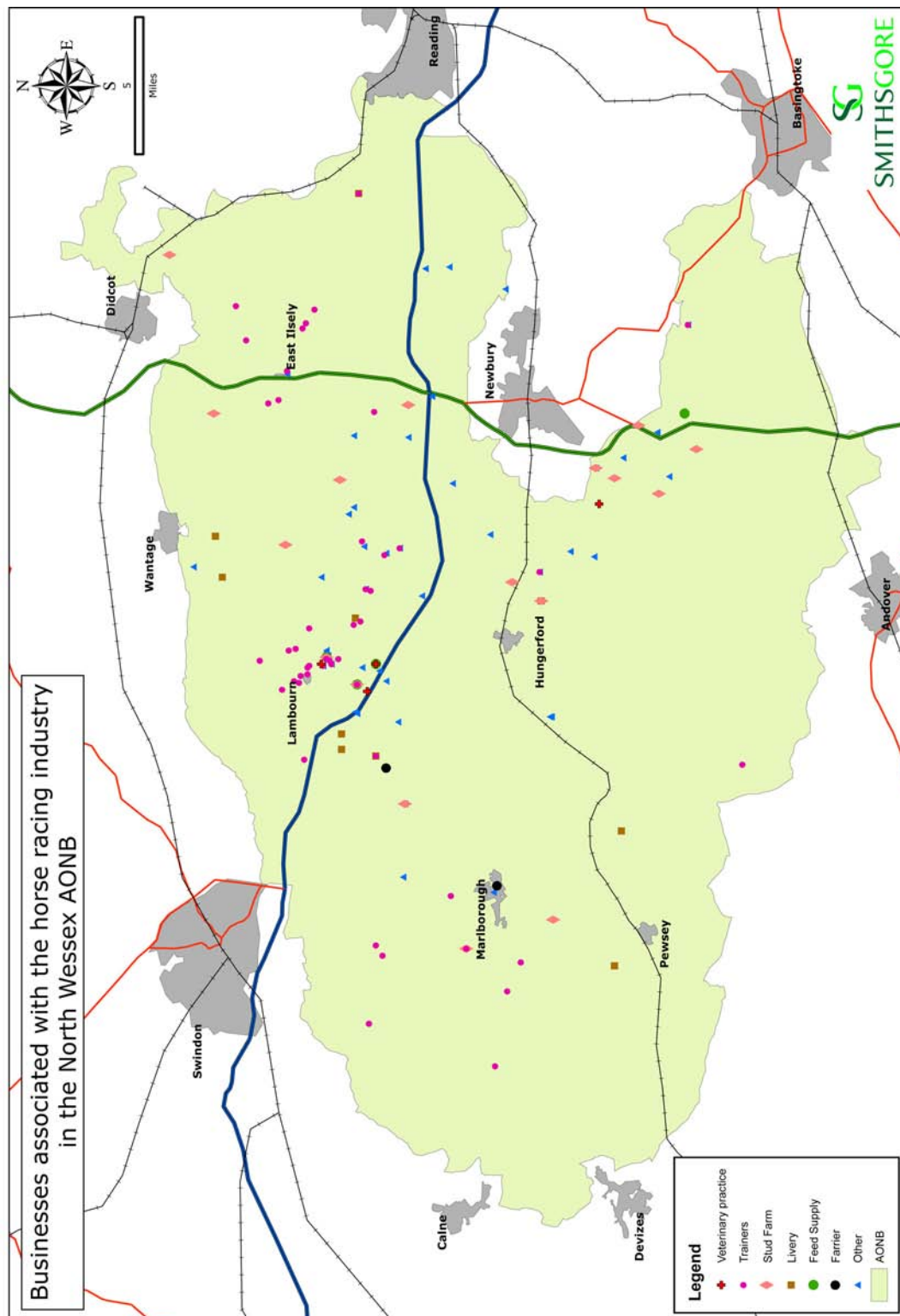
Location of businesses

The location of the businesses is shown on Figure 3. They are grouped in four main clusters around Lambourn, East Ilsley, Hungerford and Marlborough. The Lambourn cluster is the largest with 25 training yards, two stud farms, one livery yard, three veterinary surgeries, three horse feed merchants and 18 associated businesses.

² Only a small proportion (@14%) of stud farms are full time. All of the stud farms that responded in the AONB recorded stud activities as their principal business, which suggests that they were likely to be full time businesses.

³ Some major veterinary practices that service the racing industry with the AONB are located outside it and are not included in this table.

Figure 3 Location of businesses associated with the horseracing industry in the North Wessex Downs AONB



NB Business locations are centroids of postcodes, not exact locations.

Number of people employed

The core businesses employ approximately 1,370 Full-Time Equivalent staff.

Table 4 Employment by core horseracing businesses within the North Wessex Downs AONB

Type of business	Full-time Male	Full-time Female	Part-time Male	Part-time Female	Total staff employed	FTEs
Trainer	647	369	39	53	1,107	1,062
Stud	108	69	8	12	197	187
Livery	23	21	14	9	66	55
Farrier	7	0	0	0	7	7
Horse feeds and forage	5	5	0	3	13	11
Veterinary practice	26	22	0	0	48	48
Grand Total	816	486	60	76	1,438	1,370

NB FTE calculation is based on assumption that part time staff count for 0.5 FTE

The average number of employees per business is shown in Table 5. Trainers, studs and livery businesses in the AONB employ more people than the average British trainer, stud and livery business (see economic contribution section for further details). This is likely to be an effect of the area being a long-standing centre for horseracing⁴.

Table 5 Average number of employees per core horseracing businesses within the North Wessex Downs AONB

Type of business	Full-time Male	Full-time Female	Part-time Male	Part-time Female	Total staff employed	FTEs
Trainer	12	7	1	1	20	19
Stud	5	3	0	1	9	8
Livery	3	2	2	1	7	6
Farrier	1	0	0	0	1	1
Horse feeds and forage	1	1	0	1	3	2
Veterinary practice	7	6	0	0	12	12

⁴ There is a direct positive relationship between the length a training business has been established and the number of horses it trains i.e., the older the business, the more horses in training.

Number of racehorses

There are approximately 3,737 racehorses at training yards, stud farms and livery within the AONB. This figure is an estimation based on the numbers of horses reported in the survey and British Horseracing Board data on horse numbers trained by individual trainers.

Table 6 Number of racehorses within the North Wessex Downs AONB

Type of business	Number of racehorses within NWD AONB	Number of racehorses in Britain
Trainer	1,974	13,900
Stud	1,476	12,273
Livery	288	22,000
Grand Total	3,737	48,173

Source: Smiths Gore et al survey (2007), British Horseracing Board (2004), BETA (pers comm)

It is estimated that there are about 2,500 horses in training around Newmarket, slightly more than in the AONB (National Horseracing Museum, 1999).



International and national context

International context

British racing is an important player in the international racing scene⁵.

It provided around 25% of the world's top ranked thoroughbred racehorses between 2003 and 2005, second only to the USA (Deloitte, 2006).

British horses win twice as much in overseas prize money as overseas horses do in Britain (£11 million per year between 2001 and 2005 compared to £5.7 million won in Britain by overseas horses).

Many British races and race meetings have worldwide appeal, most notably the Aintree Grand National and the Derby.

Britain compares well with other leading horseracing nations in terms of numbers of meetings and attendances:

Table 7 Indicative attendances at racing in a selection of countries

Country	Number of meetings	Total attendance (m)	Average attendance
Britain	1,300	5.9	4,500
Japan	2,000	14.5	7,200
Ireland	291	1.4	4,900
New Zealand	514	1.0	1,900
Australia	2,745	1.9	n/a
Source: Deloitte (2006), based on data from the Japan Racing association and Australian Bureau of Statistics			

Britain's betting turnover lies second, behind Japan, in terms of the size of the horserace betting market.

⁵ The International Federation of Horseracing Authorities is expected to publish a global economic study of horseracing in 2007, which will help put Britain's industry into an international context (International Federation of Horseracing Authorities, personal communication, March 2007).

National context



Horseracing in the UK generated an estimated £2.86 billion in direct, indirect and induced expenditure in 2005 (Deloitte, 2006). Of this, £870 million was generated by the 'core' horseracing industry of racecourses, the Levy Board, owners and breeders, £180 million was off-course expenditure by racegoers and fans, and the balancing £1.8 billion was secondary expenditure as the activities of the core industry filtered through the economy.

Table 8 Summary of the economic impact of British racing

Core industry expenditure	£m
Racecourses	298
Levy	103
Owners	185
Breeding	202
Other racing	82
Total core	870
Off-course racing expenditure	180
Secondary expenditure	
Business to business	851
Consumer	955
Total secondary	1,806
Total economic impact of British Racing	2,856
Source: Deloitte (2006)	

Core British racing supports over 22,000 full and part-time jobs, which translate into around 18,800 full time equivalent (FTE) jobs. Due to the expenditure multiplier effect of spending in racing, it is estimated that racing supports a further 25,200 jobs, of which 2,300 are directly related to horseracing, such as vets, farriers and horse feed merchants. There are also a further 42,000 FTE jobs in the betting industry.

Total capital expenditure by British racing was approximately £420 million in the four years to March 2006 (Deloitte, 2006). This is the highest level of investment of any sport, after football. The expenditure has been mainly on improving infrastructure and facilities for staging race meetings.

As the focus of this study is on the economic, environmental and social effects of the horseracing industry on the North Wessex Downs AONB, this report will focus on the core horseracing industry within the AONB (i.e., trainers, stud farms, livery and broodmare yards, vets, farriers, horse feed merchants).

The betting industry, race goers, the effect of sponsorship and broadcasting are not covered as they have national, rather than local effects.

Trainers

There were 569 licensed trainers in Britain in 2005 (up from 526 in 2001) and a further 258 permit holders and hunter trainers⁶. Their revenue was £200 million in 2005 (Deloitte, 2006) and they employed about 6,500 staff. Wages were their largest cost, at £80-90 million.

Most trainers aim to break even on their training fees and make their money from betting or prize money (Vamplew and Kay, 2005). A *Racing Post* survey in 2000 found that almost one in five trainers reported making a loss the previous year and almost the same proportion earned over £50,000. 40% of trainers said that they would not recommend their profession as a worthwhile career. It is estimated that about 50 trainers quit racing each year.

Breeders

The British breeding industry is one of the largest in the world (estimated to be the sixth largest based on number of thoroughbred foals born in 2003). Deloitte did not have sufficient information to be able to calculate the total revenue of British breeding but sales of horses totalled around £200 million as did expenditure of the stud farms.

⁶ Not all trainers hold licenses from the Jockey Club.

Economic contribution to the regional and local economy

Despite a high response rate from all elements of the industry, less than ten businesses provided financial information on their businesses. This was inadequate to use as the basis for calculating the local and regional economic contribution so existing data was used instead (as explained below).

Assumptions made

The sources of data and assumptions made are shown in the following tables. Separate tables have not been calculated for farriers, veterinary surgeries and horse feed merchants as their economic contribution to the overall industry is taken into account in the amount paid to them by trainers, stud and livery businesses.

The contribution of Newbury racecourse has been included as it is closely associated with Lambourn and the AONB. Assumptions on income and expenditure have been made based on figures for all racecourses in Britain. The racecourse's contribution can be seen in Table 10; it is about 10% of the total economic contribution. The racecourse is a significant, diversified business which, as well as hosting racing, has 200 conferences, events, exhibitions and weddings each year which attract about 25,000 additional people to the racecourse and area. It also has a golf course and children's nursery. Newbury Racecourse Plc has significant plans for growth including a 1,500 house development.



Economic contribution of the industry

It is estimated that the horseracing industry in the AONB directly contributes £16-38 million per annum of direct Gross Value Added⁷ to the economy and employs 1,374 people (FTEs).

When the expenditure multiplier effects of the Gross Value Added trickling through the economy are taken into account⁸, it is estimated that the total economy output due to the horseracing industry is £30-70 million per annum.

Table 9 Economic contribution of the industry

£m	Trainers	Stud farms	Livery yards	Racecourses	Total
Direct employment (FTEs)	1,062	187	55	70	1,374
Direct GVA (£) (Based on definition used by ONS)	£21,032,453	£12,468,266	£422,888	£4,021,827	£37,945,434
Direct GVA (£) (KPMG assumptions)	£9,002,674	£5,058,623	£240,477	£1,790,081	£16,091,855
Change in total economy output due to HRI (£) (Based on definition used by ONS)	£38,342,162	£23,851,792	£808,985	£7,331,791	£70,334,731
Change in total economy output due to HRI (£) (KPMG assumptions)	£16,411,875	£9,677,145	£460,032	£3,263,317	£29,812,370

1,374 people represents about 2% of all employment in the AONB. This is likely to be an underestimate as the number of economically active people within the AONB of 67,589⁹ is based on Ward boundaries and includes some areas outside the AONB boundary, and also includes 14,527 people who work part time.

A better indicator of the industry's importance to the NWD AONB is that it provides 21% of all employment in the agricultural and other community, social and personal service activities sectors in the NWD AONB. The total number of people employed in these two sectors is 6,556¹⁰.

This figure highlights the importance of the RHI to the economy of the NWD AONB.

⁷ Gross Value Added (GVA) is a standard monetary measure of the value of economic activity. It has been calculated on two basis:

(i) The same basis used by KMPG (2005), which is as 31% of expenditure; this is labelled 'KMPG assumptions'.

(ii) The basis used by the Office for National Statistics, which is the residual of total output (or revenue in the following tables) less intermediate consumption (which is expenditure less employment costs or wages). This can also be calculated as the sum of Gross Operating Surplus (profits) and costs of employment (wages); this is labelled 'Based on definition used by ONS'.

⁸ The multiplier applied to the GVA is the Output Multiplier. It measures the change in the total economy output caused by an increase in demand for a product, in this case the horseracing industry. The Leontief Inverse multipliers applied are 1.823 for trainers and racecourses (industry group 121) and 1.913 for stud farms and livery yards (industry group 1) (Source: 1995 Current Price Input Output: Analytical Tables Leontief inverse (Product by Product), updated 10 May 2002)

⁹ This is based on part-time, full-time and self-employed employees in the 36 wards that cover the AONB. Source: Office for National Statistics, UV28.

¹⁰ Source: Office for National Statistics, UV34.

Summary of key issues relating to the extent of the industry and its economic contribution to the regional and local economy

Based on the analysis, the key issues are:

1. The Lambourn area and North Wessex Downs AONB is second in its importance as a centre of activity for the horseracing industry only to Newmarket
2. 10% of Britain's racehorse trainers are located in the AONB
3. Trainers, livery yards and studs employ approximately 1,370 Full-Time Equivalent staff, about 2% of all employment in the AONB and 21% of employment in the agricultural and entertainment sectors in the NWD AONB
4. There are approximately 3,737 racehorses at training yards, stud farms and liveryes within the AONB
5. It is estimated that the horseracing industry in the AONB directly contributes £16-38 million per annum of direct Gross Value Added to the economy; however the total economic output of the industry in this area is £30-70 million per annum
6. 51% of the core and associated businesses expected to expand in the next 5 years

Table 10 Trainers' income and expenditure

Trainers' income and expenditure

		Britain 2005		Per trainer 2005		Per employee 2005		Per horse in training 2005		NWD AONB 2007		Sources	Notes
		Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)		
Income	Training fees	171,900,000		299,477		24,089		12,367		35,480,655		KPMG Survey 2005	Assumed to be same as owners' expenditure on training fees
	Prize money	13,400,000		23,345		1,878		964		2,765,799		BHB 2004	
	Appearance money	400,000		697		56		29		82,561		BHB 2004	Assumes 12% of total appearance money
Expenditure	Vets		11,100,000		19,338		1,555		799		2,291,072	KPMG Survey 2005	Assumes 8% of trainers' expenditure
	Farriers		8,300,000		14,460		1,163		597		1,713,144	KPMG Survey 2005	Assumes 6% of trainers' expenditure
	Transport		10,700,000		18,641		1,499		770		2,208,511	KPMG Survey 2005	Assumes 8% of trainers' expenditure
	Horse feed		18,800,000		32,753		2,635		1,353		3,880,374	KPMG Survey 2005	Assumes 13% of trainers' expenditure
	Premises rates and utilities		16,500,000		28,746		2,312		1,187		3,405,647	KPMG Survey 2005	Assumes 12% of trainers' expenditure
	Wages		56,900,000		99,129		7,974		4,094		11,744,324	KPMG Survey 2005	Assumes 41% of trainers' expenditure
	Other costs / expenditure		18,000,000		31,359		2,522		1,295		3,715,252	KPMG Survey 2005	Assumes 13% of trainers' expenditure
	License and registration fees		400,000		697		56		29		82,561	BHB 2004	
	Total	185,700,000	140,700,000	323,519	245,122	26,023	19,717	13,360	10,122	38,329,014	29,040,885		
	Net income	45,000,000		78,397		6,306		3,237		9,288,129			
Tax		11,500,000		20,035		1,612		827		2,323,271		KPMG assumption	8% of expenditure
GVA (KMPG calculation)		43,617,000		75,988		6,112		3,138		9,002,674		KPMG assumption	31% of expenditure from ABI 2003 Analysis
GVA (based on definition used by Office for National Statistics)		101,900,000		177,526		14,280		7,331		21,032,453			
				574 Number of trainers		7,136 Number of people employed		13,900 Number of horses in training		2,869 Number of horses in training in AONB		BHB 2004	Smiths Gore 2007 survey: 30 trainers care for 1565 horses, 52 horses per trainer, therefore assumed 2869 horses cared for by 55 trainers
										1,062 Number of people employed in training in AONB			

Table 11 Stud farm income & expenditure

Stud farm income & expenditure

		Britain 2005		Per stud farm 2005		Per employee 2005		Per mare and stallion 2005		NWD AONB 2007		Sources	Notes
		Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)		
Income	Public sale of stock	91,400,000		41,545		10,156		7,447		7,365,322		Waahterby's Bloodstock Sales Review 2005 (plus industry assumption) Industry assumption Industry assumption	50% of Tattersalls sales to British vendors Value assumed to be same as for public sales Keep costs, foaling fees, sales, preparations. Also assumed by KPMG to be same value as public sales
	Private sale of stock	91,400,000		41,545		10,156		7,447		7,365,322			
	Other income	91,400,000		41,545		10,156		7,447		7,365,322			
Expenditure	Vets		119,475,000		54,307		13,275		9,735		9,627,701		
	Farriers												
	Transport												
	Horse feed												
	Premises rates and utilities												
	Wages		83,025,000		37,739		9,225		6,765		6,690,436		41% of expenditure (based on KPMG assumption for trainers)
	Other costs / expenditure												
Total		274,200,000	202,500,000	124,636	92,045	30,467	22,500	22,342	16,500	22,095,967	16,318,137	KPMG Survey; also matches Thoroughbred Breeders Association breeders survey estimate of £202,000,000	
Net income		71,700,000		32,591		7,967		5,842		5,777,829			
Tax		16,600,000		7,545		1,844		1,353		1,305,451		KPMG assumption	8% of expenditure
GVA (KMPG calculation)		62,775,000		28,534		6,975		5,115		5,058,623		KPMG assumption	31% of expenditure from ABI 2003 Analysis
GVA (based on definition used by Office for National Statistics)		154,725,000		70,330		17,192		12,607		12,468,266			
				2,200 Number of stud farms		9,000 Number of people employed		12,273 Number of mares and stallions		989 Number of mares and stallions at studs in AONB		KPMG Survey 2005 (4 people employed per stud farm); also matches Thoroughbred Breeders Association estimate of 2,200 stud farms in Britain; only 300 stud farms (14%) operate on a full time basis; Deloitte used the TBA / KPMG figures as the basis for their estimate of the economic impact of the breeding sector and noted that there is considerable variation between stud farms.	
										187 Number of people employed on stud farms in AONB		Smiths Gore 2007 survey: 13 stud farms care for 559 horses, 43 horses per stud farm, therefore assumed 989 horses cared for on 23 stud farms	

Table 12 Livery income & expenditure

Livery income & expenditure

		Britain 2005		Per livery 2005		Per employee 2005		Per horse 2005		NWD AONB 2007		Sources	Notes
		Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)		
Income	Livery fees and services			0		#DIV/0!		0		880,570		Smiths Gore Survey 2007 (Two respondents)	£5090 ave revenue per racehorse kept
Expenditure	Vets		15,770,000		8,001		#DIV/0!		717		457,682	BETA National Equestrian Survey 2005; Smiths Gore Survey 2007 (Two respondents)	£4484 ave revenue per racehorse kept
	Farriers												
	Transport												
	Horse feed												
	Premises rates and utilities												
	Wages										318,050		41% of expenditure (based on KPMG assumption for trainers)
	Other costs / expenditure												
Total										880,570	775,732		
Net income										104,838			
Tax										62,059		KPMG assumption	8% of expenditure
GVA (KMPG calculation)										240,477		KPMG assumption	31% of expenditure from ABI 2003 Analysis
GVA (based on definition used by Office for National Statistics)										422,888			
				1,971	Number of livery yards		Number of people employed	22,000	Number of horses at livery yards		173	Number of horses at livery yards in AONB	Defra / The Henley Centre 2004 estimates of 30% of 600,000 horses (from Suggett 1998); personal communication with British Equestrian Trade Association on 13 March 2007
											55	Number of people employed in livery yards in AONB	Smiths Gore 2007 survey: 6 livery yards care for 115 horses, 19 horses per livery yard, therefore assumed 173 horses cared for on 9 livery yards

These calculations are based on estimates from a number of sources. They are as accurate as could be made but some inherent inaccuracy will remain.

Table 13 Racecourse income and expenditure

Racecourse income and expenditure

		Britain 2005		Per racecourse 2005		Per racecourse 2005		NWD AONB 2007		Sources	Notes
		Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)	Revenue (£)	Expenditure (£)		
Income	Data income	111,800,000		1,894,915		12,705		2,363,045		Racecourse submissions to BHB	
	Picture income	54,500,000		923,729		6,193		1,151,932		Racecourse submissions to BHB	
	Racecourse income	119,600,000		2,027,119		13,591		2,527,909		Racecourse submissions to BHB	
Expenditure	Regulatory / integrity		17,900,000		303,390		2,034		378,341	Racecourse submissions to BHB; Newbury racecourse PLC Financial Statements ye 31 D £4,342,000 expenditure declared by Newbury Racecourse	
	Governance		14,000,000		237,288		1,591		295,909		
	Prize money, appearance money and owners premium		93,400,000		1,583,051		10,614		1,974,136		
	Racecourses		147,900,000		2,506,780		16,807		3,126,068		
Total		285,900,000	273,200,000	4,845,763	4,630,508	32,489	31,045	6,042,886	5,774,455		
Net income		12,700,000		215,254		1,443		268,432		Newbury racecourse PLC Financial Statements ye 31 December 2005	£699,000 profit before tax declared by Newbury Racecourse
Tax		22,600,000		383,051		2,484		461,956		KPMG assumption	8% of expenditure
GVA (KMPG calculation)		84,692,000						1,790,081		KPMG assumption	31% of expenditure from ABI 2003 Analysis
GVA (based on definition used by Office for National Statistics)								4,021,827		Smiths Gore assumption: wages (aka compensation of employee) costs are 65% of expenditure (aka total intermediate consumption). Based on Demand for products in 2004 The 'Combined Use' matrix, published by ONS August 2006)	
		3,085	Number of employees	59	Number of racecourses	8,800	Number of races	186	Number of races at Newbury	KPMG assumption; ABI Analysis 2003; BHB 2004 Annual Report for number of race meetings; Newbury Racecourse personal communication on 13 March 2007 for number of meetings (31) and races (6-8 per meeting) held at Newbury in 2007	
								70	Number of people employed at Newbury Racecourse	Newbury Racecourse personal communication on 13 March 2007 for number of people employed at the racecourse (70) in 2007	

This is Newbury Racecourse, which has been included in the overall economic contribution of the industry.

Landscape effects

Introduction

Aspects of the horseracing industry studied

The following analysis examines the key aspects of the racehorse related development, in particular the effect of gallops, training facilities, stabling, stud farms, and livery establishments. Other racehorse related development including veterinary practices, farriers, feed suppliers and other ancillary services such as hospitality, estate agents were not considered to have a significant impact on the landscape or settlements and therefore were not analysed.

Scope of the study

The study concentrates on the main effects of these developments on the landscape. It therefore identifies the main trends and most significant changes and impacts which affect the landscape of the AONB and need to be addressed to ensure that in the future the development of the horseracing industry conserves and enhances the natural beauty (its landscape, ecology and cultural heritage) of the AONB. The analysis has been used to inform the broad guidance set out at the end of this report (see page 102).

The effects have been considered in relation to the following aspects of the landscape:

- Overarching landscape character
- Historic development and historic landscape character
- Topography and landform
- Landscape features
- Archaeology and historic features
- Settlement pattern and built form

Area of study

In the first instance the whole of the AONB was examined to identify those Landscape Character Areas (LCAs) (as identified in the North Wessex Downs Landscape Character Assessment) which were affected by the key aspects (as identified in para. 1.1). The study then focussed on these LCAs.

Sources of information

GIS data from NWD AONB

- Landscape Character Areas
- Historic Landscape Character Assessment
- Rights of way and open access land
- Designated areas – nature conservation
- Parks and gardens
- Battlefields
- Scheduled Ancient Monuments
- World Heritage Sites
- Historical maps
- OS MasterMap

OS 1:25,000 Explorer

- Topography

Studies

- North Wessex Downs Area of Outstanding Natural Beauty Integrated Landscape Character Assessment 2002



Landscape character

The analysis showed that there is a clear pattern in the distribution of the key aspects across the AONB. The following table shows the distribution of the key aspects across the landscape character types and landscape character areas.

Key characteristic:	A number of horseracing industry facilities which are an important feature of the landscape
Localised influence:	Fewer horseracing industry facilities which are a significant local feature but have little effect on the character area as a whole
Limited influence:	Only one or two facilities with very localised effect on the landscape
No influence:	No facilities identified

G = Gallops
T = Trainers
S = Studs
L = Livery

Table 14 Distribution of horseracing industry facilities within Landscape Character Types

Key characteristic		Potential main effect of the racehorse related development			
LCA	Name	Key characteristic	Localised influence	Limited influence	No influence
Significance		1	2	3	4
LCT 1: Open downland					
1A	Marlborough Downs	G/T/S/L			
1B	Lambourn Downs	G/T/S/L			
1C	Horton Downs		G	T	S/L
1D	Blewbury Downs	G/T			S/L
LCT 2: Downland with woodland					
2A	Brightwalton Downs		G/T/S		L
2B	Ashampstead downs			L	G/T/S
2C	Lambourn Wooded Downs		G		T/S/L
2D	Walbury Hill – Watership Downs Scarp		G/S		T/L
2E	Chute Forest - Facombe		G/T		S/L
2F	Litchfield Downs		G		T/S/L
2G	Hannington Downs				G/T/S/L
LCT 3: Wooded plateau					
3A	Savernake Plateau			G/S	T/L
LCT 4: High chalk plain					
4A	Salisbury Plain				G/T/S/L
LCT 5: Downs plain and scarp					
5A	Avebury Plain			T	G/S/L
5B	Chiseldon – Wanborough Plain				G/T/S/L
5C	Hendred Plain		G/S	L	T
5D	Moreton Plain			S	G/T/L
5E	Clyffe Pypard – Badbury wooded Scarp				G/T/S/L
5F	Liddington – Letcombe Open Scarp		G		T/S/L
LCT 6: Vales					
6A	Vale of Pewsey			L	G/T/S
6B	Shalbourne Vale				G/T/S/L
6C	Wanborough Vale				G/T/S/L
6D	Thames Valley Floodplain				G/T/S/L
LCT 7: River valleys					

Key characteristic		Potential main effect of the racehorse related development			
LCA	Name	Key characteristic	Localised influence	Limited influence	No influence
Significance		1	2	3	4
7A	Kennet Valley			S	G/T/L
7B	Lambourn Valley	T/L			G/S
7C	Bourne Valley				G/T/S/L
7D	Pang Valley				G/T/S/L
LCT 8: Lowland mosaic					
8A	Hermitage Wooded Commons				G/T/S/L
8B	Winterbourne Farmland				G/T/S/L
8C	Wickham Wooded Heath				G/T/S/L
8D	Hungerford Farmland				G/T/S/L
8E	Highclere Lowlands and heath		S/L		G/T
8F	Ewhurst Parklands				G/T/S/L

Further analysis concentrated on columns 1 and 2 but facilities in column 3 were briefly examined for any particular effects of interest, not found elsewhere.

In the following tables the main impacts of the horseracing industry have been assessed against the key characteristics and key issues of each landscape character area. However, in the case of LCT1 and 2, where the impact is widespread and the horseracing industry a key feature of the landscape, an assessment of the impact on the key characteristics of the character type has also been examined.

LCT 1: Open downland

The *Open downland* landscape character type is the main location for racehorse related development in the AONB. It is recognised as a key characteristic of the area and the gallops form a distinctive feature of the landscape. The main potential effects of the industry on the key characteristics are described in the table below. Where a key characteristic is unlikely to be affected, it is marked by an X.

Table 15 Potential effects of horseracing industry on Key Characteristics of LCT 1: Open downland

Key characteristic	Potential main effect of the racehorse related development			
	Gallops	Other training facilities and yards	Stud farms	Livery
Strong sense of solitude and remoteness	Intensification of gallops	Expansion into remoter areas	Expansion into remoter areas	Expansion into remoter areas
Openness of the landscape		Large scale built form	Large scale built form	Large scale built form
Beech clumps on summits	X	X	X	X
Very sparse population	X	Localised increase in settlements	Localised increase in settlements	Localised increase in settlements
Thin light chalk soils	Soil erosion on access tracks	X	X	X
Sweeping skylines and smooth rolling landform	X	Localised levelling of landform	Localised levelling of landform	Localised levelling of landform
Intensive arable farmland	Localised conversion to grass or all weather gallops	X	X	X
Fragmented chalk grassland	Damage to chalk grassland			
Varied built form character	X	X	X	X
Good quality access to the countryside	X	X	X	X
Strong resonance of surviving visible historic features (viz, prehistoric)	Damage to historic field patterns and visible features	Damage to historic field patterns and visible features	Damage to historic field patterns and visible features	Damage to historic field patterns and visible features
Homogenisation of the open landscape	Adds diversity to the open landscape	Adds diversity to the open landscape	Adds diversity to the open landscape	X
Larger scale buildings	X	Loss of traditional small scale buildings. New building erected away from settlements	Loss of traditional small scale buildings. New building erected away from settlements	Loss of traditional small scale buildings. New building erected away from settlements

In addition to the above characteristics found across the landscape character type, the following key characteristics are particular to each landscape character area.

LCA 1A: Marlborough Downs

The horseracing industry in this area lies in close proximity to a number of valued landscape assets and therefore any future changes need to take great care to conserve and enhance these features. It is important however that the industry continues to make a positive contribution to the landscape as at present.

Table 16 Potential effects of horseracing industry on Key Characteristics of LCA 1A: Marlborough Downs

Key characteristic	Potential main effect of the racehorse related development			
	Gallops	Other training facilities and yards	Stud farms	Livery
Distinct dramatic skyline with steep scarps	X	X	X	X
Barrows and sarsen stones (viz. bowl barrows)	Close proximity – need to retain setting of historic feature	X	X	X
Pre-historic and medieval settlements	Close proximity – need to retain setting of historic feature	Growth of settlement	Growth of settlement	Growth of settlement
Attractive small settlements on the Og and Aldbourne rivers	X	Growth of settlement	Growth of settlement	Growth of settlement
Use of traditional building materials	X	Introduction of new building materials	Introduction of new building materials	Introduction of new building materials
Extensive PROW network	X	X	X	X
Loss of chalk downland	Damage to chalk grassland			
Inappropriate woodland planting	X	Screening of built form	Screening of built form	Screening of built form
Loss of floodplain pasture in the river Og corridor	X	Effect of settlement expansion	X	X
Small-scale incremental change in remote areas	Intensification of fencing Highway upgraded to control erosion	Additional or new design to fencing, signage, access etc	Additional or new design to fencing, signage, access etc	Additional or new design to fencing, signage, access etc

LCA 1B: Lambourn Downs

As in the Marlborough Downs, the horseracing industry lies in close proximity to a number of valued landscape assets and therefore any future changes need to take great care to conserve and enhance these features. It is important however that the industry continues to make a positive contribution to the landscape as at present. The horseracing industry is of particular significance to the character of this landscape due to its proximity to the Lambourn valley and the contribution that the horseracing industry makes to the valley landscape character.

Table 17 Potential effects of horseracing industry on Key Characteristics of LCA 1B: Lambourn Downs

Key characteristic	Potential main effect of the racehorse related development			
	Gallops	Other training facilities	Stud farms	Livery
Flat topped or rounded hills and ridgelines	X	X	X	X
Prominent barrows, later prehistoric lynchets and banks	Close proximity – need to retain setting of historic features	X	X	X
17 th and 18 th century informal field enclosure and parliamentary enclosure	Loss of field pattern or boundaries	X	Loss of field pattern or boundaries	X
Fringes of village of Lambourn	Growth of settlement	Growth of settlement	Growth of settlement	X
Use of traditional building materials Large modern buildings	X	Introduction of new building materials Cumulative effect of additional large buildings	Introduction of new building materials Cumulative effect of additional large buildings	Introduction of new building materials Cumulative effect of additional large buildings
Extensive PROW network	X	X	X	X
Loss of chalk downland	See Ecology section			
Inappropriate woodland planting	X	Screening of built form	Screening of built form	Screening of built form
Loss of peripheral features eg field boundaries	Expansion of gallops	Amalgamation of fields or removal of natural boundaries	Amalgamation of fields or removal of natural boundaries	X
Small-scale incremental change in remote areas	Intensification of fencing Highway upgraded to control erosion	Additional or new design to fencing, signage, access etc	Additional or new design to fencing, signage, access etc	Additional or new design to fencing, signage, access etc
Visually intrusive large buildings	X	Intensification	X	Intensification
Development pressure	Accommodation for employees	Accommodation for employees Expanded facilities	Accommodation for employees	Accommodation for employees Expanded facilities

LCA 1C: Horton Downs

The horseracing industry has a less sweeping influence on this landscape but could potentially have a localised impact on valuable landscape assets and intensification may adversely affect the strong rural unsettled character.

Table 18 Potential effects of horseracing industry on Key Characteristics of LCA 1C: Horton Downs

Key characteristic	Potential main effect of the racehorse related development
Key characteristic	Gallops
Scarp to edge of Vale of Pewsey with distinctive rounded hills	X
Round barrows	Close proximity – need to retain setting of historic features
Parliamentary enclosure	Break up of field pattern or boundaries
Neolithic monuments	X
Sparse woodland/shelterbelts to farmsteads	X
Extensive PROW network	X
Very sparse settlement	Localised small scale population increase
Loss of chalk downland and pasture	Expansion of gallops Run off into adjacent downland
Damage to archaeological sites	Encroachment of gallops into archaeological features
Small-scale incremental change in remote areas	Intensification of fencing Highway upgraded to control erosion

LCA 1D: Blewbury Downs

The horseracing industry makes a significant contribution to the existing open landscape character but care needs to be taken that any future changes provide a positive benefit and do not adversely affect remaining landscape assets.

Table 19 Potential effects of horseracing industry on Key Characteristics of LCA 1D: Blewbury Downs

Key characteristic	Potential main effect of the racehorse related development	
	Gallops	Other training facilities
Rounded and flat topped hills with dry valleys	X	X
Sparse woodland cover and little enclosure	Contributes to openness	X
Absence of settlement on the higher ground	X	Mainly located in villages
Prominent round barrows, iron age fort and folly at Churn Hill	Gallop encloses Churn Hill Close proximity to barrows	X
Complex field pattern	Gallops cut across the grain of the local field pattern Distinctive pattern to the gallops	X
Loss of chalk downland	Expansion of gallops Run off into adjacent downland	Expansion of paddocks into marginal areas next to chalk grassland
Increased intensification with loss of peripheral landscape features	Expansion of existing facilities may exacerbate this	Expansion of existing facilities may exacerbate this
Visual intrusion from large scale development	X	Intensification may result in visually intrusive development
Development pressures within small villages	X	Need for housing will need to avoid an adverse impact on the settlement pattern and AONB
Damage to archaeological features	Any changes to respect archaeological features	X
High traffic levels on rural lanes	X	Potential localised increase in traffic leading to requirement for road improvements
Cumulative impact of small scale changes	Potential for impact from changes	Potential for impact from changes

LCT2: Downland with woodland

Gallops, trainers and stud farms have been identified as having a localised influence in some areas of LCT2.

The main potential effects of the industry on the key characteristics are described in the table below. Where a key characteristic is unlikely to be affected, it is marked by an X.

Table 20 Potential effects of horseracing industry on Key Characteristics of LCT 2: Downland with Woodland

Key characteristic	Potential main effect of the racehorse related development			
	Gallops	Other training facilities	Stud farms	Livery
Tranquil & secluded rural landscape	All weather gallops may have slight impact	Expansion into remoter areas	Expansion into remoter areas	Expansion into remoter areas
Strongly rolling landform	X	Large scale built form	Large scale built form	Large scale built form
Diverse range of woodlands	Inappropriate planting	Inappropriate planting	Inappropriate planting	Inappropriate planting
Bronze/Iron Age hill forts	Possible proximity	Possible proximity	Possible proximity	Possible proximity
Wide range of field patterns	X	Reorganisation of fields	Reorganisation of fields	Reorganisation of fields
Historic parks & designed landscapes	X	Inappropriate structures and planting	Inappropriate structures and planting	Inappropriate structures and planting
Small valley villages & widespread scattered farms/hamlets	X	Inappropriate structures and planting	Inappropriate structures and planting	Inappropriate structures and planting
Remnants of chalk grassland	See Ecology section			
Intricate network of rural lanes	X	Pressure for improvement	Pressure for improvement	Pressure for improvement
Good quality access to the countryside	X	Possible pressure to limit public access	Possible pressure to limit public access	Possible pressure to limit public access
Loss of environmental assets through farm intensification	Potential loss of grassland with all weather gallops	Potentially significant	Potentially significant	Potentially significant
Changes in farming practice	X	Potentially significant	Potentially significant	Potentially significant
Loss and poor management of hedgerows/hedgerow trees	Potentially significant, plus inappropriate planting	Potentially significant, plus inappropriate planting	Potentially significant, plus inappropriate planting	Potentially significant, plus inappropriate planting
Lack of woodland management	Potential significant, plus inappropriate planting	Potentially significant, plus inappropriate planting	Potentially significant, plus inappropriate planting	Potentially significant, plus inappropriate planting
Climate change	Demand for irrigation in dry spells. Erosion increases with flash floods	Demand for irrigation in dry spells.	Demand for irrigation in dry spells.	Demand for irrigation in dry spells.
Localised visual intrusion of tall structures	Effect of new fencing	Possible from large barns	Possible from large barns	Possible from large barns
Increased traffic on rural lanes	X	Potentially significant	Potentially significant	Potentially significant
Intense development pressures	X	Potentially significant	Potentially significant	Potentially significant

LCA 2A: Brightwalton Downs

Of the *Downland with woodland* landscape type, LCA2A is the most affected by the horseracing industry. The horseracing industry is less of a characteristic of this area but often the facilities are found in close proximity to those within the LCT1 Open downland locations. As such changes to the horseracing industry in LCA2A may have a wider influence, or expansion within the LCT1 areas may affect the LCA2A.

Table 21 Potential effects of horseracing industry on Key Characteristics of LCA 2A: Brightwalton Downs

Key characteristic	Potential main effect of the racehorse related development		
	Gallops	Other training facilities	Stud farms
Large scale undulating mixed farmed landscape	X	X	X
Diverse woodland pattern	X	Inappropriate planting may affect this	Inappropriate planting may affect this
Varied field pattern including sinuous field boundaries	X	Pressure for new paddocks may affect this	Pressure for new paddocks may affect this
Chalk pits and dew ponds	X	Expansion of facilities may affect these	Expansion of facilities may affect these
Settled landscape	X	X	X
Vernacular building materials	X	New facilities may not use these	New facilities may not use these
Network of rural lanes	X	Pressure for upgrading	Pressure for upgrading
High density of public rights of way	X	X	X
Quiet rural landscape	X	Pressure for local intensification	Pressure for expansion
Loss of chalk downland	See Ecology section		
Intensive arable farming	X	Potential beneficial effect of reversion to grassland	Potential beneficial effect of reversion to grassland
Loss of hedgerow boundaries	Potentially significant, plus inappropriate planting	Localised removal in areas of settlement	Potentially significant, plus inappropriate planting
Lack of appropriate woodland management	X	Potentially locally significant, plus inappropriate planting	Potentially locally significant, plus inappropriate planting
Incongruous planting	X	Potential use to screen development	
Localised visual intrusion	Effect of new fencing	Effect of new buildings, fencing	Effect of new fencing
Increased traffic	X	Potentially locally significant	Potentially locally significant
Development pressures	X	Potentially locally significant	X
Loss of tranquillity	X	Potentially locally significant	X

LCA 2C: Lambourn Wooded Downs

Although equestrian activity is a key characteristic of the LCA, the horseracing industry only affects one area. The general increase in equestrian activity is a key issue and therefore any expansion or intensification of the horseracing industry needs to take care to avoid adverse impacts on the landscape character and to set a standard of good practice.

Table 22 Potential effects of horseracing industry on Key Characteristics of LCA 2C: Lambourn Wooded Downs

Key characteristic	Potential main effect of the racehorse related development
	Gallops
Mosaic of woodland/arable and pasture	Local impact on field sizes and diversity of mosaic
Ancient semi-natural woodland	Potential effect on adjacent ancient semi-natural woodland edge
Distinctive field pattern around Lambourn woodlands	Potential local impact on field sizes and pattern
Large number of equestrian facilities	Only one horseracing industry location – at Kingwood Stud north west of Lambourn Woodlands
Enclosed landscape with a variety of tree cover	Gallops locally reduce tree cover
Changes in farming practice	Potential conversion to horseracing industry activity: benefits and disadvantages both possible
Loss of hedgerows	Potential loss of nearby hedgerow through intensification and expansion
Lack of appropriate woodland management	Potentially locally significant, plus inappropriate planting
Localised visual intrusion	Fencing and new development may be locally intrusive
Development pressure for housing	Potential localised effect through expansion of horseracing industry facility
Visual impact of increased equestrian based land uses	Potentially significant locally but horseracing industry could lead the way in good practice to minimise adverse impacts
Loss of tranquillity	Intensification or an increase in facilities could have a localised effect

LCA 2D: Walbury Hill-Watership Downs Scarp

The horseracing industry does not have a widespread affect on the LCA generally but a significant effect on the sub area around Kingsclere. Any expansion or intensification would need to be carefully considered to avoid affecting this sub area.

Table 23 Potential effects of horseracing industry on Key Characteristics of LCA 2D: Walbury Hill-Watership Downs Scarp

Key characteristic	Potential main effect of the racehorse related development		
	Gallops	Stud farms	Trainers
Prominent dramatic steep scarp	X	X	X
Pastoral steep slopes with arable shallower slopes and blocks of woodland	Grassland on shallower slopes	Grassland on shallower slopes	Grassland on shallower slopes
Diverse woodland cover	Little contribution	Little contribution	X
Rich chalk downland	See Ecology section		
Lack of settlement outside Old Burghclere and Sydmonton	X	Creates isolated small groups of rural buildings	Creates isolated small groups of rural buildings
Narrow lanes	X	X	X
Limited public access to the area	X	X	X
Distinctive sub area in the foothills of Kingsclere	Contributes significantly to the character of this sub area	X	Contributes significantly to the character of this sub area
Dramatic views from the scarp top	X	X	X
Changes to farming practices affecting chalk downland	X	X	X
Visual impacts of increase in horse grazing	X	Potentially significant locally but horseracing industry could lead the way in good practice to minimise adverse impacts	
Intense recreation pressure	X	X	X
Loss of hedgerow boundaries	X	Potential loss of nearby hedgerow through intensification and expansion	Potential localised effect from expansion
Lack of appropriate woodland management	Potentially locally significant, plus inappropriate planting	Potentially locally significant, plus inappropriate planting	Potentially locally significant, plus inappropriate planting
Visual impact of tall structures	X	X	X
Loss of tranquillity	X	Expansion could affect existing tranquil areas	Expansion could affect existing tranquil areas

LCA 2E: Chute Forest-Facombe

The horseracing industry is currently focussed into a small area north of Luggershall. Any further expansion or intensification needs to take care to protect remnants of chalk grassland and woodland landscape and the visual quality of the open areas of the LCA.

Table 24 Potential effects of horseracing industry on Key Characteristics of LCA 2E: Chute Forest-Facombe

Key characteristic	Potential main effect of the racehorse related development	
	Gallops	Other training facilities
Extensive and distinctive woodland pattern linking to thick hedgerows	X	X
Ancient woodland - remnants of the Forest of Chute	Forms the immediate western setting of Collingbridge Wood	Forms the immediate western setting of Collingbridge Wood
Open arable landscape away from chute and Facombe	Grassland landscape	Grassland landscape
Remnants of chalk grassland	Part of area converted from chalk grassland. Small area within gallop.	Part of area converted from chalk grassland
Sparsely populated with isolated farmsteads	X	Consistent with settlement pattern
Intricate network of rural lanes	X	X
Dramatic open landscape	Contributes to this characteristic found in this part of the LCA	Subdivision of landscape may affect this characteristic
Loss of chalk downland	Expansion and intensification could affect remnant areas	Expansion and intensification could affect remnant areas
Damage to archaeological features	X	X
Poor management and visual intrusion from horse grazing	horseracing industry can contribute to setting standard of good practice. Risk of inappropriate fencing and other ancillary features	horseracing industry can contribute to setting standard of good practice. Risk of inappropriate fencing and other ancillary features
Lack of management of Forest of Chute	Risk to woodland edge	Risk to woodland edge
Localised visual intrusion	New fencing may be visually intrusive	Risk due to open character of the landscape west of the woodland
Increase in traffic	X	Intensification may have a localised effect
Loss of tranquillity	X	Intensification may have a localised effect

LCA 2F: Litchfield Downs

The horseracing industry is currently focussed into an area south west of Kingsclere. It makes a significant local contribution to the character of the east of the LCA. Further expansion could provide an opportunity to return arable land to grassland but may put pressure on remnant chalk grassland

Table 25 Potential effects of horseracing industry on Key Characteristics of LCA 2F: Litchfield Downs

Key characteristic	Potential main effect of the racehorse related development
	Gallops
Large open arable fields and poor hedgerow structure	Separates an area of downland from an extensive area of arable farmland. Contrast with arable land.
Limited tree planting except shelter belts	Contributes to this feature
Very sparse population with large scale farmsteads	X
Quiet rural area with sense of openness and space	Contributes to this feature
Loss of chalk grassland	Expansion northwards would have an impact on the chalk grassland to the north
Poor management and visual intrusion from horse grazing	X
Further weakening of the hedgerow structure	Care should be taken to protect and enhance any remaining hedgerows.
Localised visual intrusion	New fencing may be visually intrusive
Increase in traffic	X
Loss of tranquillity	X

LCT5: Downs, Plain and Scarp

Gallops and stud farms have been identified as having a localised influence in two areas of LCT5: LCA5C Hendred Plain and LCA5F Liddington – Letcombe Open Scarp.

The main potential effects of the industry on the key characteristics of, and issues within, the landscape type as a whole are described in the table below. Where a key characteristic is unlikely to be affected, it is marked by an X.

LCA 5C: Hendred Plain

The horseracing industry in its current form already makes a significant positive contribution to the character of this area and any further development, if carefully designed, could bring benefits by way of an improved landscape structure and diversity.

Table 26 Potential effects of horseracing industry on Key Characteristics of LCA 5C: Hendred Plain

Key characteristic	Potential main effect of the racehorse related development	
	Gallops	Stud farms
Numerous springs	X	X
Largely arable	Introduces grassland	Introduces grassland
Various forms of woodland cover and orchards around East Hendred	X	X
Small landscaped parks	X	X
Distinctive settlement form in clusters and estate villages	X	Sometimes reinforces settlement pattern. Other times away from existing villages
Large number of stables and equestrian establishments	A contributor to this key characteristic	A significant contributor to this key characteristic
Quiet rural area	Existing facilities do not compromise this	Existing facilities do not compromise this
Continuing loss of landscape diversity to arable production	Potential contribution to increased landscape diversity	Potential contribution to increased landscape diversity
Absence of hedgerows	X	Potential to improve local hedgerow cover
Need to manage small woodlands	X	Potential to contribute positively
Protect parkland	Avoid expansion into parkland	Avoid expansion into parkland
Development pressure and potential loss of settlement pattern	X	Expansion might have an adverse impact
Open landscape which is vulnerable to visual impact from any large scale development	X	Scale of operations will be critical

LCA 5F: Liddington-Letcombe Open Scarp

The horseracing industry has very little effect on this landscape character area with only 2 small gallops in close proximity to each other.

Table 27 Potential effects of horseracing industry on Key Characteristics of LCA 5F: Liddington-Letcombe Open Scarp

Key characteristic	Potential main effect of the racehorse related development
	Gallops
Strong skyline	Located on skyline west of Letcombe Bassett
Incised valley running north	Located within one such valley
Fragments of chalk downland	Located in area with major changes to former chalk downland – potential contributing factor
Important path along the Ridgeway	Gallops form part of Ridgeway landscape setting
Clustered villages	X
Attractive landscape	Neutral effect
Loss of landscape assets	As long as remaining landscape assets are avoided, the horseracing industry could provide benefits through landscape diversity
Loss of hedgerows	Any expansion should avoid loss of any remaining hedgerows
Management of parkland	Any expansion should avoid traditional parkland landscapes and enhance estate landscapes
Development pressure for housing	Ancillary development could be detrimental

LCT7: River Valleys

Training facilities and liveryes have been identified as being a key characteristic of one area of LCT7: LCA7B Lambourn Valley.

The main potential effects of the industry on the key characteristics of this landscape character area are described in the table below. Where a key characteristic is unlikely to be affected, it is marked by an X.

LCA 7B: Lambourn Valley

The horseracing industry is a key feature of the landscape character of Lambourn valley but the valley landscape is particularly vulnerable to damage through expansion and intensification.

Table 28 Potential effects of horseracing industry on Key Characteristics of LCA 7B: Lambourn Valley

Key characteristic	Potential main effect of the racehorse related development	
	Training facilities	Liveries
Narrow river corridor	X	X
Mix of arable and pasture in upper valley	Grassed paddocks add to mosaic	X
Water meadows and wet pasture in lower valley	X	X
Varied field pattern	Creates pattern on paddocks close to settlements	X
Lowland chalk river	X	X
Continuity of settlement and history of human activity in existing settlements	Located in settlements	Located in settlements
Regular spacing of settlements along river	Reinforces settlement pattern	Reinforces settlement pattern
horseracing industry a distinctive local feature	Important contributor to local character	Important contributor to local character
Attractive quiet river landscape	No existing adverse impact on this characteristic	No existing adverse impact on this characteristic
Maintenance of water quality and flow	Potential increase in water extraction	X
Increase in visual impact horse paddocks	Potentially significant locally but horseracing industry could lead the way in good practice to minimise adverse impacts	Potentially significant locally but horseracing industry could lead the way in good practice to minimise adverse impacts
Maintenance of water features	Intrusion into wetland areas	X
Loss of hedgerows	Potential localised effect due to expansion and use of replacement fencing	Potential localised effect due to expansion and use of replacement fencing
Increase in traffic	Potential contributor to local traffic increases	Potential contributor to local traffic increases
Management of small semi-natural woodlands	X	X
Pressure for residential development up valley sides	Expansion could add to development pressure and changes to settlement pattern	Expansion could add to development pressure and changes to settlement pattern
Small scale valley vulnerable to large scale development	Any large scale new facilities might be damaging	Any large scale new facilities might be damaging

LCT8: Lowland Mosaic

Training facilities and liverys have been identified as having a localised influence in one area of LCT8: LCA8E Highclere Landscape and Heath.

The main potential effects of the industry on the key characteristics of this landscape character area are described in the table below. Where a key characteristic is unlikely to be affected, it is marked by an X.

LCA 8E: Highclere Lowlands and Heath

The horseracing industry only has a localised impact on the character of this landscape at present but an increase in facilities needs to be carefully handled to prevent the spread of any urbanising features and further loss of rural landscape assets.

Table 29 Potential effects of horseracing industry on Key Characteristics of LCA 8E: Highclere Lowlands and Heath

Key characteristic	Potential main effect of the racehorse related development	
	Stud Farms	Liveries
Complex micro topography	Very minor effects on landform	X
Mosaic of small irregularly shaped fields	Changes to local field patterns through creation of paddocks	X
Extensive woodland cover	X	X
Parkland	Close relationship in some cases	X
Remnant heathland	Paddocks on former commonland but remnant heathland not affected	X
'Squatter' settlement pattern arising from Forest of Pamber and Freemantle	Little influence but reinforces settlement pattern	Little influence but reinforces settlement pattern
Dense rural settlement pattern	No significant effect	No significant effect
Enclosed secretive landscape	No significant effect	No significant effect
Decline in heathland vegetation	Potential further loss of local habitats through expansion	X
Poorly managed horse paddocks	Unlikely adverse affect even if horseracing industry expands	Unlikely adverse affect even if horseracing industry expands
Lack of woodland management	X	X
Increase in traffic	Potential contributor to local traffic increases	Potential contributor to local traffic increases
Development pressure and suburbanising influences	Expansion could add to development pressure and changes to settlement pattern and character	Expansion could add to development pressure and changes to settlement pattern and character
Loss of tranquillity	Potential localised effect if intensify	Potential localised effect if intensify

Main effects on specific landscape features

Physical landscape features

Topography and landform

The open rolling landform of the *Open downland*, and the *Downland with woodland and Downs plain and scarp* to a much lesser degree, is ideally suited to gallops. No significant changes to the landform have arisen through the introduction of the gallops, though a more detailed assessment may reveal subtle changes in land form.

The extension or construction of new built facilities may have an impact on the smooth, rolling landform so characteristic of the area. Considerable earthmoving may be required, which has an impact beyond that of the buildings themselves. In the past large buildings have been well hidden in the landscape by locating them in valleys.

Woodland/hedgerows

While the high downland has been largely open for thousands of years, the valleys often had a smaller scale pattern, with fields surrounded by hedgerows. These may be lost through field amalgamation/reorganisation, and replaced with fencing.

Some of the shelterbelt and woodland planting on the higher downland does not run with the grain of the topography, which interrupts the smooth, rolling landform.

New planting associated with buildings is often inappropriate to the rural setting, bringing a suburban feel to the landscape.

Historic development and historic landscape character

World Heritage Sites

The Avebury portion of the Stonehenge and Avebury and Associated Sites World Heritage Site (WHS) lies within the NWD AONB. The site was declared a WHS in 1986, and Stonehenge and Avebury were described in the nomination document as the two most important and characteristic monuments in Britain. With their associated sites and monuments, they are described as providing a landscape without parallel in Britain or elsewhere.

A Site Management Plan (SMP) for the Avebury World Heritage Site was produced by English Heritage in August 2005. It contains an analysis of the key issues facing the WHS, and key objectives for its management and conservation for the period 2005-11.

Many of the recorded archaeological features within the WHS are designated as Scheduled Ancient Monuments. However, there are many additional features which are not individually protected; Figure 3 (Land Use and Archaeology) in the SMP is particularly useful in showing all the recorded archaeology, at the time of publication.

In the SMP, the presence of racehorse related activity is noted¹¹, but is not highlighted as having a potentially damaging effect on the WHS. Plough damage during arable cultivation is seen as the major threat, and reversion of arable land to pasture is

¹¹ Avebury World Heritage Site Management Plan, English Heritage August 2005, para 5.2.2, p58

recommended. However, there are several ways in which the industry might impact on the WHS, as shown in the table below.

Hedgerow and tree planting are also noted as having potentially significant effects on the WHS. As well the physical effect of roots on archaeological remains, planting is noted as potentially inappropriate to the open character of the downland.

There are several training and stud facilities, including gallops, within the WHS, and within the proposed small extension to the WHS to the north east, in the Fyfield Down area. The main potential effects of the industry on the WHS are described in Table 30.

Table 30 Effects on Avebury World Heritage Site

Key characteristic Key issue	Potential main effect of the racehorse related development			
	Gallops	Other training facilities	Stud farms	Livery
Physical effect on archaeological features	Grass: little likely effect, unless enclosed by planting. All weather: potential slight effect depending on depth of excavation and planting proposals	Expansion of buildings and associated infrastructure, associated planting	Expansion of buildings and associated infrastructure, associated planting	Expansion of buildings and associated infrastructure, associated planting
Effect on setting of archaeological features in the landscape	Expansion of gallops: cutting across grain of landscape; inappropriate planting	Impact of buildings on open downland setting; inappropriate planting	Impact of buildings on open downland setting; inappropriate planting	Impact of buildings on open downland setting; inappropriate planting

Scheduled Ancient Monuments

Outside the WHS, there are many Scheduled Ancient Monuments (SAMs) scattered across the AONB, many of them in the downland areas where the horseracing industry tends to be concentrated.

The expansion of gallops and other facilities, especially new buildings, may affect both the settings and physical structure of Scheduled Ancient Monuments. While the majority of the SAMs are prehistoric remains, there are also features of other dates, such the deserted medieval village near Barbury Castle. As is the case within the WHS, it should be borne in mind that there will also be many other recorded archaeological features which are not scheduled.

The main potential effects of the industry on Scheduled Ancient Monuments are described in Table 31.

Table 31 Effects on Scheduled Ancient Monuments

Key characteristic Key issue	Potential main effect of the racehorse related development			
	Gallops	Other training facilities	Stud farms	Livery
Physical effect on archaeological features	Grass: little likely effect, unless enclosed by planting. All weather: potential slight effect depending on depth of excavation and planting proposals	Expansion of buildings and associated infrastructure, associated planting	Expansion of buildings and associated infrastructure, associated planting	Expansion of buildings and associated infrastructure, associated planting
Effect on setting of archaeological features in the landscape	Expansion of gallops: cutting across grain of landscape; inappropriate planting	Impact of buildings on open downland setting; inappropriate planting	Impact of buildings on open downland setting; inappropriate planting	Impact of buildings on open downland setting; inappropriate planting

Historic parks and gardens

While there are a number of historic parks and gardens within the AONB, none is significantly affected at present. Highclere Stud is immediately east of Highclere Park and has encroached into the woodland edge of the park. The main potential effects of the industry on historic parks and gardens are described in Table 32.

Table 32 Effects on Historic Parks and Gardens

Key characteristic Key issue	Potential main effect of the racehorse related development			
	Gallops	Other training facilities	Stud farms	Livery
Physical effect on historic parks and gardens	X	Expansion of buildings and associated infrastructure, associated planting	Expansion of buildings and associated infrastructure, associated planting	Expansion of buildings and associated infrastructure, associated planting
Effect on setting of historic parks and gardens	X	Impact of large buildings; inappropriate planting	Impact of large buildings; inappropriate planting	Impact of large buildings; inappropriate planting

Battlefield Sites

There is only one designated battlefield site within the AONB, the site of the Civil War Battle of Roundway. No racehorse related facilities have been identified within or near the site.

Settlement pattern and built form

This is extremely complex, and an in depth analysis is beyond the scope of this study. In order, therefore, to illustrate the possible effects of the horseracing industry a sample area has been studied in more detail; this analysis can then be taken to be broadly illustrative of the AONB as a whole.

The main clusters of horseracing industry activity are in the Downs areas and their associated valleys. The sample area selected is therefore in one of these areas, around the Ogbourne settlements in and on the edge of the Marlborough Downs, LCT1. There are several trainers in the area, and a concentration of gallops. While it is not reasonable to conclude that all the changes to the settlement pattern are as a result of the horseracing industry, it is nevertheless likely that it has had a significant influence on development.

The villages are Ogbourne St George, Ogbourne St Andrew and Ogbourne Maisey, strung out along the Og valley in a form typical for the downland settlements. To the west of these there are outlying farms/hamlets up in the Downs: Maisey Farm, Rockley, Temple Farm, Wick Down Farm, Manton House Farm and Manton House.

Table 33 describes the historic and expanded form of the settlements/farms, and the probable previous historic landscape type.

The majority of the settlements have a historic core, and the expansion is in the form of infill. This is not necessarily damaging to the historic landscape, but depends on the detail of siting, design and materials. The effective joining up of previously discrete settlements (eg, Ogbourne St Andrew and Ogbourne Maisey) is a concern.

While a number of the isolated farms are historic, there are also several new clusters of buildings/settlement, and all the farms have been expanded, the vast majority apparently to accommodate horse facilities of some kind. The main issues here of concern to the historic landscape are:

- Scale: large barns/buildings tend to dominate the historic core of farmsteads. Their scale also means that they are less likely to relate well to the surrounding topography: in the past the lack of large scale earth moving equipment meant that buildings were forced to respect the topography; this is no longer the case.
- Morphology: while new stable buildings frequently echo historic forms, the large barns inevitably do not relate to the historic form of farmsteads.
- Materials: traditional materials are rarely used, in particular for large barns.
- Design of external elements: elements such as fencing and planting are rarely appropriate to the historic landscape.
- Loss of previous landscape types: the expansion of settlements and farms is onto a variety of previous historic landscape types. Perhaps most worrying is the tendency for the open downland to be fragmented by horseracing industry related development. This is discussed further below.
- Topography can be used to an advantage, locating buildings in valley bottoms in order to 'hide' them within the landscape.

Table 33 Changes in settlement pattern around the Og Valley

Settlement/ farm	Historic settlement*	Form* (morphology)	20 th century expansion*	Form*	Previous type*
Ogbourne St George	Yes	Nucleated regular row	Yes	Fringe growth/ settlement infill, paddocks/ studs	C19 th and pre C18 th enclosure fields
Southend	Yes	Hamlet/ farm cluster	No		
Ogbourne St Andrew	Yes	Hamlet/ farm cluster	Yes	Stables/stud farm, associated paddocks	C19 th enclosure fields
Ogbourne Maisey	Yes	Hamlet/ farm cluster & irregular row	Yes	Fringe growth/ settlement infill, Stables/stud farm, associated paddocks	C19 th and pre C18 th enclosure fields
Maisey Farm	No		Yes	Individual/ isolated farm/ associated paddocks/ large barns	Downland
Rockley	Yes	Hamlet/ farm cluster & irregular row	Yes	Large barns	
Temple Farm	Yes	Individual/ isolated farm	Yes	Individual/ isolated housing/ large barns	C19 th enclosure fields & downland
Wick Down Farm	Yes	Individual/ isolated farm	Yes	Large barns/ associated paddocks	C19 th enclosure fields
Manton House Farm	No		Yes	Individual/ isolated farm/ large barns	Pre C18 th irregular fields
Manton House	No		Yes	Stables/ stud farm/ associated paddocks	Pre C18 th irregular fields, downland & C18 th /19 th designed landscape
Sources: AONB HLC/First ed OS maps/modern OS maps/aerial photographs					

Historic landscape character

An analysis of the broad historic landscape types in the AONB shows that the vast majority are enclosures of various dates, the overwhelming majority of these dating from the mid 20th century to the present. These typically consist of amalgamated and reorganised fields, generally a rearrangement of previously enclosed land. However, a significant proportion consists of 'new fields'; these are defined by the HLC as 'fields (usually arable) created in the later 20th Century through enclosure of land not previously part of the farmed landscape. These fields are usually regular in shape and have straight boundaries. The majority of these fields have been created due to the expansion of agriculture onto downland areas, traditionally used as grazing, that had escaped historic enclosure.' These are often in areas where there are clusters of horseracing industry related facilities.

Part of the small amount of remaining 'open land' as defined in the HLC is downland: this has been severely fragmented, largely through the creation of new fields, but also sometimes with the creation of paddocks. Only small pockets now remain, typically on scarp slopes which are too steep for agricultural cultivation.

Table 34 summarises the main effects of the industry on a selection of relevant broad historic landscape types.

Table 34 Potential effects of horseracing industry on broad Historic Landscape Types

Broad historic landscape types	Gallops	Other training facilities	Stud farms	Livery
Enclosures	Limited	Significant changes to enclosures made in areas containing horseracing industry facilities	Significant changes to enclosures made in areas containing horseracing industry facilities	Some changes to enclosures made in areas containing horseracing industry facilities
Settlement	X	Expansion of facilities	Expansion of facilities	Expansion of facilities
Open land	Limited	Severe fragmentation of open land	Severe fragmentation of open land	Some fragmentation of open land
Parkland	X	Limited impact on designed landscape	Limited impact on designed landscape	Limited impact on designed landscape
Ridgeway and other historic tracks	Construction of all weather gallops may alter character of tracks	X	X	X

Summary of key issues relating to landscape effects

Based on the analysis, the key potential landscape issues are:

1. Small scale changes to the smooth, rolling landform around new buildings, which cumulatively have an adverse effect on the character of the AONB.
2. Creation of new fields and paddocks on previously open downland.
3. Loss of woodland and hedgerows, new planting inappropriate, replacement by fencing leads to 'suburbanisation' of landscape.
4. Pressure to upgrade minor roads, leading to 'suburbanisation' and loss of sense of place.
5. Loss of integrity of historic settlements/hamlets/farmsteads.

Environmental effects

Impacts of the horseracing industry on biodiversity

The broad location of land managed for activities relating to the horseracing industry within the NWD AONB was identified using the information on horseracing industry businesses (see Extent of the industry section; page 20). In order to assess the impact of such activities on biodiversity this approach was complemented by a comprehensive search of OS Mastermap annotation layer for reference to training gallops and areas. Finally, the Historic Landscape Characterisation (HLC, North Wessex Downs AONB Historic Landscape Characterisation, 2006) was used to identify areas characterised by gallops or paddocks associated with stud farms and livery stables.

Extent of training gallops

The extent of training gallops within the NWD AONB identified using OS Mastermap was 1,265 hectares, whilst the HLC describes 1,891 ha. The disparity between the two figures is related to the fact that the area derived from Mastermap relates to the extent of the gallop itself, whilst the HLC data typically includes the whole land parcel, including peripheral areas associated with gallops.

Both Mastermap and HLC data showed that the training gallops were located primarily in the Open Downland landscape character type (72% and 79% of gallops area respectively). The remainder occurred in the Downland with Woodland (21%/13%) or Downs Plain and Scarp (6%/8%) landscape character types.

Extent of paddocks

The HLC data identifies an area totalling 3,684 ha of paddocks associated with stud farms and livery stables. These occur in a range of landscape character types throughout the AONB, primarily the Downland with Woodland, Open Downland and Lowland Mosaic types. They are generally in areas of lower altitude than the gallops, with an enclosed character comprising small scale fields and woodland. Notable areas occur south of Newbury, in the Lambourn and Kennet valleys, and along the foot of the scarp in the north of the NWD AONB.

Key habitats

The key habitats of nature conservation importance in the AONB are chalk grassland, ancient semi-natural woodland, chalk streams and rivers and arable farmland (AONB Management Plan). Given the location of land managed for the horseracing industry outlined above, and the nature of the activities carried out, it is chalk grassland that is the habitat most likely to be directly affected.

One of the major drivers for the historic development of the horseracing industry in the area is the presence of large areas of chalk grassland, with its springy turf composed of fine leaved grasses, on open rolling hills with freely-draining soils. Other habitats of conservation importance are less likely to be affected by the industry, although there may be small scale loss of habitats associated with arable farmland and diffuse impacts on the quality of chalk streams and rivers.

Chalk grassland is the NWD AONB's most distinctive and ecologically valuable habitat (AONB Management Plan). It provides habitat for many rare species of plant, including

early gentian and many orchids, along with diverse assemblages of invertebrates and populations of bird species of conservation concern. Many sites are protected through designation as Sites of Special Scientific Interest, or designated by local authorities as Sites of Importance for Nature Conservation or County Wildlife Sites. Pewsey Downs and Hackpen Hill have been designated as Special Areas of Conservation and as such form part of the European-wide network of sites of importance for biodiversity, Natura 2000.

In spite of this, the extent and quality of the resource is only poorly known. Surveys of the chalk grassland resource carried out by English Nature in the 1980s identified chalk grassland sites totalling nearly 1,000 ha in the areas of the AONB in Oxfordshire, Berkshire and Hampshire (Keymer & Leach 1990), whilst preliminary survey work in the portion of the NWD AONB in Wiltshire identified sites of unimproved or semi-improved chalk grassland totalling nearly 4,000 ha. Work is currently underway to survey the resource using a common classification system, and Natural England plan to release an updated inventory for Lowland Calcareous Grassland in late 2007.

Notwithstanding the variation in estimates of the current extent of chalk grassland in the AONB, it is clear that the area has declined dramatically over the last 200 years. The HLC, which summarises information from maps dating back to the 18th Century, suggests that of the 32,464 ha of downland in the AONB identified in the earliest maps, only 15% (4,814 ha) remains today. The vast majority of this area has been lost as a result of the enclosure of downland and the subsequent changes of agricultural management, either the intensification of grassland management through reseeding and application of fertilizer and pesticides, or the conversion of grassland to cultivated arable land.

The threat to remaining chalk grassland areas of conversion to arable land has largely been lifted as a result of changes in legislation and agricultural support payments. However, inappropriate management of chalk grassland, either through the intensification of grassland management or the abandonment of management, remains a threat. In addition, the diversity of remaining areas is threatened by diffuse effects of management of adjacent land (fertilizer and agrochemical drift from adjacent farmland), nutrient enrichment from atmospheric deposition, and the biological effects of isolation and fragmentation on small populations (Mortimer et al. 1998).

Effect of horseracing on chalk grassland

Data from the HLC suggest that only 248 ha of downland has been lost during this period (from 18th Century to date) through conversion to training gallops, and only 44 ha to paddocks. Loss of open downland to racehorse related land management is a historic phenomenon, affecting a small area of the chalk grassland resource. Many of the gallops created more recently run along the edges of large arable fields in the open downland areas. However, there are a number of chalk grassland sites on which training gallops are sited, or which lie immediately adjacent to training gallops (see Table 35).

Table 35 Chalk grassland sites with training gallops or adjacent to training gallops.
(SSSI, Site of Special Scientific Interest; SINC, Site of Interest for Nature Conservation/County Wildlife Site; GI, site listed in Grassland Inventory)

Site name	Parish	Status	Gallop position
Aston Upthorpe	Aston Upthorpe	SSSI GI	Adjacent
Aston Upthorpe Gallops	Aston Upthorpe Blewbury	GI	On
Ridgeway above Blewbury Down	Blewbury Compton	SINC	Adjacent
Churn Hill	Blewbury	GI	On
Abingdon Land Old Gallops	East Ilsley	GI	On
Sheep Down Gallops	West Ilsley	GI	On
Maidencourt Down	East Garston	SINC GI	Adjacent
Winterdean Bottom Down	East Garston	SINC GI	Adjacent
Eastbury Down	Lambourn	SINC	On
Giant's Steps	Lambourn	SINC GI	Adjacent
Scary Hill	Kingston Lisle	SINC GI	Adjacent
Kingstone Warren Down	Uffington Woolstone	SINC GI	On
Bishopstone Strip Lynchets	Bishopstone	SINC GI	Adjacent
The Coombs	Bishopstone	SSSI GI	Adjacent
Coombe Down Smeathe's Ridge	Chisledon Ogbourne St Andrew	GI	Adjacent
Barbury Castle	Ogbourne St Andrew	SINC GI	On
Ogbourne Down	Ogbourne St Andrew	SINC GI	Adjacent
Ogbourne Maizey Down	Ogbourne St Andrew	SINC GI	Adjacent
Rockley East	Ogbourne St Andrew	SINC GI	Adjacent
Preshute Down North	Preshute	SINC GI	On
Fyfield Down	Fyfield West Overton	SSSI GI	On
West Down Gallops	Avebury Cherhill	SINC GI	On
Inham Down	Collingbourne Kingston	SINC GI	On
Watership Down Cannon Heath Down	Kingsclere	SINC GI	On

Examination of the recent condition assessment documents for the SSSIs likely to be influenced by training gallops found no evidence of damaging activities relating to use by

racehorses, although issues relating to (in)appropriate grazing regimes were identified and these may interact with use of land for training gallops. No information is available on the impact of racehorse related activities on the Sites of Importance for Nature Conservation.

In other areas of the country, successfully integrating optimal management of chalk grassland sites for racehorse training and nature conservation has sometimes proved challenging. In particular reconciling training with appropriate grazing or mowing management has proved problematic at a number of sites. Intensive mowing during the growing season to achieve a uniform short sward impacts on conservation of both the flora and fauna associated with chalk grassland. Furthermore since botanical diversity in chalk grassland is promoted by the dry, infertile soils, failure to remove cuttings and the watering of gallops during dry periods is detrimental to conservation objectives, whilst providing a reliable surface for training.

The negative effects on chalk grassland of nutrient enrichment and the use of mowing rather than grazing have been widely studied on agricultural land (Willems 1983, Bobbink & Willems 1993). However, the other major influence of training gallops, the physical disturbance of the turf by horses' hooves, has received little attention. The only published study of the impact of racehorses on chalk grassland vegetation comes from a study of the racecourse and training gallops at Newmarket carried out in the mid 1950s (Perring, 1967). This study identified the following characteristic chalk grassland species as being especially sensitive to racehorse galloping:

<i>Asperula cynanchica</i>	Squinancywort
<i>Briza media</i>	Quaking Grass
<i>Campanula rotundifolia</i>	Harebell
<i>Carex flacca</i>	Glaucous Sedge
<i>Carex caryophylla</i>	Spring Sedge
<i>Euphrasia officinalis</i>	Eyebright
<i>Filipendula vulgaris</i>	Dropwort
<i>Helianthemum nummularium</i>	Rockrose
<i>Helictotrichon pratense</i>	Meadow Oat-Grass
<i>Hippocrepis comosa</i>	Horseshoe Vetch
<i>Medicago lupulina</i>	Black Medick
<i>Primula veris</i>	Cowslip
<i>Polygala vulgaris</i>	Common Milkwort
<i>Thymus polytrichus</i>	Thyme

In the areas used most intensively, the fine leaved grasses typical of chalk grassland are replaced by coarser species such as creeping bent (*Agrostis stolonifera*), crested dog's-tail (*Cynosurus cristatus*), perennial ryegrass (*Lolium perenne*) and Yorkshire fog (*Holcus lanatus*). Characteristic chalk grassland wildflowers are replaced by species suitable to the horseracing industry that can cope with heavy trampling such as creeping cinquefoil (*Potentilla reptans*), daisy (*Bellis perennis*) and field bindweed (*Convolvulus arvensis*).

Potential for beneficial management of chalk grassland

Whilst the area of species-rich chalk grassland affected by racehorse training might be low, the grass gallops on open downland do have the potential for offering other biodiversity benefits, since they comprise extensive areas of semi-natural, often longstanding grassland managed at low intensity. The nature of management of the gallops is consequently of key importance.

The survey of trainers and others involved in the horseracing industry provided information on some aspects of the management of gallops and other areas managed for racehorse training.

The survey included 37 respondents using grass gallops within the AONB. Of these, 22 use gallops managed by a third party, including eight using the Jockey Club gallops at Lambourn. Of the 15 respondents managing their own training areas, the following types of management were employed:

Table 36 Types of management of gallops

Type of management
9 managed their gallops by mowing
6 employed rotational usage, with resting periods
4 had cultivated and re-sown their grass gallops
3 applied fertilizer
1 applied pesticides or herbicide
1 planning to create new grass gallop

Management of the training areas was primarily by mowing, although sheep grazing of training areas was listed by one respondent. Several studies have shown that mowing results in reduced botanical diversity and a shift in plant species composition in chalk grasslands (Bobbink & Willems 1993, Willems & van Nieuwstadt 1996). Grazing by livestock is better for conservation objectives, although there are practical reasons for mowing being the favoured option related to both their use for training and the long, thin nature of the gallops. The use of rotational management may provide opportunities for grazing on some of the more extensive training areas. Use of reseeding, fertilizers, pesticides and herbicides was limited amongst the survey respondents. All of these practices are likely to adversely affect flora and fauna.

Fertilizer, herbicide and pesticide use on species poor grassland training areas may affect adjacent areas through run off and spray drift. Analysis of the land cover adjacent to gallop areas in the AONB was carried out using Land Cover Map 2000 data in 100 m and 200 m buffer areas around each gallop. The analysis shows that the majority of gallops and other training areas are adjacent to agricultural land, either arable or agriculturally-improved grassland. Only 5% of land immediately adjacent to training areas comprises chalk grassland

Table 37 Identity of land cover on land adjacent to gallops and other training areas in the AONB. Data show the percentage of land within 100m or 200 m of a training gallop categorised by Broad Habitat (Source: LCM 2000)

Broad habitat	Percentage of the area within 100 m of gallop	Percentage of the area within 200 m of gallop
Improved grassland	43%	39%
Arable	40%	44%
Broad-leaved woodland	6%	6%
Calcareous grassland	5%	4%
Others	6%	7%

The data presented here suggest that the area of chalk grassland actively used for racehorse training is low, and that, whilst many training areas are adjacent to chalk grassland sites, the area of chalk grassland likely to be affected by their management is limited. Estimates using the LCM 2000 data are that 240 ha of chalk grassland is within 100m of a training area and a further 60 ha within 200 m.

Most training gallops border agricultural land. However, in some of the areas of extensive training gallops within the AONB, there are sizeable areas of grassland that do not form part of the gallop, in corners of parcels, between parallel gallops and on the inside of curves. These areas could provide opportunities for enhancing the biodiversity of training areas. The exclusion of mowing from small patches of the training areas at Newmarket has led to flowering and seed production of many characteristic chalk grassland species, including orchids.

Appropriately managed peripheral areas could provide opportunities for ground nesting birds such as skylark. However, research is needed on the interactions between these areas and racehorse use, particularly with regard to problems associated with the presence of particular elements of the fauna. Respondents to the survey noted the presence of a range of animals on the gallops, including deer, but also problems associated with pheasants scaring horses. Rabbit, badger and mole populations may also adversely affect the quality of the gallops. This has been an issue in the NWD AONB and measures to mitigate the effects of burrows should be considered (within existing legal constraints) to have successful gallops and badger populations.

The Strategy for the Horse Industry in England and Wales, published by a partnership of the BHIC, Defra, DCMS and the Welsh Assembly Government, states that 'the horse industry should be encouraged to help improve the quality of the land it utilises'. There is a need for development of best practice management guidelines for training areas on the downland within the AONB. This should include not only management of the training gallops, including guidance on rotational management and acceptable inputs, but also the potential for enhancement of peripheral areas. Similar approaches involving integrating management with nature conservation objectives have been employed on golf courses for a number of years (Tanner & Gange, 2005).

It should be noted that gallops are one of the few areas of grass that does not receive agricultural subsidies under the CAP. This is an issue that could be followed up.

Environmental effect of all-weather gallops

In the survey of businesses, 41 respondents within the AONB used all-weather gallops, of which 32 also used grass gallops. All weather gallops were managed by 20 respondents. No proposals for construction of new all-weather gallops were identified, although two respondents were planning to resurface existing gallops. Direct impacts of all weather gallops on biodiversity are limited, and the areas of land used are small. However, there are potential issues surrounding the construction of gallops close to trees and hedgerows, with appropriate siting or disposal of soil extracted during construction, and with the siting of materials stored for resurfacing works.



With regard to the management of land on stud farms and livery stables, impacts on wildlife are unlikely to be different from those associated with lowland livestock farming. With few exceptions, the grassland areas used by such enterprises comprise species-poor, agriculturally improved grassland. However, there are some areas of chalk grassland identified in the Grassland Inventory or designated as SINC's that are managed for racehorses.

Land managed for stud farms or livery stables is often associated with increases in the density of boundary features rather than boundary removal. The landscape impact of such changes has been identified in the Landscape effects section (see page 36). However, small scale loss of hedgerows may be associated with the development of facilities by such business, for example for widening access points or the construction of new buildings. Several respondents in the survey listed the planting of hedgerows and trees as part of their environmental enhancement works. Such planting should comprise the use of appropriate species of local provenance.

One final impact of activities relating to the horseracing industry is the potential for diffuse effects on the quality of habitats associated with chalk streams and rivers. Erosion of trackways leading up the side of valleys to training areas on the downland has been a localised problem in some areas of the Lambourn valley, and one respondent in the survey highlighted this issue. Such erosion has the potential to lead to run off contaminating important chalk stream and river habitats in the Lambourn and Kennet valleys. Many survey respondents highlighted the issues surrounding disposal of waste affecting trainers, stud farms and livery stables. Waste disposal is especially difficult if businesses do not have access to land on which to spread it. Practical solutions which minimise impacts on the environment need to be developed for the storage, spreading and disposal of waste arising from activities relating to the horseracing industry.

Summary of key issues

The main habitat affected by the industry is chalk grassland on the open downland. Loss or degradation of this valuable habitat is largely historic as many of the gallops and training areas are long established. However, there are few areas where racehorse activities are there is the potential for current management practice to damage the biodiversity value.

It is likely that the presence of the industry has contributed to biodiversity value of the AONB, promoting the persistence of grassland managed at relatively low intensity in a landscape characterised by large-scale arable farming. The cultivation of certain crops used by the feed industry, such as lucerne, is also likely to add to the biodiversity of the area (Mortimer et al., 2006).

The biodiversity value of land associated with the horseracing industry could be enhanced through a number of means. Recommendations are made below relating to the need for further investigation of the extent of current biodiversity value and its interaction with management practices, and the need for the development of guidelines for management practices that minimise environmental damage and/or enhance environmental value.

1. The biodiversity value of land managed as gallops and training areas is poorly known (Recommendation: survey work on the biodiversity value of gallops and associated peripheral areas of rough grassland managed by racehorse businesses).
2. Little information is available concerning the nature and extent of management practices adopted on gallops and training areas (Recommendation: Survey of usage patterns and management practices currently in operation).
3. The development of best practice guidelines for management, including the enhancement of peripheral areas on gallops and training areas, would help the industry to implement one of the recommendations of the Strategy for the Horse Industry in England and Wales (Recommendation: Identification of best practice management and enhancement opportunities).
4. There is also a need to ensure that businesses such as trainers, stud farms and livery stables have access to information regarding practices for the storage, spreading and disposal of waste which minimise impacts on the environment (Recommendation: Identification of practical solutions for the storage and disposal of waste).

Social and community effects

The social and community dimension

The AONB Council of Partners has a duty towards the social fabric of the population within its boundaries insofar that the social dimension affects the core considerations of landscape promotion. This section sets out an expansive range of issues raised in the research, some of which may fall outside of the AONB's remit. However given the current culture of partnership working in rural policy, knowledge and understanding of such issues is likely to be useful.

This section sets out the identified issues and context for the industry, focussing particularly on the social implications of the horseracing industry for employees and local communities more widely. This aspect of the study and of the horseracing industry is not particularly well understood across the AONB, although efforts to address some of the problems experienced by horseracing industry employees nationally have been stepped up in recent years. The Burnham report of 2000 set a process of modernisation in motion. The recent Donoughue report on stable and stud staff (2004) added calls for better conditions and highlighted a number of related issues for racing to address.

In 2001 Racing Welfare, a charitable body seeking to work with the industry, was set up by the Jockey Club. Its remit is to provide an accessible, responsive and professional occupational welfare service to racing people including employers, employees and the retired. This was prompted by a number of needs identified by the Jockey Club. Racing Welfare aims to provide:

- Support for the injured, the ill and the disabled
- Welfare officers in all the main racing centres offering information and advice
- Financial support for those in need
- Affordable housing for the retired
- A holiday scheme for disabled beneficiaries
- Education

Despite this, certain unique issues faced by the horseracing industry persist and some rather more widespread challenges that are common with other groups or activities. In recognition of latent issues revolving around the horseracing industry the Donoughue review (2004) recently looked at all aspects concerning racing industry employees. This included the consideration of the pressures of an expanding race calendar, amongst other issues that fall into the social and 'welfare' category and which are relevant here.

This project is most concerned with the direct employees of horseracing industry businesses and their experience of working in the industry. The horseracing industry employs a range of workers: stable lads, jockeys, owners, trainers, ancillary workers. Stud and stable staff tend to work long hours in all weather conditions, facing potential dangers whenever they are handling the often highly-strung horses.

The broad research methodology used into the social and community impacts and benefits of horseracing industry has identified seven key issues and outlined the main draw factors for workers in the industry. Some of the issues overlap while others contain a number of constituent elements. The issues can be summarised as:

- Demographic changes in staffing

- Structure and amount of racing
- Pay and conditions
- Access to housing
- Skills and training
- Intra community issues
- Health and safety

The above issues are discussed below but in terms of importance or magnitude Racing Welfare's appraisal is that housing related matters were the single most important issue. The major stumbling block was seen by housing professionals in the AONB as being availability of land for community housing. This was echoed by the Donoughue report. Income and pensions and then access to skills and training were immediately identified by interviewees as other important issues. Housing however has the most potential to affect the landscape and natural beauty of the AONB and therefore may be regarded as the prime issue from the perspective of employees, employers, the AONB partners and other regulatory agencies.

The approach taken has been to look at existing information and to talk to professionals active in addressing social issues across the AONB. This effort included the active participation of Racing Welfare staff, community development workers focussing on the Downlands as well as housing enablers from across the AONB area. Relevant secondary material has also been looked at.

Social benefits of the horseracing industry

The main attractors to the countryside are quality of life issues such as landscape and environmental quality, which are well established draw factors for people working and living in the English countryside generally. These are common pull factors for many rural dwellers and are not exclusive to horseracing industry employees but this is still noteworthy. Beyond such general environmental goods, specific horseracing industry and equine factors are relevant. A love of horses and, to a lesser extent, horseracing itself tends to attract employees to work in horseracing. There are also strong family links present with many employees having other family members involved in racing in some capacity. For others the relative ease of entry to the industry is useful and indeed migrant workers find it a relatively accessible industry.

Camaraderie and social knit

Racing yards are generally tightly knit units and have to work as a team. This is similar in many regards for stud farms where staff live and work together. The onsite community look after each other and this provides a degree of support network for each other. As a result the industry has often been regarded as largely self-regulating. This can be seen as positive but, as detailed later, there is still a need to look outside for support as some structural factors may need addressing to bolster the social sustainability of the industry in the NWD AONB.

Another benefit is being 'part of the scene'. The intangible sense of belonging is a special benefit attributable to the structure and operation of the horseracing industry. While the majority of the work is unglamorous, weeks like the Cheltenham Festival attract people to the industry and provide high points not necessarily found in other jobs.

The close knit feeling spills over into other activities, for example, there are organised racing pool and darts leagues and until recently there was a football league; matches are still played but less frequently than in the past.

Further work could be conducted to better understand the decision-making of employees in the horseracing industry. This is partly being carried on through the ongoing 'link-up' project led by the Community Council for Berkshire and would help understand the motives, aspirations and plans of workers. The Donoughue report echoes this from the perspective of employers looking to attract more suitable staff to the industry and urges: 'a recruitment brand and marketing campaign to promote the attractions of a career in racing' (2004: p10).

Issues and problems

As indicated at the outset there are a range of issues and problems faced by the industry generally and by those working in the horseracing industry within the AONB. There is a feeling that the industry was and to some extent still is rather insular – a strength in some situations but the types of issues listed could be tackled in partnership with others. The Donoughue report does not fully recognise sources and potential support for the horseracing industry. The research team feels this is a general issue to be considered when addressing matters involving the horseracing industry.

The survey included several questions relating to the social context and asked about perceived social issues. However in Table 38 below only 7% of respondents believed their staff have social issues. However the sample were predominantly trainers and business owners and the identification of possible issues was likely to be low.

Table 38 Are there any other social issues that affect your staff?

	Total
Yes	7%
No	75%
Don't know	18%
Grand Total	100%

Training, stud and livery businesses were more likely to identify social issues than the other types of businesses.

Table 39 Social issues affecting staff by business type

Type of business	Yes	No	Don't know	Grand Total
Trainer	7%	80%	13%	100%
Stud	7%	86%	7%	100%
Livery / broodmare	33%	17%	50%	100%
Farrier	0%	0%	100%	100%
Horse feeds and forage	0%	100%	0%	100%
Veterinary practice	0%	100%	0%	100%
Other HRI related businesses	0%	76%	24%	100%
Grand Total	7%	75%	18%	100%

Livery / broodmare businesses have the most perceived social issues with their staff, with 33% saying that they do have social issues.

Foreign workers

65% of staff from the businesses that responded were from the UK; 8% were from the Irish Republic, 17% from mainland Europe and 9% from elsewhere in the world.

Trainers and stud farms employed the highest proportions of non-UK staff.

16% of businesses employing non-UK staff said that the nationality of their staff posed some issues, but the survey did not explore them.

Table 40 Nationality of staff employed

Type of business	From UK	From Irish Republic	From mainland	From elsewhere	Total
Trainer	352	61	128	63	604
Stud	101	4	10	5	120
Livery / broodmare	37	0	0	7	44
Farrier	1	0	0	0	1
Horse feeds and forage	5	0	0	0	5
Veterinary practice	24	0	0	0	24
Total	520	65	138	75	798

Table 41 Nationality of staff employed (%)

Type of business	From UK	From Irish Republic	From mainland	From elsewhere	Total
Trainer	58%	10%	21%	10%	100%
Stud	84%	3%	8%	4%	100%
Livery / broodmare	84%	0%	0%	16%	100%
Farrier	100%	0%	0%	0%	100%
Horse feeds and forage	100%	0%	0%	0%	100%
Veterinary practice	100%	0%	0%	0%	100%
Total	65%	8%	17%	9%	100%

Businesses employing foreign staff pay them the same wage as any others, which is enforced by the Jockey Club. It is also their responsibility to ensure that the staff know sufficient English so as not to pose a danger to themselves or others.

As there are is a cluster of foreign staff in the industry, they are less likely to have social issues where there is a group of them, although there may be some issues where they are slightly set apart from the rest of the staff, caused by language barriers and cultural differences.

Impact of extended or intensified racing

Much of the industry depends on a percentage of bookmakers' turnover, which has been an incentive to increase the amount of racing and has also been influenced by the rise of internet gambling. Race meetings have grown in response to demand and according to the Jockey Club there are over 150 meetings per year in England, with racing on 51 Sundays per year. This places horseracing industry workers under increasing strain. Many staff go racing typically 3-4 times per week yet this would have been only 3-4 times per month until the recent past. This often involves long distance travel and over-night stays, so married staff find they spend a lot of time away from home. Such long hours can affect staff relationships.

Traditional events are being cut back as staff are working longer hours and can't get away. For example, the inter-yard football league has been reduced to two matches per year due to time pressures and availability of staff.

The Stable and Stud Staff Steering Group, formed as a result of the recommendations of the Donoghue Commission made in 2004, are considering the effect of race frequency and wages on the industry.

Pay and conditions

According to Vamplew and Kay (2005) stable staff are the lowest paid workers in the horseracing industry. In 2000 the official weekly minimum wage of stable staff was £180. Stable staff accept low wages as they like to work with horses and many have few skills that are transferable to other industries. In 2000 the British Horseracing Board found that low pay was ranked only third on the stable staffs' list of complaints behind 'too much racing' and 'too long hours'. More than half of all stable staff nationally are

female.

While staff working conditions have been improving this has not been exclusively due to self regulated change within racing, with statutory regulations governing pay and health and safety being brought in during the past decade and which racing has been obliged to adopt. This has ultimately helped staff. Racing Welfare and the Jockey Club also enforce parity of pay for migrant workers so that is not seen as big issue. Furthermore the Donoughue Commission looked at a range of issues including race frequency and wages. The outcomes are due to be negotiated by October 2007.

Pay

The conditions of those working as stable lads in particular are not directly comparable to other workers but in absolute terms the pay levels are still low. The 2004 Stable and Stud staff commission set out a number of points for the industry to adopt to standardise and improve pay and conditions, including written contracts of employment and pay for overtime beyond 40 hours per week worked.

Pensions and retired jockeys

Pensions are seen as very low and trainers contributions have been very low (a minimum of only £400 pa). The Donoughue Commission urged a higher contribution to be negotiated by the National Trainers Federation and the Stable Lads Association.

Demographic changes in staff

In the past two decades more women and more workers from other countries have been joining the racing workforce. Moreover the gender mix of racing staff has changed leading to more married couples working in the industry. This changes the needs of those households, particularly when couples have children. Some of those are discussed below.

Migrant workers

One issue arising, and linked to health and safety, is the English language skills of some migrant workers. This was identified as an issue by the Donoughue Commission and skills training as indicated below appears to be a growing need within the industry both in terms of Health and Safety but more widely in terms of career development and quality of life.

There may be a role here for Rural Community Councils to get involved pro-actively to mediate, understand and advise on opportunities and funds available to support women, children and migrant workers. In Berkshire this type of work has begun through the Community Council for Berkshire-led 'link-up' project.

Child care

Lack of child care facilities is seen as an issue linked to the above. For example there is not one registered childminder in Lambourn but the population easily supports a school. Due to the non-standard hours that racing works, there is an apparent need for special child care facilities. The equivalent horseracing industry centre around Newmarket has a horseracing industry nursery which opens at 6.00am.

This issue also links into other welfare issues, for example life long learning, business development and enterprise. There appear to be several unmet opportunities for support businesses / services around the horseracing industry. These could be considered as part of community-building and social enterprise activities.

For example it appears that the provision of similar nursery facilities to Newmarket are needed within the NWD AONB. The most likely locations for such facilities would be around the Lambourn area or, if multiple facilities were viable, then centred around settlements serving the horseracing industry cluster areas. A partnership approach could be developed and a social enterprise set up to offer nursery facilities in and around horseracing industry clusters.

Health and safety

Injury

There are a number of interlinked health and safety issues to be highlighted. The horseracing industry is inherently dangerous given the close work required with horses and often working at high speeds. The Jockey Club acknowledge this is an issue. They state that 'falls and injuries happen daily and can result in long-term disability, premature arthritis and rheumatism leading to early retirement' (Jockey Club, 2007).

In response there is a Racing Industry Accident Scheme that the trainer and employees pay a small contribution towards each week. This pays for up to two years absence from work where staff are injured at work; plus there is a capital scheme to make payments where people are permanently injured. As an exemplar, Racing Welfare were dealing with three accidents in early 2007 – one of whom is paralysed from the waist down. The feeling from Racing Welfare is that the permanent injury arrangements are still inadequate. It is very difficult to prove a case against a negligent employer as horses are unpredictable and the job inherently risky.

Support for elderly people in the community has changed for the worse but this may be the case nationally. If injury risk is a key issue then supported and/or sheltered accommodation may be a specific need. It is unclear if such needs would be best met within the AONB / close to other horseracing industry locations, or close to appropriate services (see page 82 on housing).

This element links to the housing need issue (page 110) in that specific types of supported housing may be needed for retired and injured horseracing industry staff. This subset might usefully be included as part of a wider survey the need for supported housing across the horseracing industry in the NWD.

Traffic

There are some conflicts generated by horse movements on roads. This can create problems and accidents can occur, particularly in areas outside of the core racing villages where awareness may be lower. This issue is not really seen by the horseracing industry as a big problem in Lambourn, as people expect horses to be present. Most people are apparently very understanding but accidents and conflict do still happen. Also the delivery of feedstuffs and bedding can reportedly cause some blockages on roads.

One idea suggested and greeted with a positive response is a horseracing industry code for motorists. Racing Welfare would support this, especially for targeted areas outside

the main horseracing industry clusters, and this may be something that the AONB could lead on. This could be useful for newcomers, drivers, visitors and young staff. This is a development from the Country Code and there are parallel horse riding codes in existence, for example in Scotland the '*Are you riding responsibly?*' leaflet produced by the British Horse Society with the Scottish Executive.

Weight issues

An ongoing issue is weight as jockeys (and many other racing staff) need to be under nine stone for both flat and jump racing. This weight limit can have health implications and some jockeys have suffered ill effects from fasting and making a weight. This can have trickle down effects to stable lads as they also need to be an appropriate weight to train the horses. However Racing Welfare claims that this is not seen as being dangerous or out of control. This topic is marked out now as an issue however, partly because the weight of many young people is rising in society. Some moves to alter the weights system in racing have been made through the Donoughue review in order to address this situation (and also to consider the appropriate weights needed to train racehorses).

It was raised in the study that maintaining weight may be more pronounced for migrant workers as they depend more on the industry and have more to lose in relative terms.

There is a possible link here between advice and information provision and across into local foods and healthy eating schemes.

Alcohol and drugs

Racing Welfare has a dedicated drugs dependency adviser but it does not think that this is more prevalent in racing than any other sector of society. It also tends to be spotted earlier as trainers and staff do not want to ride with people using drugs due to safety concerns. Alcohol is seen as a greater issue as drinking and horseracing have tended to go together. This is not seen as a particular problem as such because racing jobs cannot be done effectively if staff are drunk/hungover.

Isolation

There have been some cases of mental depression and isolation as a result of working away from others. Often the first step is financial problems but no other common cause can be easily identified. In the last two years there have been four suicides in the Newmarket area of horseracing industry staff but none of them were related to work or racing directly. It may be that foreign workers could suffer isolation more than others.

Gambling

People within racing will gamble and this is probably more prevalent than in wider society. But few cases have been reported where this has got out of control. Racing Welfare often signpost to other support groups and try to overcome initial resistance to counselling for such problems.

There appears to be a need to work with partners, such as Racing Welfare, to maximise social and other advice channels for those working in yards and studs covering isolation and other topics such as gambling and other addiction problems.

Relationship between the community and the horseracing industry

Generally this is seen as not as a problem with the industry regarded as a net benefit and hoping to keep the community vibrant. Although historically the racing community has been quite insular, this is recognised to be changing. Donoughue recognised that this has been part of the reason for help to be sought and provided by external agencies.

Only minimal or background conflict between migrants and indigenous staff was reported. There has been some resentment reported from UK staff that the migrant staff are undermining their negotiating position, as there are plenty of people wanting to work in the industry. However the enforcement of equal pay is addressing such tensions. Some difficulties are actually between in-migrant worker groups. Some of these micro-communities within racing could have needs and issues that need to be looked at. There is an apparent need for English language courses and access to such opportunities, which leads to welfare and other issues. One example cited was a couple who were unable to ask for more blankets when cold. This was seen as an issue in safety terms due to the need to communicate well during training and other events.

Training, skills and education

This issue was seen as important for different reasons. There are different needs at different stages of careers, for example on entry to the industry, in the industry and also when people leave the industry. A whole chapter of the Donoughue report is devoted to this topic.

The provision of initial training for those entering the industry as stable staff appears to be relatively well provided for. There are two training schools for stable staff in Newmarket and Doncaster which run 12-week intensive courses. Also there are starter courses (pre-racing school) at Lackham College, near Chippenham begun in Autumn 2006, partly following from recommendations of Donoughue. Courses are compulsory for all entering the industry and give National Vocational Qualification 1 qualification and a guaranteed job. Modern apprenticeships have been available through the Learning and Skills Council in equine businesses across the region.

There is an opportunity to use local trainers and other employers to provide introductions to racing training. This could provide more staff the chance to be involved in education.

There appears to be a lack of good information about skills needs and a further survey with education providers, the Learning and Skills Council and those within the horseracing industry, should ascertain the level and type of education and training that the industry requires.

Career development

There is apparently an issue with the retention of staff in racing and an identified need for career development opportunities. Female staff often want to retrain when they reach a certain age or start families. Many often want to retrain as secretaries, often to the horseracing industry. Racing Welfare can help where people want to stay in the industry but not where they are planning to leave. There is often a reluctance of trainers to train staff as they fear losing staff. There is some evidence that opportunities for staff to acquire extra skills are limited and that employers need help to identify and offer such opportunities.

Trainers could try 'golden handcuffs' to retain staff after training has been provided. This would benefit the trainers as well as staff but the legality of that approach may need to be investigated and / or be part of advice given to trainers to encourage skills training.

There appears to be an opportunity to help those leaving the horseracing industry to skill-up and retrain for other industries or feed into related services that could be developed across the AONB (e.g. childcare). Organisations, such as JET, provide such services.

Retirement and exit from training

There are few exit strategies for career ends, with pensions often seen as a pittance. Racing Welfare has a 'lifetime in racing' scheme for workers who have completed 40 years in racing but this is just one special day. Many people in their 50s and 60s who are too early to retire cannot work due to physical problems, largely chronic health problems such as back pain. There is little provision for them and many people in this category live on state benefits.

Again, there is an opportunity to develop education and lifelong learning schemes to be marketed more effectively within the horseracing industry.

Housing

Housing in rural areas and the need for affordable rural housing has been subject to intensified scrutiny in the past few years with the Affordable Rural Housing Commission report (2006) and a Joseph Rowntree Foundation report also being published. The need for housing may be established but where, what type and for whom are issues that are still being considered, as are means and mechanisms for delivering such housing.

Types and needs for the horseracing industry

Housing and the need to provide more affordable housing appears to be the single most important problem identified in the social element of this study and is echoed in the Donoughue report. There is a limited stock of housing in the AONB with stringent controls on new build unless it is for on-site agricultural (including horseracing industry) workers.

Only 25% of respondents believed that there was enough accommodation in the area. This figure however includes other businesses related to the horseracing industry; for trainers, stud and livery businesses only, the figure falls to 14% believing there is enough suitable accommodation.

Table 42 Response to question, "Is there enough suitable accommodation for your staff in the area?"

	Total
Yes	25%
No	42%
Don't know	32%
Grand Total	100%

69% of the core horseracing industry businesses provide accommodation for some of their staff.

Table 43 Businesses that provide accommodation to their staff

Type of business	Yes	No	Grand Total
Trainer	70%	30%	100%
Stud	93%	7%	100%
Livery / broodmare	50%	50%	100%
Farrier	0%	100%	100%
Horse feeds and forage	0%	100%	100%
Veterinary practice	50%	50%	100%
Grand Total	69%	31%	100%

A different measure of the amount of accommodation provided by the businesses is to compare it to staff employed and full-time employees. As would be expected, a high proportion of businesses that need staff to care for horses provide accommodation; 63% of full-time training yard staff are provided housing, 83% of full-time stud staff and 62% of livery staff.

Table 44 Numbers and proportions of staff provided accommodation

Type of business	Number of staff provided accommodation	Number of staff employed	% of all staff provided accommodation (%)	Number of full-time staff employed	% of full-time staff provided accommodation (%)
Trainer	350	604	58%	554	63%
Stud	90	120	75%	108	83%
Livery / broodmare	18	44	41%	29	62%
Farrier	0	1	0%	1	0%
Horse feeds and forage	0	5	0%	4	0%
Veterinary practice	4	24	17%	24	17%
Grand Total	462	798	58%	720	64%

Despite the high provision of accommodation by the businesses, many still recognise that housing and lack of suitable accommodation is still a significant issue with 55% of trainer, stud and livery businesses stating that there is not enough.

Table 45 Provision of suitable accommodation for staff. In response to question, "Is there enough suitable accommodation for your staff in the area?"

Type of business	No	Yes	Don't know	Grand Total
Livery / broodmare	33%	17%	50%	100%
Stud	36%	21%	43%	100%
Trainer	69%	10%	21%	100%
Grand Total	55%	14%	31%	100%

In terms of available housing there are numerous hostels and tied accommodation on

training yards and as part of stud farms. Racing Welfare has five houses it can let out in the Lambourn area but claim that if they had 55 they could fill them all. There is a strong case for a more detailed record of how many applicants there are for all types of affordable housing.

Housing needs survey for the horseracing industry

While there is much anecdotal evidence of housing need, there is no comprehensive and reliable survey of need across the AONB or even in key parishes where horseracing industry businesses are located. There has not been a separate survey for the horseracing industry and in areas where horseracing industry businesses are located. There has not been a housing needs survey for Lambourn as yet but one has been done for example at nearby Cheddleworth and the process of conducting this work is ongoing across the constituent counties.

Housing Need Surveys do not build in specific horseracing industry / equine questions. Indeed there are concerns voiced by rural housing workers across the AONB that such evidence does not adequately reflect the needs of migrant workers or other workers who may be housed in hostels or other onsite accommodation. There seems to be a methodological issue in relation to housing need surveys in terms of getting to all hostels and tied accommodation – this is a gap in the evidence base. None of the attending housing enablers at the social focus group had previously identified horseracing industry specifically but are now all aware of the potential gap.

Existing mechanisms such as gypsy and traveller need assessments could be used as a template for improving methodology to reach horseracing industry employees as they appear to be a 'hard to reach' group in terms of eliciting information and gaining understanding of their needs.

A number of AONB parishes have completed parish plans but few if any have been able to clearly identify housing need and have struggled to cope with the challenge of engaging with hard to reach groups (Parker and Luck, 2006). This latter category being a label that may need to be extended to cover specific types of workers in the horseracing industry (and indeed possibly other employment types).

One indicator that does provide a stark quantification of need that is useful is the Basingstoke and Deane housing needs survey carried out in 2003. This work has got closest to delineating horse industry housing need. The survey asked land-based questions to identify where the 'rural' need was, as well as having a separate equine category. It also identified tied accommodation. The outcome was that 53 households were established as being in need within the equine community in just that one district (Basingstoke and Deane, 2004; Lancaster, personal communication, 2007). The work showed that the need was also clustered around the parishes where the horseracing industry businesses are located in the north of the district around Highclere / Kingsclere. The need level was seventh of thirteen categories included in the survey. This provides a good indication that housing need is becoming acute across the AONB and particularly in the four clusters identified.

There is anecdotal evidence of horseracing industry workers living outside of the AONB. For example a farrier who lives in Swindon because he cannot afford to live closer. This is not the intention of the design of rural policy. The majority of stud workers live in tied accommodation. Many workers may be housed now but there is an issue if they get injured or leave? This is a reservoir of potential people to be added to the waiting list for affordable housing.

There is not expected to be a big demand for trainers to build new houses in existing yards, however in the planning section of this report there are applications being made to build housing some of which are successful if onsite need and viability of the business can be proven. What this indicates is that housing need is not well understood for the horseracing industry in the AONB and this reinforces / builds a lack of planners understanding of the horseracing industry and the housing needs.

Trainers are likely to be wary about alternative methods of delivering affordable housing and may not understand how the finances could be provided, through community land trusts for example.

Any attempt to assess the housing needs of the racehorse industry should include accessing the people on the ground that we think are in need. This evidence is needed in order to persuade planners to (i) grant permissions and (ii) consider novel methods of delivery, such as Community Land Trusts.

Retirement is also an issue as workers are often forced out into urban centres. There is often no chance of workers getting into the housing market on retirement. This generates an issue of 'move on accommodation' and workers are forced out of their communities into urban areas. Racing Welfare recommends that workers over 50 register on the housing list with local authorities as they often can not get houses in their communities. The James Butcher housing scheme in Kingsclere, which provides housing for the over-55s, could serve as a model for particular groups and for the horseracing industry to emulate.

In the draft West Berks Local Development Framework, Lambourn has not been indicated as a service centre (key settlement). The implications are that new housing will not be viewed favourably. This means that some of the ideas stated above may be jeopardised by that type of strategic decision.

Houses in multiple occupation and the horseracing industry

Quite a lot of accommodation, but a low percentage, is tied accommodation and is of variable quality. Many of the workers are in the private rented sector or are forced into buying houses. Again the Donoughue Commission emphasised the need to build more affordable housing for horseracing industry employees. However many horseracing industry stables are often in open countryside so these sites often fall outside exception site policies which might allow new houses to be built. District authorities do not recognise tied accommodation so people in this type of accommodation are not eligible to go onto waiting lists for affordable housing.

The vast majority of migrant workers will go into trainers' hostels. It is unknown whether these workers are going to stay in England for the long term or go back to their countries. Often housing needs workers do not get any response from migrant communities when doing housing needs assessments.

It is recommended that detailed racehorse industry specific housing needs assessments are done for at least the four main clusters of businesses in the AONB.

Horseracing industry healthcheck idea

The idea of a 'healthcheck' across the AONB, focussing on the needs of the horseracing industry has been welcomed by members of both the planning and social focus groups in principle. This could serve to deepen and integrate efforts to work on promoting the sustainability of the industry. The idea of healthchecks has been applied to market towns and takes only a snapshot of individual settlements.

The foregoing findings indicate that a more integrated and pan-AONB understanding of issues and needs would be useful, particularly in terms of the social dimension but also in terms of understanding the economic development potentials. The horseracing industry healthcheck would necessarily be a partnership effort in order to gain access and utilise the skills and experience available from within and outside of the racing community.

This type of work could be funded through SEEDA / SWERDA particularly as it is cross boundary and as this is a priority for EU/SEEDA policies. Funding programmes such as LEADER / Rural Development Plan for England could provide the funding envelope. Alternatively the horseracing industry itself may consider this a worthwhile exercise and be prepared to fund or part fund such a process.

Key issues and recommendations

1. Develop a racehorse industry code for motorists.
2. Carry out a healthcheck of the industry across the AONB. The healthcheck should include a full housing need survey, including an assessment of the specific types of supported housing required. It should record the number of applicants there are for all types of affordable housing.
3. Promote joint work with partners, such as Racing Welfare, to maximise the social and other advice channels.
4. Carry out a survey to better understand the skills needs of the British racehorse industry. Develop education and lifelong learning schemes for the industry.

Effects of the planning system

Overview and approach to the planning part of the study

This element of the project is particularly important as it acts as a link between the research findings and the recommendations for future policy.

The distribution and type of businesses were identified across the AONB (see Table 3 and Figure 3). This process helped identify four broad clusters of horseracing industry businesses. These are located primarily across three districts in the AONB. The three local planning authorities responsible are West Berkshire, Kennet, and Basingstoke and Deane. A few businesses are also found in the Vale of the White Horse district and into North Wiltshire. The AONB covers part of four counties (Berkshire, Wiltshire, Hampshire, Oxfordshire) and eleven districts (or Unitary authorities). This spread reflects part of the complexity in policy terms and how planning decisions are taken with local considerations and local policies framing planning decisions with different emphases.

Given the inherent range of policies and applications made relating to equine activity and the horseracing industry, the task of reviewing planning effects needed to be simplified. The issues and policies extant across the AONB in planning terms were sifted by isolating the most relevant policies by talking to development control and policy officers across the AONB, and by examining recent horseracing industry planning decisions. Questions regarding planning were also included in the business survey. Planning issues were examined and featured in focus group discussions with the AONB Planning Officers Working Group.

Planning and the AONB

Planning is arguably the single most important tool available to the AONB and for partners in effectively maintaining and enhancing the AONB in terms of landscape and the economic and social fabric of the Area. However, little work on the horseracing industry and planning decisions has been previously conducted.

Most of the core horseracing industry businesses interact in some way with the planning system, largely by making applications for new development or change of use. By dint of their different needs these businesses have differing requirements and apply to develop a variety of facilities.

The horseracing industry is seen as an important part of the environmental, economic and social life of the AONB and is recognised as such in regional, county level and district plans (i.e. the South East plan, Berkshire structure plan and West Berkshire local plan). However this is also a complex part of the study as there are many different types of planning policies, applications and impacts that may affect the AONB (and the different elements of this study are themselves considerations for planners).

Given the recent changes to the planning system, as a result of the 2004 Planning and Compulsory Purchase Act, new plans are currently being prepared at the local level (these are called Local Development Frameworks). This presents an opportunity to ensure that appropriate policies relating to the horseracing industry and the AONB more widely are negotiated into Local Development Frameworks in particular. The AONB are also in the process of reviewing the AONB management plan that acts as a guide for planners and others for decision making across the Area.

Number of planning applications

It is clear that West Berkshire is host to the largest number of horseracing industry businesses and a significant number of applications are processed by that authority annually. However it has been difficult to determine an exact number of planning applications lodged by the horseracing industry across the districts. This is largely due to the way that applications are recorded and defined. From discussions with local planners there are clearly a significant number of applications made by yards and studs.

The number of equine and horseracing industry planning applications made in the three main districts over the past year (2006-07) has been investigated and approximately 120 equine related applications identified, of which approximately 50 of these were related to the horseracing industry (the majority in West Berkshire (c25), followed by Basingstoke and Deane (c15) and then Kennet (c10). These numbers should only be regarded as indicative of the scale of planning activity rather than a definitive quantification.

Definitions of horseracing industry businesses

In planning terms there is a possible need to work up a clearer definition of what is a horseracing industry business in the AONB for DC officers to work with. This is partly as some planners feel that in some cases 'horseracing industry' applications are used as 'Trojan horses' for gaining permission for housing in the countryside. It was argued in consultation that many of these businesses do not need to be located near an horseracing industry cluster. This may be the case however some do and these are the ones that could be included in any definition i.e. a spatial distinction as well as use-based definition could be involved in this work.

Horseracing industry attitudes towards planning and policies in the AONB

While many respondents in the survey did not highlight any specific planning concerns, there were some points raised. Most respondents that raised issues said they were with new buildings (rather than change of use). Some horseracing industry people are apparently frustrated as they are unable to erect new buildings, but assume there is not much that can be done about it. Across the border in Wiltshire (i.e. Kennet) there was a feeling that policy was more supportive – this is possibly in reference to the more generalised approach and lack of specific horseracing industry policies of the type in West Berkshire.

One survey respondent in particular stated that West Berkshire's ECON 9 policy presented more hurdles for the industry than helping it, and that the planners were contradictory over their policies. The ECON 9 policy states:

'The Council will permit proposals for the development of racehorse training and breeding establishments and facilities including new yards where such development, in the opinion of the Council:

a) would not result in material damage to the rural character of the area, areas of special landscape quality, nature conservation, or archaeological importance; and

b) when taken by itself or together with other race horse establishments is well related to settlements, including the built up area of Upper Lambourn, would not significantly harm the character or amenities of such settlements, road safety or the amenities of local residents; and

(c) would maintain and enhance the Area of Outstanding Natural Beauty or designated Conservation Area affected by the proposal; and; d) make adequate provision for: (i) the accommodation of personnel where there is a proven need for such accommodation, and (ii) satisfactory and safe provision for access to the gallops and training facilities and for vehicular and pedestrian access to the site; and (e) would safeguard the existing network of public rights of way.

In the context of criterion (b) of ECON 9 ,the term 'well related' means locations where the siting of new yards are both immediately accessible to the range of facilities available in identified settlements, and will be visually read in conjunction with the built up areas of these settlements . In normal cases "well related "will therefore mean adjacent to existing settlement boundaries'.

Whereas policy ECON 8 states that:

'The Council will refuse proposals for change of use or redevelopment of existing and suitably located racehorse training and breeding establishments'

ECON 8 aims to keep horseracing industry uses in the area and to prevent those sites being redeveloped for other more generic activities (e.g. offices, housing). However there have been cases where horseracing industry related proposals have sought to reuse existing horseracing industry sites and have been refused (e.g. Racing yard to Stable lads accommodation; cf. West Berkshire planning application no. 05/02324 at Rowdown, Upper Lambourn).

The majority of businesses did not express any particular feelings about the planning system. Most of the businesses that responded critically were vets and studs, followed by liveries and then trainers. This is possibly due to the closer or more distant association with the horseracing industry made by planners to certain businesses or types of business. Policies and their rationale is almost certainly not well understood by applicants. A more effective explanation of the rationale and operation of horseracing industry (and wider equine or land based industry) policies may be required across the AONB. This is certainly an approach that has been used for land-based industries elsewhere, for example by Brighton and Hove City Council.

Some horseracing industry businesses have racked up complex planning histories, particularly the larger and more established yards and studs. Basingstoke and Deane has a good case history of the stud farms located to the north of that district, for example around Highclere/Kingsclere. West Berkshire has an officer who tends to deal with most horseracing industry applications and who has built up considerable experience in dealing with these cases. However other districts appear less well versed in specific issues that may be present with horseracing industry related proposals and the knowledge and understanding of horseracing industry issues and needs is uneven.

Planning policy and issues

A brief outline of the most relevant policies nationally down to the local level is made here.

National

The hierarchy of relevant plans stems firstly from the national guidance statements such as Planning Policy Statement (PPS) 7, PPS3, PPS13 which provide general guidance on the principles of development in the countryside. PPS7 (2004) sets out how rural businesses should be supported; its Annex A explains the circumstances under which agricultural / land-based industry housing may be permitted and how. The need to maintain a vibrant rural society and economy is found in the 2000 Rural White Paper.

There is no specific guidance regarding the horseracing industry in either the Rural White Paper or PPS7 but there is a general assumption that economic activities of 'national significance' will be supported. In a designated area context this has to be managed sensitively, as indicated in policy C2 (AONBs) in the South East Regional Spatial Strategy (see below) and indeed reflected in Theme 9 ('Diversifying economic opportunities') of the AONB management plan.

Regional

At the regional level, the new level of regional spatial strategies have been under development. The draft South East Regional Spatial Strategy, submitted in 2006, has a policy RE1 (p64) which seeks to highlight the need to support regionally important sectors and clusters, of which the horseracing industry is demonstrably one. The first part of the policy urges authorities to 'ensure that land and premises are available to meet the specific requirement of regionally important sectors and clusters', the second clause seeks to encourage policies at the local level that enhance and promote these clusters. This indicates a clear strategic push to support and facilitate industries such as the horseracing industry. However policy RE2 in the same plan, relating to employment land provision, does indicate that rural business applications should be supported by appropriate evidence bases (for example the identification and location of the cluster(s), as shown in this report). The draft South East Regional Spatial Strategy is currently being examined with final approval expected in 'early 2008' and will cover the period until 2026.

Still extant are the County level structure plans, which provide strategic guidance similar to that of their replacement spatial strategies at the regional level. The Berkshire structure plan (to 2013) includes a specific policy (Spatial Policy 13) that has not often been cited in decisions seen by the study team, but which is specifically directed at the horseracing industry in the 'Berkshire downs' area of the AONB. The policy states:

'The racehorse and breeding industry in the Berkshire downs will be maintained and its sensitive growth will be allowed for. Proposals for change of use, redevelopment or fragmentation of suitable and viable existing facilities will not be permitted. Sensitive proposals for new facilities in the Berkshire Downs will be permitted where they accord with relevant development plan policies'

This policy is clearly reflected in the West Berkshire district plan policies.

Other county level plans (Hampshire, Oxfordshire, Wiltshire) do not carry specific policies but provide general guidance about appropriate development in the countryside that have come to be seen as 'standard' (cf. Wiltshire policies: DP15, DP4 development in the countryside, C8 for the AONB; Hampshire policies: C1; C2; D6 (New Residential Accommodation in the Countryside); D7 (Essential Residential Accommodation in the Countryside); EC5 (Live/Work units); EC6 (The re-use of Buildings in the Countryside); EC7 (Farm Diversification); other Berkshire policies: DP1; EN1, H5). This means that they will be treated without any special reference or exceptional status and be judged on the merits as equine or whichever use class(es) each application entails.

Local

Local plan policies are influenced by policies and policy guidance from above. However there are tailored policies and a diversity of local treatments of rural economic and other development in the countryside. Local plan policies tend to be the most often cited in individual applications and appear to act as the key determinants of development control officers decisions. Indeed local plans are supposed to be the prime consideration for development decisions. These are supplemented by overarching advice from regional and national levels where relevant (and other material considerations may be taken into account). In this brief analysis of planning decisions, the 2004 AONB plan does not appear to significantly influence decisions reviewed, despite being published just over three years ago and which devotes part of one theme (9), as above, to highlighting the role of the horseracing industry in the Area, and which includes Objective 25 of the NWD AONB Management Plan, which states:

To ensure that the racehorse industry in the North Wessex Downs is recognised and supported as culturally and economically important.

Although there are different planning policies across the three main districts, all the planning regimes are understandably restrictive towards new development in the AONB. In the research team's view there are many equine and horseracing industry planning permissions granted, with or without conditions attached, and far fewer refusals. Often the refusals are due to the housing issue discussed below or relate to change of use that is effectively prevented by specific policies in West Berkshire.

There are other local policies that will be taken into consideration for a horseracing industry application. For brevity, they have not been reproduced in this report.

Specific horseracing industry policies

Of the planning authorities operating across the extent of the AONB only West Berkshire have special policies - these are predominantly policies ECON 8 and 9 of the local plan (see page 88) although other more general local policies will be cited depending on the particulars of the case.

Beyond the specific horseracing industry policies outlined in the West Berkshire plan there are no other tailored policies across the AONB.

General 'rural' policies

All authorities have general rural policies and a range of relevant policies that relate to situations such as diversification, housing or businesses location, or landscape protection. Basingstoke and Deane for example have recently produced a supplementary

planning document on farm diversification which sets out the circumstances and types of diversification that will be acceptable to the Authority. Some partner authorities feel that these general policies allow for horseracing industry cases to be permitted if they are acceptable in these planning terms and specific policies are not necessarily merited as there are few horseracing industry businesses in those Authorities. For example Basingstoke and Deane feel that: 'If a [horseracing industry] proposal were to be received, then it would be reviewed against those policies generally applicable to rural businesses, agricultural and rural buildings'.

Scope for districts to draw up horseracing industry related policies themselves

Authorities beyond West Berkshire appear to feel that specific policies on horseracing industry would not be justified as the scale of the industry is considered too small in their jurisdictions. After the completion of this study there may be scope to reassess whether this approach should be continued or if a degree of harmonisation of approach could be ensured, either through the revised management plan, local development documents or both. There are other intermediate ideas for cross-boundary information exchange included as part of the recommendations.

horseracing industry knowledge and understanding of planning

Officers would like better preparation from applicants although this is an often reported issue beyond the horseracing industry or the AONB. However, given the type of assessments and lack of technical or specific horseracing industry knowledge held by most planners, there is scope for a general checklist for applicants on key issues to consider and the information to have/provide (e.g. access, size of buildings, number of employees, site plans, economic data).

More widely there is feeling that a more integrated and dialogical approach to the treatment of horseracing industry businesses may be beneficial. Regular POWG meetings hosted by the AONB to discuss, inter alia, the way that horseracing industry applications and policies are faring in the wider system, and context of the rural economy / environment, could be one of a package of measures to assist in this.

Types of applications

Planning applications are highly diverse even within a relatively small and specialist industry such as the horseracing industry. There is a need here to separate types of applications that could be submitted by any business as opposed to those that are in some sense unique or driven by the specific needs of the horseracing industry. The planning activity of most interest to the AONB is therefore those that are core to the industry (e.g. gallops, new yards), and which potentially impact on the AONB in terms of the landscape and to a lesser extent the local economy and society (e.g. yard change of use or provision of on-site staff accommodation). This is partly because businesses such as yards and studs operate a number of different elements (e.g. gallops, housing, stables, menages, barns). The key businesses and applications for gallops and other 'core' applications by yards and stables were focussed on to draw out the main horseracing industry issues.

Gallops

Gallops are distinctive and essential for the horseracing industry. The development of novel gallops technologies mean that horseracing industry are not as tied to traditional

'downland' areas as before. This can mean that free draining land is not now as essential. This is a concern as it puts two pressures; one environmental and one economic, on the NWD AONB. The first is the impact of all weather gallops on the landscape and possibly on wildlife. The second is the potential economic impact (and landscape implications) of the loss of horseracing industry businesses to other areas of the country. Therefore the support and maintenance of other reasons to stay in the area may be desirable (e.g. policy environment, advice, other support).

There are four main categories or 'types' of gallops, with varying potential impacts on the landscape and on other users. Gallops may be permanent or temporary, or alternatively described as formal and informal. Typically they are:

1. grass with railings on grass
2. grass without railings
3. all-weather / artificial with railings
4. all-weather / artificial without railings

According to West Berkshire there are 'very few' non-all weather gallops in the district. Furthermore there have not been any applications for new grass gallops within the last five years. Railings make a big difference to the AONB and to the treatment of cases. However there may be more informal gallops which are not drawn to the attention of LPAs as they do not require planning permission and are more difficult to monitor.

The key issues arising in the cases reviewed were around four issues, upgrading, landscape, materials (including visual impact of railings) and relationship to public rights of way. A fifth concerns the movement of horses to and from gallops, particularly if they use metalled roads.

One of the cases looked at (Case reference number 04/02327) was refused due to concerns about the impact of the gallop on the landscape of the AONB but on appeal this concern was not upheld by the planning inspector indicating that the siting and exact placing of the gallops in the landscape mean that they can be seen as acceptable in landscape terms with railings. The Jockey Club have recently upgraded two larger gallops at Mandown with little difficulty in planning terms. However without accurate knowledge of number, type and distribution (and proximity to access routes) it is difficult for planners to understand the context of gallops and their use/need.

i. Upgrading of gallops

The upgrading of gallops involves applicants seeking to make the gallop all-weather or add railings. One selected planning case concerned upgrading gallops from woodchip to synthetic sand and fibre mixture. They had previously used grass gallops. In order to do this the gallops had to be dropped into the level of the ground. Synthetic gallops are considered an engineering use so have a different fee scale to grass gallops, which are a change of use.

ii. Landscaping

There are several possible landscape issues arising:

Potential intensification, leading to loss of key characteristics of downland, in particular:

- Loss of sense of remoteness/solitude;

- Damage to field patterns and visible historic features;
- Small-scale incremental change in remote areas, such as inappropriate fencing/upgrading of highways.

iii. Materials and surfacing

Sand surfaced gallops can raise concerns if highly visible, despite being characteristic of the area. White railings and major tuning circles can have a major impact on the AONB landscape as they are a visual intensification of use despite not taking up more land. Jockey Club Estates is seeking to upgrade their gallops at the moment.

Railings are seen as a more important issue than surfacing. Surfacing is more of an issue when there are not railings involved in the gallops. The effect of railings, positive or negative, depends on the local landscape context; they can add to it or detract. Most concern is where railings are proposed in an area where there is not a tradition of railings in the landscape. (This makes it hard to make an AONB-wide rule other than to ensure the landscape context consistent). Understanding the number and distribution of gallops (with railings) would be a useful addition for decision makers.



iv. Public rights of way

The Lambourn Valley Way is crossed by the start of some gallops so a planning concern was the effect on the public using the public right of way. This was countered by the need to better understand the details of how and when horses were trained as impact can be minimal on the public if the orientation of the gallops and the rights of way are thought through. A defence put by the applicant's agent in one case was that horses would not be trained downhill which reduced the possible adverse effect. Where rights of way are crossed by gallops, often chicanes are used to warn walkers from walking straight out onto gallops.

In the light of this it would be useful for the AONB and other partners to maintain a record of the use and location of gallops across the AONB to ascertain impact and issues arising.

Training yards and Studs

Training yards and associated infrastructure are arguably the most important single category of business in terms of the horseracing industry. This is because they are historically the most attached to the downland context. They also towards the apex of the employment pyramid, providing employment for a range of associated firms. Without the yards it is unlikely that other horseracing industry employers and facilities would be located in the AONB. In this sense the logic of the West Berkshire ECON 8 policy, described above, is understandable.

The types of planning applications emanating from yards can be quite diverse and test underlying principles or logic of policy. Two training yard cases were looked at in West Berkshire (see Appendix 1). One application was refused for the conversion of a yard as it was claimed it was not going to be viable. The key issue for the planning authority was that the applicants had not proved that the existing yard was not viable, or would not be viable if operated by another business. The yard was well equipped and looked like it should be viable. Such applications may be viewed as a 'Trojan horse' application as it was seeking to change the use to residential accommodation, albeit for stable lads. Although there is no evidence of businesses setting up to fail (i.e. to release housing from the horseracing industry to use by the wider population), it does remain a concern to planning officers. Officers considered that in this situation, policies ECON 8 and 9 of the extant West Berkshire local plan almost contradicted each other. If it was not for these policies, the above application would probably have been assessed against PPS7 and would have been approved.

The research did show how an apparent need for housing for horseracing industry staff (see page 82) has to be evidenced better if planners are to place more emphasis on this need or alter policy.

Landscape issues for planners

Training yard applications can also have landscape implications, including:

- Potential impact on settlement morphology and setting, through:
 - Inappropriate expansion of settlement
 - Introduction of new building materials
 - Cumulative effect of large modern buildings

- Potential impact on key characteristics of downland, in particular:
 - Sense of remoteness/solitude, due to expansion into remoter areas
 - Openness of the landscape, through large-scale built form
 - Smooth rolling landform
 - Damage to field patterns and visible historic features
- Inappropriate woodland and/or ornamental planting
- Small-scale incremental change in rural areas, through fencing, signage, upgrading of highways etc

Materials, for new and old buildings, is an issue, particularly for Development Control officers although this can be addressed through fairly simple discussions and conditions being applied to permissions. This appeared to be understood and efforts to use traditional/sympathetic materials features in a number of the cases looked at. Cross-AONB guidance or design coding could help harmonise this. There is also an issue in that many development control planners are not yet well versed in landscape design issues.

Studs

Studs are similar in many ways to training yards (from a planning perspective). They require a range of buildings and many require staff on site with an average nine employees in the AONB (eight Full-Time Equivalents). However they may not be recognised as part of the horseracing industry automatically and beyond West Berkshire will tend to be treated as a land-based or equine business, with planning applications assessed under the same criteria as for other farming or rural businesses.

Access and traffic activity

Access and the movement of horses, both on roads and across the landscape, is a concern for planners and yet established yards and studs are unlikely to face planning refusal on this point alone. New yards or facilities close to main roads would face understandable objections from highways authorities however and could be refused unless acceptable solutions were devised. This issue is also a cause for some community conflict, although not considered to be acute by our focus group participants. One trainer stated that they could only take a certain number of horses across the road every day, after a local resident in the village complained about horse traffic. We are unsure about how this restriction was imposed or enforced.

Housing

Both training yards and studs tend to require on site accommodation. Yards may need more units partly due to the type of staff and the actual training requirements of the horses. The survey did show that the average employee number for AONB yards was higher than the national average. However there is an apparent, yet not well evidenced, need for more accommodation in some parts of the AONB.

Horseracing industry employees accommodation

A key distinction made in planning terms and reflected in policy, is the need for staff to be on site and for accommodation to be provided. Certain businesses only will fall into this category i.e. those that prove business need for workers to live on site. This is set out nationally in general terms in Annex A of PPS7. Planners do fear that some applications might be aiming to get permission for residential units with occupancy conditions and then at a later date seek a lifting of the condition. The question was raised about the large amount of stable lads accommodation for example at Manton (near Marlborough). The discussion pondered what would happen to it if the horseracing industry business ended? The general consensus was that it would be difficult for the LPA to demolish the housing for political reasons as much as anything else, and the granting of change of use would therefore be likely. This is why planners have been cautious about granting permission. Alternative means of securing premises for particular users are becoming more mainstream, for example Community Land Trusts (see: <http://www.communitylandtrust.org.uk/>).

There are difficulties associated to gaining permissions for housing off-site and the yards and studs may not currently accommodate other workers on their premises. An option is to ask horseracing industry businesses to prepare business plans to set an application in context. This would help the business and the planning authority to understand and discuss longer term ideas and requirements. This idea was welcomed cautiously but it was pointed out that planners are not business consultants so it is difficult to make decisions on the economic viability of businesses. Some authorities already employ advisers to assess the likely financial viability of an applicant's business.

One officer drew the link to the social housing and social dimension of the project by suggesting that the horseracing industry could usefully set up as a Registered Social Landlord themselves. While supported by Racing Welfare, the idea would require good evidence of need and industry wide.

Horseracing industry health check

The idea of an industry-wide survey was raised during the study and was generally seen as a good idea in principle. This met with a positive response in principle from the planning discussion group and from the social dimension discussion group. This could replicate on an industry wide basis the approach taken towards community planning and market towns health checks operated elsewhere in recent years (see Countryside Agency, 2003). This would be conducted across the AONB to provide strategic overview. Such a health check would provide planners with more certainty about horseracing industry applications (see page 85). Furthermore there exists considerable experience in supporting such exercises across the AONB, particularly within the rural community council network.

Cross-boundary working

The issues of how to work across the AONB to provide appropriate treatment for horseracing industry businesses was discussed in the focus groups. The key issue was seen to be that AONB wide policy did not contradict district level plans. If any AONB policies were developed they would need to be both strong and flexible. This may be difficult to achieve. Another idea is to develop standard conditions for use across the AONB – such as for materials or landscaping issues, or standard conditions for limited occupancy or the more novel mechanisms such as community land trusts.

Conclusion - key planning effects and key points arising

The operation of the planning system provides guidelines for rural businesses and specific guidance for diversification and for applicants who are considering housing components in their business setup. There are clear sets of policies that explain at different scales the aim to protect and enhance the landscape and character of the AONB. In this sense the system provides a degree of clarity for users and appears to generally work well. It must be remembered however that this work has been inevitably broad brush and further (survey) work would provide a clearer, more accurate picture.

Our view is that the planning system does support the horseracing industry but there are a number of broader issues, as well as a few horseracing industry/planning specific issues, that should be recognised and possibly addressed through changes in approach, policy and funding by various AONB partners.

Specific policy

Across the AONB only West Berkshire has specific policy to support the horseracing industry while other authorities do not. They instead rely on general rural policies and policies that apply to the AONB, or some have adopted 'middle range' policy and guidance on topics such as equine development or farm diversification. Specific policy on horseracing industry is also found in the Berkshire Structure plan and reference is made in the SE regional plan. Decisions are being made to protect existing horseracing industry facilities in West Berkshire due to the operation of ECON 9 and ECON 8. This is supposed to provide more certainty for applicants but has the disbenefit of potentially pushing out non-horseracing industry businesses and it has caused some confusion where horseracing industry businesses attempt to change use.

Key business types of concern to planning are gallops, training yards and studs. The other types of horseracing industry business are more 'general' and tend to be treated by planners in the same way as any other planning application in the countryside.

The main planning issues for gallops are: impact on landscape (notably railings), materials used and interaction with rights of way. The main planning issues for training yards and studs are change of use from training yards to another use, need for on-site accommodation, size and scale of buildings, materials used. Other issues are common to developments both rural and urban including accessibility, design and setting.

More generally there is a lack of consistent dialogue and a lack of evidence in at least some parts of the AONB to support (or constrain) the horseracing industry. This reflects the lack of time and lack of training for any particular industry's needs and should not be read as a criticism. There does seem to have been a mismatch between perceived needs and policy implementation effects, particularly in terms of affordable housing for horseracing industry employees (and others). It will be part of the task for new local development frameworks to incorporate such issues and policy support, given the amount of debate and research conducted nationally on the topic.

Recommendations

Stemming from the above and informed by issues raised in other chapters there are a number of ideas and recommendations outlined below.

i. Reimagine the industry

There is potential to 'reimagine' the horseracing industry across the AONB as one 'network' of businesses that are co-dependent. Work on how such businesses interrelate and form part of the wider horseracing industry network could be useful to planners and others - and could form part of the health check process as outlined.

ii. Specific horseracing industry advice and training

There may be scope to reassess whether a degree of harmonisation of approach is desirable or feasible, through the revised management plan or local development documents. There are a number of ways and means to approach this:

- The idea of a supplementary planning document or guidance on the nature, extent and approach towards the horseracing industry could be an alternative but is less flexible.
- Cross-AONB guidance or design coding could help harmonise how materials are specified.
- Beyond this the new planning system allows for Area Action Plans to be developed and this might be possible focussing on the clusters of horseracing industry activity and potentially be used on a cross-boundary basis.
- A frequently-asked questions sheet, possibly AONB-wide, would assist applicants and planning officers. This also partly addresses the concern that better training for planners on the needs and idiosyncrasies of the horseracing industry may be required, for example on training practices and requirements.
- Further discussion of how and if training for planners is required could be pursued.

iii. Evidence base (and health check)

Compilation of a better evidence base to demonstrate the need for development (or not) may be required to influence policy and inform local development documents and area action plans for affordable housing, yard expansion and changes of use. This may be captured or maintained through the health check idea (outlined in the social section), or otherwise through a more consistent and well resourced system of rural housing needs surveys, currently conducted by rural community councils on a parish by parish basis.

iv. Monitoring of horseracing industry planning cases

The AONB Council of Partners should keep a record of horseracing industry planning cases. This would require constituent planning authorities to supply basic information to the AONB (i.e. application number, location, date, decision, description). It would be ideal to commence this process when the new AONB management plan is published, if not sooner. One possibility would be to maintain this record through the AONB portal that is currently being developed, so that constituent authorities can use the cases as a resource.

v. Recording the Distribution of Gallops

A record or database of type and use of gallops may prove useful for planners and others. This could be used to understand the travel patterns and intensiveness of use of different gallops and their relationship to yards.

vi. Profile and marketing of policy intent of the AONB and partners

A wider point related to the above is the apparent need for a more effective explanation of the rationale and operation of the AONB's policy towards the horseracing industry (and wider equine or land based industry). This may be a useful role for the AONB to fulfil beyond the publication of the management plan itself.

Guidance on how to ensure that the horseracing industry is a sustainable and vibrant economic and social resource within the NWD AONB.

From the survey and analysis carried out for the study, it is clear that the horseracing industry is a regionally important sector and that there is an important cluster in the AONB.

Key potential and known effects on the North Wessex Downs AONB

The horseracing industry has the following key effects on the North Wessex Downs AONB:

Extent of the industry and economic contribution

- Significant employer and economic contributor to the local economy
- It is estimated that the horseracing industry in the AONB directly contributes £16-38 million per annum of direct Gross Value Added to the economy; however the total economic output of the industry in this area is £30-70 million per annum
- The industry is a significant employer making up 20% of employment in the agriculture and entertainment sectors
- It is the location for 10% of the UK racehorse trainers
- It employs 1,374 people (Full Time Equivalents)
- 51% of the core and associated businesses expected to expand in the next 5 years
- Large number of businesses which benefit from being in a horseracing industry cluster
- It is an industry that defines and attracts visitors and businesses to the Area and the 'Valley of the Racehorse' in particular
- If the sector expands as the businesses expect, this may have effects on the landscape and will have social and community effects (on child care, housing, training and skills development, and use of migrant workforce)

Landscape, biodiversity and the natural and historic environment

- The overall environmental effect of the industry is broadly positive as it contributes to chalk grassland management. There is more grassland than there otherwise would be without the horseracing industry.
- Other environmental issues are limited, but soil erosion is a localised issue.
- Small scale change of landform around new buildings can have negative effects on the landscape.
- Creation of new fields and paddocks on previously open land is a notable deleterious effect.
- Loss of woodland and hedgerows and also inappropriate new planting
- Pressure to upgrade minor roads
- Loss of integrity of historic settlements and farmsteads
- The industry in general contributes positively to landscape heterogeneity.

Social

- Creation of significant levels of employment in the AONB
- Attraction of significant numbers of migrant workers
- Health and safety issues on roads and for workers
- Significant demand for rented and / or affordable housing by workers

Planning policy support for the horseracing industry

The survey results suggested that around 20% of respondents felt that current planning policies did not support the horseracing industry. It reflects the approach and support to the industry varies between planning authorities.

Recommendations to support the horseracing industry

The following is recommended to support the horseracing industry:

Landscape, biodiversity and the natural and historic environment

- Investigate the impact of the management and intensity of use of gallops primarily on chalk grassland. (The last research on this appears to be from 1967).
- Guidance to horseracing businesses on best practice management of chalk grassland, which increase the environmental benefit of the industry. This could be provided by the AONB Council of Partners.
- Dialogue with the horseracing industry to identify design solutions to changing horseracing industry requirements which can minimise the impact on the AONB landscapes.
- Site specific studies to identify good and bad practice in conserving and enhancing the AONB landscape
- Further study to enable a better understanding of the effect of the horseracing industry on settlement pattern and form and to identify how best to accommodate new horseracing industry development within settlements
- Issue a landscape design statement which local planning officers and applicants can refer to which outlines the development considerations in different landscape types and areas. For example, guidelines for equestrian development have been produced for the Nidderdales AONB or the South Downs Landscape Design Framework. They should draw on both the AONB wide landscape character assessment and district level landscape character assessments
- Develop a strategy for better managing horse manure.

Social

- Carry out a health check of the industry to better understand the decision making of employees in the horseracing industry e.g., career plans, motives, training needs, further housing needs. This will help with the provision of suitable support for the industry.
- Produce a country code for the AONB to make visitors to the area aware of the horseracing industry and how to behave around horses.
- Provide greater support for bodies that deal with social issues related to the horseracing industry.

Planning

- Better training for planners on needs and idiosyncrasies of the horseracing industry, for example on training practices and the need for railings along gallops.
- Maintain a horseracing industry related planning database of planning applications and type and use of gallops.
- Compilation of a better evidence base to demonstrate need for development, especially in relation to housing, yard expansion and change of use. This should be developed with the landscape design statement and be available to both planners and the horseracing industry.

Location of racehorse businesses in the AONB

All-weather gallops are reducing the need for horseracing businesses to be located in the AONB as they do not require free draining grassland. However there are some clear benefits from the cluster of the industry. The benefits are to the industry and to the area more widely.

The businesses benefit from the specialist local services, such as specialist feed suppliers, vets and Jockey Club gallops. It is likely to be difficult to relocate somewhere else where the local services will have the same expertise with the racehorses and their needs. This will make it less attractive for businesses to relocate out of the AONB, despite perceptions of lower land prices and less stringent planning regulations due to the AONB designation. This is a good justification for thinking about RHI and related businesses as part of the co-dependent network.

Few businesses are intending to relocate in the next 5 years (6% of horseracing industry businesses and 17% of other related businesses; see Table 51). This suggests that many of the businesses do recognise the benefits of the racing cluster in the area.

It is possible that some of the businesses intending to relocate could be retained in the area if more suitable premises could be found or built (see Table 52).

The area benefits from the employment and economic that the industry brings as well as the less tangible benefits of being associated with a high profile, glamorous sport.

It is interesting to note that Newbury Racecourse Plc held a meeting on 20 April 2007 to discuss how the racing industry could be supported in terms of the provision of affordable housing¹². Many racing organisations attended the meeting, including Racing Welfare, the Thoroughbred Breeders Association, Injured Jockeys Fund, The Jockeys Association of Great Britain and Lambourn Valley Housing Trust. The discussion focussed around how, as part of the racecourse's development plans, it could work with other racing organisations to provide social and / or affordable housing, a hospice for racing workers and also provide part-time employment for retiring racing workers. This approach echoes many of the recommendations in this report and should be supported.

Concentration and retention of the horseracing industry within the AONB will help considerably to retain the distinctive landscape character and settlement pattern of the downland areas. However if the nature of the horseracing industry changes to meet future economic demands, either through concentration into larger single units, greater proliferation, or relocation, there is likely to be a considerable effect on the landscape character of parts of the AONB which will require careful and positive consideration in planning policy and siting and design.

At a workshop held at Stoneleigh in December 2003, a participant described the horse industry as suffering from "constipated fragmentation". The participants, who were broadly representative of the range of equine interests, concluded that the single most important challenge facing the industry was the need for greater co-operation from all sectors. There are clearly benefits of agglomeration to the racing industry in the NWD AONB that have overcome the constipated fragmentation.

End

¹² Mark Kershaw, Managing Director, Newbury racecourse Plc, personal communication

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Appendix 1 Horseracing industry planning cases from West Berkshire, Kennet and Basingstoke and Deane districts

Table 46 Cases from Kennet district

Case ref No.	LPA	Business type / Appn type	Officer name	Rec'd/ Decision date	Outcome - Refused/ Granted	Conditions applied / policies cited	Location e.g Open countryside	Other comments (e.g negotiation issues/success)
K/52665 and K/52065	KEN	Manor Farm, Little Bedwyn. Gallop / exercise track.	Andrew Guest	26/07/05 20/09/05 (plus earlier appn)	Granted (earlier app. refused)	No policies cited. Landscaping / Construction conditions required. Cited for K/52065 are: PD1, NR7, 8 (refusal).	Open countryside	Re-submission following earlier refusal after negotiations to remove impact on landscape and prevent damage to trees/ hedgerows. May have been avoided if better pre-application communications.
K/51540	KEN	Upper Slope End Farm, Shalbourne. Change of use of land to equine clinic for treatment of injured horses and riders including stable yard (20 stables, treatment rooms, gym, staff room, offices and flat), hay barn, horsewalker and a 6 bed detached house.	Peter Horton	07/01/05 06/10/05	Granted	Policies cite: NR6,7 and 8 cited also HC27, PD1 and Structure plan policy DP15, plus PPS7. Conditions: No work on house until stables completed; Occupancy restriction; Section 106 tying buildings to adjacent land to be used by equine operation; architectural treatment; landscaping.	Site of former dairy buildings in open countryside (now derelict)	Unusual proposal, but one that would have helped foster diversification of local economy and clear large derelict site. Officer view was that, despite permission the scheme is unlikely to go ahead as applicant and landowner failed to agree deal.

Table 47 Cases from Basingstoke and Deane district

Case ref No.	LPA	Business type / Appn type	Officer name	Rec'd/ Decision date	Outcome - Refused/ Granted	Conditions applied / policies cited	Location e.g Open countryside	Other comments (e.g negotiation issues/success)
61891	B&D	Highclere Stud Farm, Highclere. Conversion of stables to accommodation and staff toilets	Anne W'kinson	19/10/05 08/12/05	Granted	Cited: Local plan E1, E6, D8, D9 (and GS1, C100, 101, C25, C20; Structure C1, C2 Conditions: Time limit (3years) Occupancy - Staff accommodation Materials to be submitted	Open countryside	Long planning history built up by the business and clear understanding of plans and long term viability of the business. Officer usefully details the existing buildings and uses on the wider site.
64925	B&D	Scotswood Stud Farm, East Woodhay. Creation of a covered ménage and demolition of pre-existing farm building.	Emma Davies	27/11/06 30/01/07	Granted	Cited: Local plan E1, E6, E7, UB3. Conditions: Time limit – full Tree Protection Plan submitted Specification of all proposed works within root protection areas/ construction exclusion zones ; Provision for temporary car park; Landscape proposals submitted to LPA; Materials to be submitted	Open countryside	A fairly straightforward case. Replacement of an Asbestos farm building with a ménage (and access). Not harmful to AONB with conditions.

Table 48 Cases from West Berkshire district

Case ref No.	LPA	Business type / Appn type	Officer name	Rec'd/ Decision date	Outcome - Refused/ Granted	Conditions applied / policies cited	Location e.g Open countryside	Other comments (e.g negotiation issues/success)
04/02327 and 06/00922	WBC	Woods Folly, Beedon Common. Creation of All Weather Gallop	Isabel Johnson	27/09/04 12/12/04 Appeal: 13/06/05 23/04/06	Refused. (Granted on appeal)	Cited ENV2 of WB local plan. Cited AOB plan Obj 25 [Contra example: 06/00922 granted for upgrade of Gallops]	Open countryside	Proximity to footpaths, lack of evidence of need. Landscape character cited as an issue. Not in recognised centre for horseracing industry... Appeal: 'no impact on AONB' Less large/wide than pre-existing. Significance of all weather surface / design / materials downplayed.
05/02800 and 06/02751	WBC	Glebe House Stables, East Garston. Relocation of Yard (first application). Stable buildings & horsewalker,	Isabel Johnson	12/12/05 13/02/06	Granted (02800) (revised 01/12/2006)	ECON 9 cited. Ten conditions imposed, inc; restriction of use to horseracing industry; landscaping; others more generally applicable conditions	Open countryside	Initial proposal was withdrawn. This was a revised application.
05/02324	WBC	Rowdown, Upper Lambourn. Conversion of yard to lads accommodation (x3 units)	Isabel Johnson	17/10/05 11/01/06	Refused	Policies cited: DP1; EN1 H5 (structure plan); ECON 8; ENV 18; ENV2; OVS3 (local plan). Plus other policies relating to general issues such as infrastructure provision.		Previous scheme was withdrawn in 2005 (05/01202). Closure of yard not justified. Worried about precedent. Housing would have been restricted occupancy. Attempt to reuse historic buildings for horseracing industry related use. Many local policies cited as justification for the application.

Appendix 2 Survey form

HORSERACING INDUSTRY IN THE NORTH WESSEX DOWNS AONB

Everything you say is **confidential** and will not be made public. Although it looks long, the survey **should take less than ten minutes** – ideal with a cup of tea! We would be grateful if you could **please respond by 31st January**. Your help is greatly appreciated.

Your name:	
Business name:	
Telephone:	
Postcode:	

ABOUT YOUR BUSINESS

How long has your business been established? (enter number of years)
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What is your principal business activity? (by revenue generated)	Trainer	<input type="checkbox"/>	Breeder / stud	<input type="checkbox"/>
	Vet	<input type="checkbox"/>	Farrier	<input type="checkbox"/>
	Feed supplier	<input type="checkbox"/>	Livery	<input type="checkbox"/>
	Saddlery / equipment shop	<input type="checkbox"/>	Horse transport	<input type="checkbox"/>
	Breaking yard	<input type="checkbox"/>	Horseracing organisation	<input type="checkbox"/>
	Affiliated sector (training, edu)	<input type="checkbox"/>	Horseracing media	<input type="checkbox"/>
	Event management services	<input type="checkbox"/>	Other (please give details below)	<input type="checkbox"/>

If you have any secondary activities, what are they?	Trainer	<input type="checkbox"/>	Breeder / stud	<input type="checkbox"/>
	Vet	<input type="checkbox"/>	Farrier	<input type="checkbox"/>
	Feed supplier	<input type="checkbox"/>	Livery	<input type="checkbox"/>
	Saddlery / equipment shop	<input type="checkbox"/>	Horse transport	<input type="checkbox"/>
	Breaking yard	<input type="checkbox"/>	Horseracing organisation	<input type="checkbox"/>
	Affiliated sector (training, edu)	<input type="checkbox"/>	Horseracing media	<input type="checkbox"/>
	Event management services	<input type="checkbox"/>	Other (please give details below)	<input type="checkbox"/>

How many racehorses do you keep / look after? (enter number)
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Do you expect your business to change in the next five years? (This relates to capital / economic growth)	Expand	<input type="checkbox"/>
	Stay the same	<input type="checkbox"/>
	Contract	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

Is your business likely to relocate within the next five years?	Yes	<input type="checkbox"/>
	No	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

If you expect to relocate, why?	Need different sized premises	<input type="checkbox"/>
	Need more adaptable premises	<input type="checkbox"/>
	Need more suitable staff	<input type="checkbox"/>
	Lease is coming to an end	<input type="checkbox"/>
	Need less remote location	<input type="checkbox"/>
	Impact on neighbours	<input type="checkbox"/>
	Other (please give details below)	<input type="checkbox"/>

If you expect to relocate, how far away do you expect to move from your present location? (This is direct or crow flies distance)	Same site	<input type="checkbox"/>
	Within 1 mile	<input type="checkbox"/>
	Within 5 miles	<input type="checkbox"/>
	Within 10 miles	<input type="checkbox"/>
	Within 20 miles	<input type="checkbox"/>
	More than 20 miles away	<input type="checkbox"/>
	Where suitable premises are	<input type="checkbox"/>

STAFF

How many staff do you employ, including yourself? (enter number) (for part time staff, please show as equivalent to full time staff eg if you have two staff who work 2.5 days per week, this is equivalent to 1 full time staff member)	Male	Full time	.....	Part time	.....
	Female	Full time	.....	Part time	.....
	Full Time Equivalents				.....

What nationality are your staff? (You can enter the number or % of staff)	Number	or	%
	From United Kingdom	.....	.....
	From Irish Republic	.....	.....
	From mainland Europe	.....	.....
	From elsewhere	.....	.....

Does the nationality of your staff present any particular issues?	Yes (please give details below)	<input type="checkbox"/>
	No	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

Are there enough suitable staff for your business?	Yes	<input type="checkbox"/>
	No	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

Do you provide your staff with accommodation? If yes, how many of the staff?	Yes	<input type="checkbox"/>	Number	.....
	No	<input type="checkbox"/>		
	Don't know	<input type="checkbox"/>		

Is there enough suitable accommodation for your staff in the area?	Yes	<input type="checkbox"/>
	No	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

Are there any other social issues that affect your staff?	Yes (please give details below)	<input type="checkbox"/>
	No	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

PLANNING – FOR TRAINERS, STUDS AND LIVERIES ONLY

Is your business affected by planning issues in any way?	Yes – new buildings / extensions	<input type="checkbox"/>
	Yes – access / parking	<input type="checkbox"/>
	Yes – fencing / lighting	<input type="checkbox"/>
	Yes – landscape / ecology / historic features	<input type="checkbox"/>
	Yes – effect on local villages / houses	<input type="checkbox"/>
	Yes – other (please give details below)	<input type="checkbox"/>
	No	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

Are the policies / planners sympathetic to your business?	Yes	<input type="checkbox"/>
	No (please give details below)	<input type="checkbox"/>
	Don't know	<input type="checkbox"/>

ENVIRONMENT – FOR TRAINERS, STUDS AND LIVERIES ONLY

What types of training gallops do you own/use/manage?	Grass	<input type="checkbox"/>	Length	.....
	All weather	<input type="checkbox"/>	Length	.....

How do you manage your grass gallops? (please give details below)	Don't know		<input type="checkbox"/>	
	Managed by someone else		<input type="checkbox"/>	
	Fertiliser inputs	<input type="checkbox"/>	Mowing	<input type="checkbox"/>
	Pesticides	<input type="checkbox"/>	Reseeding	<input type="checkbox"/>
	Herbicides	<input type="checkbox"/>	Resting periods	<input type="checkbox"/>

Do you plan to change your gallop facilities in the next 5-10 years	No	<input type="checkbox"/>
	Yes – creation of new grass gallops	<input type="checkbox"/>
	Yes – creation of new all weather gallops	<input type="checkbox"/>
	Yes – abandonment of existing gallops	<input type="checkbox"/>
	Yes – other (please give details below)	<input type="checkbox"/>

What positive and negative impacts of the use of gallops on wildlife or other aspects of the environment are you aware of?	None	<input type="checkbox"/>
	Positive (please give details below)	<input type="checkbox"/>
	Negative (please give details below)	<input type="checkbox"/>

In relation to horses, have you done any of the following on your land in the last 5 years?	Sub-divided paddocks / erected new fencing	<input type="checkbox"/>
	Removed or planted hedgerows	<input type="checkbox"/>
	Built new hard standing	<input type="checkbox"/>
	Any other changes to the landscape	<input type="checkbox"/>

Are there any other issues that you face? (please give details below)	None	<input type="checkbox"/>
	Waste disposal / pollution	<input type="checkbox"/>
	Soil erosion / water run off	<input type="checkbox"/>
	Public access	<input type="checkbox"/>
	Wildlife and ecology	<input type="checkbox"/>

EXPENDITURE AND REVENUE

In relation to the horseracing industry, can you give us an indication of your annual revenue and costs?

We do appreciate that this information is sensitive and confidential but we need it to assess the economic size of the industry to demonstrate its importance to the local economy.

Any information, even approximate, is very useful to us and we will of course treat it in the strictest confidence and not disclose it to anyone other than the research team

	Revenue (£)	Expenditure (£ or % of total revenue)	Please identify the location where you normally obtain these goods and services Locally / within the UK / from overseas
Horse care (training fees, breeder or stud fees, livery yard fees, vet, horse dental fees, horse feed, bedding)			Locally / within the UK / from overseas
Horse and rider equipment (saddlery, other tack, farriery, horse transport, riding clothing)			Locally / within the UK / from overseas
Horse trade (dealing yard fees, horses)			Locally / within the UK / from overseas
Indirect costs and overheads (utility bills, building maintenance, rent, wages and salaries including principles)			-
Financial services (insurance, bank interest and charges, specialist equine insurance)			Locally / within the UK / from overseas
Land management (grassland, woodland, trees, hedgerows, water bodies and water courses, soils, fencing, etc)			-

Please return your completed form to Jason Beedell by:

Fax: 01733 866561

If you would prefer an electronic version, please email jason.beedell@smithsgore.co.uk and we will send you one.

Thank you very much for your help. It is greatly valued. If you would like a summary of the study please indicate below:

	I would like a summary of the study <input type="checkbox"/>
--	--

End

Appendix 3 Current and future situation

This section is based on responses to the survey of trainers, stud farms, livery yards, vets, farriers, horse feed merchants and associated businesses carried out in January to March 2007.

Length of establishment

The average length of establishment of all businesses was 15 years, although 15 of them (23%) had been running for three years or less.

Table 49 Average length of establishment of businesses

Type of business	Years
Trainer	13
Stud	16
Livery	10
Farrier	42
Horse feeds and forage	15
Veterinary practice	8
Other HRI related businesses	19
Grand Total	15

Principal and secondary business activities

The businesses were asked to identify their principal and secondary, if any, business activities. All of the trainers apart from two solely concentrated on training. There was more cross-over between studs, livery and breakers yards, where nine of the 20 responding businesses stated that they carried out multiple activities.

Expectations of business change in the next five years

Very few of the businesses had negative views of the future for their businesses, with only one expecting to contract. Most expected to expand (51%) or stay the same size (40%).

Table 50 Expectations of business change in the next five years (%)

Type of business	Expand	Stay the same	Contract	Don't know	Grand Total
Trainer	60%	40%	0%	0%	100%
Stud	36%	64%	0%	0%	100%
Livery	50%	17%	17%	17%	100%
Farrier	0%	100%	0%	0%	100%
Horse feeds and forage	50%	50%	0%	0%	100%
Veterinary practice	100%	0%	0%	0%	100%
Other HRI related businesses	44%	28%	6%	22%	100%
Grand Total	51%	40%	3%	7%	100%

Relocation

Plans for business expansion may also mean that more space is needed. If the space is unavailable or additional space is not given by planning permission, the businesses may choose to locate elsewhere, or shut down. The biggest issue with sustainability is buildings for staff and equine accommodation, because if these are unable to be built to sustain the growth of the industry, businesses could start locating elsewhere where more space is available.

Table 51 Expectations of relocation within the next five years (%)

Type of business	Yes	No	Don't know	Grand Total
Trainer	10%	69%	21%	100%
Stud	0%	100%	0%	100%
Livery	0%	67%	33%	100%
Farrier	0%	100%	0%	100%
Horse feeds and forage	0%	100%	0%	100%
Veterinary practice	0%	100%	0%	100%
Other HRI related businesses	17%	78%	6%	100%
Grand Total	8%	79%	13%	100%

79% of the businesses that responded are not expecting to relocate which suggests stability in the industry and, possibly, a recognition of the benefits of agglomeration. Whether new businesses are going to continue locating in the AONB is difficult to tell from this survey, however the results suggest that there are few reasons for businesses to want to move away from the area.

The main reason cited by the six businesses that are intending to relocate was the need for different sized premises but most (63%) expected to move less than 10 miles, and so are likely to remain within the AONB or its immediate environs.

Table 52 Reasons for intention to relocate

Relocate_why	Total
Need different sized premises	75%
Lease is coming to an end	13%
Need more adaptable premises	13%
Grand Total	100%

Staff numbers

See Table 4 for count of staff employed.

Staff nationality

65% of staff from the businesses that responded were from the UK; 8% were from the Irish Republic, 17% from mainland Europe and 9% from elsewhere in the world. Trainers and stud farms employed the highest proportions of non-UK staff. 16% of businesses employing non-UK staff said that the nationality of their staff posed some issues.

Availability of suitable staff

Most businesses (72%) reported that there were enough suitable staff available for their businesses. However, over a quarter of trainers and half of livery reported staff shortages.

Table 53 Response to question, "Are there enough suitable staff for horseracing industry businesses?"

Type of business	Yes	No	Don't know	Grand Total
Trainer	66%	28%	7%	100%
Stud	93%	0%	7%	100%
Livery	33%	50%	17%	100%
Farrier	0%	0%	100%	100%
Horse feeds and forage	100%	0%	0%	100%
Veterinary practice	100%	0%	0%	100%
Other HRI related businesses	76%	6%	18%	100%
Grand Total	72%	17%	11%	100%

Availability of suitable accommodation for staff

69% of the core horseracing industry businesses provide accommodation for some of their staff.

Table 54 Businesses that provide accommodation to their staff

Type of business	Yes	No	Grand Total
Trainer	70%	30%	100%
Stud	93%	7%	100%
Livery	50%	50%	100%
Farrier	0%	100%	100%
Horse feeds and forage	0%	100%	100%
Veterinary practice	50%	50%	100%
Grand Total	69%	31%	100%

A different measure of the amount of accommodation provided by the business is to compare it to staff employed and full-time employees. As would be expected, a high proportion of businesses that need staff to care for horses 24 hours per day provide accommodation; 63% of full-time training yard staff are provided housing, 83% of full-time stud staff and 62% of livery staff.

Table 55 Numbers and proportions of staff provided accommodation

Type of business	Number of staff provided accomm	Number of staff employed	% of all staff provided accomm	Number of full-time staff employed	% of full-time staff provided accomm
Trainer	350	604	58%	554	63%
Stud	90	120	75%	108	83%
Livery / broodmare	18	44	41%	29	62%
Farrier	0	1	0%	1	0%
Horse feeds and forage	0	5	0%	4	0%
Veterinary practice	4	24	17%	24	17%
Grand Total	462	798	58%	720	64%

Despite the high provision of accommodation by the businesses, many still recognise that housing and lack of suitable accommodation is still a significant issue with 42% stating that there is not enough.

Table 56 Response to question, "Is there enough suitable accommodation for your staff in the area?"

	Total
Yes	25%
No	42%
Don't know	32%
Grand Total	100%

Other social issues affecting staff

Most businesses (75%) did not consider that there were any other social issues (other than housing) that affected their staff; only 7% said that there were other social issues. Livery / broodmare businesses had the most perceived social issues with their staff, with 33% saying that they do have social issues. Very few trainers and studs reported having staff social issues (7% each).

Planning effects on businesses (for trainers, studs and livery yards only)

Most businesses did not report that they were affected by planning issues (58%). Of the 40% that were affected, the most common issue related to new buildings and extensions. Other issues cited were moving horses across roads, obtaining planning permission for mobile homes and the effect of a road scheme on an existing business.

Table 57 Response to question, "Is your business affected by planning issues in any way?"

Type of business	Yes - access / parking	Yes - new buildings / extensions	Yes - other	No	Don't know	Grand Total
Trainer	7%	17%	7%	67%	3%	100%
Stud	0%	43%	14%	43%	0%	100%
Livery / broodmare	0%	50%	0%	50%	0%	100%
Grand Total	4%	28%	8%	58%	2%	100%

Supportiveness of planning system

Of those businesses that expressed a view, most (65%) felt that planners and planning policies were sympathetic to their businesses. Those that did not usually expressed a view based on a personal negative experience, often refusal of permission or application of conditions perceived to be unfair.

Type of training gallops

Most trainers (27 out of 30) use both grass and all-weather gallops, with three using all-weather ones only. Two of the livery yards use grass only gallops, two use all-weather only and one uses both. Only two stud farms reported using gallops; one used both and one used grass gallops only.

Management of gallops

Over half of the responding trainers use gallops that are managed by someone else, usually Jockey Club Estates Limited.

Plans to change gallop facilities

None of the trainers intended to change their gallops facilities, by creating new ones or abandoning old ones, in the next 5-10 years. Only one business expected to create new gallops.

Effects of gallops on wildlife and landscape

As might be expected, none of the businesses apart from one, stated that there were any negative effects of the gallops. Twelve (40%) stated that there were neither positive or negative impacts on wildlife. 55% believed that gallops have a positive effect on the wildlife and the landscape.

There were many reasons that the respondents felt the gallops are a positive or neutral effect on the landscape, including: gallops having a positive impact due to the amount of set aside near them, lot of work done to ensure gallops blended in when built, planted trees but in a very exposed place so they are hard to establish, erected a new barn and gallops have been there such a long time they are not an issue to wildlife- see deer a lot up there.

Landscape changes

Only 9 out of 39 respondents stated that they had sub-divided fields or put up new fencing in the last five years. 13 had changed the pattern of hedges on their premises by planting or removing hedgerows. Seven had build new hard standings and four reported making any other changes to the landscape.

There is a core of businesses that report that they have changed their landscape. The work carried out tends to include all or most of the above changes.

23 of the businesses (59%) have not made any changes to the landscape in the past five years.

Other environmental issues

The most important environmental issue raised was waste disposal and pollution (by 13 respondents, 33%). Manure is expensive and difficult to dispose of and is considered a waste rather than a useful product as in other land-based industries. Soil erosion was the only other issue mentioned (1 respondent).