


West Berkshire Local Plan Review 2022-2039
Proposed Submission Representation Form
Ref:
(For official use only)

Please complete online or return this form to:	Online: http://consult.westberks.gov.uk/kse
	By email: planningpolicy@westberks.gov.uk
	By post: Planning Policy, Development and Regulation, Council Offices, Market Street, Newbury, RG14 5LD
Return by:	4:30pm on Friday 3 March 2023

This form has two parts:

- Part A - Your details: need only be completed once
- Part B - Your representation(s): please fill in a separate sheet for each representation you wish to make

PART A: Your Details

Please note the following:

- *We cannot register your representation without your details.*
- *Representations cannot be kept confidential and will be available for public scrutiny, however, your contact details will not be published.*
- *All information will be sent for examination by an independent inspector*
- *All personal data will be handled in line with the Council's Privacy Policy on the Development Plan. You can view the Council's privacy notices at <http://info.westberks.gov.uk/privacynotices>*

	Your details	Agent's details (if applicable)
Title:		Ms
First Name:*		Wakako
Last Name:*		Hirose
Job title (where relevant):		Senior Associate
Organisation (where relevant):	Lambourn Trainers' Association	Rapleys LLP
Address* <i>Please include postcode:</i>	C/O Agent	66 St James's Street London SW1A 1NE
Email address:*	C/O Agent	████████████████████
Telephone number:		██████████

*Mandatory field

Part B – Your Representation

Please use a separate sheet for each representation

The accompanying guidance note available at: <https://www.westberks.gov.uk/lpr-proposed-submission-consultation> will assist you in making representations.

*Your representation should cover succinctly all the information, evidence and supporting information necessary to support/justify the representation and the suggested change(s) as there will **not normally** be a subsequent opportunity to make further representations, **further submissions will ONLY be at the request of the Inspector, based on the matters and issues they identify for examination.***

Your name or organisation (and client if you are an agent):	Rapleys on behalf of Lambourn Trainers' Association
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Please indicate which part of the Local Plan Review this representation relates to:

Section/paragraph:	
Policy:	SP1
Appendix:	
Policies Map:	Lambourn Area
Other:	

1. Legally Compliant

Please see the guidance notes for an explanation of what 'legally compliant' means.

Do you consider the Local Plan Review is legally compliant?

Yes

No

Please give reasons for your answer:

2. Soundness

Please see the guidance notes for an explanation of what 'soundness' means.

Do you consider the Local Plan Review is sound?

The soundness of the LPR should be assessed against the following criteria from the National Planning Policy Framework (NPPF)

Please tick all that apply:

NPPF criteria	Yes	No
Positively Prepared: The plan provides a strategy which, as a minimum, seeks to meet the area's objectively assessed need and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where practical to do so and is consistent with achieving sustainable development		√
Justified: the plan is an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence		√
Effective: the plan is deliverable over the plan period and based on effective joint working on cross-boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground		√
Consistent with national policy: the plan should enable the delivery of sustainable development in accordance with the policies of the NPPF		√

Please give reasons for your answer:

Please see the accompanying statement Section 2 and Paragraphs 3.1 and 3.3.

3. Complies with the Duty to Co-operate

Please see the guidance note for an explanation of what 'Duty to Cooperate' means.

Do you consider the Local Plan Review complies with the Duty to Co-operate?

Yes

No

Please give reasons for your answer:

4. Proposed Changes

Please set out what change(s) you consider necessary to make the Local Plan Review legally compliant or sound, having regard to the tests you have identified above (Please note that non-compliance with the duty to co-operate is incapable of modification at examination).

You will need to say why this change will make the LPR legally compliant or sound. It will be helpful if you are able to put forward your suggested revised wording of any policy or text. Please be as precise as possible.

- The following should be added to the section under North Wessex Downs AONB
The horseracing industry is particularly important to the rural economy, with the Lambourn area being a nationally important location and making a significant economic contribution. The broad area of Lambourn's horseracing industry cluster is identified on the policies map. The HRI in Lambourn will be safeguarded and its expansion supported, as set out in Policy DM37.
- The policies map should identify the horseracing industry cluster in Lambourn.

5. Independent Examination

If your representation is seeking a change, do you consider it necessary to participate at the examination hearing session(s)?

Yes No

If you wish to participate at the oral part of the examination, please outline why you consider this to be necessary:

In order to respond to the Inspector's MIQs on this matter effectively and clearly.

Please note the Inspector will determine the most appropriate procedure to adopt to hear those who have indicated that they wish to participate at the oral part of the examination.

6. Notification of Progress of the Local Plan Review

Do you wish to be notified of any of the following?

Please tick all that apply:

	<i>Tick</i>
The submission of the Local Plan Review for Independent Examination	√
The publication of the report of the Inspector appointed to carry out the examination	√
The adoption of the Local Plan Review	√

Please ensure that we have either an up to date email address or postal address at which we can contact you. You can amend your contact details by logging onto your account on the Local Plan Consultation Portal or by contacting the Planning Policy team.

Signature	[REDACTED]	Date	03/03/2023
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Friday 3 March 2023.


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	Your details	Agent's details (if applicable)
Title:		Ms
First Name:*		Wakako
Last Name:*		Hirose
Job title <i>(where relevant):</i>		Senior Associate
Organisation <i>(where relevant):</i>	Lambourn Trainers' Association	Rapleys LLP
Address* <i>Please include postcode:</i>	C/O Agent	66 St James's Street London SW1A 1NE
Email address:*	C/O Agent	████████████████████
Telephone number:		██████████

*Mandatory field

Part B – Your Representation

Please use a separate sheet for each representation

The accompanying guidance note available at: <https://www.westberks.gov.uk/lpr-proposed-submission-consultation> will assist you in making representations.

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Your name or organisation (and client if you are an agent):	Rapleys on behalf of Lambourn Trainers' Association
---	---

Please indicate which part of the Local Plan Review this representation relates to:

Section/paragraph:	Paragraphs 12.38 to 12.55
Policy:	DM37
Appendix:	
Policies Map:	Lambourn Area
Other:	

1. Legally Compliant

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Yes

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Please give reasons for your answer:

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Do you consider the Local Plan Review is sound?

The soundness of the LPR should be assessed against the following criteria from the National Planning Policy Framework (NPPF)

Please tick all that apply:

NPPF criteria	Yes	No
Positively Prepared: The plan provides a strategy which, as a minimum, seeks to meet the area's objectively assessed need and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where practical to do so and is consistent with achieving sustainable development		√
Justified: the plan is an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence		√
Effective: the plan is deliverable over the plan period and based on effective joint working on cross-boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground		√
Consistent with national policy: the plan should enable the delivery of sustainable development in accordance with the policies of the NPPF		√

Please give reasons for your answer:

Please see the accompanying statement Section 2 and Paragraphs 3.4 to 3.20.

3. Complies with the Duty to Co-operate

Please see the guidance note for an explanation of what 'Duty to Cooperate' means.

Do you consider the Local Plan Review complies with the Duty to Co-operate?

Yes

No

Please give reasons for your answer:

4. Proposed Changes

Please set out what change(s) you consider necessary to make the Local Plan Review legally compliant or sound, having regard to the tests you have identified above (Please note that non-compliance with the duty to co-operate is incapable of modification at examination).

You will need to say why this change will make the LPR legally compliant or sound. It will be helpful if you are able to put forward your suggested revised wording of any policy or text. Please be as precise as possible.

The following changes as shown in bold italics should be made to Policy DM37 and supporting paragraphs.

Policy DM37

Change the sub-heading "Equestrian Development" to "Equestrian Development (***not related to Horseracing Industry***)"

North Wessex Downs AONB Horseracing Industry

Whilst conserving environmental quality and countryside character, the horseracing industry in the AONB will be maintained, and its sensitive growth will be allowed for. Within this context:

i. Suitable existing establishments or facilities are expected to be retained. ***Re-development or conversion away from uses essential to the horseracing industry will be subject to the tests of suitability and necessity outlined in the supporting text to this policy;***

ii. Permanent fragmentation will be resisted; ~~and~~

~~iii. Re-development away from uses essential to the horseracing industry will be subject to the tests of suitability and necessity outlined in the supporting text to this policy;.~~

iii. Existing support facilities and infrastructure which support the HRI in Lambourn will be protected unless the applicant can demonstrate that there is no alternative economic use for the site within the HRI and that the proposal does not have a negative impact upon the vitality and viability of Lambourn horseracing industry cluster; and

iv. New residential accommodation in association with the HRI in the countryside proposed as a standalone development or as part of proposed new stabling or breeding facilities will be permitted where genuine need is suitably demonstrated through a business case and accommodation cannot reasonably be secured within existing settlements.

Any development within or around Lambourn horseracing industry cluster which is likely to have a material adverse impact on the operational use of an existing site within the horseracing industry (such as noise, volume of traffic, loss of paddocks or other open space, access and/or servicing requirements), or which would threaten the long term viability of the horseracing industry, will not be permitted unless the benefits would significantly outweigh the harm to the horseracing industry.

Supporting Text

- Insert a heading "***Equestrian Development (not related to Horseracing Industry)***" for Paragraphs 12.38 and 12.44.
- Paragraph 12.51

Suitability test: In considering the suitability of existing establishments, the key factors to consider will be:

~~a. The location of the site relating to the form and character of the settlement;~~

ab. The existing range of facilities on the site and their adequacy for the purpose of training and/or breeding horses, or their capability for adaptation to meet such needs; ***and***

bc. The availability of and access to (including the potential for improved access) suitable gallops and training areas;

~~d. The impact on local roads including the safety of horses and riders and traffic using the highway; and~~

~~e. The availability of sources of labour and the accommodation of personnel on site or in the locality.~~

- Paragraph 12.46

"The policy aims to allow for the sensitive development and growth of the horseracing industry whilst conserving environmental quality and countryside character. This includes the built and natural form, and social and economic aspects such as the influence of the horseracing industry as part of the local economy which gives Lambourn its unique character. Outside of settlements, preference will be given to proposals that seek to locate within valleys and avoid development on hilltops or ridgelines. Equine buildings on sites which are open, exposed, elevated or sloped are likely to have particular landscape impacts that may make it difficult to achieve sensitive design solutions. *Design guidance specific to the horseracing industry in Lambourn will be considered in the preparation of the emerging Neighbourhood Plan for Lambourn.*"

- Move part of Paragraph 11.45 to Paragraph 12.55:

"It is acknowledged that there is a need in some circumstances to provide accommodation close to hand in order to provide 24 hour supervision as part of licensing requirements, or for the effective running of an establishment. It is the Council's preference for workers to be accommodated within existing nearby villages, so as to contribute to the overall sustainability of settlements and limit development in the countryside. Whilst racing charities *and training yard owners* provide some *low cost subsidised*—and/or hostel accommodation in the area, it is recognised there is still a specific need for affordable single person accommodation in Lambourn. *Where new stabling or breeding facilities are proposed, together with residential accommodation, financial viability will need to be demonstrated together with supporting evidence to show the new facility has sufficient need to require a worker to be permanently living on the site in the long term. It should be noted that a restricted occupancy condition will be applied in order to ensure that the accommodation for staff employed in the HRI will not be lost to non-HRI occupants, as it would threaten the function and viability of the HRI establishments or facilities and could lead to a permanent loss of the HRI establishments or facilities.*"

5. Independent Examination

If your representation is seeking a change, do you consider it necessary to participate at the examination hearing session(s)?

Yes

No

If you wish to participate at the oral part of the examination, please outline why you consider this to be necessary:

In order to respond to the Inspector's MIQs on this matter effectively and clearly.

Please note the Inspector will determine the most appropriate procedure to adopt to hear those who have indicated that they wish to participate at the oral part of the examination.

6. Notification of Progress of the Local Plan Review

Do you wish to be notified of any of the following?

Please tick all that apply:

Tick

The submission of the Local Plan Review for Independent Examination	√
The publication of the report of the Inspector appointed to carry out the examination	√
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Signature		Date	03/03/2023
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West Berkshire Local Plan Review 2022-2039 – Proposed Submission Consultation

Representations on behalf of Lambourn Trainers' Association
3 March 2023
Our Ref: WH/23-00428



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- Appendix 1 Lambourn Horseracing Industry Cluster Plan
- Appendix 2 Horse Racing in Lambourn Valley: The Industry’s Economic and Social Impacts



Quality Assurance

This report has been prepared within the quality system operated at Rapleys LLP according to British Standard ISO 9001:2015.

We confirm that the undersigned is an appropriately qualified and experienced Chartered Surveyor/Planner [delete as appropriate] experienced in the commercial property sector.

Created by: Wakako Hirose BA (Hons) DipTP MRTPI

[Redacted]

Signature:

[Redacted]

Checked by: Jason Lowes BSc (Hons) DipTP MRTPI

[Redacted]

Signature:

[Redacted]

1 INTRODUCTION

- 1.1 These representations to West Berkshire Local Plan Review 2022-2039: Proposed Submission (Regulation 19) consultation have been prepared on behalf of Lambourn Trainers' Association ('LTA'). LTA represents licensed racehorse trainers in Lambourn, one of the key stakeholders of the success of the Horse Racing Industry (HRI) in Lambourn (known as the Valley of the Racehorse), along with others including Jockey Club Estates (JCE), the owner and operator of Lambourn Training Grounds.
- 1.2 The HRI cluster in and around Lambourn is identified on a plan titled Lambourn Horseracing Industry Cluster at Appendix 1. The success of the HRI is vital to protecting Lambourn's racing heritage dating back to the 18th Century and making a substantial contribution to the economic, cultural and environmental well-being of the area. LTA also recognises that the HRI cluster in Lambourn is located in the North Wessex Downs AONB, where development proposals would need to be considered sensitively, and that the HRI makes a contribution to the character of the AONB.
- 1.3 In this context, LTA wishes to ensure that the new Local Plan contains appropriate and clear policies to protect the HRI in Lambourn and to support its future success while recognising its location being within the AONB. Further, a Neighbourhood Plan for Lambourn is being prepared by Lambourn Parish Council, which is understood to include policies for the HRI. While LTA is broadly supportive of the draft Local Plan, it is considered that further amendments are necessary to ensure the effectiveness and the soundness of the Plan, taking into account evidence for the HRI in the area, and a Neighbourhood Plan being prepared for Lambourn.

2 EVIDENCE FOR THE HORSE RACING INDUSTRY IN LAMBOURN

Lambourn HRI Cluster

- 2.1 Great Britain is the birthplace of modern thoroughbred horseracing. The high quality of racing has been central to the substance and long-term success of the country's HRI. Britain's reputation for the training and breeding of thoroughbreds as well as for high horse welfare standards, which are governed and regularised by the British Horseracing Authority ('BHA'), is internationally renowned.
- 2.2 Lambourn's HRI Cluster is shown on the plan at Appendix 1. It comprises; JCE owned public training grounds (or gallops), private gallops, training yards (existing and sites with planning permission) concentrated in Lambourn (including Upper Lambourn) and facilities and infrastructure supporting the HRI. The concentration of the facilities and establishments in Lambourn makes the HRI cluster a success and secures its long term viability.
- 2.3 Lambourn's HRI cluster plays a crucial part in Britain's horseracing industry and international reputation. The Lambourn area is a nationally important location for the HRI. We support paragraph 4.16 of the consultation document which identifies that Lambourn serves as the heart of one of the most important areas for horseracing in the country.
- 2.4 The importance of maintaining HRI facilities in Lambourn cannot be overstated. Lambourn HRI has grown since 2006, facilitated by JCE's significant investment in the public training grounds and wider infrastructure which has, in turn, encouraged investment in new and existing training yards, and is once again a successful HRI cluster. However, its reputation and JCE's investment alone cannot maintain Lambourn HRI's vitality and success as the HRI competes with the international market in terms of investment in the industry. Appropriate local policy will be critical in maintaining Lambourn HRI's success. Opportunities for further growth also need to be recognised given its contribution to the rural economy and British horseracing. Public training grounds such as those operated by JCE in Lambourn are training facilities which are made available to all licensed trainers. Due to economies of scale achievable, they enable trainers to access higher quality and a greater variety of facilities than would otherwise be possible in all but a very few cases. As well as being used by many trainers throughout their careers, public training grounds are particularly important in enabling start-up training businesses to operate without the capital or maintenance costs of their own training facilities.
- 2.5 In the context of the above, protection of the HRI's success can be achieved through local planning policy that balances the need to enhance and grow the HRI, while protecting the crucial features of the industry i.e. the existing facilities and establishments which make the HRI cluster.

Evidence Base

- 2.6 The Council's evidence cited is the Study of the Key Effects of the Horseracing Industry on the North Wessex Downs Area of Outstanding Natural Beauty dated March 2007, though this does not provide the most up to date evidence for the HRI. A report entitled "*Horse Racing in Lambourn Valley: The*

Industry's Economic and Social Impacts", dated January 2019 by SQW ('the HRI Report') (Appendix 2) was commissioned by JCE with support from West Berkshire Council. The HRI Report describes the HRI in Lambourn and sets out the economic and social impacts of the HRI as well as the industry's needs which should be taken into account in the plan making process.

2.7 The study area is Lambourn Valley 'equine cluster' (defined as the parishes of Lambourn, East Garston and Great Shefford) and focuses on the racehorse training industry. The HRI Study identifies that there is a concentration of trainers' yards (where racehorses are cared for by trainers) in Upper Lambourn and along the B4000 Ashbury Road leading back towards Lambourn, owing to the good access to the training grounds operated by JCE and other private gallops.

2.8 In summary, the following findings are drawn from the HRI Study:

- There are over 1,500 racehorses in yards, being cared for and exercised by over 500 FTE staff.
- Organisations and businesses relating to the HRI (veterinary practices, horse transportation, equine surfaces and equipment, farriers, media companies specialised in racing, inns with rooms, yard & stable hygiene services, saddlers, and stud farms) in the study area employ over 160 FTE staff.
- Taking into account direct and indirect Gross Added Value (GVA) contribution and induced employment and GVA contributions, the HRI's contributions to Lambourn Valley were 745 FTE staff (representing 30% of the area 's total jobs) and GVA of £22 million per annum.
- Whilst there are a number of trainers whose horses do not use JCE's public training grounds on a regular basis, the number of horses which do is a useful barometer of the health of the HRI in Lambourn. In 2006 the daily average was 367 horses using the public training grounds. In 2022 the daily average was 649. Several racehorse trainers from a wider area benefit from the opportunity to use JCE's facilities on a "casual" (per visit) basis; in 2006 this equated to 615 horses visiting rising to 1,286 in 2022.

2.9 In addition to the economic contribution, the HRI Study identifies the following challenges and development needs:

- There is a lack of low-cost housing for staff employed in the HRI which meets the industry's requirements reflecting the nature of jobs involving animal husbandry and anti-social hours. Accommodation to be built by trainers for their staff and/or the HRI should be seen as key infrastructure for the HRI.
- There are ongoing concerns with safety of horses accessing the gallops due to increase in traffic. Measures such as horse crossings and horse walks have been installed, but there is a need to ensure that appropriate mitigation and the necessary infrastructure to ensure safety of horses and other road users are considered as part of future development proposals in the area.

2.10 It is critical that the HRI continues to make investment in the area to secure Lambourn's position as a vibrant and successful equine cluster in the long term, which would in turn encourage further investment in the HRI in the area. In order to facilitate this, an appropriate policy framework is required to ensure that the HRI in Lambourn is safeguarded, its needs are met and its growth is supported.

2.11 In addition to the Council's evidence on the contribution that the industry makes to the character of the area set out in the West Berkshire Landscape Character Assessment, the SQW HRI Report should be included as evidence for the Local Plan.

3 REPRESENTATIONS

POLICY SP1 – SPATIAL STRATEGY

3.1 The consultation document recognises that Lambourn serves as the heart of one of the most important areas for horseracing in the country and there is evidence of the HRI's significant contribution to the rural economy as set out above. The Council's support for the retention and growth of the HRI in Lambourn should be identified as part of the Plan's spatial strategy. There is no strategic link to Policy DM37 which specifically addresses the equestrian and horseracing industry.

3.2 Notwithstanding the strategic importance of the HRI in Lambourn, the draft Policies Map does not identify the location. We note that Newbury Racecourse is identified on the Policies Map. Similarly, Lambourn's horseracing industry cluster should be identified on the plan, as a broad location as a minimum, for clarity and effectiveness of the policies. The National Planning Policy Framework (2021) ('NPPF') states that broad locations for development should be indicated on a key diagram, and land use designations and allocations identified on a policies map (paragraph 23). Given the strategic importance

of Lambourn's horseracing cluster where its growth is supported, it should be identified on the Policies Map.

- 3.3 We therefore object to Policy SP1 and consider that following is added to North Wessex Downs AONB spatial area section:

"The horseracing industry is particularly important to the rural economy, with the Lambourn area being a nationally important location and making a significant economic contribution. The broad area of Lambourn's horseracing industry cluster is identified on the policies map. The HRI in Lambourn will be safeguarded and its expansion supported, as set out in Policy DM37."

POLICY DM37 – EQUESTRIAN AND RACING INDUSTRY

Structure of the Policy

- 3.4 Policy DM37 deals with equestrian and horseracing industry. It should be noted that the HRI's operational requirements and characteristics are entirely different from non-racing equestrian industry. Without a clear distinction separating the policy between the HRI and non-racing equestrian development, the policy would be ineffective in responding to the needs of the HRI, or worse it would fail to protect the HRI.
- 3.5 In this regard, the first part of the policy under the heading "Equestrian Development" appears to consider non-racing related equestrian development, as it refers to the guidance and standards set out in the Equine Industry Welfare Guidelines and the British Horse Society. These standards are not necessarily applicable to the HRI as HRI related developments (e.g. training yards) are regulated and licensed by the British Horseracing Authority ('BHA'). However, equestrian development could also mean development related to the HRI and the supporting paragraphs do not make this point clear. We therefore object to the structure of Policy DM37, as it is not clearly written, is ambiguous and it is not evident how a decision maker should react to development proposals contrary to paragraph 16 of the NPPF. We request that the heading for the first part of the policy is amended to "Equestrian Development (*not related to Horseracing Industry*)."
- 3.6 Supporting text for Policy DM37 makes the interpretation of the policy unclear, particularly with the terms "equestrian activities and related development", "the equestrian industry", "equestrian development" and "the horseracing industry" being used interchangeably without definitions in the paragraphs 12.35 to 12.44.
- 3.7 Paragraph 12.35 states that equestrian activities and related development and the horseracing industry are characteristic features of West Berkshire and are of particular importance to the rural economy. There is evidence of the economic contribution the HRI makes to the economy, and the needs and impacts of the HRI industry are different from the other equestrian activities. Therefore, supporting text should follow the same structure as the policy and provide headings for each industry. More specifically, paragraph 12.38 to 12.44 should have a heading "Equestrian Development (*not related to Horseracing Industry*)".

Protection of Existing HRI Facilities

- 3.8 We support the aspect of the policy under the heading of North Wessex Downs AONB Horseracing industry, which seeks to protect the existing establishments and facilities from uses and redevelopment not related to the HRI. As evidenced in the earlier section, contributions Lambourn's HRI makes to Britain's horseracing industry and the local economy are significant. Given that the area is located within AONB and developments are generally constrained, it is of critical importance that existing facilities and establishments in connection with the HRI are safeguarded for the ongoing maintenance and success of the HRI. Once an existing facility is lost, it would put the HRI's vitality at risk as existing facilities are not easily replaceable without further development within the AONB. Therefore, robust policy is needed to ensure that existing establishments and facilities in connection with the HRI are given the necessary safeguarding.
- 3.9 Policy DM37 expects to retain "suitable" existing establishments or facilities under criterion i) and its application in terms of protection of existing establishments and facilities is provided in criterion iii) by way of the tests of suitability and necessity outlined in the supporting text at paragraphs 12.51 and 12.53. For clarity, criterion i) and part of criterion iii) should be combined as these are dealing with the protection of existing facilities and establishments.
- 3.10 In terms of suitability test, we object to criteria a), d) and e) for the following reasons:

a) The location of the site relating to the form and character of the settlement is not relevant to the suitability test relative to the retention of the existing facilities. It is a test which is ambiguous and not clear how this aspect is assessed. Any facilities or establishments which were formally used in connection with the HRI should be protected regardless of its locational relationship to the form and character of the settlement. The principle of the existing facilities location in the context of the settlement should not be a factor which determines the suitability of existing facilities/establishments to be protected.

d) The impact on local roads including the safety of horses and riders and traffic using the highway should not be a factor informing the suitability of the “existing” establishments or facilities relating to the HRI. It is not clear how the decision maker will assess the impact of the retention of the existing establishments and facilities relating to the HRI for the HRI on local roads. Rather, the HRI’s existing establishments and facilities should be protected from impacts on local roads from new developments in the HRI Cluster and investment should continue to be made to improve accessibility and highway safety for all road users. The ambiguous criterion such as this will undermine the importance and need to protect the existing HRI establishments and facilities.

e) The availability of sources of labour and the accommodation of personnel on site or in the locality should not be a relevant factor in assessing the suitability of the site, as the availability of accommodation of personnel on site may not always be relevant to the particular use and the availability of sources of labour is not a material consideration, as the maintenance of the HRI will attract labour regardless of the availability of sources at that particular point in time. For example, the availability of labour is not questioned in the development of traditional employment developments in the determination of planning applications. It is considered that such a test goes beyond the role of planning. Moreover, this would make any development difficult to secure planning permission, given that the lack of labour within or near the HRI area is commonplace.

3.11 In order to ensure the effectiveness of the policy to safeguard the existing facilities and establishments to ensure the long-term future of Lambourn’s HRI, criteria a), d) and e) should be deleted.

Protection and Development of facilities and infrastructure supporting equestrian development

3.12 At paragraph 12.36, it explains that the shared facilities and infrastructure which support the wider equestrian industry including the HRI, commercial and recreational markets will be considered in accordance with Policy DM35 which considers developments sustaining a prosperous rural economy. Policy DM35 seeks to prevent proposals resulting in the loss of existing business sites and premises in the countryside unless it can be demonstrated that no alternative economic use can be found, and that the proposal does not have a significant negative impact upon the vitality and viability of the local economy of the surrounding area.

3.13 As the HRI Report, the HRI is supported by a range of businesses which are located in Lambourn because of the HRI. Without these businesses, the HRI in Lambourn will not be as successful and viable a cluster as it can be. Therefore, it is considered that the protection of existing businesses supporting the HRI does not go far enough under Policy DM35 and should be protected under Policy DM37, as follows:

Existing support facilities and infrastructure which support the HRI in Lambourn will be protected unless the applicant can demonstrate that there is no alternative economic use for the site within the HRI and that the proposal does not have a negative impact upon the vitality and viability of Lambourn horseracing industry cluster.

Housing for the HRI

3.14 Housing for the HRI on site or in close proximity to facilities/establishments is key infrastructure for the future of the HRI, reflecting the nature of jobs in the HRI involving animal husbandry and anti-social hours. Therefore, we support the second part of criterion iii) which supports proposals for associated new residential accommodation in the countryside where genuine need is suitably demonstrated through a business case and accommodation cannot be reasonably secured within existing settlements. This is a separate point from the first part of criterion iii) which seeks to protect existing facilities and establishments for the HRI. Therefore, the second part of criterion iii) should be a new criterion.

3.15 Supporting text at paragraph 11.45 for Policy DM23 which addresses housing related to rural workers makes it clear that housing in the countryside essential for the HRI is supported by Policy DM37. Paragraph 11.45 provides the following guidance in terms of new housing development for the HRI:

Where new stabling or breeding facilities are proposed, together with residential accommodation, financial viability will need to be demonstrated together with supporting evidence to show the new facility has sufficient need to require a worker to be permanently living on the site in the long term. It should be noted that a restricted occupancy condition may be applied.

3.16 It is considered that this should be moved to paragraph 12.55 so that evidence needed and key considerations for residential accommodation relative to the HRI are set out in Policy DM37. In particular, the imposition of a restricted occupancy condition for the accommodation of those employed in the HRI is critical to the HRI. If a restricted occupancy condition is not imposed, racing staff/employee accommodation will be lost to non-HRI occupants. This will threaten the function and viability of the HRI establishments or facilities, leading to a permanent loss to non-HRI related uses. This point should be addressed in the supporting text.

3.17 Suggested changes to new criterion iv) is as follows:

iv. New residential accommodation in association with the HRI in the countryside proposed as a standalone development or as part of proposed new stabling or breeding facilities will be permitted where genuine need is suitably demonstrated through a business case and accommodation cannot reasonably be secured within existing settlements.

Supporting the Expansion of the HRI

3.18 The significance and importance of the HRI in Lambourn and the Council's desire to support the expansion of the industry as being of particular importance to the local rural economy are recognised in the consultation document (e.g. paragraph 11.45 expressly states that the Council wishes to retain and support the expansion of the horseracing industry and Policy DM37 also states that the horseracing industry's sensitive growth will be allowed for). Paragraph 12.46 provides further guidance on sensitive development and growth of the HRI. It is understood that the emerging Neighbourhood Plan for Lambourn will look to include more detailed design guidance specific to the HRI. As such, Paragraph 12.46 should refer to the emerging Neighbourhood Plan to ensure there is a clear framework within the Local Plan upon which the Neighbourhood Plan is to be prepared relative to the HRI.

Development Affecting the Horseracing Industry

3.19 The HRI Cluster in the Lambourn area is a historical and cultural asset as well as making a significant contribution to the economy. Therefore, it should be safeguarded from developments in and around the area which would threaten the long-term sustainability of the HRI Cluster, such as those impacting on the safety of racehorses accessing training grounds, which they need to do on a daily basis. Any development that would adversely affect the economic, social and environmental role of the HRI should not be permitted. Accordingly, we suggest that the following criteria is added to Policy DM37:

"Any development within or around Lambourn horseracing industry cluster which is likely to have a material adverse impact on the operational use of an existing site within the horseracing industry (such as noise, volume of traffic, loss of paddocks or other open space, access and/or servicing requirements), or which would threaten the long term viability of the horseracing industry, will not be permitted unless the benefits would significantly outweigh the harm to the horseracing industry."

3.20 A similar policy in West Suffolk District Council's Local Plan has been effective in protecting the horseracing cluster in Newmarket.

4 SUGGESTED AMENDMENTS TO POLICIES SP1 AND DM37 AND SUPPORTING TEXT

4.1 Policy SP1

North Wessex Downs AONB

The North Wessex Downs AONB will have appropriate and sustainable growth that conserves and enhances its special landscape qualities as set out in Policy SP2.

"The horseracing industry is particularly important to the rural economy, with the Lambourn area being a nationally important location and making a significant economic contribution. The broad area of Lambourn's horseracing industry cluster is identified on the policies map. The HRI in Lambourn will be safeguarded and its expansion is supported, as set out in Policy DM37."

4.2 Policy DM37

Change the sub-heading "Equestrian Development" to "Equestrian Development (*not related to Horseracing Industry*)"

North Wessex Downs AONB Horseracing Industry

Whilst conserving environmental quality and countryside character, the horseracing industry in the AONB will be maintained, and its sensitive growth will be allowed for. Within this context:

- i. Suitable existing establishments or facilities are expected to be retained. *Re-development or conversion away from uses essential to the horseracing industry will be subject to the tests of suitability and necessity outlined in the supporting text to this policy;*
- ii. Permanent fragmentation will be resisted; ~~and~~
- iii. ~~Re-development away from uses essential to the horseracing industry will be subject to the tests of suitability and necessity outlined in the supporting text to this policy;-~~
- iii. *Existing support facilities and infrastructure which support the HRI in Lambourn will be protected unless the applicant can demonstrate that there is no alternative economic use for the site within the HRI and that the proposal does not have a negative impact upon the vitality and viability of Lambourn horseracing industry cluster; and*
- iv. *New residential accommodation in association with the HRI in the countryside proposed as a standalone development or as part of proposed new stabling or breeding facilities will be permitted where genuine need is suitably demonstrated through a business case and accommodation cannot reasonably be secured within existing settlements.*

Any development within or around Lambourn horseracing industry cluster which is likely to have a material adverse impact on the operational use of an existing site within the horseracing industry (such as noise, volume of traffic, loss of paddocks or other open space, access and/or servicing requirements), or which would threaten the long term viability of the horseracing industry, will not be permitted unless the benefits would significantly outweigh the harm to the horseracing industry.

4.3 Supporting Text

- Insert a heading “*Equestrian Development (not related to Horseracing Industry)*” for Paragraphs 12.38 and 12.44.
- Paragraph 12.51
Suitability test: In considering the suitability of existing establishments, the key factors to consider will be:
 - ~~a. The location of the site relating to the form and character of the settlement;~~
 - ab. The existing range of facilities on the site and their adequacy for the purpose of training and/or breeding horses, or their capability for adaptation to meet such needs; and*
 - be. The availability of and access to (including the potential for improved access) suitable gallops and training areas;*
 - ~~d. The impact on local roads including the safety of horses and riders and traffic using the highway; and~~
 - ~~e. The availability of sources of labour and the accommodation of personnel on site or in the locality.~~
- Paragraph 12.46
“The policy aims to allow for the sensitive development and growth of the horseracing industry whilst conserving environmental quality and countryside character. This includes the built and natural form, and social and economic aspects such as the influence of the horseracing industry as part of the local economy which gives Lambourn its unique character. Outside of settlements, preference will be given to proposals that seek to locate within valleys and avoid development on hilltops or ridgelines. Equine buildings on sites which are open, exposed, elevated or sloped are likely to have particular landscape impacts that may make it difficult to achieve sensitive design solutions. *Design guidance specific to the horseracing industry in Lambourn will be considered in the preparation of the emerging Neighbourhood Plan for Lambourn.*”
- Move part of Paragraph 11.45 to Paragraph 12.55:
“It is acknowledged that there is a need in some circumstances to provide accommodation close to hand in order to provide 24 hour supervision as part of licensing requirements, or for the effective running of an establishment. It is the Council’s preference for workers to be accommodated within existing nearby villages, so as to contribute to the overall sustainability of settlements and limit development in the countryside. Whilst racing charities *and training yard owners* provide some *low cost subsidised* and/or hostel accommodation in the area, it is recognised there is still a specific need for affordable single person accommodation in Lambourn. *Where new stabling or breeding facilities are proposed, together with residential accommodation, financial viability will need to be*

demonstrated together with supporting evidence to show the new facility has sufficient need to require a worker to be permanently living on the site in the long term. It should be noted that a restricted occupancy condition will be applied in order to ensure that the accommodation for staff employed in the HRI will not be lost to non-HRI occupants, as it would threaten the function and viability of the HRI establishments or facilities and could lead to a permanent loss of the HRI establishments or facilities.”

5 CONCLUSION

5.1 These representations to West Berkshire Local Plan Review 2022-2039: Proposed Submission (Regulation 19) consultation have been prepared on behalf of Lambourn Trainers' Association ('LTA') in relation to the horseracing industry ('HRI') Cluster in and around Lambourn. The success of the HRI is vital to protecting the Lambourn area's racing heritage making a substantial contribution to the economic, cultural and environmental well-being of the area.

5.2 LTA wishes to ensure that the new Local Plan contains appropriate and clear policies to protect the HRI Cluster in and around Lambourn and to support its success while recognising its location being within the AONB. Further, a Neighbourhood Plan for Lambourn is being prepared by Lambourn Parish Council, which is understood to include policies for the HRI. While LTA is broadly supportive of the draft Local Plan, it is considered that amendments are necessary to ensure the effectiveness and the soundness of the Plan, taking into account evidence for the HRI in the area, and a Neighbourhood Plan being prepared for Lambourn.

5.3 These representations provide evidence identifying the national importance of the HRI in Lambourn and needs of the industry to sustain and grow its success in the long term, and seek the following amendments to Policy SP1 and DM37 and relevant supporting text for the soundness of the Plan:

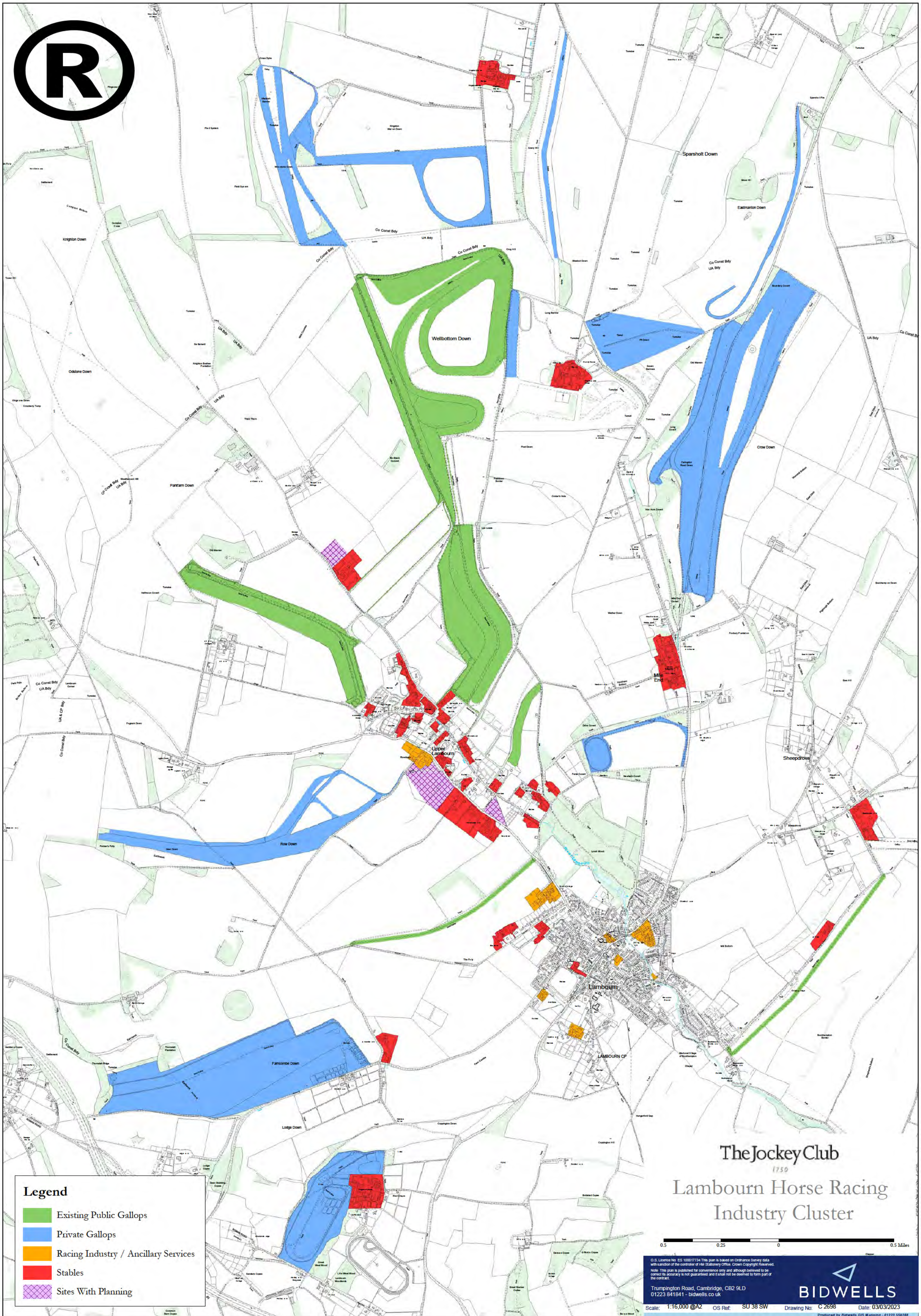
- To recognise the importance of the HRI to the rural economy and the Plan's commitment to the protection and support for growth of the HRI in the strategic policy;
- To identify Lambourn's HRI Cluster in the Policies Map;
- To make a clear distinction between equestrian development not related to the HRI and uses and developments for the HRI;
- To include the protection of the existing facilities and infrastructure for the HRI in and around Lambourn;
- To clarify the relevant consideration and necessary protection of new and existing residential accommodation in association with the HRI;
- To include a policy which protects the HRI from developments within and around the HRI Cluster;
- To make the suitability test for the protection of the existing HRI facilities and establishments effective and relevant; and
- To have regard to the emerging Neighbourhood Plan for Lambourn in relation to more detailed HRI related policies and guidance.

5.4 It is respectfully requested that these representations are fully taken into account in the current consultation process. We will be pleased to discuss our representations and work collaboratively with Planning Policy Officers.

Appendix 1

Lambourn Horseracing Industry Cluster Plan





Legend

- Existing Public Gallops
- Private Gallops
- Racing Industry / Ancillary Services
- Stables
- Sites With Planning

The Jockey Club
1750
**Lambourn Horse Racing
Industry Cluster**

Scale: 1:16,000 @ A2 OS Ref: SU 38 SW Drawing No: C 2698 Date: 03/03/2023

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Horse Racing in Lambourn Valley: The Industry's Economic and Social Impacts



Horse Racing in Lambourn Valley

The Industry's Economic and Social Impacts

January 2019



SQW

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Overview

This report quantifies the economic contribution of horse racing to the Lambourn Valley (defined as the parishes of Lambourn, East Garston and Great Shefford). The study was commissioned by Jockey Club Estates with support from West Berkshire Council. The findings and views are, however, SQW's and only the consultancy team had access to the confidential data provided by trainers and supporting businesses and organisations.

The research was conducted during 2018. As of April 2018¹, the direct and indirect job contributions are as follows:

- 34 trainers employ 529.5 full time equivalent (FTE) staff caring for and exercising 1,547 horses
- organisations and businesses which have located in the study area because they relate to the horse racing industry employ 164.5 (FTE) staff
- 503 (95%) of the trainers' staff live within the study area and 107 (65%) of those from the other organisations and businesses – a total of 610.

The generally accepted measure of an area's contribution to the national income is its Gross Value Added (GVA); this is the sum of wages plus profits. Direct and indirect gross GVA contributions for 2017 were:

- GVA contribution from the 34 trainers - £13,203,962

¹ Reported employment data from trainers were for April but some of the estimated employment related to an earlier period. There was, inevitably, some variation in the financial years for which data were provided.

- GVA contribution from organisations and businesses which located in the study area because they provide services to horse racing - £7,982,000.

There are also induced employment and GVA contributions that arise from expenditures within the study area of the employees of trainers and supporting businesses/organisations.² We estimate these contribute a further 60 FTE staff and £1,450,200 GVA.

The grand total of the racing industry's contributions to the Lambourn Valley in 2017 was, therefore:

- **employment of 754 FTE staff (i.e. 30% of the area's total jobs)**
- **Gross Value Added of £22,636,162.**

This is a cautious estimate. Activities (such as pre-training) where we have neither accurate evidence nor a reasonable basis on which to make an estimation, are excluded from the computation. Also, we know of significant further growth in training activity since 2017, the year on which our financial data are centred.

The qualitative picture is of an industry that is positive about recent developments and sees scope for growth; though noting local issues to be addressed, (e.g. housing and road safety), and other impending challenges, which

² The most recent guidance from HM Treasury is that multiplier effects should not usually be included in economic appraisals. Given the relatively small economy of the study area and its simple economic structure we have, however, felt it reasonable to estimate that for staff living in the study area, 20% of their wages would be spent in shops and pubs within Lambourn Valley but for staff living outside the area this would be lower at 10%. This gives total expenditure in local shops and pubs etc. of £2,900,400 and, taking the average GVA/turnover ratio for these kinds of outlets as 50% gives a GVA contribution of £1,450,200. Assuming 70% of the GVA is accounted for by wages gives a wage bill of £1,015,140. We have allowed £17,000 for the average retail salary and thereby calculated 60 jobs.

may hamper realisation of the area's growth potential.

1. Introduction



This report has been commissioned by Jockey Club Estates (JCE) with support from West Berkshire Council to review the contribution that horse racing and supporting services make to the Lambourn Valley.

Lambourn, “The Valley of the Racehorse”, is widely known as an important centre for horse racing and our research has focussed on quantifying its scale and importance.

In order to set the findings in relation to this ‘equine cluster’ within the broader economic and social context, as described

in official data sources, the study area has been defined as comprising three parishes: Lambourn, East Garston and Great Shefford. A brief overview of the area is provided in Chapter 2. It is inevitable that these rigid boundaries fall short of a perfect fit with Lambourn Valley’s horse racing activities and there are two trainers some of whose land (most in one case) falls outside them. We have, nonetheless, included the data relating to the training activities of Mr Candy and Mr Whittington within the discussion of trainers in Chapter 3.

Figure 1: Lambourn Valley study area



Source: Produced by SQW 2018. Licence 100030994 Contains OS data © Crown copyright [and database right] [2018]

Our study area is defined by three parishes.

Training racehorses is the most visible aspect of the equine cluster, but important additional contributions are made by services which support the trainers, their staff and visitors coming to the training yards or Lambourn’s “Open

Day”. Within the Lambourn Valley these include:

- veterinary practices
- institutions providing social and medical support

- specialist retailers and equipment suppliers
- farriers and horse transporters
- shops, hotels and inns.

When quantifying their various contributions to Gross Value Added (GVA), which is the accepted measure for economic contribution, it is important to avoid double counting. This is most obviously a danger in respect of the vets; as the survey of trainers (see Appendix 1) will already have captured Lambourn-based vets' income from trainers in the Valley. However, all the veterinary practices also work extensively outside the study area and this proportion of their business provides additional economic benefit. A similar situation arises with other organisations which are based in Lambourn because of the equine cluster but whose activities service a wider area.

The approach to gathering data, information and broader insights involved:

- the postal/on-line survey of trainers and pre-trainers mentioned above
- a wide range of face to face discussions including trainers, supporting institutions/businesses and individuals with a broad

perspective on how the cluster has evolved to date and may do in future

- a small number of telephone discussions in cases where face to face meetings could not be arranged.

Chapters 4 and 5 report the quantitative findings from these discussions. The economic data are aggregated so as to ensure that the confidentiality of responses is preserved. There is no racecourse in the Lambourn Valley which means that Newbury, some 16 miles away, is the "local" course for Lambourn trainers. Chapter 6 describes recent developments at Newbury racecourse and considers its importance for Lambourn.

As this report clearly evidences, Lambourn's natural attributes as a location for developing horses have been enhanced in recent years by substantial investments. The impetus provided by Jockey Club Estates' acquisition and upgrading of the gallops has led to significant investment in training yards. Chapter 7 discusses the economic contribution that capital expenditures by the racing industry make to the study area. Finally, in Chapter 8 there is a discussion of opportunities, issues and challenges that were mentioned during our discussions in Lambourn Valley.

2. An overview of the Lambourn Valley



The Lambourn Valley is within the North Wessex Downs Area of Outstanding Natural Beauty. The overall impression that Lambourn itself gives is of a largely functional rather than an elegant place; but it is set within scenic countryside and many of the surrounding villages are picturesquely attractive. Housing is, correspondingly, expensive. The steep sides of the valley lead up to downland which is well suited to training racehorses. On hillier ground, horses can be fully stretched at lower speeds, with less risk of injury, and centuries of sheep grazing have produced favourable grassland.

Key statistics

The most reliable data are those from the national census – the most recent being that of 2011. More recent figures shown below need to be viewed with greater caution when they relate to the study area (the three parishes of Lambourn, East Garston and Great Shefford) as the sample sizes on which they are based will

typically be too small for confident interpretation.

The Office for National Statistics (ONS) estimates that, in 2017, the study area was home to some 5,710 people with 60% of the population of working age (between 16 and 64).

In terms of economic activity, the Census data suggested that West Berkshire had a strong labour market when compared to England as a whole. This strength was somewhat diminished in the study area. The most notable differences were that it had:

- fewer residents employed part time
- more self-employed residents and fewer in full time employment
- a somewhat higher unemployment rate than West Berkshire
- significantly fewer students
- more retired people in the 16 to 64 age range than for West Berkshire.

Table 1: Economic activity of all usual residents aged 16 to 74 (2011)

Economic Activity	Lambourn Valley		West Berkshire	England
	no.	%	%	%
All usual residents aged 16 to 74	4,201	100	100	100
Economically active	3,182	75.7	76.2	69.9
Economically active: In employment	2,938	69.9	70.8	62.1
Economically active: Employee: Part-time	528	12.6	13.9	13.7
Economically active: Employee: Full-time	1,792	42.7	45.6	38.6
Economically active: Self-employed	618	14.7	11.3	9.8
Economically active: Unemployed	153	3.6	2.9	4.4
Economically active: Full-time student	91	2.2	2.5	3.4
Economically Inactive	1,019	24.3	23.8	30.1
Economically inactive: Retired	601	14.3	12.6	13.7
Economically inactive: Student (including full-time students)	81	1.9	3.4	5.8
Economically inactive: Looking after home or family	188	4.5	4.3	4.4
Economically inactive: Long-term sick or disabled	79	1.9	2.2	4.0
Economically inactive: Other	70	1.7	1.4	2.2

Source: 2011 Census, KS601EW to KS603EW - Economic activity by sex, ONS (from nomis)

More recent data on employment are available from the Business Register and Employment Survey (BRES) but these are imperfect, particularly at a low geographical level and estimates should, therefore, be interpreted with caution. In 2017, it was estimated that there were some 2,500 employee jobs in the study area. The largest share (16%) was in “accommodation and food services”³.

“Arts, entertainment, recreation and other services”, which includes activities of racehorse trainers, accounted for a further 14%. The category “professional, scientific and technical” has a higher share of employee jobs than is recorded for West Berkshire and presumably includes Lambourn’s veterinary practices.

³ This includes a wide range of business: hotels and similar accommodation; holiday centres and villages; youth hostels; other holiday and other short stay accommodation (not including holiday centres and villages or youth hostels) n.e.c.; camping grounds, recreational vehicle parks and trailer parks; other accommodation; licensed restaurants; unlicensed restaurants and cafes; take away food shops and mobile

food stands; event catering activities; other food service activities; licensed clubs; public houses and bars.

Table 2: Employees by sector (2017)

	Lambourn Valley		West Berkshire	England
	no.	%	%	%
1: Agriculture, forestry & fishing	30	1.2	0.7	0.6
2: Mining, quarrying & utilities	10	0.3	1.8	1.2
3: Manufacturing	150	6.0	10.5	8.1
4: Construction	125	5.0	5.3	4.8
5: Motor trades	50	2.0	1.8	1.7
6: Wholesale	200	8.0	5.3	4.0
7: Retail	125	5.0	8.4	9.5
8: Transport & storage (inc. postal)	300	12.0	3.2	4.8
9: Accommodation & food services	400	16.0	6.3	7.4
10: Information & communication	50	2.0	13.7	4.5
11: Financial & insurance	30	1.2	1.1	3.5
12: Property	30	1.2	1.8	1.7
13: Professional, scientific & technical	225	9.0	6.3	8.7
14: Business administration & support services	125	5.0	8.4	9.3
15: Public administration & defence	10	0.3	3.2	3.9
16: Education	300	12.0	8.4	9.0
17: Health	100	4.0	6.3	12.8
18: Arts, entertainment, recreation & other services	350	14.0	6.3	4.5
Column Total	2,500	100	100	100

Source: Business Register and Employment Survey: open access, ONS (from nomis)

Lambourn
Valley has a
distinctive
profile in terms
of jobs.

Data from the 2011 Census suggested that general health across the study area was good. 51.6% of all usual residents in

the study area were in “very good health” compared to 47.2% nationally.

Table 3: Health of all usual residents in 2011

	Lambourn Valley		West Berkshire	England
	no.	%	%	%
All categories: General health	5,575	100	100	100
Very good health	2,874	51.6	51.6	47.2
Good health	1,882	33.8	34.5	34.2
Fair health	626	11.2	10.7	13.1
Bad health	155	2.8	2.5	4.2
Very bad health	38	0.7	0.7	1.2

Source: 2011 Census, QS302EW - General health

Overall levels of deprivation are low but there are local variations.

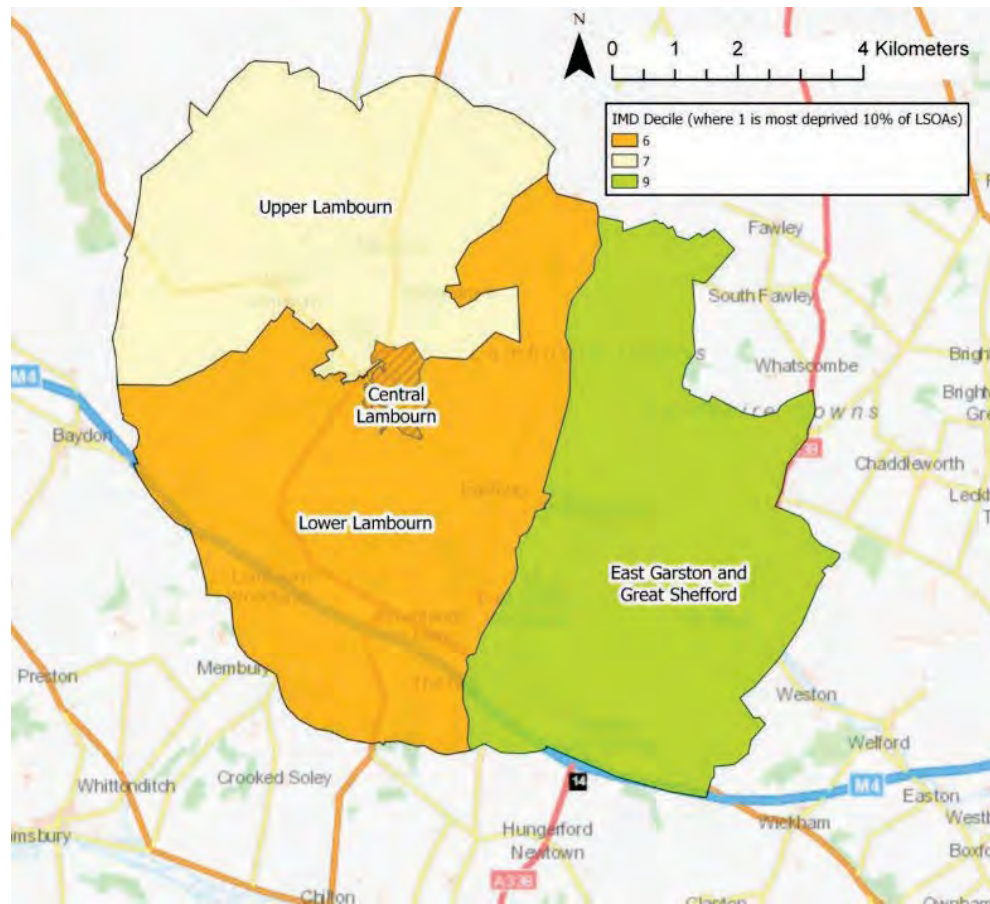
Data on deprivation are reported by Lower Layer Super Output Areas (LSOAs) rather than parishes and as Figure 2 shows, there are four of these in the study area. The extent of deprivation in an area is measured relative to deprivation in other areas of England and various factors are taken into account to construct an Index of Multiple Deprivation (IMD). The IMD and its components (see Table 4) are shown in terms of which decile of deprivation an area falls into; with a score of 10 meaning that it is one of the 10% of LSOAs nationally that have the lowest level of deprivation and a score of 1 indicating that it is among the 10% of the most deprived.

Figure 2 shows differences in the overall levels of deprivation within the study area though, when considered against England

as a whole, it has relatively low deprivation. Table 4 shows a number of variations within this overall picture, notably:

- Central Lambourn performs badly in relation to *education, skills and training* (perhaps because a proportion of trainers’ staff have acquired craft skills rather than formal qualifications) and less well than the rest of the study area regarding *income and employment*
- *crime and barriers to housing and services* are problematic in Lower Lambourn and Upper Lambourn
- there is a strongly positive picture across the whole study area for *health deprivation and disability*.

Figure 2: Indices of deprivation (2015)



Source: English indices of deprivation 2015, ONS

Table 4: Domains of deprivation where 1 is most deprived 10% of LSOAs (2015)

LSOA name (2011)	IMD Decile	Income Decile	Employment Decile	Education, Skills and Training Decile	Health Deprivation and Disability Decile	Crime Decile	Barriers to Housing and Services Decile
East Garston and Great Shefford	9	9	10	9	10	7	5
Lower Lambourn	6	6	8	4	10	4	2
Upper Lambourn	7	7	9	6	9	4	4
Central Lambourn	6	5	4	2	9	9	7

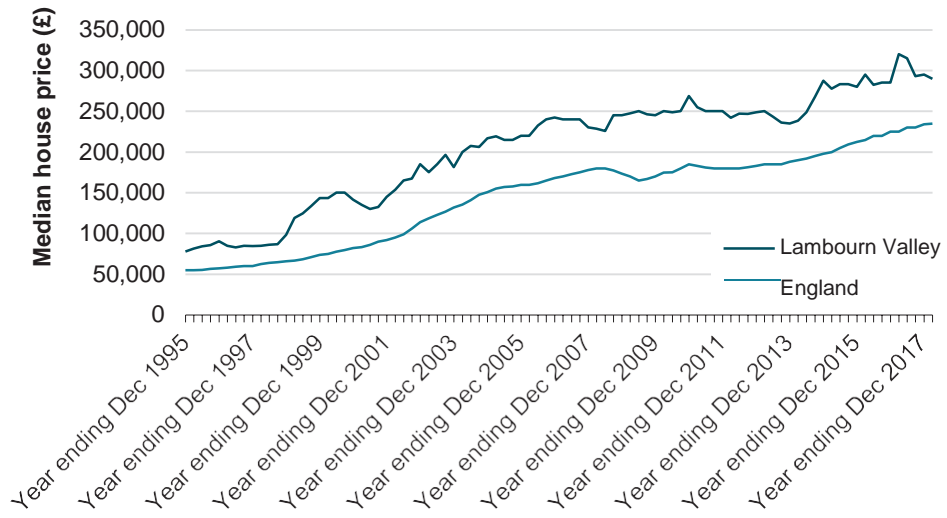
Source: English indices of deprivation 2015, ONS

House prices in the study area are consistently higher than for England as whole; typically 30 – 40% more, though the gap may have narrowed somewhat in

more recent years. Unfortunately, analogous data are not available for rentals.

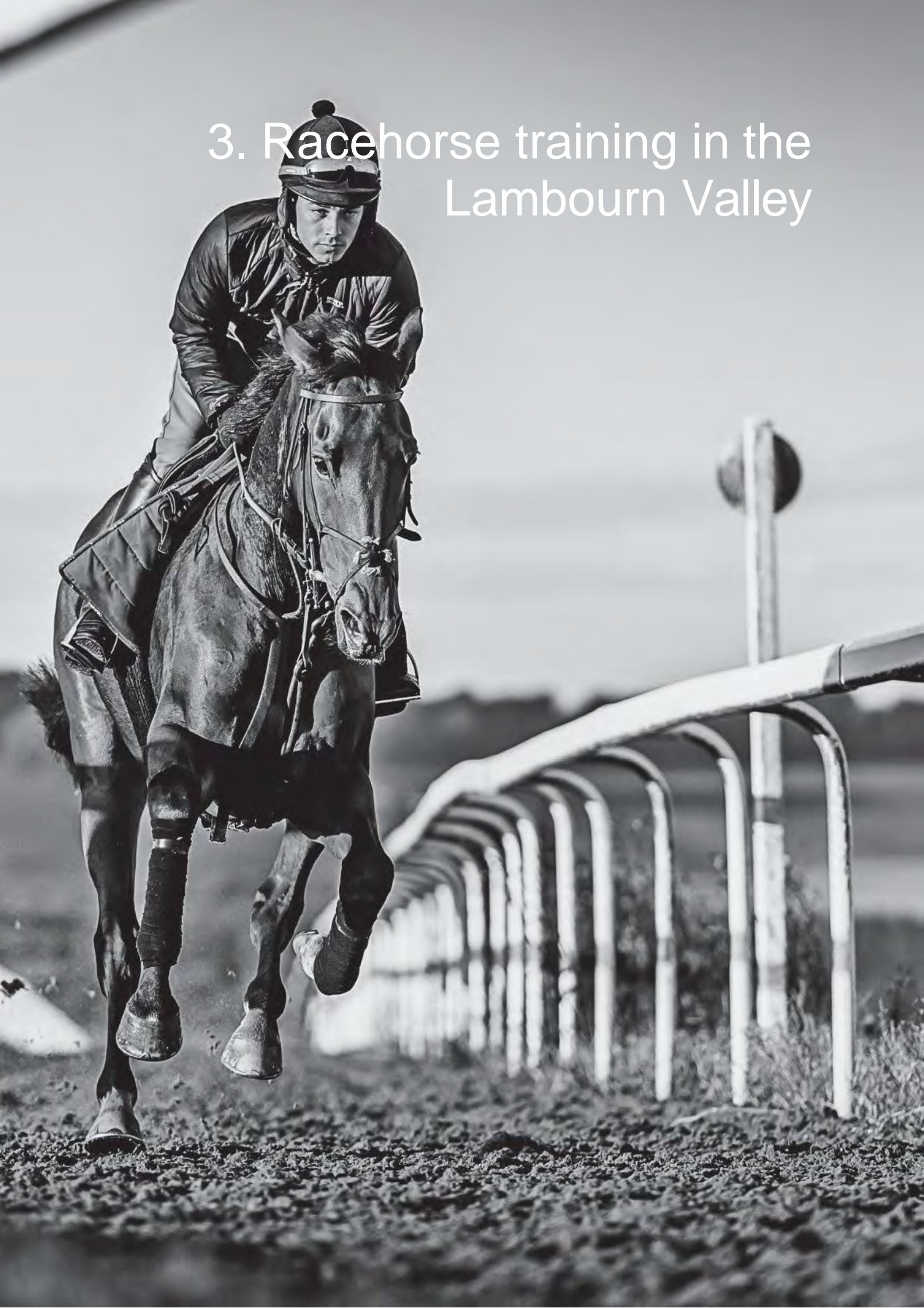
House prices are high in Lambourn Valley.

Figure 3: Median house price



Source: ONS, Median house prices by ward and administrative geographies HPSSA dataset 37 and 9

3. Racehorse training in the Lambourn Valley



There have been changes amongst the trainers over the last decade, and the overall number has increased.

Background

There is a concentration of trainers' yards in Upper Lambourn and along the B4000 Ashbury road leading back towards Lambourn; these are the areas most conveniently located for the public gallops operated by Jockey Club Estates (JCE). A number of yards located further away from this concentration have their own private gallops. They include some of the trainers with the largest number of horses. As mentioned in the introduction, two of the trainers, whilst considered part of the Lambourn cluster, are right on the edge of the study area. Only two yards still operate within the fabric of Lambourn village.

In addition to the trainers, there are two pre-training establishments in Upper Lambourn. We do not have sufficient information for them to be included in the quantitative analysis and the results given in chapter four will, consequently, understate total impacts somewhat.⁴

At one time, Lambourn was chiefly recognised as a major centre of training *Jumps* horses. It is still important, perhaps even pre-eminent in this sphere, but recent years have seen significant increases in horses trained for the *Flat*. **Some 34 trainers** were included in the quantitative survey reported below, of which:

- 20 largely trained Flat horses and had about 66% of all horses
- 10 largely trained Jumps horses, with about 30% of all horses
- 4 had an approximate balance between Jumps and Flat and about 4% of all horses.

A perspective on how training in Lambourn has progressed over the past decade can be obtained by comparing the programmes for the Lambourn Open Day. These contain information on most, but not all, trainers. Those that participate list the horses in their yard and the latest programme (for March 30th 2018) identifies horses that are for sale – whether on the trainer's own account or for another owner. The programme for 2008 was prepared for the Open Day of March 21st. Sentiment in the first two months of 2008 was cautious and it was not until the week beginning March 9th that the economic crisis broke. A comparison between 2008 and 2018 gives, therefore, a broad sense of what happened during the critical years and the real progress that has been achieved to date.

There were **31 trainers** listed in the 2008 programme. By 2018 almost half of them had ceased to train in Lambourn for the following reasons:

- retired: 7
- left to train outside the area: 5
- died: 3.

Of the 16 remaining in the study area, 10 still occupied the same yards and six had moved to another yard within Lambourn. Over the same 11-year period, 16 of the current trainers moved into Lambourn; eight largely train for the Flat, six for Jumps and two have an approximate balance. Just under 40 per cent of these in-movers own their premises; a similar proportion to that for all Lambourn trainers.

⁴ Kingwood Stud farm is discussed in Chapter 4.

Training facilities

A distinctive characteristic of Lambourn Valley's horse racing industry is that several major trainers have private gallops which are owned together with their training yard. Together they accounted for just less than 40% of the total horses in yard in 2017. The remaining 60% of Lambourn's trainers, together with a number of others from further afield, are regular users of the gallops operated by Jockey Club Estates.

The Nugent family had owned the public gallops since the 1920s. For various reasons their involvement with racing lessened and the gallops, in particular the all-weather facilities, were becoming run down. This was seen by The Jockey Club as an issue of strategic concern and the gallops were acquired in 2006 to safeguard the future of Lambourn's racing community. A programme of investment was started in that year and has continued since then⁵.

⁵ New installations or the foundations of a gallop (such as tarmac base) are capitalised on the assumption that the work has only to be done once. Regular maintenance and refurbishment outlays are accounted for as operational costs; the figures shown above relate solely to maintenance and upgrading of the gallops and horse walks.

Table 5: JCE expenditure (excluding purchase of the gallops) in Lambourn

Year	Capital outlay	Operational costs
2006	£121,194	£804, 506
2007	£231,939	£119,007
2008	£153,120	£117,839
2009	£136,603	£104,927
2010	£41,166	£119,168
2011	£11,040	£87,075
2012	£23,487	£715,481
2013	£26,000	£182,283
2014	£26,958	£123,174
2015	£108,368	£321,902
2016	£93,905	£197,427
2017	£995,752 ⁶	£212,624
2018	£269,367	£170,795
Grand Total	£2,238,899	£3,276,208

Source: Jockey Club Estates

⁶This includes JCE's maintenance yard and office.

The major item in annual operational costs is the maintenance and refurbishment of artificial riding surfaces which have a limited life and are, therefore, not capitalised. In 2012 there was an exceptional outlay to refurbish the Long Gallop and, with the agreement of the trainers using the facilities, a significant increase in the gallops tax (from £97 to £109) to help pay for it. This collaborative approach is indicative of the positive relationship which has been developed between the gallops' users and JCE.

A consistent message from interviews across the local community was the importance of the revitalised gallops to the standing of the equine cluster:

“Lambourn has always had ‘character’ but with JCE’s investment it has become more ‘modern’”

“Investment in the gallops has improved Flat racing performance. The attraction of quality trainers such as Ed Walker and Archie Watson⁷ has set the tone. Increasing interest is now being shown by Newmarket trainers”.

Customer satisfaction is clearly indicated by time series data for the number of horses using Lambourn gallops on an average day.

⁷ Archie Watson, a young trainer and a recent in-mover, (mid 2016) reached a total of 100 winners for 2018 by the end of November – in only his second full year as a trainer.

Table 6: Number of horses using Lambourn's public gallops

2006	367	2013	562
2007	427	2014	557
2008	447	2015	632
2009	386	2016	679
2010	427	2017	747
2011	478	2018	789
2012	522		

Source: Jockey Club Estates

The social and economic contributions of Lambourn trainers

Results from the survey of trainers

From the 34⁸ trainers to whom the survey questionnaire was sent, full replies were received from 11 trainers and partial information was provided by a further eight. Training establishments vary widely in size and survey data were provided chiefly by the larger ones. Measured by the average number of horses in yard during calendar year 2017, the pattern of replies was as follows:

- nine trainers had 70 or more horses in yard; five of them gave full data and three partial – together they accounted for 894 horses
- eight trainers had 35-69 horses in yard; five gave full data and one partial – they accounted for 342 horses
- eight trainers had 20-34 horses in yard; none gave full data, two gave partial – they accounted for 213 horses
- nine trainers had fewer than 20 horses in yard; one gave full data and two gave partial – they accounted for 98 horses.

In summary, full data were provided for 708 of the total 1,547⁹ horses in yard (46%) and partial information (including staff numbers) for a further 383 (24%). In the aggregate analysis of economic contribution which follows, the actual

data from the full replies are used. For trainers not responding or only providing partial data, their contributions have been estimated on the basis of the number of horses that they had “in yard” in 2017.

The trainers from whom we have data on employment reported employing 344 staff full time and 54 part-time in April 2018. These respondents accounted for 70% of the horses in yard in 2017. It may be supposed, therefore, that the missing 30% will have employed a further 147 staff full time and 23 staff part time. This gives a total for all trainers (but excluding the two non-respondent pre-trainers) of:

- 491 full time staff
- 77 part-time staff
- on the basis that a part-time member of staff is on average equivalent to half a full time, **the 34 trainers employ 529.5 full time equivalent (FTE) staff.**

Fewer trainers provided financial information from which their gross value-added (GVA) contributions – i.e. the sum of wages and profit – can be calculated. The trainers that provided data on wages had 699 horses – 45% of the total - and the aggregate of their wages totalled £4,833,298. We, therefore, estimate aggregate wages for the remaining 55% as £5,907,364, bringing **the wages total for the 34 trainers to £10,740,662.**

In the answers received to the questionnaire there was no clear correlation between the number of horses in yard and the profit from either training operations or horse sales. We do not consider that linking profit to horse

In terms of direct effects, 34 trainers employ 529.50 FTE staff and make a GVA contribution of £13,203,962.

⁸Two trainers, both owner occupiers, did not list their horses in the 2008 Open Day programme but were in the area then and remain active in the area today. Their inclusion brings the total to 34.

⁹This is a cautious estimate of the total number of horses. A comparison with the horses listed in the 2018 Open Day programme shows an increase of almost 8% (or 12% if the known increase in Mr Watson’s horses is included).

numbers will distort the totals obtained from grossing up to any great extent (and there isn't an obvious alternative approach). However, to be on the safe side we have assumed that no profits are made by the nine trainers with fewer than 20 horses in yard. The remaining 25 trainers had 1,499 horses. Based on the replies from 10 trainers that gave their operating profits and nine trainers that gave their profits from horse sales, we estimate an average overall profit of £1,700 per horse in yard and **aggregate**

profits for the 1,449 horses of £2,463,300.

The social contribution is measured largely in terms of employment opportunities whereas the economic contribution is measured by the contribution to Gross Value Added – the total of wage costs and profits. Excluding multiplier effects from staff expenditures i.e. including only wages (net of NI and pension contributions), the **total GVA contribution from the 34 trainers is, therefore, £13,203,962.**

4. Commercially orientated Services and Facilities supporting the cluster



The equine cluster involves many organisations providing specialist support to local trainers.

There is a wide variety of firms and organisations located in Lambourn Valley because of the horse racing industry. Taken together with the trainers and the training facilities they form, in economists' jargon, a true cluster in which competition and collaboration increase the whole cluster's competitiveness. In a close-knit community, it is essential to preserve confidentiality and to aggregate commercially sensitive information even if this means grouping together organisations that have few apparent similarities. In large part the information reported below was obtained through face to face discussions. The aim was to gather hard facts from all the significant firms that provide specialist support to local trainers; thereby obtaining an accurate estimate of the *indirect* component of the *multiplier*. The commercial data, however, include both business obtained from Lambourn trainers and business won outside the area; on the grounds that local relationships and the image of the "Valley of the Racehorse" are why the firms have chosen a Lambourn location.

Veterinary practices

Equine vets are involved in many aspects of training and racing horses. As well as responding to instances of sickness or injury, they make inspections when horses are bought and sold, advise on nutrition, attend race meetings and supervise breeding. There are four equine practices in Lambourn Valley¹⁰; two are long established in the area and the larger of them provides RCVC regulated equine

hospital facilities. The other two have established more recently as branches of Newmarket partnerships Their arrival has affected the way this part of the cluster "works".

Lambourn trainers also have access to a number of vets, some from Newbury and others based elsewhere, who visit the area on a regular basis. The advantage of local vets is that they are on hand to deal with emergencies on a 24-hour basis. Lambourn-based vets themselves serve a wider market and, when specialist treatments are required, may well use hospital facilities elsewhere (including Newmarket).

In aggregate, approximately 35% of the four Lambourn practices' turnover comes from Lambourn trainers. They provide 36 jobs and 57% of these are held by people living in the study area.

Horse Transportation

In addition to the travel involved with race meetings, some of them overseas, horses are taken to and from the major sales houses and may also need to travel to specialist hospital and remedial facilities. Many trainers have their own transport in the form of two-box vans which are exempt from tachograph regulations and have the added advantage that they can be driven by part-time drivers who do not require an HGV licence. There are, however, two specialist horse transportation businesses with a Lambourn presence, although only one of them – Lambourn Racehorse Transport - is locally headquartered and making a significant local economic contribution.

¹⁰ There are several vets from outside the area who have established relationships with Lambourn trainers and two partners of Donnington Grove, the major Newbury-based veterinary practice, live in Lambourn Valley.

Equine surfaces and equipment

Martin Collins Enterprises develops, produces, supplies and installs artificial surfaces for the full range of equine activities; racing, performance and leisure. It also designs and supplies equipment for the maintenance of its surfaces. Although Jockey Club Estates in Lambourn is a significant customer, over 90% of the firm's business comes from outside the local area. The company website¹¹ summarises its track record as follows:

- Opened offices in Europe, North America, Australia and Asia, and have joint venture companies in South Africa, China, Japan and France.
- Supplied over 200km of racehorse training gallops in the UK.
- Installed over 4,000 equine arenas worldwide.
- Provided arenas for major national and international competitions, including London International Horseshow, Olympia, Longines Global Champions Tour, Royal Windsor Horseshow, Dressage at Hickstead, Wales & West Showground, Your Horse Live, Spanish Riding School Tour, HM The Queen's 90th Birthday celebrations and many other prestigious temporary events.

Farriers

Inputting "Lambourn" to the search facility on the Farriers Registration Council generates a list of 18 farriers who are 2.1 miles or less away from central Lambourn. Amongst these is Chapel Forge Farriers with a team of seven qualified farriers (six

of whom live locally) and seven apprentices who live locally. Apprentices train for four and a half years and on completion most choose to move. About 75% of the firm's work is from racing and three-quarters of this is in the Lambourn Valley. Around two thirds of the 25% 'recreational' business is also local.¹²

Racetech

Racetech, based in West London, provides a range of services to horse racing. These include video coverage, Photofinish and Starting Stalls. To support the starting stalls work and reflecting Lambourn's equine expertise together with its excellent location in relation to major racecourses, the company employs locally-based stall handlers and drivers. Seven staff are on six-month contracts and a further 13 casual staff work, on average, about 30 days a year.

Inns with rooms

Both of Lambourn Valley's inns with rooms, The Pheasant and The Queen's Arms, have had new owners for the past three years. Each has a modest number of rooms (11 and 12 respectively) but The Pheasant hopes to add a further eight shortly. The quality of accommodation is good and rack rates range between £115 and £135. For both these establishments (and other pub/restaurants such as the Plough), quality dining is a crucial ingredient in their business model. Whereas the racing industry, other than the big Newbury meetings, contributes only a small share of room occupancy, the

¹¹ <http://polytrack.com.au/> [accessed 08/02/2019]

¹² Chapel Forge declined to provide financial information, but we have made estimates for wages and profit for them and the independent farriers based on information obtained in Newmarket.

patronage of trainers and owners is crucial for both lunchtime and evening trade. The Queen's Arms, in particular, has sought to appeal to the industry through themed lunches and dinner events relating to major racing events and has set up a racing club. Although they are very much part of the racing community, the location of these inns in Lambourn cannot be claimed to result from racing. In consequence, a relatively low percentage (we have taken 15%) of their employment and turnover can be attributed prudently when calculating racing's contribution to the Lambourn Valley.

Yard & Stable Hygiene Services / Stable Shield

Yard & Stable Hygiene Services is a small Lambourn firm that provides building and maintenance services with a specific focus on hygiene. They have developed and supply a proprietary anti-bacterial paint (manufactured for them in the Netherlands). Whilst the paint is supplied more widely, most (some 80%) of their contracted work is within the Lambourn Valley and there are well-developed relationships with a number of trainers. A core of local full time and part time employed staff is supplemented by casual workers who are typically hired from further afield.

E J Wicks (Saddlers)

E J Wicks' shop in Lambourn provides a very wide range of items for horses and riders. Lambourn trainers contribute an important proportion of the firm's turnover but, although the Lambourn connection is highly significant to market credibility, they now account for somewhat less than half total income. As

well as serving local customers, specialist leather work, both production and repair, is undertaken for non-equine customers outside the valley and further diversification in both equine and non-equine markets is seen as important for the future. In a recent development, racing equipment now features on the company website and on-line orders are being secured both from outside the valley and from overseas.

Kingwood Stud

The stud farm was purchased in 2010 with the specific objective of developing and demonstrating a radical new approach to pre-training young horses. After earlier development work in Turkey, its owner's home country, Lambourn was selected as the location to showcase and further develop "Kurtsystems" because of:

- the Lambourn Valley's reputation as a centre for the racing industry and the fact that it is growing fast
- the availability of ideally suited premises
- its excellent location in relation to racecourses and the first-rate equine support services available locally.

Their website explains the motivation insight and innovation of its owner, Mehmet Turk, who sought to develop a new approach that would minimise injuries to young horses in their first year of training:

"Most injuries were due to problems with the young horses' musculoskeletal system. These young horses couldn't bear the weight and exercise regime in the early months of training as their musculoskeletal systems had not yet matured.....I felt that if we could pre-train

the young horses using an entirely mechanical system, we could then introduce gentle speed and light weights, and then gradually increase them in a controlled and sustained manner.”

A fully functional mechanical system is now operating at Kingwood Stud and there are encouraging early signs of success. Five young horses that have been developed through it are now with trainers, three of them in Lambourn, and this autumn has seen racing success as well as an encouraging sale at Tattersalls.

The stud has 13 mares and operates commercially. It is hoped that further income will be generated from trainers using the “Kurtsystem” in Lambourn though the principal business objective is to sell the “Kurtsystem”. It is highly unlikely that this will be produced in Lambourn. We have estimated the GVA contribution from the information provided on staff numbers. In the Lambourn Open Day programme for 2018 it is stated that Mr Kurt has spent £25 million so far but, as it is unclear how much of this relates to Lambourn, none of this is included in our estimate of economic contribution.

Aggregate social and economic contribution¹³

The social contribution to the economy of Lambourn Valley can best be quantified in terms of jobs. In aggregate these businesses employ **141 Full Time Equivalent people of whom 95 (67%) live in the Valley.**

¹³ The employment numbers are totally based on information provided by the businesses themselves. The GVA calculation includes some SQW estimation but more than 85% of the total is from data the businesses provided so any errors will be only minor.

The economic contribution is measured by the contribution to Gross Value Added. Excluding any possible multiplier effects from employees spending in the study area, the aggregate **GVA contribution of these businesses is £6,970,000.**

5. Other organisations supporting the cluster



As with the commercial businesses in the previous chapter, the organisations described below have chosen to locate in Lambourn because of the large number of trainers in the area. However, whilst they also serve the racing community outwith the study area, it is appropriate to consider all their local operations as attributable when calculating the overall economic and social impact of the Valley's horse racing industry.

Oaksey House

This is a state of art rehabilitation centre established ten years ago by the Injured Jockeys' Fund (IJF) with generous support from leading owners and their foundations. Its website¹⁴ describes the activities and facilities as follows.

- provides specialist rehabilitation treatment for physical and neurological injuries
- has a fully equipped gym including a state-of-the-art AlterG anti-gravity treadmill
- has a hydrotherapy pool added in 2018
- has respite accommodation also available for those receiving extended treatment together with their carers if required
- offers educational courses on fitness and nutrition for the general well-being of young and aspiring jockeys
- has private function rooms available for hire for meetings and conferences.

Oaksey House typically does not charge holders of professional jockey licences and offers subsidised access for retired jockeys and other racing staff. A limited amount of additional revenue is generated commercially from a company

located on-site that provides specialist treatment for head injuries, but we do not have data on their economic contribution. A major refurbishment was completed recently, including the hydrotherapy pool.

Racing Welfare

Racing Welfare (RW) was formed in 2000 as an amalgamation of several racing charities. It focusses on the behind-the-scenes staff in racing and their dependents (both active and retired); thus dovetailing with the support that the IJF provides for jockeys. Much of the work of the Lambourn office is concerned with accidents and injuries but advice and some assistance are also provided in respect of financial issues such as benefit entitlement and indebtedness. In recognition of the difficulties that racing staff have in finding suitable accommodation to rent¹⁵, even if they can afford it, RW provides through its housing arm, *Racing Homes*, hostel accommodation in Lambourn for four young people starting their careers in racing. There is an active business plan to develop more housing focused on the young and retired.

Both in respect of housing and other issues, the situation in Lambourn is complicated somewhat by an element of transience in the racing community. Young people who have completed their training at one of the specialist racing schools (the British Racing School in Newmarket and the Northern Racing College in Doncaster) tend to start their careers in one of the major racing centres, but a proportion will then move on elsewhere.

¹⁴ <http://www.injuredjockeys.co.uk/Oaksey-House.asp> [accessed 08/02/2019]

¹⁵ Housing was highlighted as a major issue by many of the people we met.

Jockey Club Estates

Jockey Club Estates' capital outlays on the training grounds are described in Chapter 3, where mention is also made of the exceptional operational expenditure in 2012. In a normal year, operational expenditures are lower, though still substantial, and a high proportion goes to suppliers in the valley. In addition to the outlays on the training grounds, JCE recently invested heavily in its new offices and yard; a tangible statement of its long-term commitment to the area.

National Trainers Federation

The National Trainers Federation is a regulated employers association for licenced racehorse trainers. Its stated objective is to: *"..... represent and protect trainers' interests and to be a reliable and respected source of information, advice and support."* Services are provided by NTF's own staff (these include an in-house legal executive) and retained professional advisers on accountancy, insurance, veterinary matters, property and work permits for foreign staff. The Lambourn office has national coverage and although some staff live quite near, none is a valley resident.

Lambourn Open Day

The Open Day is held on Good Friday a day on which, until recently, no race meetings were held. Many yards are open in the morning (26 had intended to open in 2018 although heavy rain caused great disruption) and the afternoon has a

programme of demonstration events. Money raised for charity is a major benefit of the day; in a typical year this might amount to £100,000 net of expenses. As the Open Day receives good media coverage, it also benefits the wider racing community in terms of PR and provides a good opportunity for trainers to meet potential owners.

Lambourn Valley Housing Trust

Whilst a proportion of the money raised is distributed to a variety of local charities, there is an especially close link to the Lambourn Valley Housing Trust. The stated principal activity of the Trust is to *"relieve poverty among persons employed, or formerly employed or active in the horse racing industry together with their wives, widows and dependent children, in particular by the provision of housing."* The Trust has built 12 two bed and 6 three bed properties on land within its ownership and, in addition, purchased three houses one of which is converted into three flats. All are let at subsidised rents, some 50% of those charged by the local Council. Its future focus is likely to be on the needs of single staff.

Aggregate social and economic contribution

In aggregate these organisations employ **23.5 Full Time Equivalent people of whom 9.5 (40%) live in the Valley.**

Excluding any possible multiplier effects from employee's spending in the study area, the aggregate **GVA contribution of these organisations is £1,012,000.**

6. Newbury Racecourse



Newbury Racecourse is some 16 miles distant from Lambourn Valley but it provides an important asset for Lambourn trainers. This is all the more so since the major reinvestment programme which has greatly enhanced the ambience and functionality of the racecourse. From a racing point of view, Newbury is a Grade 1/Group 1 track, with a programme that caters for a good cross section of horses in training. It is wide, relatively flat and has gentle bends, in summary a “fair” track and well suited for proving younger and less experienced horses. A number of Lambourn trainers use the course to gallop their horses during the Jumps season on a regular basis.

The questionnaire sent to Lambourn trainers asked:

For your Lambourn establishment is Newbury’s racecourse (please delete as applicable): very important / fairly important / not important.

Some 15% of respondents said “not important”, 15% said “fairly important” and 70% said “very important”. Prize money is crucial for the quality of racing and although the racecourse has increased its contribution to the total, some trainers still expressed a degree of dissatisfaction. In 2017 prize money totalled approximately £5 million of which the racecourse and associated sponsors contributed about 43%.

Viewed from another angle, Lambourn trainers are also important for the racecourse as data on runners and winners clearly demonstrate.

Table 7: Lambourn trainers’ horses at Newbury Racecourse 2013-2018 (up to 5th August)

Trainer	2013		2014		2015		2016		2017		2018	
	Ran	Won	Ran	Won	Ran	Won	Ran	Won	Ran	Won	Ran	Won
<u>Flat runners</u>												
Lambourn	222	11	199	11	199	14	227	19	269	15	177	10
All trainers	1256	124	1237	121	1296	130	1155	117	1375	130	831	80
Lambourn percentage	17.7	8.9	16.1	9.1	15.4	10.8	19.7	16.2	19.6	11.5	21.3	12.5
<u>Jumps runners</u>												
Lambourn	104	14	78	18	106	16	98	11	97	16	49	8
All trainers	679	70	640	77	761	82	651	70	669	75	240	26
Lambourn percentage	15.3	20.0	12.2	23.4	13.9	19.5	15.1	15.7	14.5	21.3	20.4	30.8

Source: Jockey Club Estates and British Horseracing Authority

As a contribution to Lambourn Open day’s charitable fund raising, the racecourse acts pro-bono as its box office, communicating with their own ticket purchasers about the event. The facilities for owners and trainers have

been greatly improved with a recently opened brand new facility in the Owners Club which Lambourn trainers have started to use for events; for example, Mr Henderson’s “40 years in training” gathering.

Overview

The racecourse website¹⁶ gives the following overview of its activities:

“Newbury Racecourse PLC is the parent of a Group of companies which own Newbury Racecourse and engage in racing, hospitality and catering retail activities. The first class racing and leisure destination boasts the largest conference and events centre in Berkshire with over 3,800 sq. metres of event and exhibition facilities.

The Racecourse provides 29 race fixtures annually including 11 Jump racedays and 18 days Flat racing. In September 2012 the company completed a Joint Venture agreement with David Wilson Homes to undertake a major redevelopment of the racecourse as well as a housing development of 1,500 homes

[...] Today the historic racecourse site is undergoing a multi-million-pound redevelopment and it is a key part of the company’s strategy to become a vibrant leisure and events business with horseracing at its core. The racecourse runs its own nursery – The Rocking Horse Nursery, located within the site.”

Operations

¹⁶ <https://newburyracecourse.co.uk/> [accessed 08/02/2019]

From the Financial Statement for year ended 31st December 2017, the direct contribution to Gross Value Added (essentially staff costs and profit) can be estimated at somewhat over £5 million; the precise figure depending on whether or not “exceptional” profit items are included. Across the various business units there are 89 staff and two executive directors. The staff breakdown is as follows:

- Office and management: 32
- Catering: 12
- Ground maintenance and security staff: 13
- Lodge (a 36-bedroom hotel): 6
- Rocking Horse Nursery: 28

In addition to staff on the permanent payroll, 300 casual staff are, on average, employed on race days, with up to double that number for the major meetings. The Lodge also makes extensive use of casual staff. With their inclusion the GVA total increases to approximately £6.3 million. Purchases totalled some £8.3 million, of which approximately 10% was spent with West Berkshire businesses.

Turnover in 2017 totalled just under £18 million. The nursery, which contributed £1.3 million of this, can be considered a business that serves both residential

development at the racecourse and the wider community. Of the remainder, £16.4 million is racing or conference/events related. Racing itself performed strongly with total attendances of 196,000 in 2017, some 11% up on 2016 (when three meetings were cancelled owing to adverse weather), but it is also noteworthy that media revenues are of increasing importance - amounting to approximately 20% of turnover.

Music nights are major events (there were two in 2017) which increase attendances by around 50% and add 20% to the cost of entry. Attitudes towards them amongst traditional racegoers are mixed, as they attract a different clientele, and this may limit the scope for increasing their number. Overall, some 48% of racegoers come from within a 20-mile catchment and the annual membership, of approximately 1,000 members is similarly quite local. However, both the two major race meetings and the music nights attract racegoers from a considerably wider area.

The racing calendar is well spread over the year; attendances in 2017 were as follow (three meetings were cancelled owing to adverse weather):

Table 8: Race meeting attendances in 2017

Date	Attendance	Type	Date	Attendance	Type
18 th January	2,834	Jump	11 th February	7,278	Jump
3 rd March	3,488	Jump	4 th March	4,796	Jump
24 th March	3,304	Jump	25 th March	6,678	Jump
21 st April	4,239	Flat	22 nd April	8,178	Flat
19 th May	3,902	Flat	20 th May	12,197	Flat
15 th June	3,518	Flat	29 th June	3,628	Flat

Date	Attendance	Type	Date	Attendance	Type
6 th July	4,324	Flat	13 th July	4,349	Flat
21 st July	4,588	Flat	22 nd July	18,294	Flat
27 th July	5,553	Flat	18 th August	4,181	Flat
19 th August	23,408	Flat	22 nd Sept	4,456	Flat
23 rd Sept	8,131	Flat	27 th October	3,514	Flat
28 th October	7,375	Flat	9 th November	5,203	Jump
1 st December	8,431	Jump	2 nd December	16,986	Jump
20 th Dec	4,692	Jump	30 th Dec	8,450	Jump

Source: Horserace Betting Levy Board

Investment

The racecourse is nearing the end of a major programme of investment in new facilities and the upgrading of existing ones. Approximately £21 million will have been spent on the racecourse re-development when the current work on the parade ring is completed and planning approval has been given recently for an upgrading of the Berkshire Stand and the Pall Mall Building. Further investment has taken place in the Rocking House Nursery (£4 million) and the Lodge (also £4 million).

A crucial impetus for these enhancements to the racecourse has come from the joint venture with David Wilson Homes, signed in 2012. Half of the phased development to 2020 of 1,500 homes, has now been completed. As part of the Section 106 agreement a new access route has been opened; serving both the housing and the racecourse; this included a major outlay for the bridge over the main railway line.

7. Capital expenditures within the study area



It is not possible to estimate the attributable contribution to either employment or GVA from capital expenditures made by trainers or the various organisations described in chapters 4 and 5¹⁷. As there is no major construction company located in the study area, most of the economic benefit will accrue elsewhere, although we have no doubt that a number of Lambourn Valley residents will have found employment on capital projects.

An outline picture of the impact from the horse racing industry is given below, including the data provided from the survey of trainers (which asked for an estimate of their average annual capital expenditure over the past four years) and a summary of information obtained from other organisations:

- 10 trainers, with 614 horses, reported an annual outlay on capital projects of £516,000. Grossed up for the total of 1,547 horses gives an estimate of about £1.3 million
- when a new trainer's yard is developed this will increase the total radically. For instance, one that is currently under construction will cost well over £1 million
- when Oaksey House was built some ten years ago it cost approximately £5million and two years ago there was a further major outlay on refurbishment and additional facilities
- since purchasing the public gallops in 2006, JCE has undertaken capital works on them totalling just over

£2million and spent a further £3.3 million on gallops and horse walks

- there has been a major programme of investment at Kingwood stud, notably including the installation of the *Kurtsystem*
- racing charities have invested in housing for their community and further investment is planned
- the veterinary practices have made significant capital investments in recent years in both office accommodation and equine hospital facilities.

¹⁷ Part of the contributions from Yard and Stable Hygiene Service and from Martin Collins Enterprises may be attributable to capital projects in the study area, but the associated GVA will be fairly small.

8. Opportunities, issues and challenges



The main focus of the fieldwork research for this report has been on assembling hard data. However, during the programme of meetings held in and around Lambourn we also explored views on the horseracing industry and other aspects of the area's economic and social life including:

- how it has evolved over recent years and the prospects for further development
- current issues and challenges.

Lambourn as a place to train horses

Our various consultations were consistent in the view that recent developments in Lambourn's horse racing industry have been strongly positive. The figures in chapter 3 evidence the successful programme of improvements to the gallops and people well placed to provide an overview suggest that the average occupancy rates for trainers' yards have improved. The attraction of trainers to the area who have demonstrated success since coming to Lambourn is seen as helping to reinforce racehorse owners' confidence that Lambourn is a good location for their horses.

Some took the view that, with the land now being brought forward for new yards, Lambourn is *"on the cusp of moving up a league"* and is now *"as good as anywhere to train"*. They believed that the training facilities can and should attract significantly more horses to the Valley. Others had a more nuanced and cautious view. They were concerned that growth should not be too rapid and that care should be taken to pace development appropriately.

The changes in the ethos of horse ownership over recent decades were seen

as positive for Lambourn. Attitudes are now much more relaxed and the increasing importance of syndicates means that ownership is more accessible to those not amongst the super wealthy. This plays to Lambourn's strengths as a location that is well-connected both to London and to many of the leading racecourses. Taking only a single day out of work, London-based owners can come and see their horse in Lambourn early in the day and then watch it race in the afternoon.

Housing and staffing

Staff recruitment and housing are related and serious issues for Lambourn trainers and, perhaps to a lesser extent, other local businesses. Although wage rates in the industry have improved, the pattern of work required to work with racehorses is intrusive and the increase in weekend racing has reinforced the "anti-social" aspects of the job. Lambourn is set in a highly attractive area of countryside and, as the figures in Chapter 2 confirm, this is reflected in high house prices. There have been several responses to this:

- as mentioned in Chapter 5, charities connected with racing have developed housing for rent and they have plans to do more
- trainers have built and plan to build accommodation for their own staff in the form both of hostel accommodation and more traditional housing types
- local Almshouse Charity funds are used to maintain housing which is around 50% occupied by people who are or have been involved with racing. The Charity has plans to provide more units by converting the redundant

Methodist Chapel, adjacent to the existing sites in the centre of Lambourn.

Whilst it seems likely that housing availability will remain problematic, a more intractable issue relates to social amenities. Young people account for a high proportion of racing staff and, as mentioned above, may well be in the area for a relatively short time. Housing may be one reason for this transience, but another is the lack of social venues and things to do. In this respect Lambourn falls between two stools. Freestanding training yards in more rural settings are more likely to be able to recruit and retain local staff with family roots in the surrounding area. Market towns such as Newmarket, though not providing the “bright lights, big cities” ambience, offer at least some entertainment options.

One response to staffing shortages has been to introduce mechanical aids such as horse-walkers and treadmills and thereby increase the number of horses per worker. A second has been to increase the number of female staff and a third has been to bring in more staff from overseas. Nonetheless, to enable successful trainers to expand in response to market demand and to create a good environment for aspiring in-movers, further housing initiatives are required. In the words of one trainer *“What Lambourn needs is a 30 person ‘Premier Inn’ for racing staff.”*

Despite the inherent challenge of a young and often transient population located in a ‘quiet’ village, the social issues should not be overstated. Trainers’ staff have chosen to work in the industry because they want to work with horses and this positive factor needs to be set against the negative aspects mentioned above. There are issues relating to social isolation,

alcohol and the use of illegal drugs, but the local surgery suggests that these, whilst needing to be addressed, are no more pronounced in Lambourn than other comparable settlements.

Roads, traffic and safety

Over the years there has been growth both in housing that serves other employment centres, such as Swindon, and the numbers of horses in trainers’ yards. Road capacity has not increased and although interventions, such as horse crossings and horse walks, have sought to compensate; traffic and safety remain topics of great concern to trainers. There is a levy of £3 per horse per year paid to the Parish Council to help fund extra road salting and gritting in the winter and local sentiment is generally sympathetic to trainers’ concerns, though it is felt that scope exists for some trainers to be cooperative.

There are no easy solutions which will be affordable and acceptable to all road users and there is a particular sensitivity surrounding the development of yards that remain in Lambourn village. It is important that further growth in trainers’ yards is accompanied by infrastructure that helps to mitigate conflicts between motor traffic and horses. Recent developments have sought to address this requirement. Continuing efforts are needed to achieve a meeting of minds on what can be done to manage the relationship between horses and other road users.

In this respect, a good deal of relevant work has been undertaken in Newmarket to improve horse and rider safety. This includes a current project to develop an improved surfacing material for horse

crossings. Newmarket's experience may well provide useful insights for improving Lambourn's infrastructure.

Economic outlook

Horse ownership is a “luxury good” and susceptible to a downturn in the economy. Moreover, any restrictions that hamper easy movement of horses between the UK, Ireland and the continent would be problematic for race meetings and for horse breeding and sales. Nonetheless, Lambourn’s current

buoyancy means that it is well positioned to withstand a downturn and there is still considerable scope for increasing the scale and diversity of the cluster. In this context various planning applications for new yards signal a level of local confidence.

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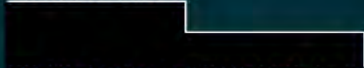
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