



British 
Equestrian

Coronavirus Impact Survey

In collaboration with British Equestrian

Introduction

The British Grooms Association (BGA) and Equestrian Employers Association (EEA) conducted this survey during April 2020. Its aim was to discover how coronavirus has impacted the people who work in the equestrian industry, with a focus on those who care for horses and those who run equestrian businesses that employ staff.

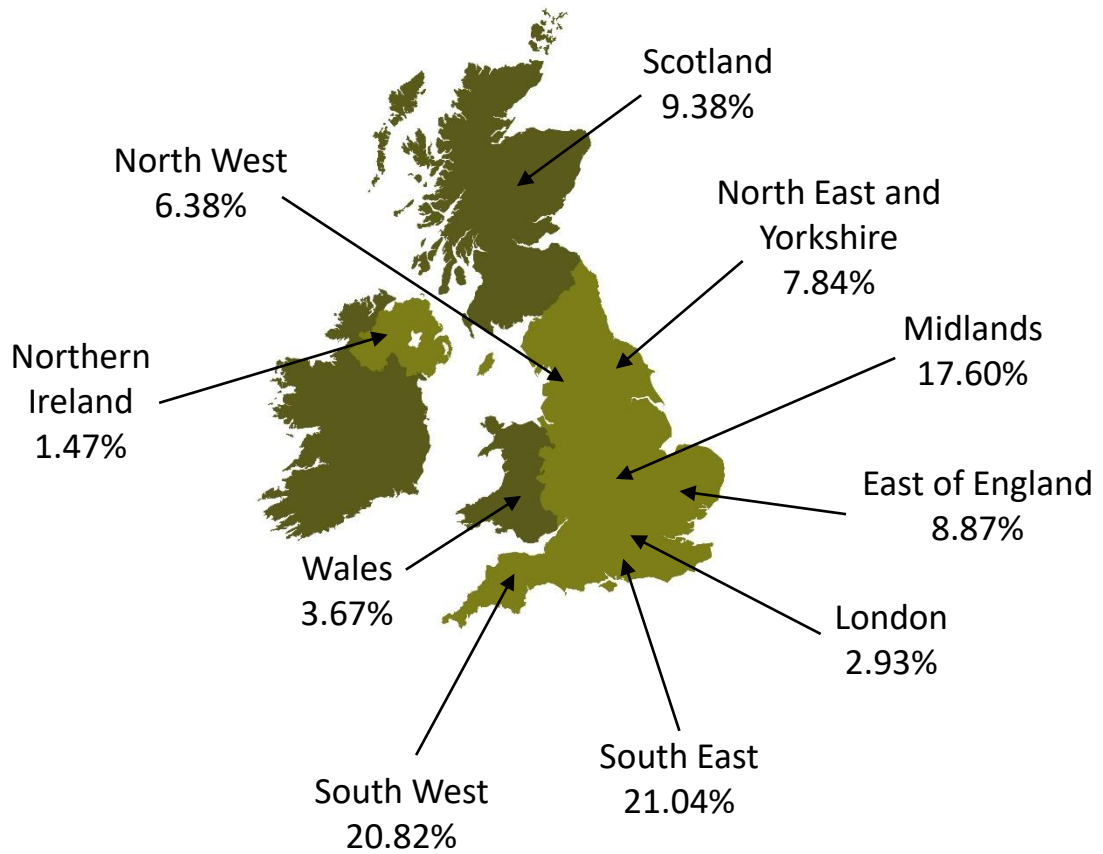
The data analysis was conducted with support from British Equestrian.

A total of 1373 responses were received.

This report details:

- Who responded
- The impact of coronavirus on business and employee finances
- The impact of coronavirus on working hours
- The methods that businesses and grooms are using to support their finances at this time
- The potential future of those responding as a result of the coronavirus outbreak
- The impact of coronavirus on employers' and grooms' mental health

Who responded?



**Employer/
business
owner**

33.36%

**Freelance
groom**

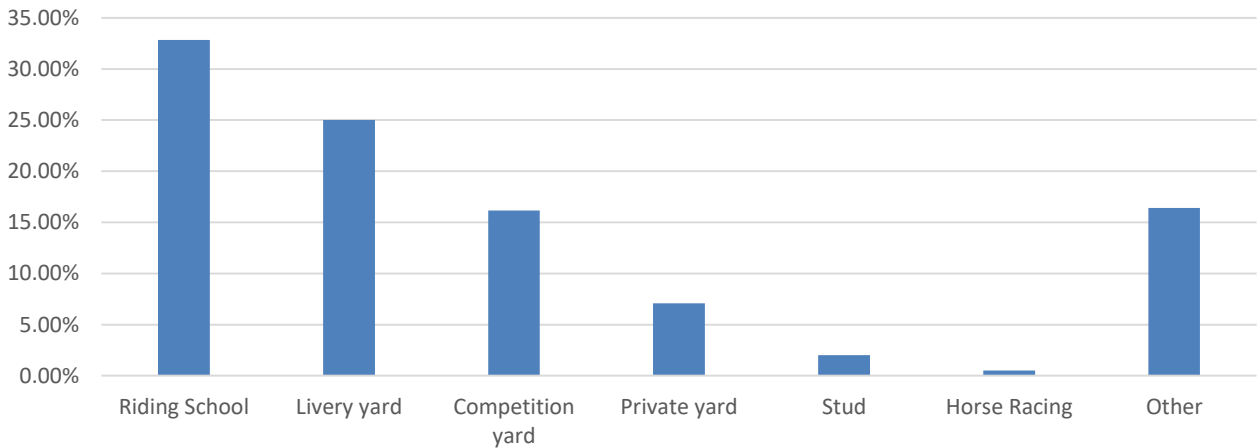
36.01%

**Employed
groom**

30.63%

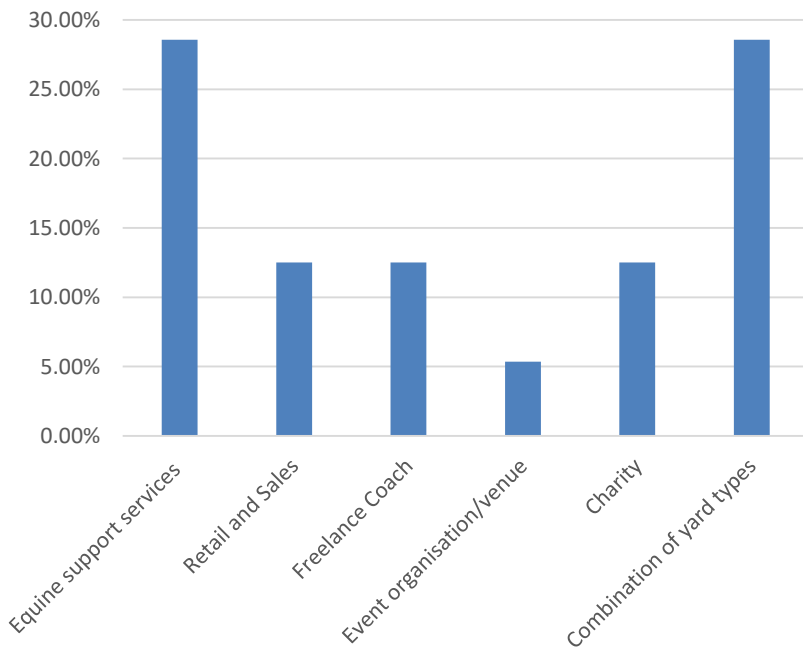
Employers and business owners

Q. What best describes your business?



The survey returned good responses across most of the main employment areas, with the exception of studs and the horseracing industry. The responses from these businesses was lower in number than the others, so results from these businesses will be treated with less confidence due to low sample size.

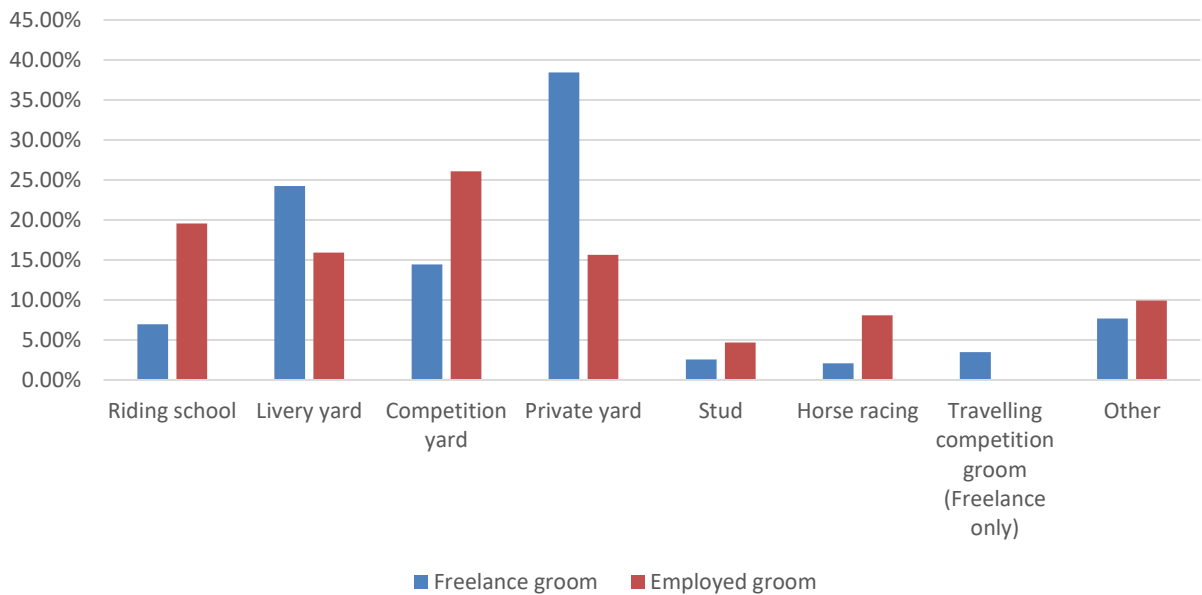
Other businesses



When it comes to 'other' businesses, these were mainly made up of equine support activities such as vets, physios and dentists, retail, coaches, event venues, charities, and employers running more than one type of yard or business.

Grooms

Q. What type of yard do you work in the most/are you employed by?



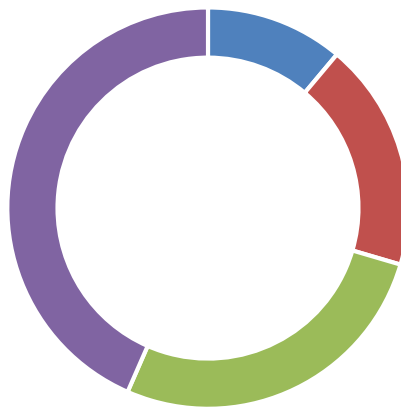
The freelance grooms who responded were more likely to work in private yards and livery yards than employed grooms.

Employed grooms are more likely to work in riding schools and competition yards.

The financial impact of coronavirus

Employers/businesses

Q. Is your business experiencing financial difficulties from the effect of the coronavirus pandemic?

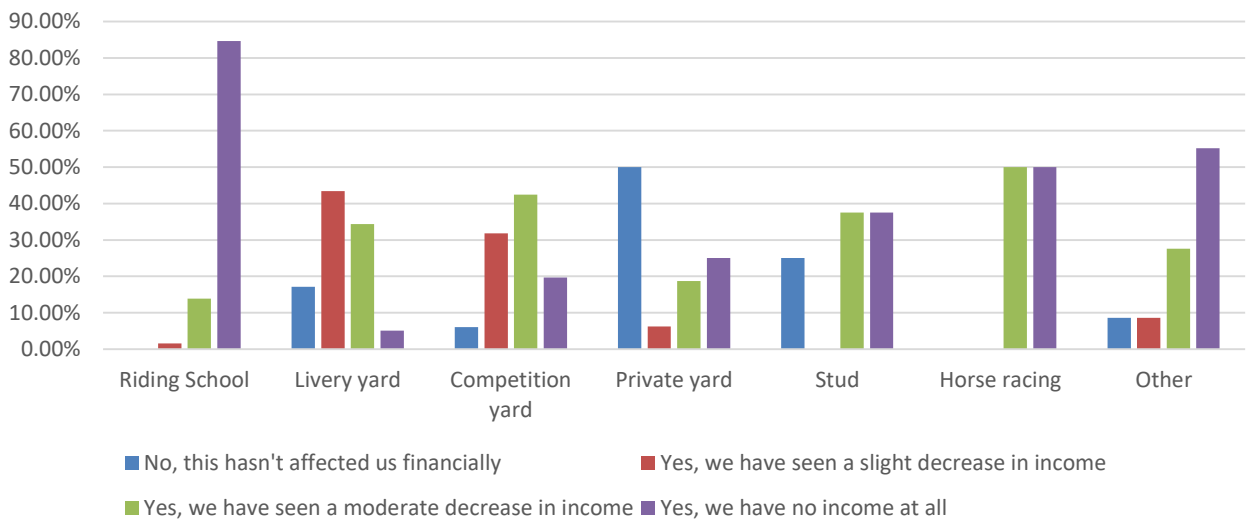


- No, this hasn't affected us financially
- Yes, we have seen a slight decrease in income
- Yes, we have seen a moderate decrease in income
- Yes, we have no income at all

Just under 44% of the employers and businesses who responded stated that, due to the coronavirus pandemic, they have no income at all.

Just 11% said the virus has had no impact on their income, meaning 89% of all businesses that responded felt that coronavirus had impacted their business in some way.

Q. Is your business experiencing financial difficulties from the effect of the coronavirus pandemic?



Breaking the results down by the different types of yard, 85% of riding schools that responded are now without any income at all. As may be expected, none of the riding schools who responded felt coronavirus had had no effect, and only 1.5% felt that the effect was slight. This means around 98% of riding schools have seen a moderate or complete decrease in income.

Livery yards, who rely more on caring for horses on behalf of owners, seem to be faring a little better – 5% of respondents say they have no income at all, while 34% have seen a moderate decrease.

Competition yards, for whom competitive activity has stopped as a result of coronavirus, appear more affected than the livery yards, but not quite to the same level as riding schools. Some owners may remove the horses they stable within competition yards for the duration of lockdown, choosing instead to keep them at more cost-effective yards or taking them home.

Private yards seem to be more polarised in the effect of coronavirus. 50% of respondents felt that there was no effect financially, but 25% had no income at all as a result. The definition of private yards may cover a variety of set-ups, from yards where the owner/employer is involved in low-level buying and selling to family yards employing a groom, where the employers income is not dependent on the yard itself. This may explain the difference in the effect of coronavirus.

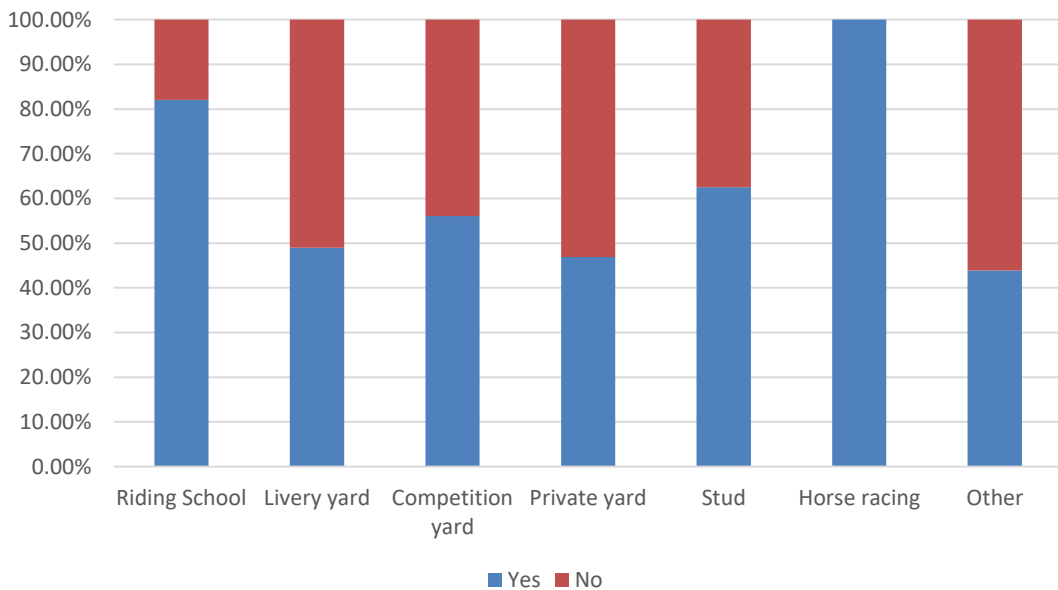
Studs and racing yards had a low number of respondents, so had a small sample size. However, it appear that while a quarter of the studs that responded felt there was no effect on income, 38% said they now have no income at all.

Associated industries such as the retail sector, vets, physios, dentists and farriers also look to have had a dramatic change in income, with almost 83% of respondents saying they either have no income or a moderate decrease.

The impact of coronavirus on working hours

Employers/businesses

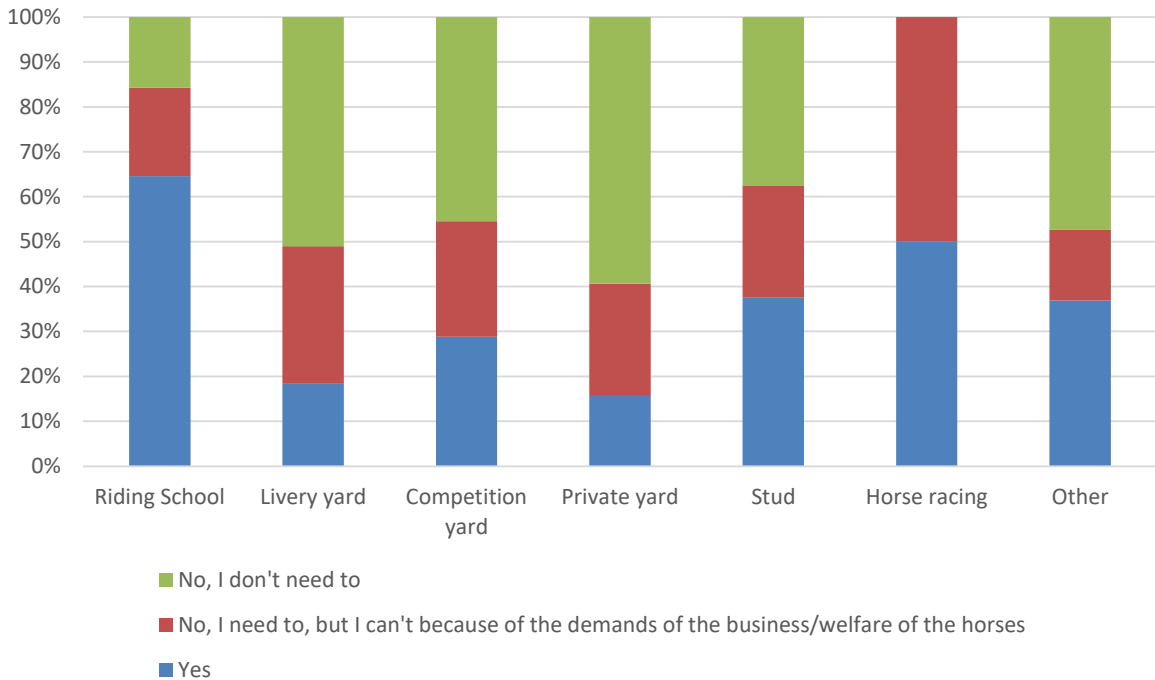
Q. Have you had to reduce any of your employees hours?



Financially, the greatest effect of coronavirus was seen to be among the riding schools that responded to the survey. This would correspond with the 82% of riding school respondents who said they have had to reduce employees hours – the highest percentage of all of the yard types (with the exception of racing yards).

Livery, competition and private yards seem to be less likely to have reduced their employees' hours. However, it would be worth considering if riding schools may be able to change working practices – for example, no lessons means no coaches are required, horses turned away so can manage with fewer yard staff – whereas livery, competition and private yards where horses may not be owned by the business owner are expected to deliver a similar level of service for their clients, so are more likely to need to retain similar staffing levels.

Q. Have you had to furlough any employees?



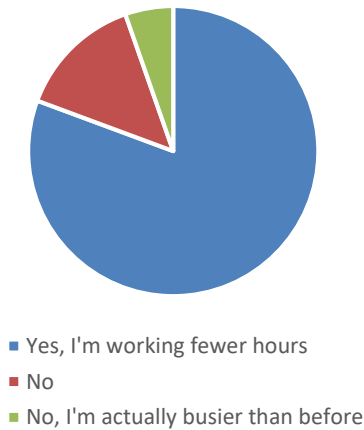
Again, the percentage of furloughed staff is higher for respondents from riding schools – 65% of riding schools have furloughed staff. An additional 20% would like to furlough staff but can't, meaning that if it weren't for the demands of the business, 85% of staff would ideally be furloughed from riding schools.

Livery, competition and private yards are less likely to furlough staff, but are more likely to want to but are unable to do so. This could indicate, as was also seen in the previous information on reducing employee hours, that they may need to be required to deliver a similar service to that pre-coronavirus, but with reduced finances.

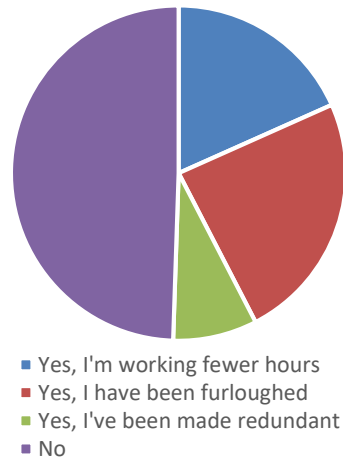
For those businesses that had furloughed staff, the average number of furloughed staff per business was four employees.

All grooms

Q. Have you seen a reduction in your normal working week? Freelance grooms



Q. Have you had your hours reduced or been furloughed? Employed grooms



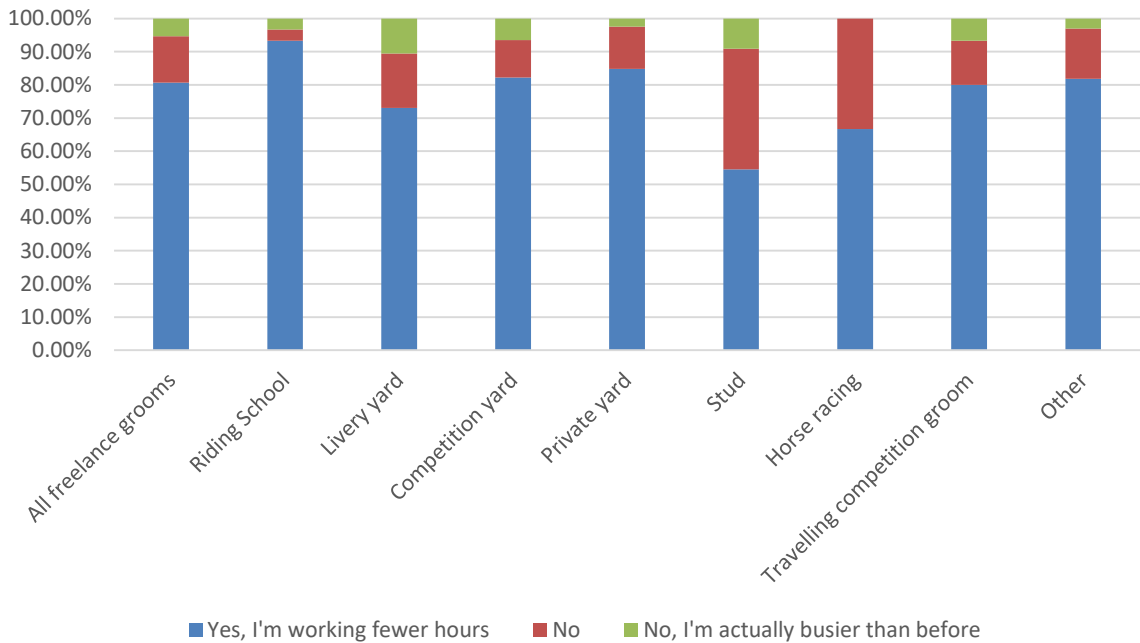
Over 80% of freelance grooms are working fewer hours than before coronavirus.

Just over 50% of employed grooms have seen their hours reduced, have been furloughed, or have been made redundant. Those being made redundant make up 8% of respondents.

The difference between the reduction in hours for freelance and employed grooms may be as a result of freelance grooms being the first employees to have hours reduced, ahead of employed grooms in businesses where a combination of the two are employed. In addition, it may be the case for freelance grooms working within private yards or for employers who work elsewhere, that their employers have take over the care of their horses due to their own work hours being reduced or being put on furlough.

Freelance grooms

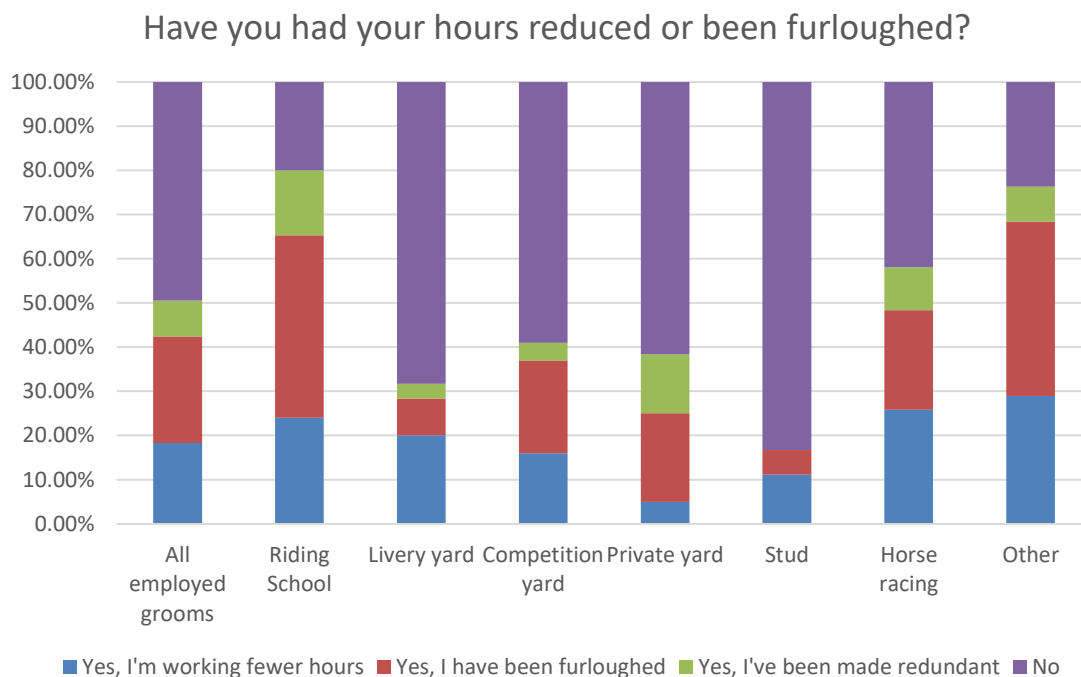
Q. Have you seen a reduction in your normal working week?



The freelance grooms working in riding schools seem most affected, with 93% seeing a reduction in hours. Many freelance grooms working predominantly on competition and private yards have also seen a reduction in hours.

Freelance grooms working with studs seem to be the least affected of the respondents, with almost 10% saying they are busier than before. However, a few respondents commented that while they are busy at the moment, this time of year is a period of increased activity at studs, so once the quieter season arrives they expect their work levels to be reduced.

Employed grooms



Again, riding school grooms seem most affected when looking at the respondents who are employed as grooms, as opposed to those working freelance. 80% of grooms employed at riding schools have seen their hours cut, been furloughed or been made redundant.

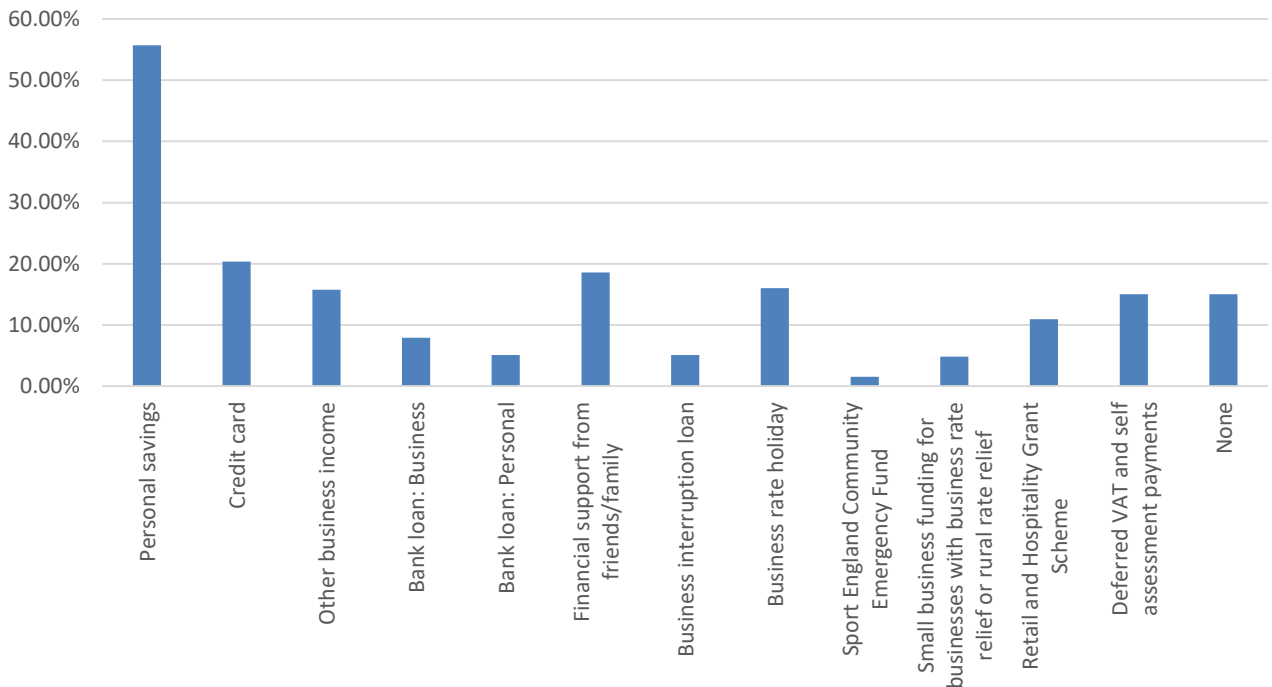
A significant number of respondents who are employed within livery, competition and private yards have seen their working hours affected, which is consistent with the reduction in income that the business owners who responded to the survey said they were seeing.

Riding school grooms seem to be those most affected, with twice as many working on reduced hours, furloughed or made redundant compared to at livery, competition and private yards.

How are people supporting themselves at this time?

Employers/businesses

Q. Are you using any of the following for your business?



Over 50% of businesses and employers who responded are supplementing their income with their personal savings. Over 20% are using credit cards for additional finances.

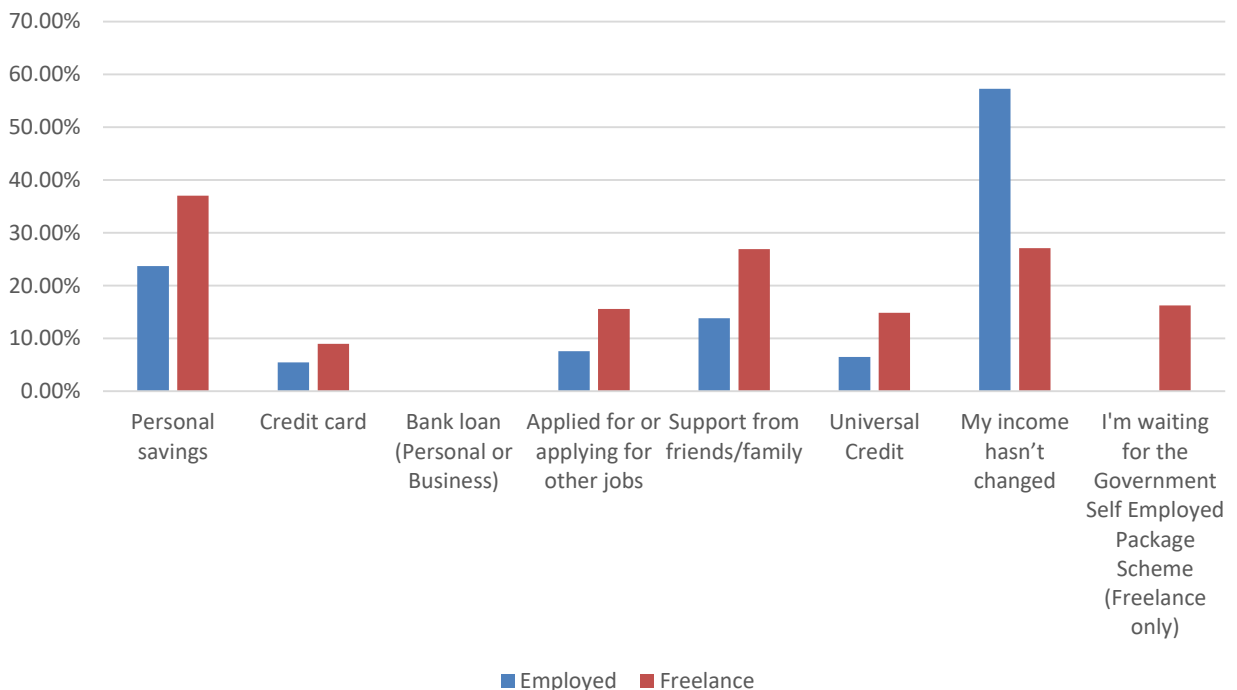
16% are taking advantage of the business rate holiday, and just under 5% have accessed small business funding for businesses with business rate relief or rural rate relief.

15% are not using any of the means mentioned to supplement their income. However, when asked earlier in the survey, just 11% said they were not seeing any effect on their income, meaning there is potentially 4% of respondents who have seen an effect on their income, but are not utilising any of the methods mentioned to counteract this drop in income.

How are people supporting themselves at this time?

Grooms

Q. If you are earning less, how are you supplementing/replacing your income?



From those that responded, employed grooms are over twice as likely than freelance grooms to say that their income hasn't changed as a result of the coronavirus pandemic (57.29% compared with 27.12%).

The most popular means of supplementing income at this time is through personal savings, but 27% of freelance and 14% of employed grooms are relying on support from family and friends to supplement their income.

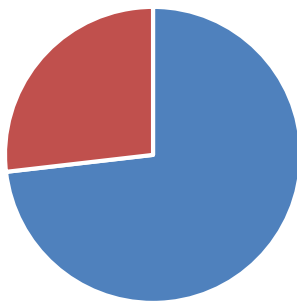
16% of freelance grooms are actively applying for other jobs to support their income.

How are those not working spending their time?

Grooms

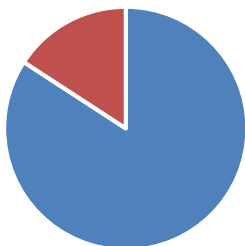
Q. If you have found yourself not working with horses, what are you doing?

Freelance grooms



■ At home, no work ■ Doing some element of alternative paid work

Employed grooms



■ At home, no work ■ Doing some element of alternative paid work

Employed grooms are more likely to be at home and not doing alternative work if they find themselves not working with horses, with just 16% doing alternative paid work.

27% of freelance grooms have found work elsewhere.

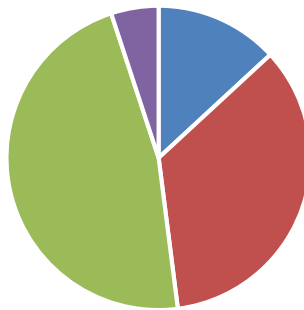
This could be due to the fact that employed grooms are able to be furloughed, so still retaining some income, and need to remain available to return to work at the end of their furloughed period.

Alternative jobs that were mentioned most frequently by respondents were:

- Supermarket work
- Delivery driving
- Farm work
- Return to care/nursing

The future of equestrian businesses

Q. Do you think the coronavirus pandemic will have a long term negative impact on your business?

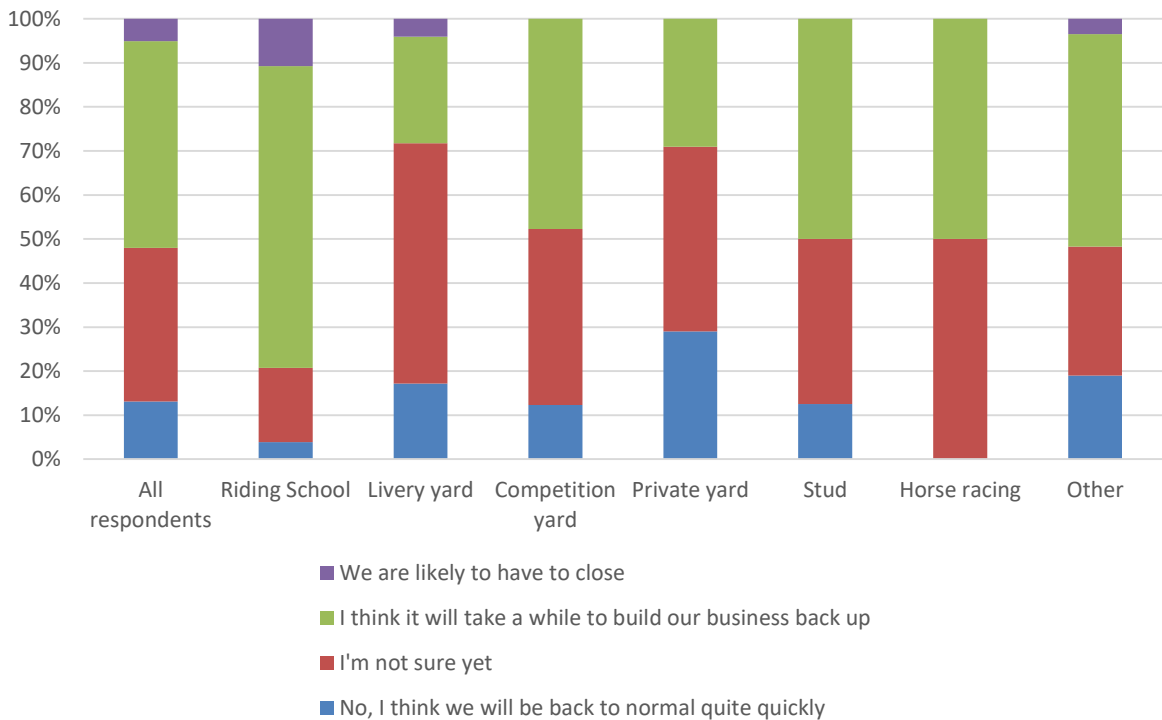


- No, I think we will be back to normal quite quickly
- I'm not sure yet
- I think it will take a while to build our business back up
- We are likely to have to close

On average, 13% of those that responded to the survey feel that their business will get back to normal quite quickly. 5% expected to close as a result of coronavirus, and almost half expect to take a while to rebuild the business.

35% of employers felt unsure what the long-term impact on their business would be.

Q. Do you think the coronavirus pandemic will have a long term negative impact on your business?

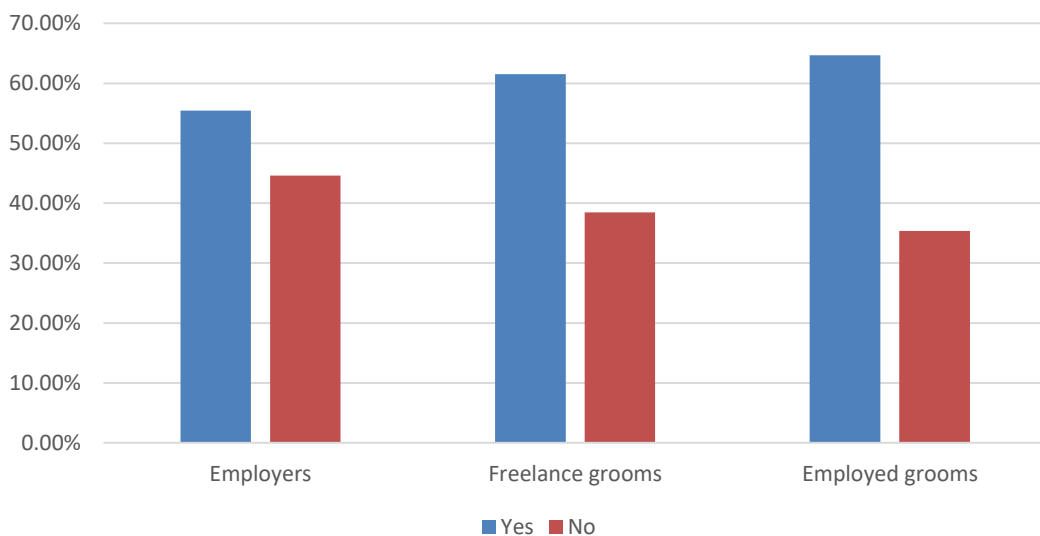


When the various types of business are compared, 11% of riding schools that responded felt they are likely to close as a result on the coronavirus pandemic, along with 4% of livery yards and 3.45% of 'other' businesses (these include retail stores, farriers, physios and vets). The other businesses that responded felt they weren't likely to close, but would take some time to build back up again.

Only 4% of riding schools said they would be back to normal quite quickly. Along with those riding schools that are not sure, this means 96% of riding schools are uncertain of their future, think they will struggle to build back up, or will be forced to close. This will have a great impact on the staff reliant on these businesses, especially in the case of the 20% of employed grooms who responded working in this environment.

The impact of coronavirus on mental health

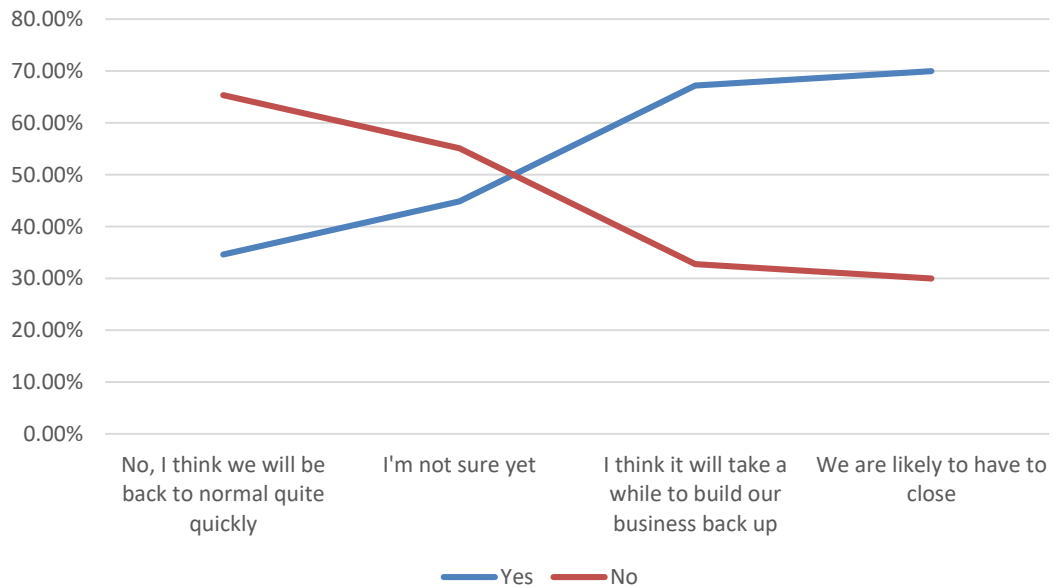
Q. Do you feel the current situation is impacting your mental health?



For all respondent groups (employers, freelance grooms and employed grooms), a higher percentage of respondents felt that the current situation was impacting their mental health than those who didn't feel it was having an effect.

65% of employed grooms, 62% of freelance grooms and 55% of employers felt that the current situation was impacting on their mental health.

Comparing whether employers felt there would be lasting negative effects of the pandemic with whether they feel the pandemic has affected their mental health.



When the response received from employers regarding the future of their business is compared with the mental health of the same respondents, it would appear that if the future of the business is uncertain, this could have a marked impact on the mental health of those business owners.

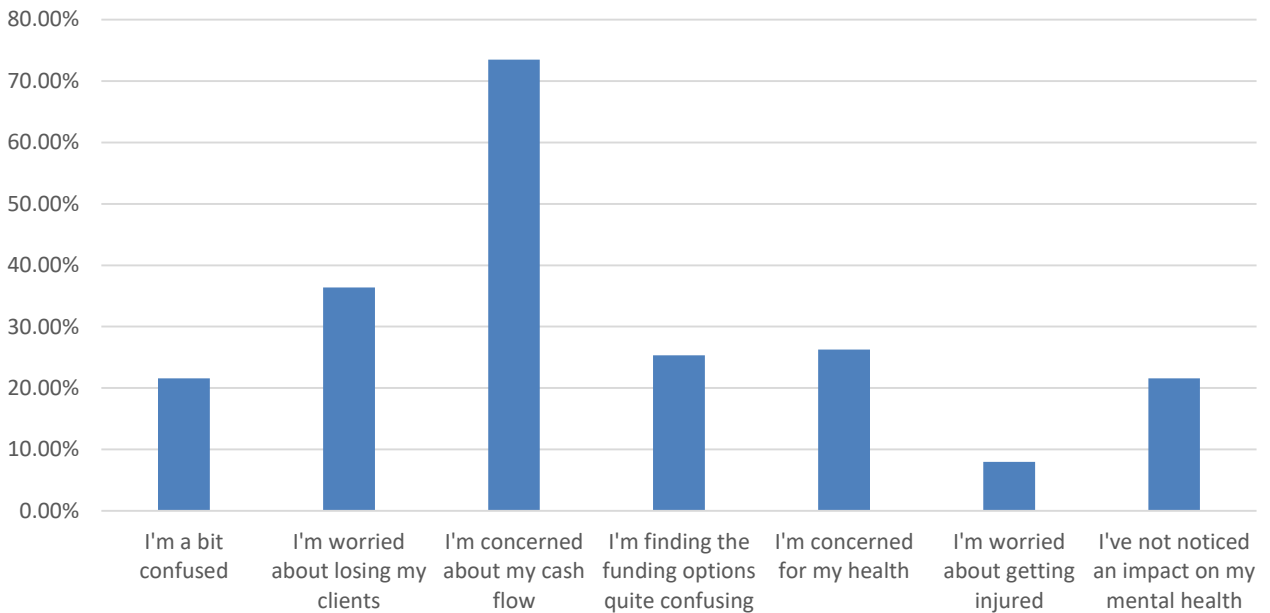
70% of employers who feel they are likely to have to close have reported the pandemic having a negative effect on their mental health, compared with 35% of business owners who felt they'd get back to normal quite quickly.

Alternatively, it may be the case that where the pandemic has had a negative impact on the mental health of the employers that responded, these respondents may feel more negatively about the future of their businesses.

Either way, this could suggest that, alongside business support, mental health support is of importance because the two factors can be negatively affected at this time.

Freelance grooms

Q. How are you feeling?



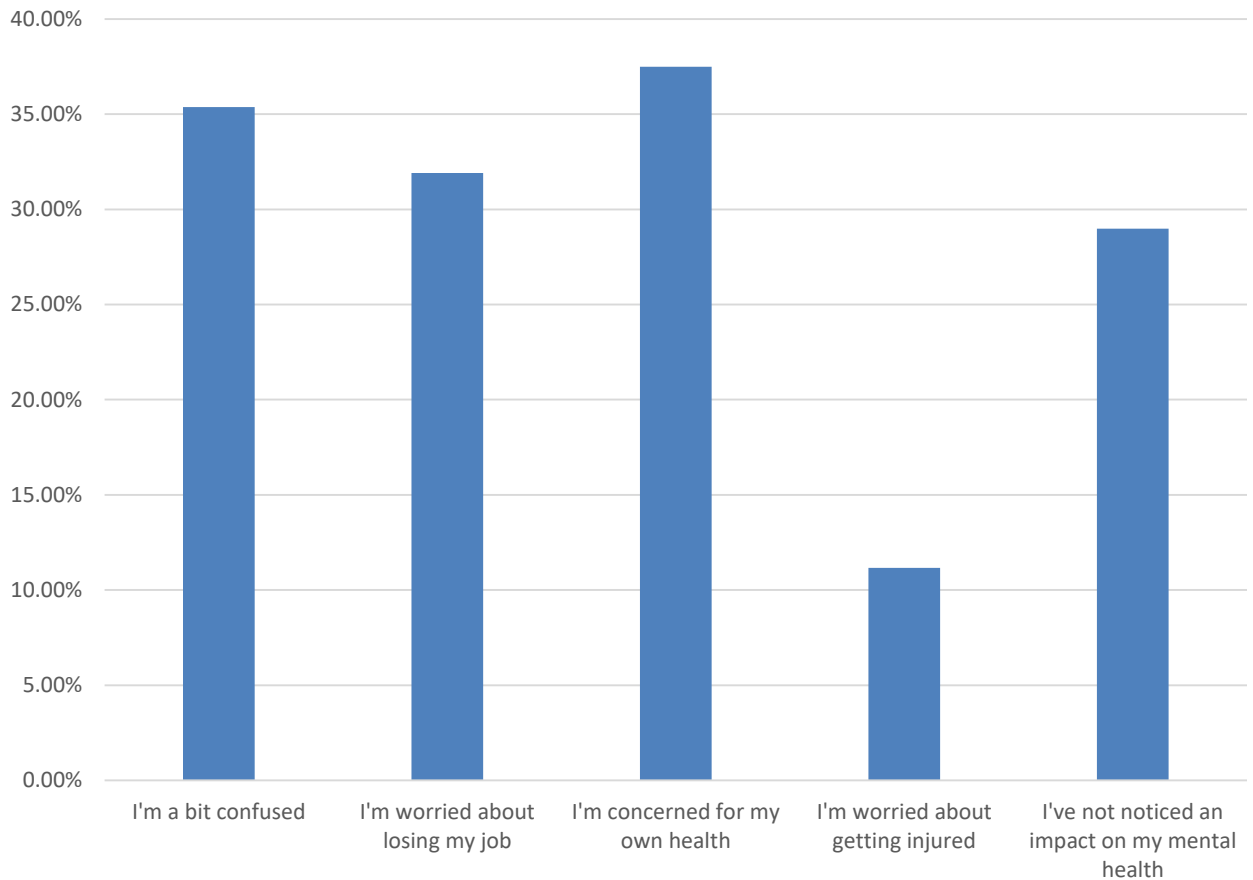
The predominant direction of feelings of freelance grooms are towards worries around cash flow, with almost three quarters of respondents concerned about this.

A quarter of freelance grooms are worried about their health, and over a third are concerned about losing their clients.

A quarter are finding the funding options confusing, with nearly the same amount finding the whole situation confusing.

Employed grooms

Q. How are you feeling?



For employed grooms, there doesn't seem to be one overriding worry, just a similar feeling of confusion, concern for losing their job (and, as a result, income) and worries about their health.

Almost 30% from this question felt they had not noticed an impact on their mental health.

Additional comments

Respondents were given the opportunity to include any additional comments they felt they wished to. These responses were many and varied, but included comments related to :-

Government support

‘As a charity, we have received a Third Sector Resilience Grant from SCVO and this should enable us to continue operating when restrictions are lifted.’

‘Government guidelines have been rather vague concerning the horse industry, which has led to various yard owners and livery clients interpreting them differently...’

‘I feel that without the help from the Government, we would be in serious financial difficulties.’

Mental health

‘It has been especially difficult and isolating living alone, but being able to come to work everyday and be outside and be with colleagues has definitely helped keep me sane’

‘I live alone on-site, so not being able to leave and see friends/family means getting very lonely’

‘It’s been very hard to adjust from being outside all day everyday with the horses to being inside most of the day and only allowed out to exercise once a day.’

‘At first the lockdown didn’t worry me as I live on site and tend to be a slight hermit...I’ve realised my ‘normal’ life isn’t healthy and I need to make sure I go out and make an effort when it’s all over.’

‘Mental health has improved by not having the rush around of a repetitive job, and trying to get all the jobs done which are too much for one person in a day.’

Business concerns

'Unfortunately with the current situation we are in... our outgoings are so high...if we can't open within the next month... we will need to close the riding school for good'

'All horses were at full livery and owners took them home at start of lockdown. As owners are unable to work the likelihood of them being able to afford full livery is slim.'

'Unfortunately it is a small price to pay, and if it means my family are safe then I am happy not to sell horses and let people view. It will not last forever'

'Our business developing web infrastructure for rural businesses will be bigger as a result of coronavirus, or at least the market we expect in several years has been brought forward as a result as shops and farms go online and direct to customers...'

'On a positive – this time has afforded me the opportunity to take stock and restructure parts of the business...So hopefully good will come out of this longer term'

Employment

'I will be seeking alternative employment once this has all passed'.

'I feel pressured to ride as to not let my employer down... but not too sure it's necessary in the current situation. I enjoy riding and do it happily, but is it the right decision?'

'I will be ok as I'm older and have some savings, but young freelancers who maybe haven't been going too long are vulnerable to loss of income and being forced to work and put themselves at risk.'

'My boss is being fantastic and has kept on me and another member of staff, despite the fact we have less work to do.'

Coronavirus

'Not only the impacts of catching the virus myself but the stress brought on from clients not understanding or taking it seriously.'

'I don't think clients should be riding but can't say anything...'

'It is very difficult in our current position, how can we be social distancing while foaling mares, leading mares and foals, and covering?'

'Extra costs for PPE...Getting staff to understand and follow social distancing a real problem'.

Recommendations

- The entire industry is facing a time of unprecedented challenge. The specific source of challenge may vary slightly between business type and grooms way of working, but the coronavirus pandemic is affecting everyone in some way.
- This report shows that support and additional provision is needed in many areas, including an increased provision for the businesses and freelance grooms to ensure financial survival coming out of the pandemic. Businesses need to be viable and guided to any available funding.
- The pandemic has affected the well-being of grooms and business owners, and the industry needs to provide care in this area.