

DEVELOPING A STRATEGIC FRAMEWORK FOR EQUESTRIAN TOURISM ACROSS THE SOUTH OF SCOTLAND

2021



southern uplands partnership
living land, living community



This project is supported by Nature Scot, through the Green Recovery Fund.



Teddy the horse provides a local rider with an immersive way to experience the natural and built heritage distinctive to the South of Scotland taking in Smalhólm Tower, significant to the life of Sir Walter Scott : Photo credit:: Natalie Herdman

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FORWARD BY HELENE MAUCHLEN

National Manager for Scotland, British Horse Society

Scotland's horse country, God's horse country. Dramatic stage for the historical common riding; that showpiece of community spirit, homeland, equi-culture and a spectacle of horsemanship. There is no getting away from the fact that the South of Scotland has a special claim on equestrian tourism.

We have consistently shown equestrian tourism to be a "small but growing niche" and "full of potential" but always facing the conundrum of what comes first - the infrastructure or the demand? How to properly market our offer and who is responsible. This document will help in every direction.

In these (hopefully) post pandemic times with society's focus on selfcare, combatting global warming, active travel and slow ways there could not be a better time to develop our métier and this Strategic framework does just that, signposting the way ahead. Tying two decades of effort and delivery down and framing the opportunities in business speak linked to potential funding streams, innovative ideas, and rural economic development.

We have the rolling countryside, we have the amazing heritage, we have enthusiastic partners and digital opportunity and we have the experience (having delivered The Borders Festival of the Horse so successfully for over a decade) so the time to forge forward must be now. The historic houses tour excursion is an inspired idea, combining all that is best to make a horse voyage into an adventure; heritage, battles, romance, beautiful routes to ride, soft grass to canter on and privileged and beautiful places to stay.

A favourite Borders story is that of Thomas the Rhymer who is taken up onto the horse of the Queen of the Faeries and shown the paths to heaven and the faerie lands; Thomas was from Earlston. From the Dumfries end we know of 'Tam o Shanter' and his famous horse Meg who just managed to escape those half-dressed market day witches (The mare without her tail!) Equestrian tourism has already left a long and fanciful legacy in the south of Scotland and you don't have to own or ride a horse to enjoy it.

The strategy says tourism is about people, well equestrian tourism is all about the horse and where could you find a more positive or forever giving theme? We all know of the good horses can do for people. From the solid and reassuring 17.2 hh police horse at Hampden to the gentle and generous 8hh therapy pony in the riding school and else in between. Our industry empowers people and we are woke as well as a rural driver.

The consultants have taken all these equestrian goods and framed them so that they are poised to develop and grow in an agile and all-encompassing manner, showing us the potential while capturing the intrinsic pleasure of horse riding

We wish the strategy good luck and look forward to helping with delivery.



WELCOME

Southern Uplands Partnership (SUP), facilitated by Nature Scot through Better Places Green Recovery funding, has developed this proposal to further progress the Equestrian Tourism product development achieved to date through the regional Scottish Thistle Award winning Ride Scottish Borders Project.

The proposal identifies opportunities to widen the scope of strategic activity in the Scottish Borders and extend the reach of this activity to include Dumfries & Galloway (D&G) with the goal of optimising the opportunities for a significant pan-south Scotland Equestrian Tourism proposition - coast to coast.

Areas outlined for consideration included;

- Sustainably evolving the existing Ride Scottish Borders website inclusive of routes in D&G.
- Outlining the feasibility of a pan-south Festival of the Horse 2022.
- Identifying 'shovel-ready' path projects within D&G.
- Developing a multi-stakeholders Big Houses Tour Package.
- Establishing funding sources to progress activity, particularly focusing on the Visit Scotland Growth Fund.

It was quickly recognised that effective progression of the above considerations required an approach that strategically consolidated the existing Scottish Borders Equestrian Tourism assets and the potential for development in D&G, within, crucially,

the wider context of the South of Scotland and Scotland's Tourism Industry Strategy and market opportunity in this space.

It was also recognised that in order for any recommendations to be effectively adopted, the report needed to address the widespread lack of specialist understanding needed to practically implement and promote Equestrian Tourism initiatives wholeheartedly among stakeholders, as well as illustrate the mechanisms through which Equestrian Tourism can contribute to the cross-sectoral goals in the South of Scotland. It became clear to us that the same case can be made for a national Equestrian Tourism strategy.

With this in mind, the report, rather than existing as a group of independent papers, has taken the form of a strategic overview, that includes initial project planning outlines, focused on demonstrating the potential value created by a series of practically implementable themes.

This approach was taken with the view that the resulting document could then be used to attract wider stakeholder engagement and investment; reducing the reliance on public sector investment; maximising further opportunity for the sustainable long-term development of Equestrian Tourism activity; on behalf of a comprehensive and diverse range of interested community, local, national; and environmental stakeholders.

THE VISION

The South of Scotland is recognised as the leading destination for quality community-driven Equestrian Tourism in the UK, distinctive for the authentic horse-related culture and heritage intrinsic to the local region; high calibre, comprehensive multi-user trails network; and innovative, regenerative Equestrian Tourism products; appealing as the destination of choice to a diverse and inclusive visitor.

THE MISSION

To develop strategic activity that will advance the latent potential for a sustainable Equestrian Tourism proposition across the South of Scotland region based around a holistic framework of themes that unite community, environmental, workforce, industry, and visitor motivations, preserve the local heritage of the area; and grow the overall economic contribution in line with key destination stakeholder goals.

” Tourism is no longer just about tourists; it’s about people. Success means more than numbers; it’s about enrichment and prosperity for residents and our visitors”

Scotland Outlook 2030

WHAT IS EQUESTRIAN TOURISM AND WHY DOES IT MATTER?

DEFINING BY TYPOLOGY

The solution recommended, at the 4th International Rural Tourism Congress 2018, to the 'definitional conundrum' of 'horse-riding tourism' is that a 'holistic conceptual model' of horse tourism should be built, 'advocating that it should be defined from the perspectives of its main stakeholders – tourists, enterprises and destination management and based on a typology of horse-related experiences instead on a n ever-ending list of horse related experiences', with the aim or

forming a 'foundation for a coherent research agenda, [that] should be able to guide stakeholders in setting up successful horse tourism enterprises and devise tourism development strategies based on horse-tourism.'

With such a model yet to be widely endorsed, an accessible typology framework defining the key aspects of Equestrian Tourism is as follows;



WHAT IS EQUESTRIAN TOURISM?

BRING YOUR OWN HORSE	Horse owners holidaying with their own horse. This can be based at a single accommodation or touring with multiple accommodation stops and can be guided or unguided.
RIDERS WITHOUT HORSES	Horse riders holidaying without their own horse, using hirelings or horses from riding stables. This can be based at a single accommodation or touring with multiple accommodation stops and can be guided or unguided.
MIXED GROUP OFFERINGS	Provision for visitor groups containing riders and non-riders - Eg. A family, or group of friends, where often the non-riders are looking for alternative activities to engage in while the riders ride.
ACCESS AND THERAPY	Accessible and Inclusive horse experiences which cater for special visitor requirements as well as provision of horse-led therapeutic activities.
SOCIAL ENTERPRISE	Horse-related visitor experiences delivered by businesses whose strategic model prioritizes a social good along with business success.
TRANSFORMATIVE EXPERIENCES	Horse-related experiences that cater for visitors who intentionally travel to stretch, learn, and grow into new ways of being and engaging with the world.
HERITAGE	Experiences that engage with traditions and influences transferred through generations, involving horses and horse culture, that are unique to the local built, natural and socio-cultural environment.
CULTURE	Experiences surrounding 'a set of distinctive material, intellectual, spiritual and emotional features of a society that specifically.' encompasses [horses and horse culture across] arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions. <i>(https://www.unwto.org/tourism-and-culture)</i>

ECONOMIC CONTRIBUTION OF SCOTLAND'S EQUINE INDUSTRY

The Equine Industry is worth¹;

AREA	WORTH	EMPLOYS
GLOBAL	\$300bn (£218bn)	971k FTE
EUROPE	\$133bn (£96.6bn)	400k FTE
UK	£4.7bn	85k FTE
IRELAND	\$1.3bn (£944.5m)	-

The UK has one of the highest quality equine industries in the world and is internationally recognised as the leading source of equine expertise.

There are 27m people in Britain with a stake in the equestrian industry. With around 1m horses, the sector has a gross output of £4.3bn a year and is the second largest rural employer after agriculture.

It is a sector that is both vibrant and valuable, contributing £8bn a year to the economy.²

Consumer spending within the UK equestrian sector stands at an economic value of £4.7 billion across a wide range of goods and services each year. This has increased from £4.3 billion in 2015³ demonstrating that it is a sizable active sector realising sustained growth.

The equestrian industry in Scotland contributes £355m⁴ in consumer spending annually to the economy.

There is a lack of data breaking this figure down further or more regionally, it is however useful to consider alongside other parallel sectors that share assets and have a dominant stake in south of Scotland regional tourism, for example mountain biking, which has recently seen significant investment through the Borderlands growth deal, and is estimated to be worth £141m in Gross Value Added (GVA) and to create over 400 new jobs in the south of Scotland.⁵

¹ Cross, Paul, Global Horse statistics internal 02 2019

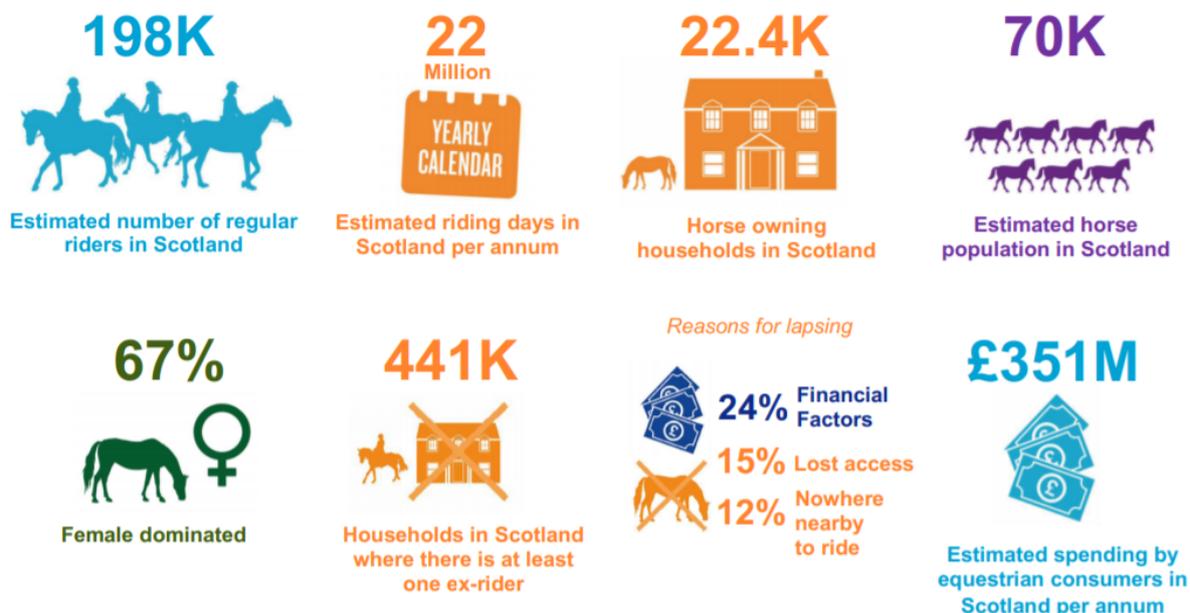
² BETA Developing Benchmarks & Trends to Measure Equestrian Activity in Scotland August 2019

³ www.beta-uk.org/pages/industry-information/market-information.php

⁴ BETA Developing Benchmarks & Trends to Measure Equestrian Activity in Scotland August 2019

⁵ www.scotborders.gov.uk/news/article/4039/boost_for_borders_as_multi-million_pound_borderlands_inclusive_growth_deal_signed

Developing Benchmarks & Trends to measure equestrian activity in Scotland



This infographic shows results from research undertaken by The British Equestrian Trade Association in 2019 to assist with creating Scottish benchmark for future onward measurement

Please note: Attributing value to nature-based tourism is complex. In many instances, data is not available and where it does exist, distinct studies often cannot be compared because of significant differences in approaches.

POTENTIAL ECONOMIC CONTRIBUTION OF EQUESTRIAN TOURISM

Spending by tourists in Scotland generates around £12 billion of economic activity for the wider Scottish supply chain and contributes around £6 billion to Scottish GDP, representing about 5% of total Scottish GDP⁶.

Data is lacking on a more granular estimation of the Equestrian Tourism contribution to this however looking to where it should sit in the sectorial landscape, amongst outdoor, nature-based tourism and Adventure Tourism particularly, allows for greater insight into its potential.

Data surrounding nature-based Tourism shows that the value to Scotland's economy (the direct economic impact) of nature-based tourism is £1.4 billion per year. 39,000 jobs (FTE) are reliant on Scotland's nature-based tourism. Tourist spending on nature-based activities is worth nearly 40% of all tourism spending in Scotland.

The value of outdoor recreation by Scottish residents is approximately £2.6 billion each year, which supports businesses and jobs – cafes, accommodation, shops and hire centres, outdoor instructors, rangers, transport providers – particularly in rural areas.

Manifesto for the Outdoors – Holyrood 2021

It is also worth noting that with the recent formation of South of Scotland Enterprise and more specifically for tourism, the South of Scotland Destination Alliance, that there

may be more scope to acquire further regional data for the South of Scotland in the future.

Looking to other rural regions in Scotland can show value is brought by Equestrian Tourism. Numbers show that in 2010 there were 207,000 trips made to the Highlands and Islands of Scotland to participate in equine related activities. This led to 730,000 days spent within the nation, and was expected to create a £15.3m of spill over expenditure within the Highlands and Islands. This amount of expenditure led to creation and sustainability of 393 full time employees, with 282 directly relating to the equine industry.⁷

Adventure tourism is an expanding market with over 350,000 holiday trips to Scotland made by visitors undertaking adventure activities, including mountain biking, every year. It combines elements of physical activity, interaction with nature and cultural exploration and discovery. The active element includes canoeing and kayaking, surfing, sub aqua, sailing, mountain biking, cycling, extreme snow sports, horse riding and adventure activities such as rafting or paragliding. All rely on a diverse, high quality natural environment. The value to the economy of adventure activity tourism is £178 million per year.

Valuing nature-based tourism in Scotland – NatureScot

⁶ www.gov.scot/policies/tourism-and-events

⁷ Bryden, D.M., Westbrook, S.R., Burns, B., Taylor, W.A., and Anderson, S. 2010.

Assessing the economic impacts of nature based tourism in Scotland Scottish Natural Heritage Commissioned Report No. 398.

HOLISTIC BENEFIT

There are notable social and holistic benefits to come from developing Equestrian Tourism.

A higher proportion of people with accessibility needs engage with horse activities in relation to other sports⁸ Offering the right provision can allow broader diversity of experience to a significant market segment that is loyal to businesses who can provide the delivery certainty that leads to greater individual independence.

Horse riding is a female dominated activity in Scotland (as it is elsewhere in Britain) which makes it distinctive from virtually any other sporting activity. More than 2 in 3 regular riders are female, the largest group are those aged 25-45.⁹ Horse riding encourages women into outdoor spaces and often into remote places they might not otherwise access. Equestrian Tourism is perfectly positioned to directly compliment other traditionally male dominated adventure tourism offerings specific to the South of Scotland region such as Mountain/ gravel/ road biking that are currently seeing significant investment, giving the opportunity to offer a diverse and formidable adventure tourism proposition all in one place.

A higher proportion of participants over the age of 45 engage in horse related activity, relative to other sports, with nearly 40% of those not participating in any other forms of physical activity. The physical and psychological benefits of riding have been well documented through research by the British Horse Society¹⁰ This research highlighted the significance that recreational riding has in maintaining kinship and social networks amongst older participants and potentially avoiding isolation and loneliness as well as the physical benefits attributed.

⁸ BHS Statistics for Equestrian Access in England and Wales

⁹ BETA National equestrian survey 2019

REGENERATIVE BENEFIT

There is an opportunity for Equestrian Tourism to play a regenerative role within south of Scotland, by encouraging slower travel and sustainable best practice. In particular supporting conservation grazing practices, and rare breed preservation.

This is particularly relevant in relation to the Dales Pony now considered at 'critical' risk by the Rare Breed Survival Trust¹¹ and who are the close ancestors of the regional native but now extinct Galloway Pony from south west Scotland.



Equestrian Tourism development aligns with the following UN Sustainability Goals designed as 'a blueprint to achieve a better and more sustainable future for all'.⁴

¹⁰ BHS The health benefits of Horse Riding in the UK

¹¹ www.rbst.org.uk

⁴ sdgs.un.org/goals

NATIONAL CONTEXT

There is a unique opportunity for Equestrian Tourism to develop and thrive given the current national and regional landscape.

SOUTH OF SCOTLAND DESTINATION ALLIANCE

With the newly formed South of Scotland Destination Alliance there will be, for the first time, a Tourism Strategy specifically for the South of Scotland region (Dumfries and Galloway and the Scottish Borders) well positioned to support the realisation of Equestrian Tourism development as an asset that is authentic to the regions narrative.

SOUTH OF SCOTLAND REGIONAL ECONOMIC PARTNERSHIP

The South of Scotland Regional Economic Partnership is also currently developing a Regional Economic Strategy (RES) described as ‘a real opportunity to drive the transformational change that many living and based in our region want to see.’

SOUTH OF SCOTLAND ENTERPRISE

Both of these strategies come in the wake of the recently established South of Scotland Enterprise and The South of Scotland Enterprise Act 2019 outlining aims to;

- a) Further the sustainable economic and social development of the South of Scotland
- b) Improve the amenity and environment of the South of Scotland.

BORDERLANDS INCLUSIVE GROWTH DEAL

There is also the Borderlands Inclusive Growth Deal delivering a significant integrated investment package to the area with adventure tourism recognised through the Mountain Biking Project that harnesses

the region potential to deliver high calibre adventure and nature-based experiences.

SCOTLAND'S TOURISM OUTLOOK 2030

While these strategies are still awaited, there is clear alignment with a number of other governmental and sectorial goals and initiatives, not least Scotland's Outlook 2030 (published in March 2020), the, national strategy for Tourism in Scotland.

The vision for this sees a shift to community focused sustainable growth with activity based around broader holistic and regenerative priorities that Equestrian Tourism could reinforce through its development. The 4 priorities are;

Our Passionate People
We will attract, develop and retain a skilled, committed, diverse and valued workforce
Our Thriving Places
We will create and develop a sustainable destination together
Our Diverse Businesses
We will build business resilience, sustainability and profitability
Our Memorable Experiences
We will provide the very best, authentic and memorable experiences

BRITISH HORSE SOCIETY RIGHT OF WAY AND EQUESTRIAN ACCESS TRAINING

The British Horse society has developed and provides training on laws and issues surrounding rights to ride and carriage drive to educate riders on engaging in positive best practice when out riding.

UNIQUE REGIONAL ASSETS

The South of Scotland has many unique features that are a draw for those that wish to visit the region on horseback

ACCESS & LOCATION	Under Scots law everyone (unmotorised) has the right to be on most land and inland water for recreation, education and going from place to place providing they act responsibly. Land Reform (Scotland) Act 2003 The South of Scotland is uniquely placed as it is close to the highest destination populations in Scotland and within a 2-3 hour drive of the north of England.
EQUESTRIAN CULTURE	The South of Scotland has an unrivalled equestrian heritage from the Selgovae horse tribes to the many Olympic and national champions in the region to this day. That heritage has left its mark on the landscape, built heritage and its people witnessed in the high proportion of people who still own and ride horses, the Common Ridings, artifacts, and art.
HERITAGE TRAILS	The peoples that have inhabited this region over the ages have left their mark on the landscape with a legacy of ancient tracks and trails. Drove, Roman and thieves' roads, customary rights of way and common land all still in existence.
NATURAL CAPITAL	The ice age left a dramatic aftermath of gentle rolling hills, open moorlands and a region through its geography and land suitability for agriculture has resisted over urbanisation. The wildlife renowned for its variety, from Golden Eagles and Black Grouse to Red squirrels and Otters.
COMMUNITIES	The geography and history of the area has left a patchwork of small, friendly rural communities and small towns connected by quiet roads and tracks. no significant population centres, as can be found elsewhere in the UK. As a result, large areas can be traversed by non-motorised methods without restriction of major infrastructure.

The South of Scotland – as recognised for centuries by locals – offers some of the best riding in Britain, a match for any to be found elsewhere in Europe, and within relatively easy reach of literally thousands of horse-owners and riders. Equestrian Tourism based on the self-guided riding routes offers potential to positively contribute sustainable tourism throughout the South of Scotland, supporting a diverse range of small businesses. There are many existing accommodation providers and other small businesses who might usefully diversify into equestrian tourism, not least farms looking for alternative income who may already have suitable accommodation for horse and rider, or be able to offer other back-up services such as luggage transfer or guides. However, unless the “product” is right, and riders are aware of the opportunities, the market niche is likely to remain small and its potential unrealised.

V Wood-Gee & T Costley. Equestrian Tourism Report 2004



The Cornet gallops up Hawick Hill during the annual Common ridings. Equestrian heritage is intrinsic to existing local culture in the South of Scotland, events like this have high engagement within communities, each with their own distinctive traditions. Photo credit: Visit Scotland

MARKET OPPORTUNITIES

KEY POTENTIAL MARKETS

There are 3 key potential markets identified who have a direct interest in Equestrian Tourism.

AREA	DATA	SOURCE
UNITED KINGDOM	Horse owners within a 2 -3 hour drive time, those further afield if suitable longer distance trails were available for multiple day rides.	Equestrian tourism project V. Wood Gee, June 2004
GERMANY	1.34 million of whom ride frequently, (belonging to federations) and a rise in non-federation/ competitive riders looking for leisure options.	AVA survey 2009 and 2019
USA	Thirteen million households have participated in <u>trail riding</u> in the US with over <u>seven</u> million Americans involved in the industry with <u>2</u> million horse owners. That means that 1 out of every 63 Americans is involved with horses. This coupled with American interest in genealogy and heritage travel makes a potent combination.	The Equestrian Channel, Equestrian Market Analysis 2019

EXPANDING APPEAL

By expanding the way we represent Equestrian Tourism through the definition outlined earlier in this report, to include Culture, Heritage, Transformative Experiences, Social Enterprise and Access and Therapy; the potential market becomes more inclusive of non-riders and beginner riders and widens the overall appeal where Equestrian Tourism has crossover with other sectorial interests.



Les Amis D'Onno Stunt Team, Traquair medieval Fayre 2017. Photo Credit: Sue Zacharias

CASE STUDIES

There are some good examples of initiatives in the UK that have been successful in connecting and elevating equestrian Tourism provision, opportunity and culture to a wider audience through improving infrastructure, collaborative working and raising awareness of the proposition available and local narrative around horses and horse-riding as well as how to access it.

Further detail of a selection of key initiatives can be found in the annex.

- [Ride Yorkshire](#)
- [South of Scotland and Countryside Trails](#)
- [Rainbow Trails](#)
- [Falkirk Council & Helix Park](#)

There are also good UK examples of how successful, sustainable equestrian products have been developed, evidencing best practice as well as demonstrating the market demand for Equestrian Tourism offerings.

Further detail of the examples below can also be found in the annex.

- [Dartmoor Derby](#)
- [Wilder Ways](#)
- [Fell Pony Adventures](#)
- [Lindores Farm and Cross Country](#)



The Kelpies, Helix Park, received almost 1m visitors in the first year according to Scottish Canals, and visitor numbers for Kelpies tours grow 23% year on year from 2018 to 2019 according to the 2019 ASVA annual visitor Trend Report Photo Credit: www.thehelix.co.uk



A BRIEF HISTORY OF RIDE SCOTTISH BORDERS

2000

South of Scotland countryside trails project (SOSCT) 375 Km multi-use trail development.

A partnership project involving British Horse Society Scotland, local community path groups, Scottish Borders Council and Solway Heritage under the umbrella of Southern Uplands Partnership (SUP).

2004

Equestrian tourism proposal completed investigating the potential and scope of the UK market. A positive conclusion showing a keen interest in holidays in the South of Scotland but with work to be done on infrastructure and marketing.

2016

Equestrian tourism proposal completed investigating the potential and scope of the UK market. A positive conclusion showing a keen interest in holidays in the South of Scotland but with work to be done on infrastructure and marketing.

2017

Equestrian tourism proposal completed investigating the potential and scope of the UK market. A positive conclusion showing a keen interest in holidays in the South of Scotland but with work to be done on infrastructure and marketing.

2018

- Engagement with the Scottish Enterprise Planning to Succeed group (P2S) and other potential businesses, landowners and stakeholders. Plotting routes and accessing condition reports.
- Route condition and access was a concern so all routes were rechecked and new ones scoped out.
- A digital mapping exercise was undertaken to be added to the new website.
- The website was built and developed in line with the existing Scottish Borders Council walking and cycling sites. The site links up accommodations with routes and services with downloadable routes for riders.

2019

- The P2S group continues as a separate group of 5 providers, originally (the group was 12) estimated to be worth £196,000 to the local economy.
- The RSB website grows to over 30 accommodations and many new routes. This group is estimated to be worth a further £784,000 to the local economy
- 6 new businesses undergoing diversification or upgrades to include equestrian tourism as a product estimated to be worth £168,000 to the local economy.
- Services for the horses were not included in this but estimated to be in the region of a further £25,000
- Multiple marketing campaigns
- Produced a 44-page booklet of trails around the Scottish Borders
- Plan revival of Festival of the Horse

2020

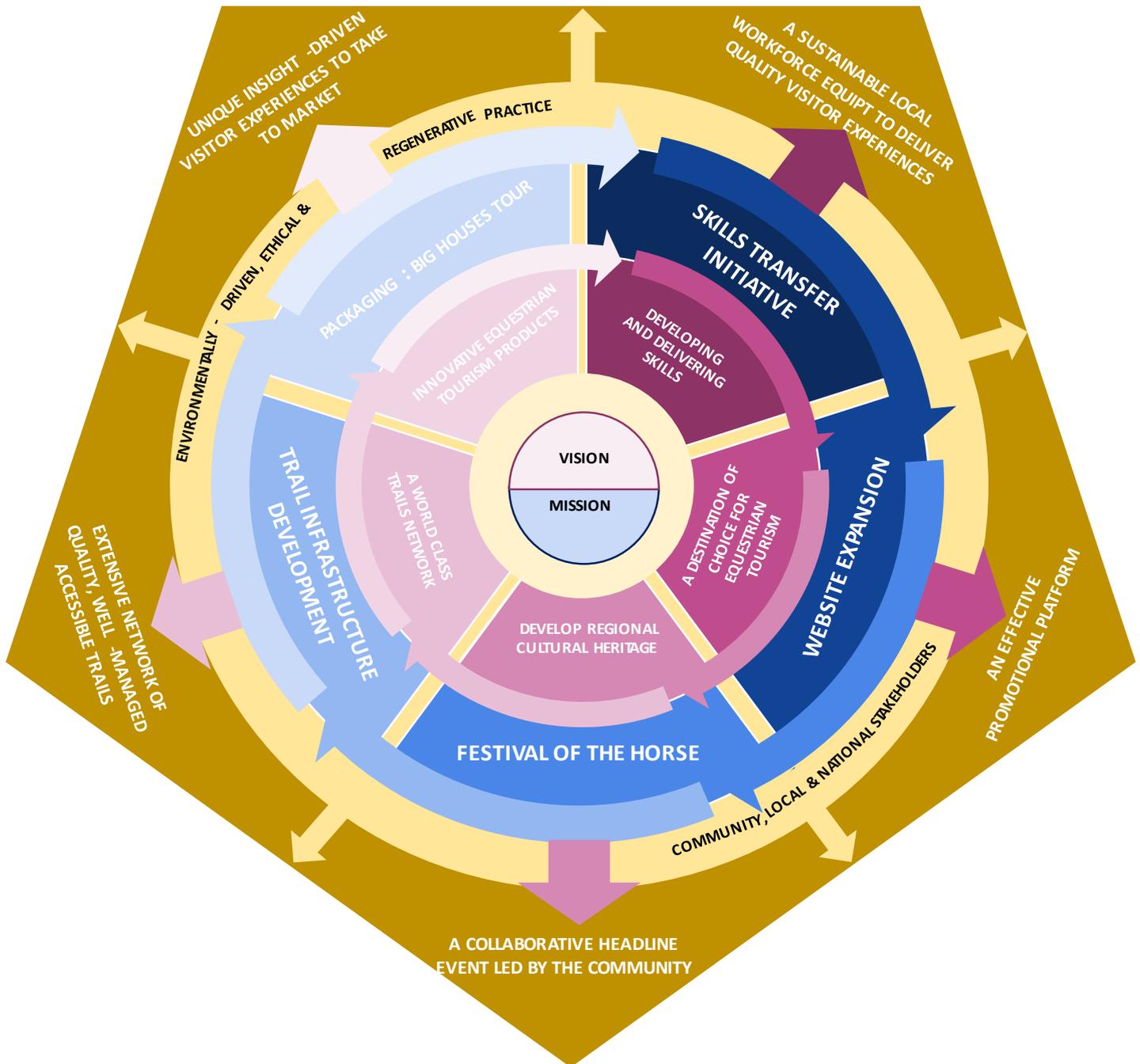
- SoSE funds a feasibility study to look at expanding the network into Dumfries & Galloway and packaging The 'Big Houses' tour in the Scottish Borders and revival of the Festival.
- Covid-19 stalls any funding options
- The South of Scotland Destination Alliance is established as the new destination management and marketing organisation for the region. RSB riding routes are added to their Scotland Starts Here website and app

2021

SUP, facilitated by Nature Scot through Better Places Green Recovery funded a strategic outline focused on demonstrating the potential holistic value created by a series of practically implementable themes.

EQUESTRIAN TOURISM STRATEGY FRAMEWORK FOR THE SOUTH OF SCOTLAND

The below strategic framework consolidates five key themes around which Equestrian Tourism can contribute to the South of Scotland destination proposition



5 STRATEGIC THEMES

Developing and Delivering Skills	By assuring the development of a sustainable local workforce equipped with the specialist skills required to deliver welfare, safety, environmental and customer service best practice, the sector can meet expanding demand and deliver high quality visitor experiences that aligns with market expectation, create local opportunities for young people and preserve heritage skills.
Destination of Choice For Equestrian Tourism	By integrating marketing activity into industry strategy at a destination (SSDA) and sectorial level (Adventure Tourism) and establishing a promotional platform with long-term viability that can reach key target audiences with a strong message aligned to their demands and values, an effective and resilient route to market for local businesses can be established securing sustainable local employment long-term and increased economic contribution from the sector.
Develop Regional Cultural Heritage	Investing in community-led preservation and celebration of the rich local Equestrian heritage and culture, through considerate diversification, innovation and events that showcase the diversity of equine experiences, will raise the profile and reputation of the regions unique offering. This authentic foundation will attract visitors to engage with the sector, generating income for the community and local Equi-tourism businesses through tourism.
A World Class Trails Network	By establishing a reputation for a high calibre, joined up trail network, with comprehensive, reliable routes, quality assurance and end to end specialist provision available, visitors will have confidence to invest in trips to the region, bring their own horses and staying longer in the destination and repeating their visits. The infrastructure around equestrianism will create truly multi-user trails where horse-riding, walking and cycling can co-exist
Innovative Equestrian Tourism Products	Collaborative partnerships and packaging based on market analysis trends and insights should inform the development of end to end, easily marketable, unique Equi-Tourism products that will capture the visitor and industry imagination drawing a spotlight on the regions unique proposition and driving consumer demand across sector and destination.

STRATEGY INTO ACTION

FROM THE STRATEGIC THEMES FIVE ACTIONS WERE IDENTIFIED

**DEVELOPING
AND
DELIVERING
SKILLS**

**SOUTH OF
SCOTLAND
FESTIVAL OF
THE HORSE**

**WEBSITE
DEVELOPMENT**

**BIG HOUSES
TOUR**

**TRAILS
NETWORK**

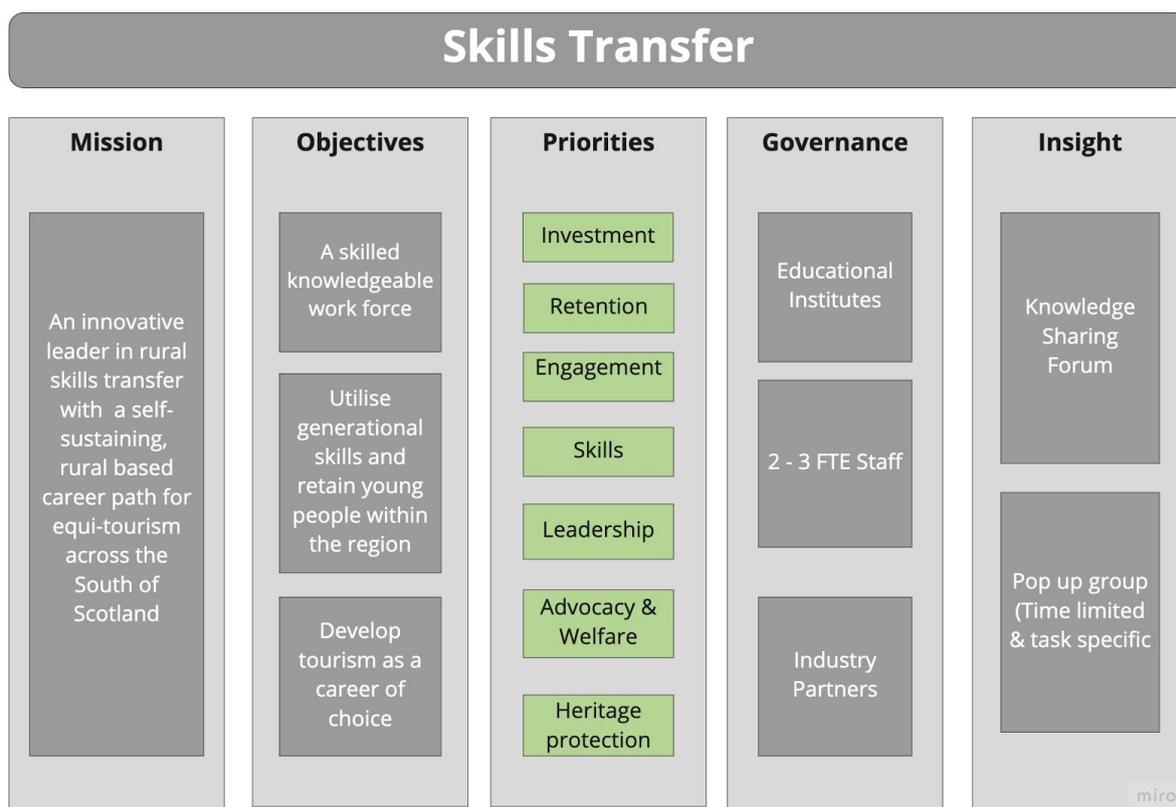
DEVELOPING AND DELIVERING SKILLS

Opportunity

Retaining and enhancing the unique equestrian skill set in the South of Scotland and combining it with top class tourism skills.

Delivery

By collaborating with the experienced providers in the region to develop a unique rural heritage and cultural tourism skills product we can enhance the options for young people to remain living and working in the region. Also by tapping into some of the older workforce potential by upskilling the experienced, time-rich, equestrian resource we have to complement any tourism product.



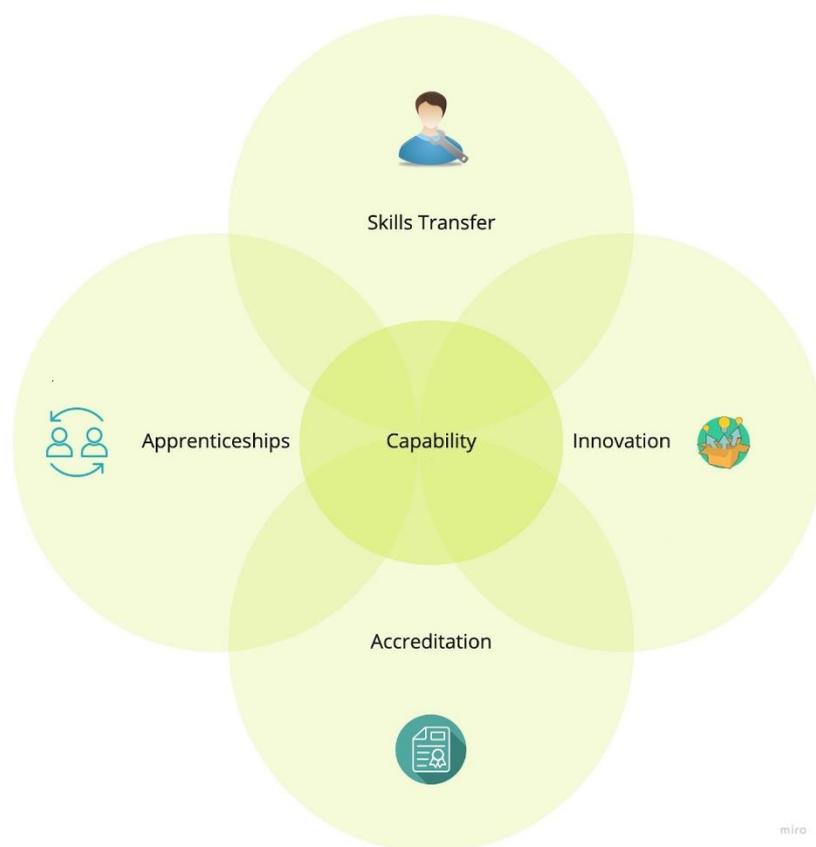
Whilst traditional sectors of rural employment including farming, forestry and fishing still have an important role to play in rural areas, so increasingly do activities across a wide range of sectors including tourism. With the equine industry already thought to be the second biggest employer in the rural environment in the UK, after agriculture, the combination of tourism and equestrianism will attract,

develop and retain a skilled, committed, diverse and valued workforce of passionate people. The traditional skills that keep a living landscape like the South of Scotland alive are an important part tying together people and their communities. Rural skills like dry stone dyking, hedgelaying, coppicing, charcoaling, blacksmithing, horse-

logging, spinning and weaving, stone carving, green woodworking, etc are all woven together with the history of the landscape.

These skills have played an important role in shaping the distinctive and unique landscape that we see around us today. Sadly, changes in land management practices over the past century have resulted in many of these

features being left neglected and falling into disrepair. This project would aim to help address this by facilitating the teaching of these fascinating and practical skills to new generations of people as well as the skills needed if the tours and packaging aspect were to be developed such as trail guiding.



Current accredited training routes are minimal and linear tourism qualifications are being developed by Borders College and SSDA with equestrian specific qualifications provided by land-based colleges such

as Barony campus Dumfries, Oatridge College, Broxburn and nationally by the BHS. Working in collaboration with these providers there is opportunity to develop a bespoke equestrian tourism qualification encompassing the full

gamut of the history and heritage as well as the practical skills, providing a career of choice, retaining a well-trained, passionate workforce with a broad spectrum of roles covering tourism, equestrianism, rural crafts but encouraging a generational workforce with a deep reservoir of skill, wisdom and local knowledge . All this supports a diverse business network of entrepreneurs delivering memorable experiences to tourists from Scotland, the rest of the UK and worldwide.

“It is clear to me that people are key to driving forward our rural communities and economy. We recognise the need to safeguard and value our rural communities, making them sustainable and inclusive place for people to live, work and thrive. The Scottish Government is committed to supporting our people to remain in, and return to, rural communities by creating a sustainable and productive environment in which they can live and work. We want to ensure we have the right people with the right skills in order to help the Sottish rural economy flourish by providing opportunities for training, development and entrepreneurship”

Fergus Ewing, Skills Action Plan for Rural Scotland 2019-2021

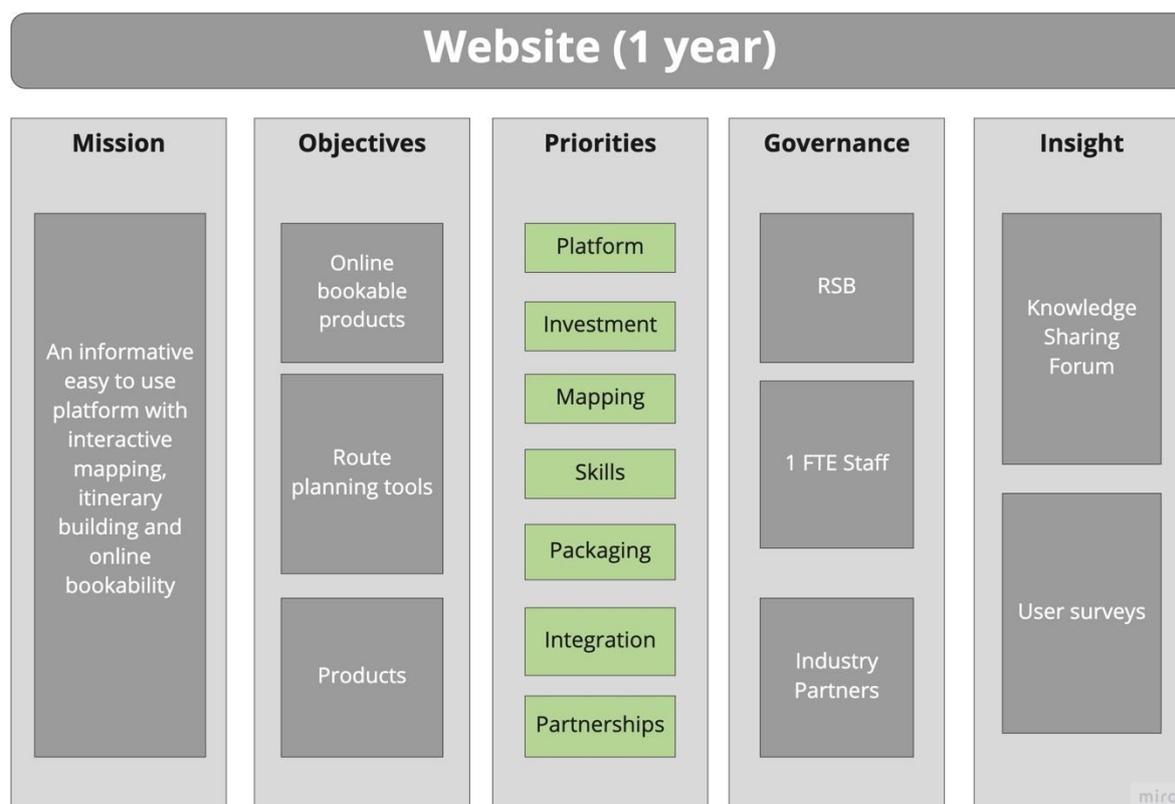
WEBSITE DEVELOPMENT

Opportunity

Have a platform to promote the South of Scotland as an equestrian destination.

Delivery

A visible innovative website promoting the region and its offering to a wider audience. A robust site that will give confidence to its audience planning a trip and to attract new visitors integrating with product development and packaging.



Project Concept

The website www.ridescottishborders.com (RSB) was developed by If Looks Could Kill in 2018 on a WordPress platform. It uses the same architecture as Walk (WSB) and

Cycle Scottish Borders (CSB). The hosting for RSB is paid for by the

Southern Uplands Partnership. It is currently partially maintained by RSB with any structural changes there are 10 paid for development hours per annum. Hosting for WSB and CSB is paid for by Scottish Borders Council, any changes are paid for by SBC.

The WSB and CSB are moving their data over to Scotland Starts Here (SSH) the consumer facing platform of the South of Scotland Destination Alliance (SSDA).

An initial set of strategic objectives were developed:

- Find a sustainable platform for the RSB website
- Develop the site so it is pan South of Scotland
- Investigate integration with the SSDA and the SSH platform.
- SSDA is looking to set up a mapping working group re the transfer of the WSB & CSB. RSB ideally will be part of this
- Investigate a stand-alone site with more specialist functionality than SSH. SSH will link out to the site or be a module on SSH with a landing page.
- To develop long-term relationships accommodation providers, stakeholders, suppliers and users.
- To increase the capability and spread of the South of Scotland's equestrian routes, providers and suppliers in order to increase equestrian tourism and spend in the region.
- Developed a premier brand identity for the region as a premier equestrian destination, which is vibrant, inclusive, sustainable and environmentally sound, with subsequent marketing collateral [booklets, web and social media presence]
- To raise the awareness of the unique equestrian heritage and assets in the South of Scotland.

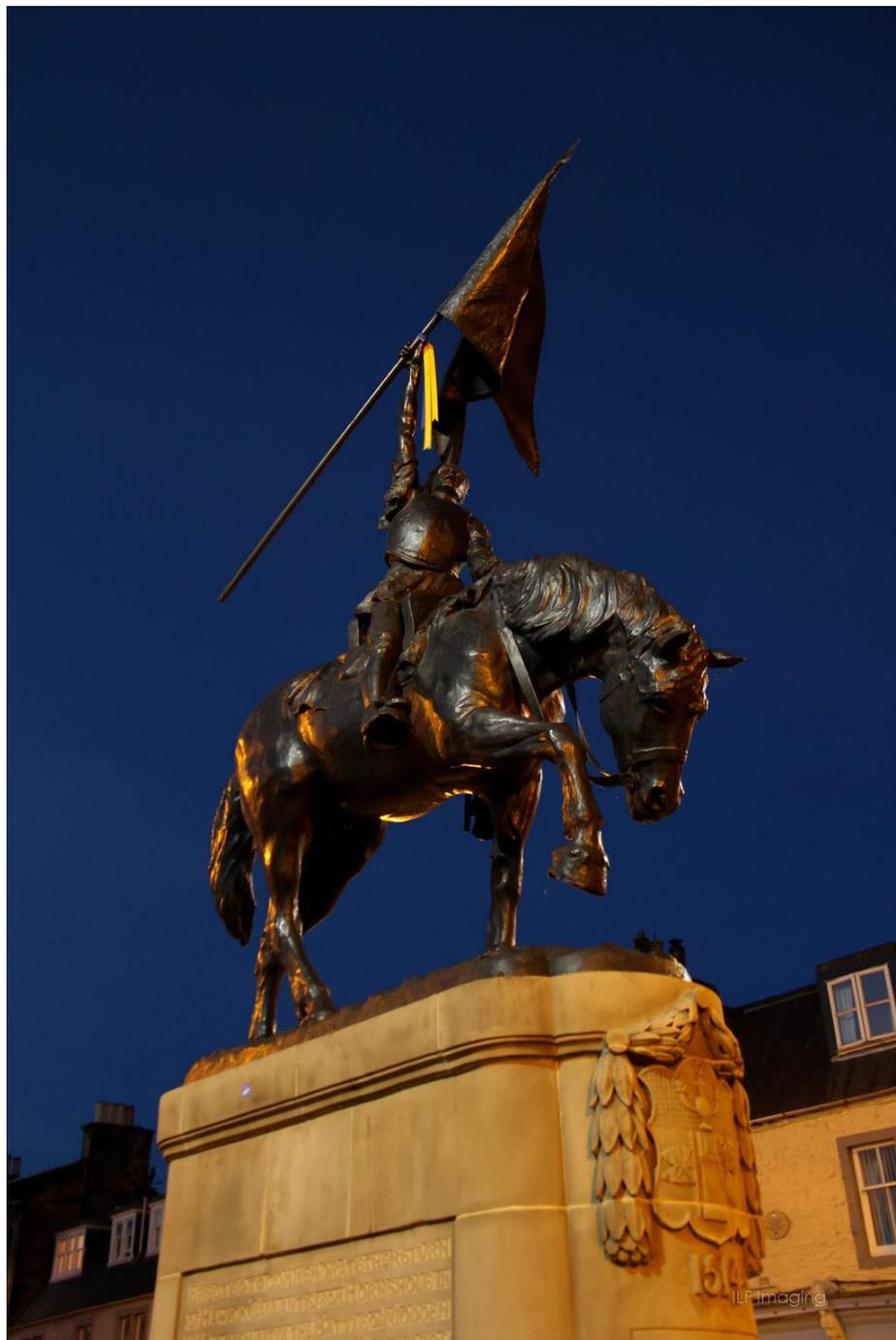
To achieve those the 6 Key themes are:

1. User friendly platform - how the current platform can evolve to provide an unrivalled experience, this would allow users to plan and prepare.
2. Deep and Wide Engagement - how the website can enhance the current SSH offering and reach a wider audience of not just riders but those interested in equestrian culture and heritage. Engaging marketing reaching a worldwide audience.
3. National and Global Positioning - how forging strong partnerships give the region a voice and how branding and marketing are integral to relationship building.
4. Digital Ways and Means - new technologies must be embraced to connect and to offer new ways to plan and experience the region safely and with confidence. These can also bring about cost savings.
5. Investment and Enterprise - sustainability, growth and innovation are essential to ensure the website continues to be active and relevant with the potential to be rolled out to other regions with wide reaching implications around innovation in its market.
6. Developing and Delivering – Investigate a pilot product development, selling through SSDA as a destination management company (DMC) Developed by a RSB social enterprise.

Conclusion

A working group needs to be established to investigate integration with the Scotland Starts Here platform, whether a full integration or partial needs further development and to establish what happens to the data in the long term without specialist support. Further updating and maintenance of the existing site to ensure it is fit for purpose

(and any subsequent transfer of data) is also needed. To complete the initial work 24 days work is required to achieve this with a cost of approx. £8000 and ongoing development would be part of a wider product development project.



Ken the Horse', Hawick (1514 Memorial) Photo Credit ILF Imaging

SOUTH OF SCOTLAND FESTIVAL OF THE HORSE

Opportunity

How can a region take advantage of its unique equestrian culture and heritage to promote it to a wider audience, attracting new visitors and those outwith this special interest genre.

Delivery

Develop a strategic regional showcase with both participants and brand positioning objectives.



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Project Outline

The BHS Borders 'Festival of the Horse' was held annually from 2001-2014 in the Scottish Borders. The festival started with the aim of using the horse for rural regeneration in the wake of the 2001 Foot and Mouth disease outbreak. It was sponsored by Scottish Enterprise. In 2014, the festival was supported by the Forestry Commission and LEADER and linked with many local tourist facilities. It was

estimated that the 2014 festival involved 1,200 horses and was attended by approximately 10,000 people.

The revival of the festival was met with great enthusiasm and was slated to return in May 2020 with a packed programme of over 40 events throughout the Scottish Borders, over nine days. It was entirely volunteer led and relied on businesses putting on

events which would come under the umbrella of the festival.

This experience created an ambition to develop a bigger and wider festival connecting the South of Scotland's equestrian heritage in order to maximize opportunities for communities, exhibitors, makers, artists, storytellers and participants while also raising the profile of the region through a persistent and collaborative presence.

An initial set of strategic objectives were developed:

- To raise the awareness of the unique equestrian heritage and assets in the South of Scotland.
- To develop long-term relationships between artists, producers, venues, sports people, equestrian professionals, presenters and Scottish/UK/International festival directors.
- To foster exchanges of ideas between UK and International equestrian communities.
- To build the capability of the South of Scotland's equestrian producers/ performers, producers, presenters, curators and directors in order to increase equestrian tourism and spend in the region.
- Developed a brand identity for the festival, which is vibrant, colourful and eye-catching, with subsequent marketing collateral [brochure, poster, web and social media presence]

To achieve those the 6 Key themes are:

1. Festival Hub and outposts - how the regions infrastructure and operations

can evolve to provide an unrivalled experience, a ten year strategy to sustain the success of a festival, the audiences and opinion formers from across the world.

2. Deep and Wide Engagement - how the festival can collaborate to support education through participation, learning and belonging. Quality engagement programmes including training, apprenticeships and volunteering and closer ties developed with education at all levels.

3. National and Global Positioning - how forging strong partnerships give the region a voice and how branding and marketing are integral to relationship building.

4. Digital Ways and Means - new technologies must be embraced to connect across time and space in order to offer new ways to experience the festival as well as a new means of creation and brand building. People are accessing culture and entertainment in new ways, a festival has to consider the balance between the live and digital experience.

5. Investment and Enterprise - sustainability, growth and innovation while recognising the significant challenges facing public finances but alternative funding models should be considered and asking the wider business community to invest in the festivals from which they will greatly benefit.

6. Developing and Delivering – the structures for success how the structures need to evolve to embrace new opportunities and develop new partnerships and ways of working to take the festival through the next decade.

Conclusion

The South of Scotland is an often-overlooked region when it comes to visitors and tourism but this festival has the opportunity to put it onto Scotland's stage and build on our reputation for world class events. The recommendation is to produce a detailed five year plan, with costings capitalising on the reputation of the previous festival, and finding new ways of experiencing and investing in this new era of festival going. To do this the Festival must step up and look outwards, confident and bold in its ambition. It is recommended support of £20,000 to enable development of the first year with ongoing support sought from other sources.



Balance race, pony games, Newtown Show 2018 Photo Credit : G Miller

TRAILS NETWORK

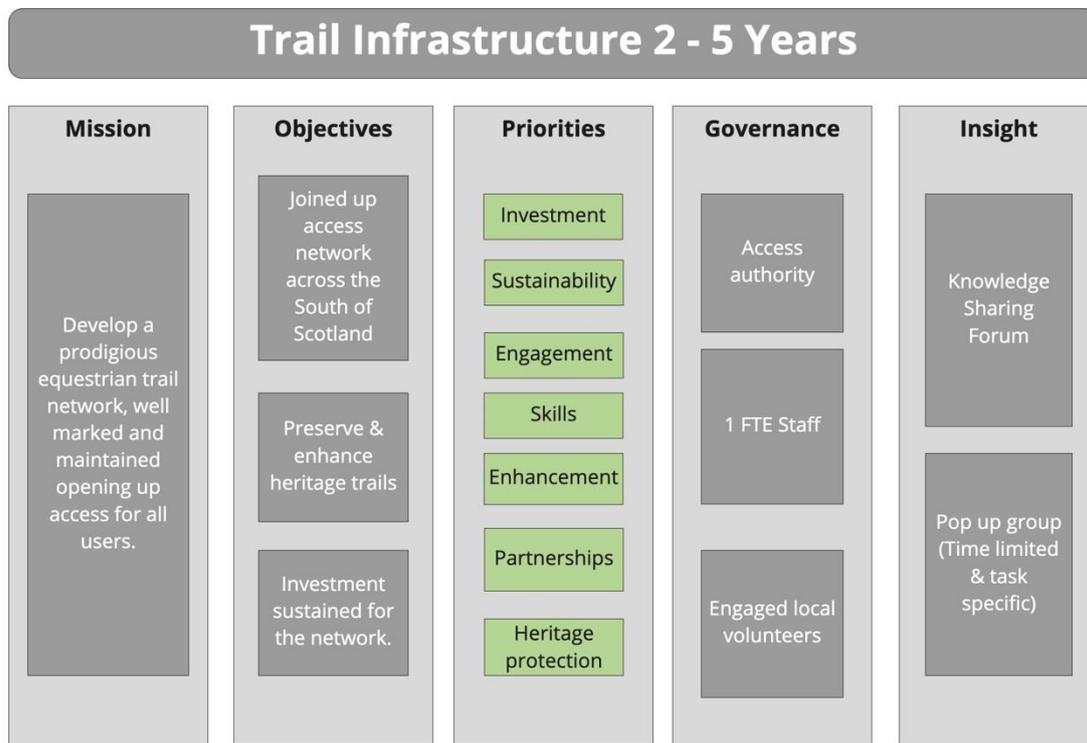
Opportunity

The Ride Scottish Borders website is successfully promoting over 350kms of trails across the South of Scotland with the majority of them within the Borders, with scope to expand those further, connecting more providers with the network.

Dumfries and Galloway has a proliferation of trails that lack the connectivity that the Scottish Borders network has, again there is great scope to expand and enhance what is there. This would provide a network of signed accessible routes across the whole of the South of Scotland.

Delivery

Deliver a connected trail network across the whole South of Scotland with a wide range of options in difficulty, terrain type and distance from point-to-point long distance trails as well as loops, themed routes and multi-day trails.



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Project Concept

The South of Scotland benefits, as does the rest of Scotland from the Outdoor Access Code legislations, known more commonly as the right of responsible access (or the erroneous term of right to roam). With a wealth of historic byways and tracks, the potential to ride coast to coast, rarely

seeing a road, this huge untapped potential is unique to this region. With great infrastructure, route marking and mapping this will open the region up to not just to horse riders but walkers and cyclists.

Objectives

- To develop an unrivalled interconnected coast to coast equine accessible trail network in the South of Scotland
 - To build capacity of the South of Scotland as a destination of choice and increase spend in the regions economy.
 - To survey existing routes and scope potential new routes and any connections that may need negotiation.
 - To digitally map all existing and potential routes
 - Develop long term relationships between users, stakeholders, visitors and other access takers
 - Deliver a short term project plan for 2 - 3 routes for delivery within 12-18 months.
 - Deliver a medium term more ambitious project plan for 2 -3 routes for delivery within 3-5 years
- developed with education at all levels.
 - Digital Ways and Means - use of new technologies to waymark routes, expand cultural understanding of the natural spaces as well as navigation and safety operations.
 - Investment and Enterprise - sustainability, growth and innovation while recognising the significant challenges facing public finances but alternative funding models should be considered and asking the wider businesses, users & communities to invest in the infrastructure they all benefit from.
 - Thriving places - Joining up communities and businesses with this network would support growth and diversification in remote rural areas, encouraging new skills and entrepreneurship.
 - Responsible tourism - by developing a social enterprise DMO model to deliver the trails infrastructure as well as package any products tourists would be contributing directly to the communities they are visiting and ensuring a sustainable future for any network.

Key Themes

- Deep and Wide Engagement - how the construction of a trails network can encourage visitors but also connects communities with quality engagement programmes including training, apprenticeships and volunteering and closer ties

Conclusion

The South of Scotland is considered an ideal location for horse riding because of its well-established equine industry, high level of local participation in and support for equine activity. By further developing and connecting a network of this scale it would deliver a destination for visitors, horses riders, walkers and cyclists alike, like no other.

Delivery would be over a 5 year period with three shovel ready projects that could be delivered in the first 2 years at a cost of at £26,100 and a further 3 routes that could be delivered for £159,150

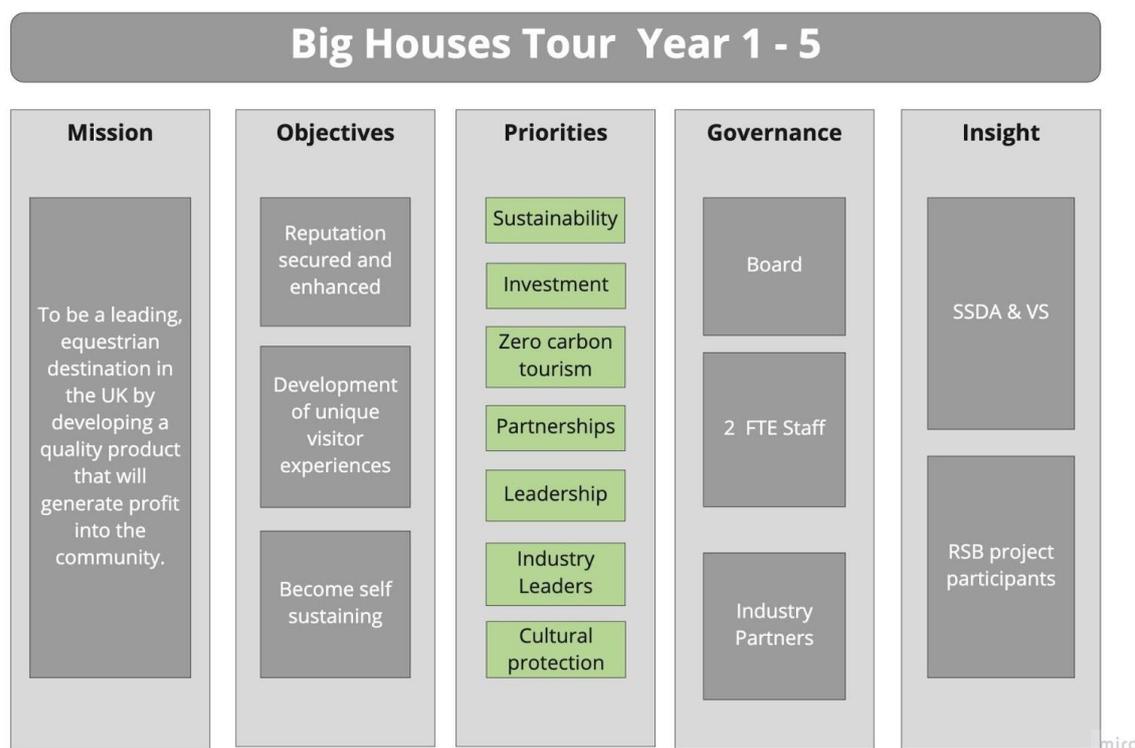
BIG HOUSES TOUR

Opportunity

Equestrian visitors, as do other visitors, want the ease and convenience of booking online in one easy place. Overwhelmingly the feedback from potential visitors in response to the Ride Scottish Borders project is positive with a strong desire to visit the region however, the barrier to that is knowing where to go and how to book, the majority want to be able to book a pre planned package.

Delivery

Deliver a collaborative approach to marketing, a unique opportunity to discover the big houses of the South of Scotland on horseback with the aim to be self-funding once established.



Project concept

An astonishing amount of Scotland's rich cultural heritage can be found in the historic towns, rolling countryside and green hills of the South or Scotland. And there's a wide range of interesting and unusual places waiting for you to discover – from famous houses and fairy tale castles, to

medieval churches and award-winning museums.

The natural beauty of the region is often unexpectedly dramatic – and its history can be equally surprising. The often turbulent past of the region is reflected in the number of fortified keeps and tower houses which dot the

landscape, particularly in the Borders. The long-standing pioneering spirit of the wider region is still very much in evidence, too – from the engineering genius in the mining industry, to the innovation and ingenuity of the textile mills.

With all that cultural heritage and long association with everything horse, there can be nowhere better to develop a Big Houses Tour on horseback!

The South of Scotland is home to 12 big houses - each one providing a unique and individual insight into the culture and heritage of this scenic region.

Each of the houses are located in beautiful, but rural locations and this project would deliver an environmentally sustainable tour whilst supporting employment across a whole range of services from transport businesses, grooms, farriers, food and drink providers, accommodation providers, etc

Objectives

- To deliver a range of tour packages centring on the 12 big houses across the South of Scotland
- Market the packages to those within the UK with their own horse but also those wishing to hire a horse across Scotland, the UK and overseas markets
- Develop long term relationships between accommodation, landowners, producers, guides and guests
- To build capacity of the South of Scotland as a destination of choice and increase spend in the regions economy
- Develop and grow a strong brand -identity and

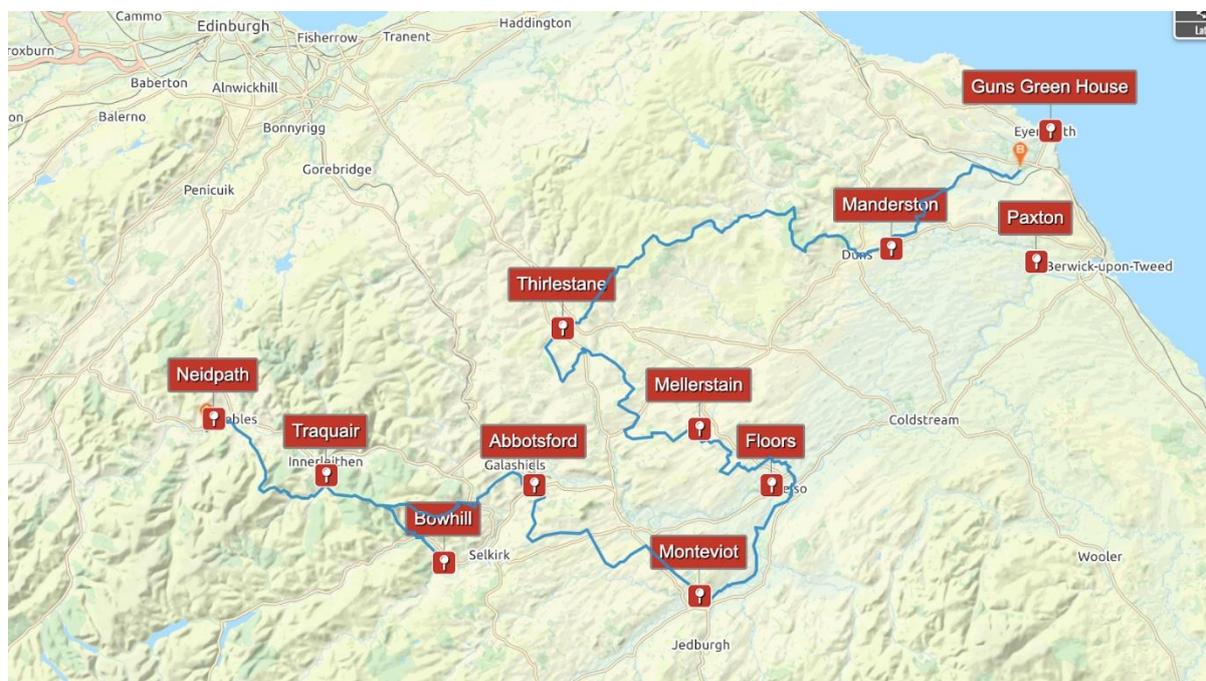
products associated with authenticity and quality.

- All products developed with a net zero carbon goal

Key Themes

- Responsible tourism - equestrian tourism is one of the greenest ways to travel within a region and by developing a variety of packages horse back exploration becomes a transport of choice rather than a secondary choice
- Passionate people - We have a huge repository of knowledge and skill in the South of Scotland by utilising that we can deliver unforgettable unique experiences as well as making the South of Scotland a vibrant place to live and work.
- Diverse businesses - By encouraging diversification and with a strong growing Agritourism sector the South of Scotland is ideally placed to support this growth, with everything from luxury castle accommodation to glamping and B&Bs to supported wild camping there really is something for every budget.
- Our thriving places - With unrivalled off road trails and options of ground support for transporting luggage or horses, locally produced food & drink options, rest day (part day) tours of local towns, events, etc this package would be quite unique. The current plotted route could easily be extended to include Drumlanrig House in Dumfries & Galloway via Ae forest.
- Our memorable experiences - Packages from epic 12 - 14 days to smaller bite size tours of

2- 3 days. Self guided or fully guided options and an option for horses for hire



Conclusion

Nowhere in the UK are there the assets, infrastructure or potential for a tour of this scale and quality but it will need facilitation by a body other than that of the providers due to complexity, insurances and hands on specialist knowledge and skills needed. The Ride Scottish Border project did some work into the feasibility of such a product and the Big Houses group (see appendix) were positive to the concept and a trial package was outlined (Pre covid-19). The recommendation is a project commencing mid to late 2021 for delivery of the first tours mid 2022. To ensure self sustainability the project would ideally run for a minimum of 3 years developing other packages and products. It would need investment of £180,321 with potential to start generating £50,480 in the first full season.

There is potential for this to either develop as a destination management company (Social Enterprise) providing employment, sustainability and regenerative solutions to small local enterprises to bring their products to market in a collaborative impactful manner. Such a body could also manage the Festival of the Horse.

FUNDING

We hope that development of this strategy document will enable funders to see Equestrian Tourism as robust sector ripe for development and investment in the South of Scotland enabling us to take forward applications

		SKILLS	DESTINATION	EVENTS	INFRASTRUCTURE	DEVELOPMENT	SUSTAINABILITY
	GROWTH FUND		✓			✓	✓
	RECOVERY FUND			✓			
	RURAL TOURISM INFRASTRUCTURE FUND			✓	✓	✓	
	GRANTS FOR HERITAGE	✓	✓	✓	✓		
	COMMUNITY FUND		✓	✓		✓	✓
	LAND FUND				✓		✓
	AWARDS FOR ALL	✓	✓	✓		✓	
	IMPROVING PUBLIC ACCESS				✓		
	FUTURE ROUTES	✓		✓		✓	✓
	RIDE OUT FUND				✓		
	COMMUNITY PATHS GRANT				✓		
	SMALL GRANTS SCHEME				✓		
	GRANTS PROGRAMME			✓		✓	✓
	ENVIRONMENT GRANTS PROGRAMME				✓		miro

STRATEGIC STAKEHOLDER ENGAGEMENT

Which stakeholders we would need to engage with to deliver each of the theme actions



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RECOMMENDATIONS

The following recommendations are suggested to forward the strategic goals for Equestrian Tourism in the South of Scotland established in this report;

Establish facilitated cross sector working groups to further develop the project concepts identified in each of the strategic actions areas informed by broad specialist knowledge.

Seek appropriate funding to further develop each of the five project plans utilising the knowledge acquired from the working groups to gain support and resource to realise the project activity goals

Investigate the formation of a self-sustaining social enterprise model to facilitate equestrian tourism, that benefits the region's stakeholders and communities and to oversee project implementation in order to establish practical requirements and resource needs and where they will come from.

Comprehensive data collection to be facilitated specifically in regard to equestrian, regional and accessible tourism, also equestrian tourism within the adventure tourism sector and its worth to the Scottish economy and more specifically the South of Scotland to benchmark, use as supporting evidence and inform future activity.

A NOTE ON LEGACY

The Strategic Framework set out in this report has been developed to support the realisation of an economically, holistically and regeneratively successful Equestrian Tourism ecosystem within the South of Scotland based on the unique culture, heritage and environmental assets that exist in the region.

By looking at the 5 key themes around skills, positioning, culture and heritage preservation and celebration, infrastructure and product innovation that are necessary to provide this, 5 strategic project outlines have been developed that, with the support of further funding, resource and stakeholder involvement can evolve into a premium, inimitable Equestrian Tourism

proposition creating jobs, infrastructure and economic growth for local communities within the South of Scotland.

Although the opportunity is particularly strong in the South, these themes for Equestrian Tourism development could, in future be used to broaden the scope of a national Equestrian Tourism offering, routed in the culture of the South but inclusive of a broader offering built sustainably from within other local Scottish communities, projecting Scotland nationally as a leading destination for Equestrian experiences and strengthening the diversity of Scotland's Adventure Tourism product.



Weston Farm B&B Dunsyre, already offers stable accommodation for visiting horses, a professionally surfaced all-weather outdoor arena and 900 acres of off-road hacking for visitors to enjoy. Photo Credit: H Hiram

PARTNERSHIPS

Thank you to Nature Scot for supporting this strategic development framework and also the ongoing support and advice of The British Horse Society (Scotland). Other supporters and stakeholders of the Ride Scottish Borders project and the further feasibility study are listed below.

- Scottish Borders LEADER
- Scottish Enterprise
- The British Horse Society (Scotland) (BHSS)
- Scottish Borders Council
- Dumfries & Galloway Council
- SUW Rangers
- Forestry and Land Scotland
- South of Scotland Destination Alliance (SSDA)
- Energise Galashiels
- Future Hawick
- Buccleuch Estates
- South of Scotland Enterprise (SOSE)
- Accommodation providers, landowners and managers across the South of Scotland.
- Scottish Endurance Riding Club (SERC)
- Ian Stark Equestrian
- Kailzie Stable
- Lesley Douglas Stables
- Midlothian and Borders Tourism Action Group (MBTAG)
- Scottish Borders Tourism Partnership (SPTP)
- Visit South West Scotland (VSWS)
- Individual riders and visitors who have contributed and fed back throughout the projects
- Scottish Borders & Dumfries & Galloway access forums
- Scot Ways
- Pennine Bridleway (Yorkshire Dales National Park Authority)
- Peak District National Park
- Northumberland County Council