

Carmarthenshire Equestrian Access Strategy

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1) Introduction

Carmarthenshire County Council has developed this Equestrian Strategy in recognition of the interest in and demand for equestrian facilities in the County.

The need for an Equestrian Strategy to 'promote and develop an accessible network for equestrian use' was identified in the Carmarthenshire Rights of Way Improvement Plan 2019-2029.

According to the latest BETA National Equestrian Survey (2023), the estimated horse population in Britain currently stands at 726,000 with 27 million people in the UK reportedly having an interest in the equestrian industry.

The number of regular horse riders in the UK has seen a steady increase from 1.8 million regular horse riders recorded in the 2019 BETA survey to 1.82 million in 2023.

BETA survey data shows the number of horse owners in the UK has fallen from 374,000 in 2019 to 331,000 in 2023 with some associated reduction in regular horse-riding participation amongst the 45+ age group. Results do however show a 30% growth in participation amongst 25 - 44-year-olds.

The 2023 National survey revealed an economic value in equestrian spending of £5 billion per annum. In addition, the British Horseracing Association (BHA) estimates that their sport generates "£4.1bn in direct, indirect and associated expenditure annually for the British economy".

The British Horse Society (BHS) commissioned research into health and wellbeing benefits of recreational horse riding in the United Kingdom. The report, published in 2010, assessed horse riding as a form of moderate intensity exercise, and reliable evidence indicates that physical exercise produces several wellbeing benefits such as social interaction and changes to anxiety levels and self-esteem.

In producing this strategy, we have engaged with the equestrian community, other recreational users, as well as relevant groups and businesses.

The strategy sets out an Action Plan to achieve both short and long-term ambitions for equestrian provision in Carmarthenshire which are under local authority control. These have been developed in consideration of the principles of the five ways of working set out in the Well-being and Future Generations Act (Wales) 2015.

The Access Reform Programme ongoing in Wales, particularly in respect of the Welsh Government aspiration to 'provide wider access to the countryside', has also been a consideration when developing this strategy.

The strategy has been produced by the Countryside Access team with support and contributions from divisions across the local Authority as well as external stakeholders and other public bodies.

Delivering this strategy will require collaborative working between Carmarthenshire County Council departments. Published actions need to be

deliverable within available resources with any aspirational objectives dependent on successfully securing external funding.

Ongoing budget pressures, existing ROWIP obligations and continuing demand for public access from all user groups must continue to be managed alongside the strategic outcomes of this document.

2) The Carmarthenshire Equestrian Community

According to the Wales Outdoor Recreation Study (WORS) 2016-17 a wide range of activities are enjoyed by people visiting the countryside from horse riding, to picnicking to walking and running.

The study showed that horse riding was an activity enjoyed by 3% of the adults in Wales who took part. Walking was by far the most popular pastime with nearly three quarters of adults in Wales (71.4%) participating. Many of the activities reporting higher figures in the WORS report were assigned to widely accessible activities with little associated cost.

The horse-riding participation figure was amongst one of the lowest recorded in the 2016-17 study. This is indicative of a pastime that, despite the sizable UK figures published by BETA, is enjoyed by a small proportion of the overall population in Wales.

Whilst the WORS findings might indicate a low demand for horse riding in Wales, operational findings in Carmarthenshire demonstrate a pastime which has a considerable level of interest and demand for provision.

The Carmarthenshire ROWIP commitment to develop this strategy is a demonstration that the Authority recognise the equestrian community in the County to be a small but important group.

3) Our Vision

We want to enhance the equestrian access offer, under local authority control, in Carmarthenshire.

We will strive to work across the whole local authority portfolio to seize opportunities to improve and, where possible, broaden equestrian access, working collaboratively with our partner organisations to realise our objectives.

By delivering the actions contained in this strategy we want to maximise the potential health, wellbeing & economic benefits that equestrianism brings to our County.

We intend to see the outcomes of this strategy delivered for our equestrian community, within current resources in this challenging economic climate for local government.

4) Existing Equestrian Opportunities

Current opportunities for horse riders and carriage drivers in Carmarthenshire vary significantly across the County both in availability and condition.

Bespoke facilities, venues, roads, paths and ways offer a mix of both on and off- road public riding and driving routes, permissive access and fee-paying equestrian destinations.

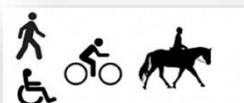
The access provided by roads, paths and ways (combined) are seemingly considerable in length however routes are often broken up by busy roads which can inhibit use.

4.1 Public Rights of Way (PROW) Network

Carmarthenshire's PROW network, recorded on the County's Definitive Map and Statement (excluding Bannau Brycheiniog National Park), offers a total of 166.06km of bridleways, which horse riders are legally entitled to use.

The network also has 82.9km of Restricted Byway and Byway Open to All Traffic (combined) that both horse riders and horse drawn vehicles are legally entitled to use. The PROW network is managed and maintained by the local authority as the relevant highway authority and is free at the point of use for those legally entitled to use it.

BRIDLEWAY



RESTRICTED BYWAY



BYWAY OPEN TO ALL TRAFFIC



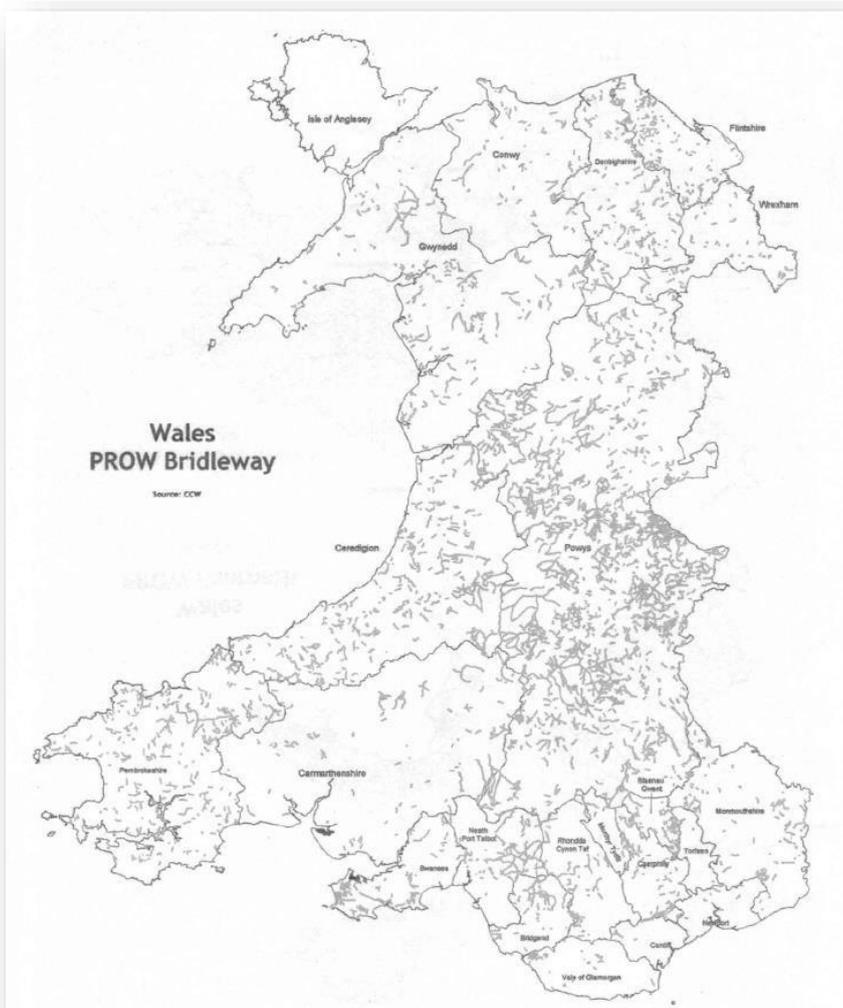
Table 1. below provides details of the respective numbers and length of recorded PROWs in Carmarthenshire, the third largest local authority PROW network in Wales.

Table 1. Network Routes & Length (August 2024)

Route Type	Number of Routes	Length (km)
Footpath	2956	2282.0
Bridleway	138	166.06
Byway Open to All Traffic	88	81.3
Restricted Byway	1	1.6
Totals	3183	2530.96

It should be recognised that currently less than 10% of the total length of PROW network in Carmarthenshire provides any equestrian access opportunities, this figure is notably lower than in surrounding Counties.

Map 1 – Welsh Bridleway network (source former Countryside Council for Wales)



Map 1, produced by the former Countryside Council for Wales (now Natural Resources Wales), shows the bridleway network across the whole of Wales.

This map indicates areas in Wales with good bridleway networks that offer County wide equestrian routes.

It is clear from the map that Carmarthenshire’s bridleway network performs poorly, particularly against its neighbouring Counties.

In the case of carriage drivers who are only entitled to use restricted byways and BOATS, 3.27% of the total network can be lawfully accessed.

BOAT and Restricted Byway networks vary considerably in length across neighbouring Counties so Carmarthenshire's figures in this regard are more in line with other Local Authorities in the region.

Some of the County's bridleways and BOATs are clustered in reasonably small geographical areas where some are quite fragmented.

Map 2. shows the extent and distribution of the PROW network in Carmarthenshire that carry equestrian and/or carriage driving rights.

Public rights of way of all classifications can be viewed online at [Public Rights of Way - Public Rights of Way map \(esdm.co.uk\)](https://esdm.co.uk).

A 2018 data gathering exercise suggested that 110km/66% of the County's bridleway and restricted byway network (combined) was open and accessible. This data is not current so this figure may not be a true reflection of the network today.

2024 has seen the commencement of the Carmarthenshire PROW Network Survey that will see all bridleways in the County surveyed by trained volunteers. Volunteer surveys commenced in April 2024.

It is estimated that it will take approximately 2 years for all PROWs in the project to be surveyed but from the bridleways surveyed to date, 83% are reported to be open and accessible.

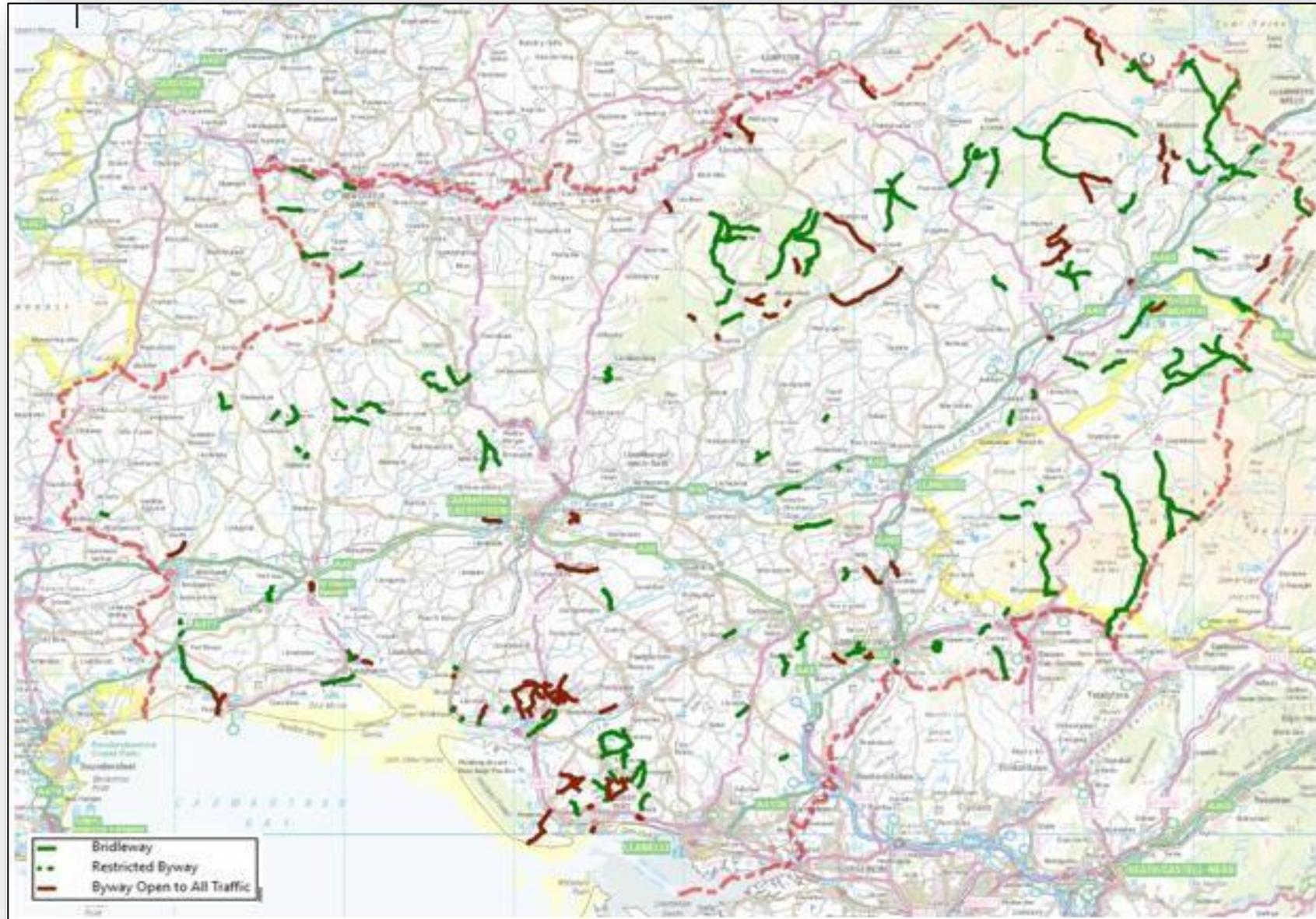
Although both sets of data are incomplete, for the purposes of this strategy, the 2018 data and the volunteer survey data gathered to date provide indicative figures that will help to shape this strategy.

The County's Highways division inspect and maintain the BOAT network.

In November 2018, highways survey data combined with available PROW data at that time suggested that approximately 25km of the BOAT network was fully open and accessible.

Again, the age of the data means this may not provide a fully accurate picture of the current network condition, but it does provide an indicative figure for the purposes of this strategy.

Map 2. Bridleway and BOAT Network in Carmarthenshire



The **Carmarthenshire Public Rights of Way Network Hierarchy** was introduced in 2021. The Hierarchy provides a risk-based framework for prioritising PROW network maintenance, enforcement and improvement projects.

Bridleways, restricted byways, and BOATs are the classifications of PROW sometimes termed 'multi-user' (legally open to multiple classes of user).

With just 9.8% of the overall Carmarthenshire PROW network being 'multi-user' these have been classified as Category B routes on the Network Hierarchy (Med- High) which, subject to resources, has seen and should continue to see some improvement in operational performance in coming years.



Image:wearecyclingUK

Equestrians using bridleways and restricted byways must share the facility with other lawful users, namely pedestrians and cyclists.

The Countryside Act 1968 gave cyclists the right to use bridleways but stated that they must give way to horse riders and walkers.

When using BOATs, equestrians must also share their access with motorised vehicles, it is however generally accepted that these PROWs are predominantly used by non-motorised traffic.

The Countryside Access team are entirely responsible for the County's public footpaths and bridleways alongside keeping the legal record for BOATs.

Most of the BOAT maintenance and enforcement across Carmarthenshire is undertaken by the Highways team.

Under Recorded Rights

It is widely accepted amongst local authorities and organisations focused on PROW access, that equestrian rights of way were often omitted from the Public Rights of Way registration process or put on as footpaths.

The National Parks and Access to the Countryside Act 1949 instigated the process of recording public rights of way on a Definitive Map and Statement so the evidence to support the assertion of 'under recorded rights' is usually located in local authority archives.

The Countryside Access team holds and manages the historical record for PROWs in Carmarthenshire. Documents dating back to the 1949 Act and subsequent registration process do provide some supporting evidence to the claim that there are some routes with under recorded rights across the County.

The Definitive Map Modification Order process enables local authorities to correct the legal record of PROWs where evidence proves, on the balance of probability, that rights should be recorded differently.

The DMMO process requires considerable staff resource due to the time required to properly consider all available evidence, so it is rare for PROW teams to have the capacity to be proactive in investigating these potential equestrian routes.

It is a statutory duty placed on all Highway Authorities to keep their Definitive Map and Statement under continuous review, correcting errors such as under recorded rights as soon as reasonably practicable.

Where DMMO applications to are received, alleging under recorded rights, with supporting evidence, the authority must consider the case and reach a decision within 12 months of receipt.

Those routes identified as potentially under recorded based on a desktop exercise are recorded but with no statutory timeline or limit in Wales to deal with these cases they are addressed when time and resources allow.

4.2 Public Road Network

Carmarthenshire has the second longest network of public roads in Wales. Equestrians are legally entitled to use all classes of public road in the County (excluding motorways), free at the point of use.

The road network is managed and maintained by the local authority as the relevant highway authority. It is subject to variable speed limits from 20mph to the national speed limit.

Carmarthenshire's busiest A roads can exceed 20,000 vehicles per day with an average figure of nearly 9000 vehicles per day; our B roads average approximately 6000 vehicles per day. The classified road network extends to 1865.5km and provides arterial, primary and secondary routes through the County. Carmarthenshire's classified roads link with the quieter unclassified road network and PROW network.

The County's network of minor unclassified roads (UCRs) sees much lower vehicular traffic flows, there aren't comprehensive figures for vehicle numbers on our UCRs but where monitoring has taken place an average of 678 vehicles per day has been recorded.

The unclassified road network is largely subject to the national speed limit.

Map 3. shows the extent of the UCR network which extends to 1658km and (if 'urban' routes are excluded) is reasonably evenly distributed across the County, considerably more so than the multiuser PROW network.

Parts of the UCR network are termed "green lanes" (a descriptive term) where the surface material can be varied

Some "green lanes" have unsealed surfaces, these can often resemble bridleways or BOATs used and are seldom by vehicles.



Of the 1658km of UCRs, 95.8 km (approx. 6%) are currently termed "green lane".

These quieter parts of the road network can provide valuable equestrian access opportunities.

The distribution of these low trafficked routes (excluding urban), as shown on the map, provide links with otherwise fragmented areas of equestrian access in Carmarthenshire. They can also provide routes in areas lacking any other equestrian access provision at all.

Carriage drivers that are confined to only a small proportion of the PROW network must rely heavily on the County's Road network.

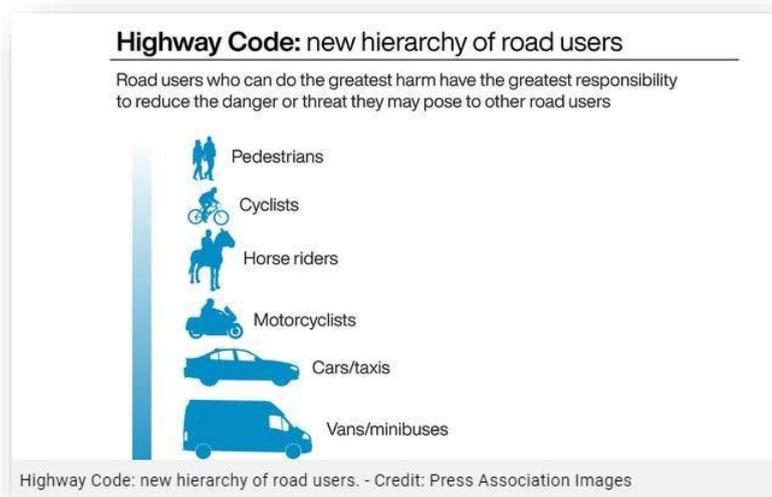
According to rule 204 of the Highway Code, horse riders are one of the most vulnerable non-motorised public road users, alongside pedestrians and cyclists.

On 29 January 2022, the revised Highway Code came into effect following calls to protect vulnerable road users. A 'Hierarchy of Road Users' is one of the 8 published changes.

This hierarchy places those road users most at risk in the event of a collision at the top with road users who can cause the greatest harm bearing the greatest responsibility for ensuring they do not endanger more vulnerable users.

The Department for Transport image below illustrates the hierarchy. Although effective in aiding understanding, this commonly used design used suggests horse riders are at a lower risk of harm than cyclists. It should be recognised that this is not the case, and it is not inferred by the new Highway Code. Both horse riders and cyclists are classed equally as vulnerable road users.

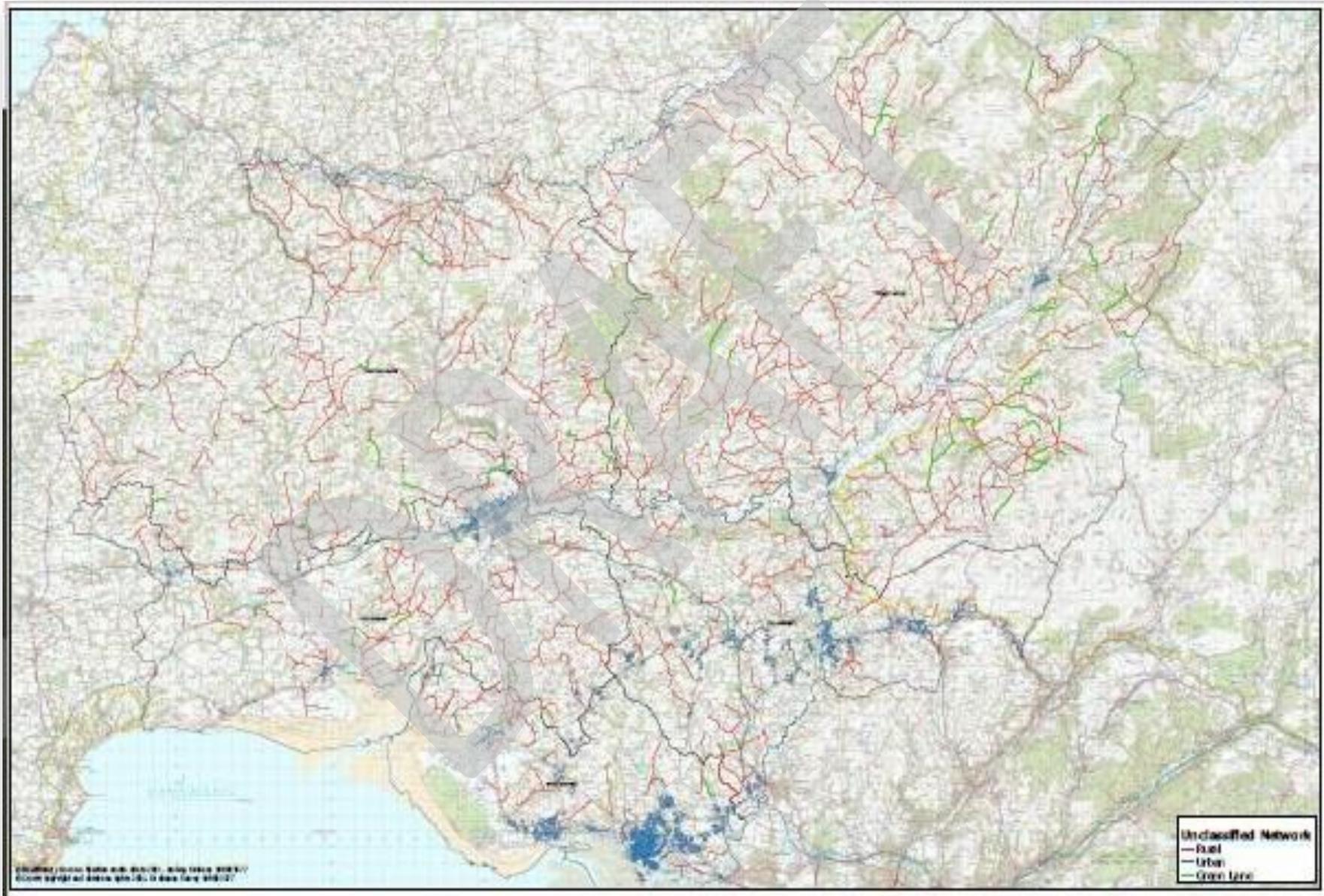
The changes introduce new advisory measures aimed at bringing about behavioral change amongst road users, at present they are not legal requirements.



Carmarthenshire County Council's Environmental Infrastructure division manage and maintain the County's Road network. The Highways team works in accordance with the Carmarthenshire Highways Asset Management Plan (HAMP), a document which sets out a risk-based approach to targeting resources to areas where they are most needed and where investment will derive greatest value.

The Carmarthenshire HAMP is available to view online [Highway Infrastructure Asset Management Policy \(gov.wales\)](#)

Map 3. Unclassified Road Network in Carmarthenshire



4.3 Country Parks



Carmarthenshire's Country and Woodland Parks are managed by the Leisure division. There is currently permissive equestrian access provision at two out of the three main sites.

Llyn Llech Owain Country Park and Mynydd Mawr Woodland Park offer designated permissive off-road horse-riding opportunities that are free to use. Currently permissive bridle paths within Llyn Llech Owain and Mynydd Mawr extend to approx. 6.1km.

There is no parking for horse transport at Llyn Llech Owain at present.

There is currently the facility to park horse transport at Mynydd Mawr at no cost.

There is no equestrian access within Pembrey Country Park. There is however a Byway, 2.7km in length, which travels from Factory Road, towards the main Country Park entrance before turning and following the outside of the park boundary to mean high water at Cefn Sidan beach.

This byway provides statutory access to ride a horse or carriage drive around the southern perimeter of the Country Park to mean high water. Horse riders are permitted to then ride from the byway onto a designated section of the Cefn Sidan beach, owned by Carmarthenshire County Council. Carriage driving is not currently permitted on the beach.

A permit-controlled parking bay has been installed along this Byway, designated by the Environmental Infrastructure division. This bay provides parking for horse transport in a safe location for loading and unloading horses, so that equestrians can safely park and enjoy the byway and access to the beach.



4.4 Cycle Paths (Shared use Paths)

Carmarthenshire has an extensive network of cycle paths, currently in the region of 106km.

Some routes form part of the National Cycle Network that has been developed and is managed and maintained by Sustrans.

Other routes have been constructed by Carmarthenshire County Council to form part of either the Active Travel network or for 'Safer Routes' schemes.

Sustrans manage and maintain 19km of the cycle network in Carmarthenshire. 2.4km of the Sustrans network near Swiss Valley (Llanelli) is open for permissive horse-riding access alongside designated cycling and walking. Equestrian access to this section of path has been authorised for several years and was designated based on suitability.

At present, as part of the Sustrans 'Paths for Everyone' initiative, all Sustrans managed routes in the County are currently under review, an exercise being undertaken to identify more routes suitable for providing access to horse riders across their network.

Sustrans and the British Horse Society have entered a memorandum of understanding to identify and pursue opportunities to promote the public benefits of multi-modal use, including equestrians, of the National Cycle Network.

The multi-modal promotion message reaches out to national, regional, and local government, statutory bodies, opinion formers, other mutual partners, and potential funders.

The local authority's cycle path network has been developed for use by cyclists and walkers only. The network has primarily been constructed with Active Travel funding, for the purposes of safe, sustainable and active travel.

Strategic development of the County Council's cycle path network, its ongoing maintenance and continuing improvement is led by the Environmental Infrastructure division.

4.5 Welsh Government Forestry Estate

The Welsh Government Woodland Estate (WGWE) is managed by Natural Resources Wales (NRW).

A significant proportion of the estate has been designated permissive access for equestrians.

Both horse-riders and carriage drivers can make use of parts of the woodland estate across Carmarthenshire for riding under the terms of a Concordat between Natural Resources Wales and the British Horse Society (BHS).

The WGWE extends to some 7167 hectares which is accessible to equestrians in Carmarthenshire. The two major blocks at Brechfa and Crychan that provide this access are in the northern part of the County.

The WGWE contain a network of bridleways and forest roads. These forest roads were constructed for the purpose of timber extraction and forestry operations that also provide permissive recreational access for horse-riders, and other recreation

users. These forest roads are maintained prior to and following forestry operations and provide wide and firm routes. These routes are also suitable for carriage driving.

There is open access for carriage driving in Crychan and NRW operate a permission system for the remainder of the WGWE. Further information on these locations is available at [Natural Resources Wales / Horse riding and carriage driving](#).

There are some WGWE sites excluded from the permissive access agreement, Pembrey forest is one such site. Equestrian access at this site is allowed but requires users to purchase an annual permit from the Pembrey Conservation Trust who manage the equine access on behalf of NRW [Pembrey Conservation Trust: Equine Permits \(pembreyconservationtrust.blogspot.com\)](#)

Pembrey forest is a popular destination for horse riders and with increasing demand, NRW are aware of concerns regarding adequate horse transport parking for permit holders. NRW will work with the Local Authority to consider options on how these concerns can be addressed.

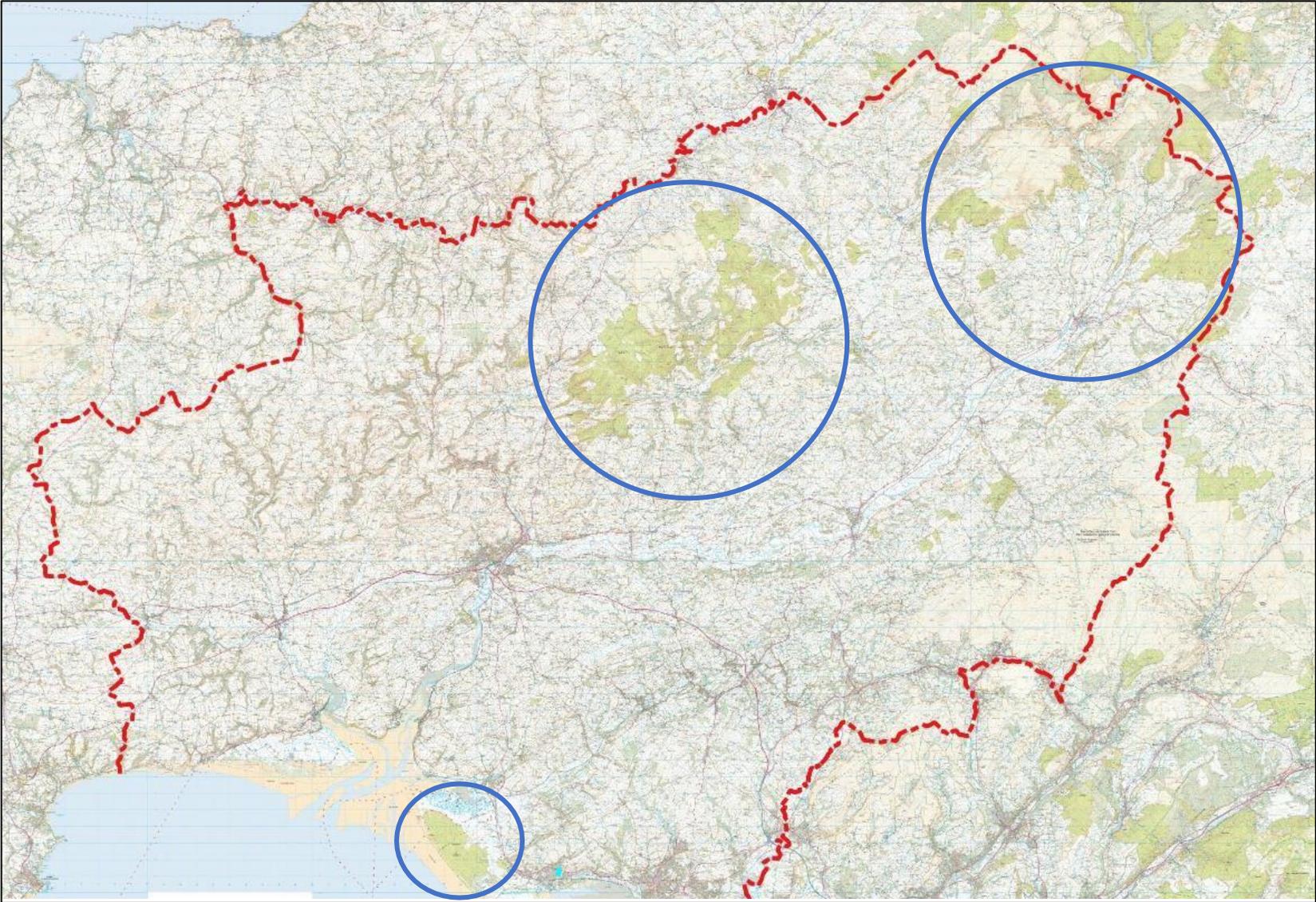
Map 4 shows the main areas of WGWE in Carmarthenshire shaded pale green and circled in blue.

It is important to remember that this access is permitted within working forests and certain locations may be closed off for safety reasons or during certain times of the year due to forestry operations. NRW request that all equine users follow and obey any safety signage provided on site.

Carmarthenshire County Council has minimal involvement in respect of the permissive equestrian access provided across the WGWE, it is managed and controlled by Natural Resources Wales.



Map 4 – Areas of Welsh Government Forestry Estate



4.6 Riding Centres

For non-horse owners, opportunities to ride or carriage drive are reliant on riding centres that offer the necessary facilities for a fee. Carmarthenshire is well served by riding centres located across the County offering lessons and riding experiences (Beach/Forest/Mountain rides) for all ages.

Carmarthenshire's riding centres offer their services to people of all abilities from complete beginners to advanced equestrians, many also offer riding for the disabled (RDA) opportunities.

The 2022 BHS annual report revealed that over 8.7 million riding lessons were safely delivered through their BHS approved riding centres.

Most riding centres across the UK are privately owned and run. Carmarthenshire County Council is not involved in the operational planning or delivery of equestrian opportunities through the County's riding centres, this strategy will not therefore be proposing any interventions at riding centre facilities.

4.7 Competition & Training Venues

Carmarthenshire has several venues which offer opportunities in numerous competitive disciplines. These venues run organised competition and training events, normally for a participation, entry or membership fee.

From horse racing opportunities at Ffoslas Racecourse, harness racing at Amman Valley Trotting Club to multi-discipline venues such as Coleg Sir Gar Equine campus, Beacons Equestrian, Coombe Park and Little Mill Equestrian Centre, the County offers good range of opportunities for competitive equestrians.

Use of these types of competition facility requires competitors to have their own public liability insurance.

Most competition venues across the UK are privately owned and run. Carmarthenshire County Council is not involved in the operational planning or delivery of equestrian opportunities at these types of venues; this strategy will not therefore be proposing any interventions at these types of facilities.

4.8 Private Hire Venues

There are several private hire venues in Carmarthenshire which offer facilities to hire for most equestrian disciplines, for a fee.

These venues offer a range of facilities, predominantly based on all-weather surfaces to allow use all year round with parking for horse transport so visitors can travel their horse(s) and make use of facilities regardless of location.

Use of these facilities will normally require participants to have their own public liability insurance.

These venues are privately owned and run. Carmarthenshire County Council is not involved in the operational planning or delivery of equestrian opportunities at these types of venues; this strategy will not therefore be proposing any interventions at private hire facilities.

5 Legislation & Policy Context

Currently there is no enacted National legislation or approved Policy that relates to the promotion or enhancement of equestrianism.

Active Travel (Wales) Guidance 2021 contains published objectives relating to equestrian access.

The 2005 British Horse Industry Confederation strategy for England & Wales included, amongst its eight published aims, the goal to increase access to off-road riding and carriage driving.

This 'Strategy for the Horse Industry in England and Wales' reached the end of its 10-year term in 2015. There is no published review of the strategy to evaluate its delivery however, the Access Reform Programme in Wales, which includes proposals to increase opportunities for horse riders, has followed on from the 2005 strategy.

The ongoing Access Reform Programme in Wales has the potential to have a significant impact on equestrian access opportunities in the County. Through the reform programme the Welsh Government wants to provide for wider access to the countryside for the purposes of recreation.

Reforms may lead to key legislative change to enhance the accessibility of the PROW network for horse riders (and cyclists), although the proposals would not see a change to access opportunities for carriage drivers.

The ongoing Access Reform process must be considered in developing this strategy although any actions arising from the document must be deliverable within current legislative frameworks.

The wider duties and obligations of the local Authority imposed by key legislation and policy (both national and local) must also be acknowledged and embedded where possible.

National (in date order)

- **Welsh Government Active Travel Act Guidance 2021**

Primarily guidance that supports the duties and objectives of the Active Travel Act (2013) such as, mapping active travel routes, delivering new and improved active travel routes, having regard for walking and cycling and promoting active travel journeys.

The latest 2021 guidance does however include provisions to ensure equestrians are not disadvantaged by active travel initiatives along routes which they currently enjoy and where there is high demand along a route from horse riders, the feasibility of accommodating them should be assessed.

This addition to the guidance may have a notable impact on actions developed within this strategy to enhance the local authority offer for Equestrians in Carmarthenshire.

- **The Environment Act 2021**

The Environment Act 2021 operates as the UK’s new framework of environmental protection, embedding environmental protection into law. The Act offers new powers to set new binding targets, including for air quality, water, biodiversity, and waste reduction.

Some of the new statutory duties introduced by the 2021 Act have a bearing on the actions developed for this strategy, for example, in the interests of environmental protection, due regard will need to be given to the environmental principles policy statement.

The duty to conserve and enhance biodiversity will also need be considered when planning the delivery of strategic actions. Often, access provision requires land clearance, construction and/or infrastructure across areas of open countryside or over undeveloped land, potentially rich in biodiversity.

- **Well-being of Future Generations (Wales) Act 2015**

Ensuring that future generations have at least the same quality of life as we do now is the primary objective of the Well-being of Future Generations (Wales) Act 2015.

The Act puts in place a stronger, more coherent sustainable development framework for Wales through a set of seven well-being goals, a sustainable development principle, and a strong duty for all public bodies to carry out sustainable development, reflecting the need to improve the economic, social, environmental and cultural well-being of Wales.

This Equestrian Strategy delivers the key objectives of the Well-Being of Future Generations Act as shown in table 2 below:

Table 2. 7 Well-being Goals of the Well-being and Future Generations (Wales) Act 2015

Well-being Goal	Carmarthenshire Equestrian Strategy
A prosperous Wales	<p>Wales and the West is the second largest horse-riding region contributing to a £9.1 billion annual equestrian spend across Great Britain (<i>BETA Equestrian Survey 2023</i>)</p> <p>Carmarthenshire’s equestrian community is a small percentage of the total population however, annual spend a proportionately higher per person than in other activities such as walking, running and cycling.</p> <p>Equestrians contribute to the economy and provide opportunities for employment and economic activities such as livery, competition centres and facilities for hire of which the County has several.</p> <p>Improving access for equestrians through a suite of medium to long term actions, working with relevant partners and involving stakeholders, should make Carmarthenshire more attractive to equestrian users in the medium term and to businesses and tourism operators in the longer term.</p>

<p><i>A resilient Wales</i></p>	<p>An enhanced and more connected equestrian access offer in Carmarthenshire would contribute to supporting Wales' ability to adapt to climate change.</p> <p>By providing opportunities for recreational equestrian activity more widely, the need to travel to areas of better provision in the County, or further afield, would be reduced.</p> <p>The impact of high visitor numbers to areas with superior access provision would also be reduced, spreading visitor numbers across the County.</p>
<p><i>A healthier Wales</i></p>	<p>Open space has the potential to provide benefits to health and wellbeing and can assist in mitigating the causes and effects of inactivity.</p> <p>Open spaces can also provide arenas for social interaction and community activities and have a key role to play in underpinning other key strategic documents, such as the Health, Social Care and Well Being strategy.</p> <p>The Carmarthenshire Equestrian Strategy has the potential to use the benefits of open spaces to improve the health and well-being of the equestrian community.</p> <p>This is true particularly of women over the age of 45yrs who have been identified by our survey as prevalent in the County and trends show are less active in other popular open space pastimes such as cycling and running.</p> <p>Strategic actions that improve provision in areas with high numbers of horse ownership would provide residents with opportunities local to them and could contribute towards improved health within those communities.</p>
<p><i>A more equal Wales</i></p>	<p>Equestrian access infrastructure by its very nature, is inclusive. It provides opportunities not only for horse riding and carriage driving but for cycling, running and for people with limited mobility.</p> <p>The features of equestrian provision in some areas may restrict access to some users however, we will endeavour to develop and deliver strategic actions which extend the enhanced access offer to all members of society to enjoy.</p>
<p><i>A Wales of cohesive communities</i></p>	<p>This strategy involves communities, the Local Access Forum, other organisations and stakeholders in delivering strategic actions targeted at enhancing the equestrian access offer in Carmarthenshire.</p> <p>Working jointly in this way has been shown to improve community cohesion and reduce anti-social behaviour.</p>
<p><i>A Wales of vibrant culture and thriving Welsh Language</i></p>	<p>Landscapes play a significant role in distinct cultural practices across the County such as building techniques and locally specific art and literature.</p> <p>This strategy will act to protect any cultural aspects of the land and wider environment through which equestrian access is being maintained, enhanced or expanded.</p>
<p><i>A globally responsible Wales</i></p>	<p>The environment supplies all our material resources, this strategy will ensure that in maintaining, improving and developing equestrian access under local authority control, we use only our fair share.</p> <p>Providing equestrian opportunities for people in their local areas will help cut down on the need for equine transportation and therefore the carbon footprint of residents and visitors alike.</p>

It should be noted that each policy/priority within the Equestrian Strategy is not required to meet all seven goals. Instead, through having a comprehensive suite of strategic actions, the strategy as a whole will meet the requirements of the Well-being of Future Generations (Wales) Act 2015.

- **Road Safety Framework for Wales 2013**

In light of the Welsh Government commitment to stop deaths and injuries on Welsh roads, the Road Safety Framework for Wales was published in 2013.

The framework included three targets for casualty reduction to be achieved by 2020 alongside 98 actions for the Welsh Government and partners to undertake.

Equestrian road users were identified in the framework as vulnerable on the road network with any collision involving a horse being potentially life threatening for all involved.

The published Welsh Government action is to ‘work with representatives of the horse-riding community to understand their road safety concerns and facilitate engagement with other partners.’

The published action for partners such as local authorities is to ‘actively engage with the horse-riding community and consider whether any road safety interventions should be introduced, where there are significant numbers of horse riders and/or road traffic collision involving horses.’

- **Equality Act 2010**

The Equality Act 2010 legally protects people from discrimination in the workplace and in wider society.

It is against the law to discriminate against anyone with one of or more of 9 protected characteristics including age and sex and legal protection from discrimination applies in almost all aspects of day-to-day life including as a consumer and when using public services.

The authority must actively consider the Act when we deliver our public services, we therefore must develop and deliver all aspects of this strategy, giving Equality Act obligations due consideration.

- **Countryside & Rights of Way (CROW) Act 2000**

The CROW Act 2000 contains measures to improve public access to the open countryside and registered common land whilst recognising legitimate interests of those who own and manage that land. The improved access does not however extend to equestrian users at present.

The Act did introduce a new category of public right of way – Restricted Byway – which carries rights on foot, horseback, leading a horse and for all non-mechanically propelled vehicles. This category was implemented to replace the ambiguous RUPP category (road used as public path) delivering the benefit of clarity to horse riders and carriage drivers on their rights to use certain routes with RUPP classification.

It also contains additional powers for appropriate clearance of overhanging vegetation for horse riders, a provision that assists in safeguarding a safe and accessible equestrian network.

- **Highways Act 1980 (HA80) & Wildlife & Countryside Act 1981 (WCA81)**

As the two principal pieces of Public Rights of Way legislation that record, protect and maintain the network, compliance with both HA80 and WCA81 is embedded in all aspects of PROW work, planning and policy delivered by the authority.

The application of HA80 and WCA81 safeguards the legal record of PROWs with equestrian rights and ensures those routes are maintained.

Actions developed for this strategy must seek to meet these statutory functions whilst seeking enhancements for equestrian access along PROWs in line with the strategy vision statement.

Local (in order of relevance)

- **Carmarthenshire Rights of Way Improvement Plan 2019-2029**

The current Carmarthenshire ROWIP is the primary document that steers management of PROWs and other forms of recreational access in the County. The plan spans 10 years and includes 5 primary Aims, 24 Policies and a suite of 47 actions for PROW and access improvement.

The ROWIP identified the need for an Equestrian Strategy and supports its delivery at Policy level. However, beyond satisfying this principal objective of ‘producing an Equestrian strategy’, the strategy outcomes should align with wider ROWIP goals.

- **Carmarthenshire PROW Network Hierarchy 2021**

The Carmarthenshire PROW Network Hierarchy was adopted in 2021. It was created and implemented for the purposes of developing a risk-based approach to the prioritisation of and resource allocation for, the maintenance, improvement and enforcement of the PROW network.

The Hierarchy supports the delivery of Carmarthenshire's ROWIP objectives.

The multi-user parts of the network offer access to the widest range of recreational users including those often in the minority. Bridleways, restricted byways and byways were therefore identified as Med-High priority routes.

This categorisation highlights the importance of Carmarthenshire's multiuser PROWs and has supported the delivery of an Equestrian Strategy. The importance of multiuser PROWs will strengthen the case for PROW based actions to enhance the equestrian network, developed in this strategy.

- **Carmarthenshire Highways Asset Management Plan (HAMP) 2018**

The Carmarthenshire HAMP was adopted in 2018. It was developed in recognition of the vital role the highway network plays in facilitation the safe movement of goods and people in the County and the challenge of maintaining the highway network in a serviceable condition against a weight of public expectation and funding reductions.

The recreational value of the Highway Network and its potential to serve equestrian users is not a key consideration within the HAMP however, as lawful users of the network, equestrians will feel the impact of the management plan as it is delivered, alongside all other frequent users.

The key findings of the HAMP, particularly around the prioritisation of the road network will have a considerable influence on the actions contained in this strategy that are reliant on the Highway network.

- **Carmarthenshire Highways Maintenance Manual 2021**

The Highways Maintenance Manual forms Part 4 of the HAMP and is being developed as a portfolio of specific manuals that cover the management of a range of highway asset categories.

The maintenance approach to the assets along routes considered valuable for equestrian use will be contained in these manuals once completed and will have a considerable influence on the actions contained in this strategy that are reliant on the Highway network.

- **Carmarthenshire Well-being Plan - The Carmarthenshire We Want (2018-23)**

The Carmarthenshire Well-being Plan was published by the County Public Service Board (PSB) in 2018 and it sets out its local objectives to improving the economic, social, environmental and cultural well-being of the County and the steps it proposes to take to meet them.

Carmarthenshire's Well-being Plan focuses on the delivery of four objectives namely Healthy Habits, Early Intervention, Strong Connections and Prosperous People and Places.

As a local strategy, the suite of actions that are developed in this document should align where possible with the wellbeing objectives to assist in delivering the PSBs wellbeing goals.

- **Carmarthenshire Local Development Plan 2018-2033**

The Local Development Plan (LDP) sets out proposals and policies for the future use of all land within Carmarthenshire (excluding the part contained within the Bannau Brycheiniog National Park) and is part of the development plan framework for Wales.

The Council has submitted the *2nd* Deposit Revised LDP and associated documents to the Welsh Government and Planning Environment Decisions Wales (PEDW) and Independent Examination of the deposited LDP is due to commence on 15 October 2024.

Given the implications access can have on land use in the County, the actions contained in the final Equestrian Strategy should take account of any Aims, Policies and Actions published in the LDP.

6 Public Consultation

A mixed methods approach to ascertaining views of the Equestrian opportunities in Carmarthenshire took place via consultation during the period from 21st June 2021 to 25th July 2021.

We asked what respondents' interests and experiences are of equestrianism in the County, what people enjoy, the opportunities they see and the barriers they face.

A survey was administered electronically via the Council's online consultation page on the website. Moreover, it was distributed directly to organisations and clubs.

With very little existing data available for equestrianism in Carmarthenshire or Wales as a whole, the survey was extensive to build a well evidenced and accurate picture of the industry in Carmarthenshire.

The survey asked respondents for their views on various elements of equestrianism in Carmarthenshire to help shape the Equestrian Strategy.

Equestrian participants were asked about the general background of equestrianism within their household including opportunities and barriers to equestrian participation in Carmarthenshire, this included those travelling to Carmarthenshire to ride/drive as non-Carmarthenshire residents.

Businesses were asked about their Equestrianism trade within the County.

Councillors and Community Councils were asked about opportunities in their administrative areas and organisations/groups operating within the County were asked about their membership and priorities for equestrianism.

A total of 502 responses were received from various sections of the equestrian community.

Most respondents who took part in the consultation were individuals (95%). Additionally, 17 businesses, 6 organisations/groups, 1 Town and community council and 1 local elected member completed the online survey. A breakdown of respondents is shown in figure 1 below.

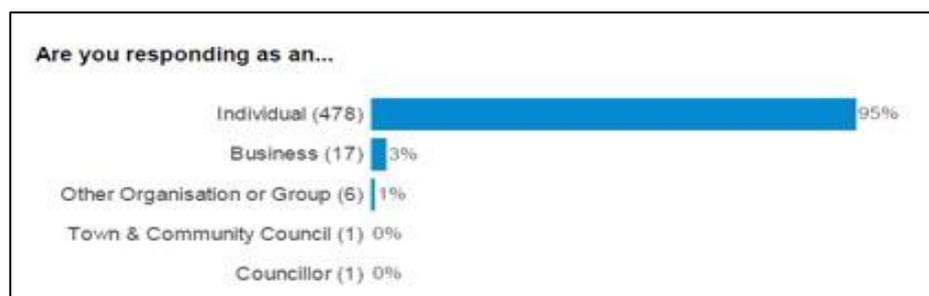


Figure 1 – Breakdown of respondents

7 Evaluation of Key Consultation Outcomes

7.1 Age, Gender, Ethnicity and Disability

Of those individuals who completed the public consultation over half were over the age of 45.

The gender of consultation participants was primarily female with 416 women (87%) participating; 52 (11%) men took part.

White ethnicity was predominant amongst participants with 95% reporting that they were of White ethnicity.

These outcomes illustrate that the equestrian community in Carmarthenshire consists of mainly women of white ethnicity, in the upper age bracket.

This age and ethnicity result is perhaps not surprising when you consider that both 2011 and 2021 Census data for Carmarthenshire see those over the age of 45 years situated in the largest population age bracket. In addition, 95.6% of the Carmarthenshire population is of White ethnicity (*2011 Census data*).

The outcome also largely reflects the UK picture of gender and age in equestrianism. The *2023 British Equestrian Trade Association (BETA) National Equestrian Survey* found that 58% of horse riders were female. The figure for male participants was 38%, a reported increase on previous years and a new category of non-binary saw an 8% result. However, despite the increasing male rider figures, female equestrians remain the dominant gender nationally.

BHS statistics published in November 2019 state that horse activities engage a high proportion of 'women participants and participants over the age of 45' (*Statistics for Equestrian Access in England & Wales, BHS, Nov 2019*).

More recent 2023 BETA data however, shows that participation in this higher age bracket has seen reduced numbers with the 25-44 yrs the dominant age group. This altering age demographic had not presented itself in Carmarthenshire in 2021 however, if our consultation were to be re-issued we may now see some change to the County's equestrian age profile.

The BHS statistics also state that a high proportion of people with disabilities are engaged by horse activities; our survey results do not fully support this assertion with majority of participants (91%) noting that they do not have a long-term disability.

Whilst the disability result does deviate from the BHS reported national trend, it should remain a consideration in light of the Equality Act 2010.

The gender demographic of equestrianism differs to that of other popular public access pursuits.

Ramblers Association figures illustrate that walking is enjoyed equally by both genders across a broad age range from 16 years to 65+ years (*Ramblers Association Facts and Figures 2 – Participation in Walking*).

Statistics from the *Sport in Wales UK Dossier, Walking and Cycling in Wales: Active travel 2018-19 and Cycling UK Statistics 2019-20* indicate men and younger people are more likely to participate in cycling.

The demographic picture of equestrianism from our survey data indicates a prevalence of demand from female residents and female visitors for equestrian opportunities in Carmarthenshire.



Where access opportunities for walking, cycling, horse riding and carriage driving cross-over, the differing demography of those participating could have a bearing on both the attitudes of user groups and the feasibility of sharing access opportunities safely and equally.

Image: British Horse Society

7.2 Household Participation

Over half (51%) of the 439 **individual** respondents indicated that 1 adult in the household rides or drives horses with a further 36% noting that 2 adults ride or drive.

Added to this, over half (54%) of respondents also indicated that there is at least 1 child under the age of 13 that rides or drives in their household with a further 27% noting that 2 children in their household ride or drive.

Taking all household participation figures into account, the consultation results illustrate a total 650 individuals actively participating in equestrianism in Carmarthenshire, 23% of whom are children under 13 years old.

7.3 Popular Activities and Facilities

According to our survey results the most frequent equestrian discipline for both adults and children is hacking (riding a horse for light exercise either on or off-road at ordinary speeds).

After hacking, the next most frequent activity for both age groups is non-competitive riding, followed by lessons and training. 2023 BETA survey data produced similar results in this area.

Both age groups reportedly participate in competitive riding disciplines far less than non-competitive/recreational disciplines.

The most common areas for participants to ride or drive was the road, PROWs were the next most popular facility, followed closely by arena riding. Riding on own land or in forestry were popular with 44% and 40% of respondents respectively. Beach, Country Park and Mountain riding/driving were least common.

Almost all of the facilities above are most commonly used for hacking and non- competitive riding with the exception of arenas which area more commonly used for lessons and training.

Only 4% of children and 3% of adults reportedly participate in carriage driving in Carmarthenshire.

7.4 Equine Ownership and Equines in Work.

Of the 439 **individual** respondents who completed the public consultation, 50% owned either 1 or 2 horses and 70% reported 1 or 2 horses in work (ridden or driven).

While 22% of respondents reported ownership of 4 or more equines, only 13% indicated that 4 or more horses were in work.

2023 data for microchipped horses, ponies and donkeys provided by Defra (Department for Environment Food and Rural Affairs) reported a total of 32,340 equines in Carmarthenshire based on postcode.

*Please note, a proportional estimate of the total figure was made where postcode areas fell significantly outside of Carmarthenshire.

It has been a legal requirement to microchip all horses, ponies and donkeys, regardless of their use, since 2018.

The same 2023 Defra data also provides a figure for equine owners in each Carmarthenshire postcode area. The total reported figure for horse owners in the County is 8,523, again using an estimated figure for partial postcode areas; this equates to 4.5% of Carmarthenshire's total population.

If you take an average from this data, then a typical horse owner in Carmarthenshire in 2023 owned between 3 and 4 horses/ponies, this is a higher figure than the results of our consultation. The inclusion of donkeys in the Defra data might explain this difference although there may also have been some change in ownership trends since 2021.

The Defra figure takes account of **all** horses, ponies and donkeys that are owned by people living in Carmarthenshire, whether ridden, driven, for breeding or retired. Owing to this, Defra data does not show how many equines are regularly ridden or driven in the County, and therefore have access needs.

To gain a reasonable estimate of the number of **active** equines present across the County we can use number of horse owners in Carmarthenshire (taken from 2023 Defra data), together with the average figure for horses/ponies 'in work' identified as the majority in our 2021 consultation.

By combining these two figures (8,523 owners x 1.5 horses) we can reasonably estimate approximately 12,784 horses and their owners/riders want to make use of Carmarthenshire's equestrian opportunities.

In terms of frequency, our 2021 consultation found that throughout the year, most adults (55%) on average ride/drive 3-5 times a week. This suggests that the estimated number of horses and ponies in regular work, does not equate to a daily demand from 12,000+ equestrians for access/facilities but it does highlight a considerable and regular weekly need within the County.

7.5 Areas of Highest Equine Activity/Participation

Our survey asked participants that live in Carmarthenshire to provide details in respect of which Town or Community Council area they keep their horse(s).

This was used to obtain a picture of the areas likely to have highest equestrian participation based on ownership density, and therefore the areas with greatest demand for access.

Map 5 illustrates the results of the 2021 survey; Towns and Communities identified with the highest number of equines kept by survey participants are clearly visible.

The 2023 Defra microchip data has similarly been mapped to verify the clusters in equine ownership and likely participation/access demand.

Although the Defra data doesn't account for where a horse might be kept as the recorded address in a microchip is that of the owner, in most cases it is likely a horse will be kept in relatively close proximity to its registered owner for the sake of convenience.

Map 6 illustrates the results from 2023 Defra data; postcode areas with the highest density of equines owned in Carmarthenshire is clearly visible.

Maps 5 & 6 exhibit some similarities, with both showing the south of the County with a higher density of equines, although not to the same extents. Both also show the central band of the County showing a comparatively moderate to low density.

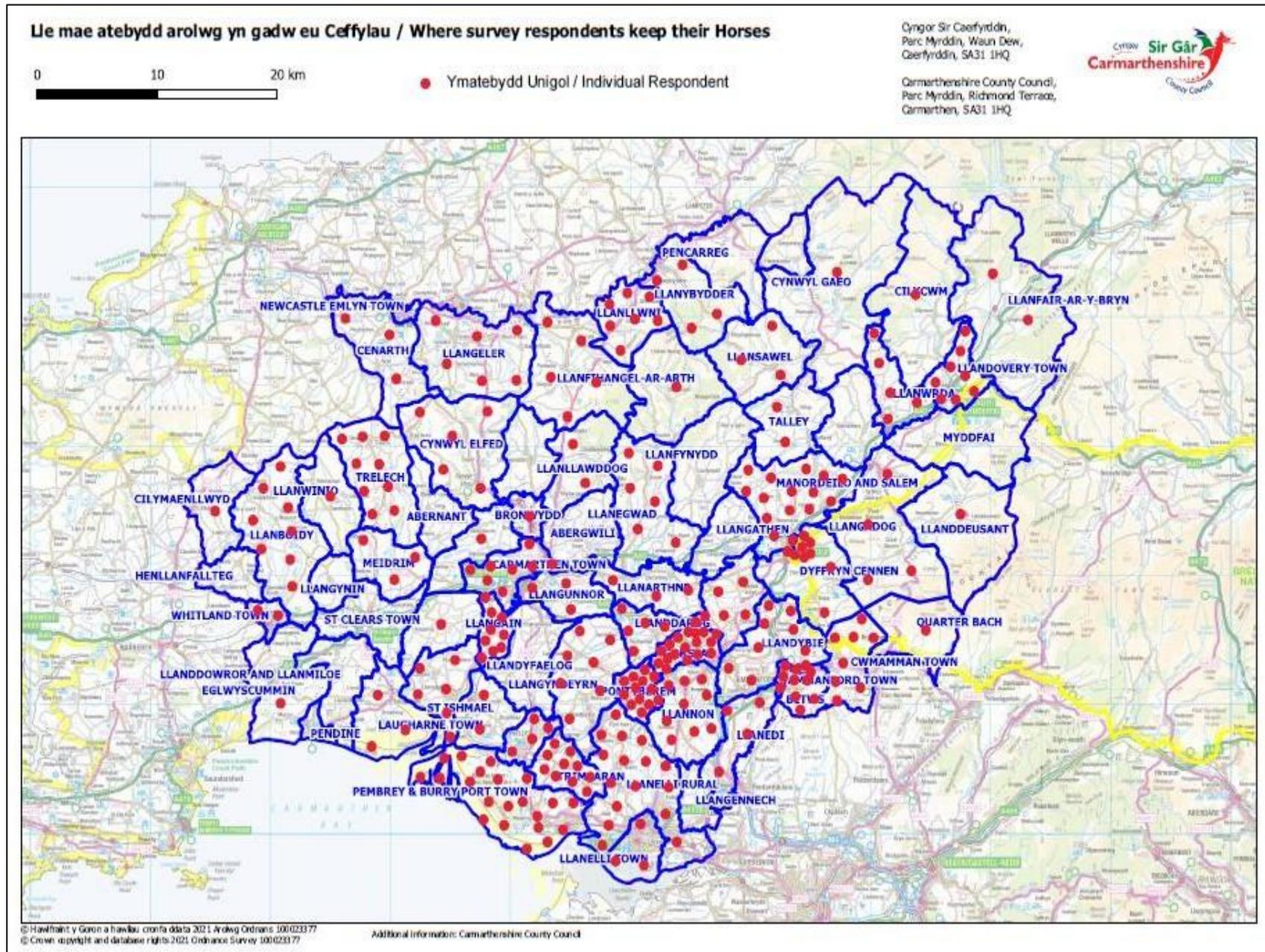
There is however a significant difference between the 2 maps in the north.

2021 survey data illustrated a very low equine population in northern Carmarthenshire, where the Defra data shows a high density across the north, particularly in the northeast.

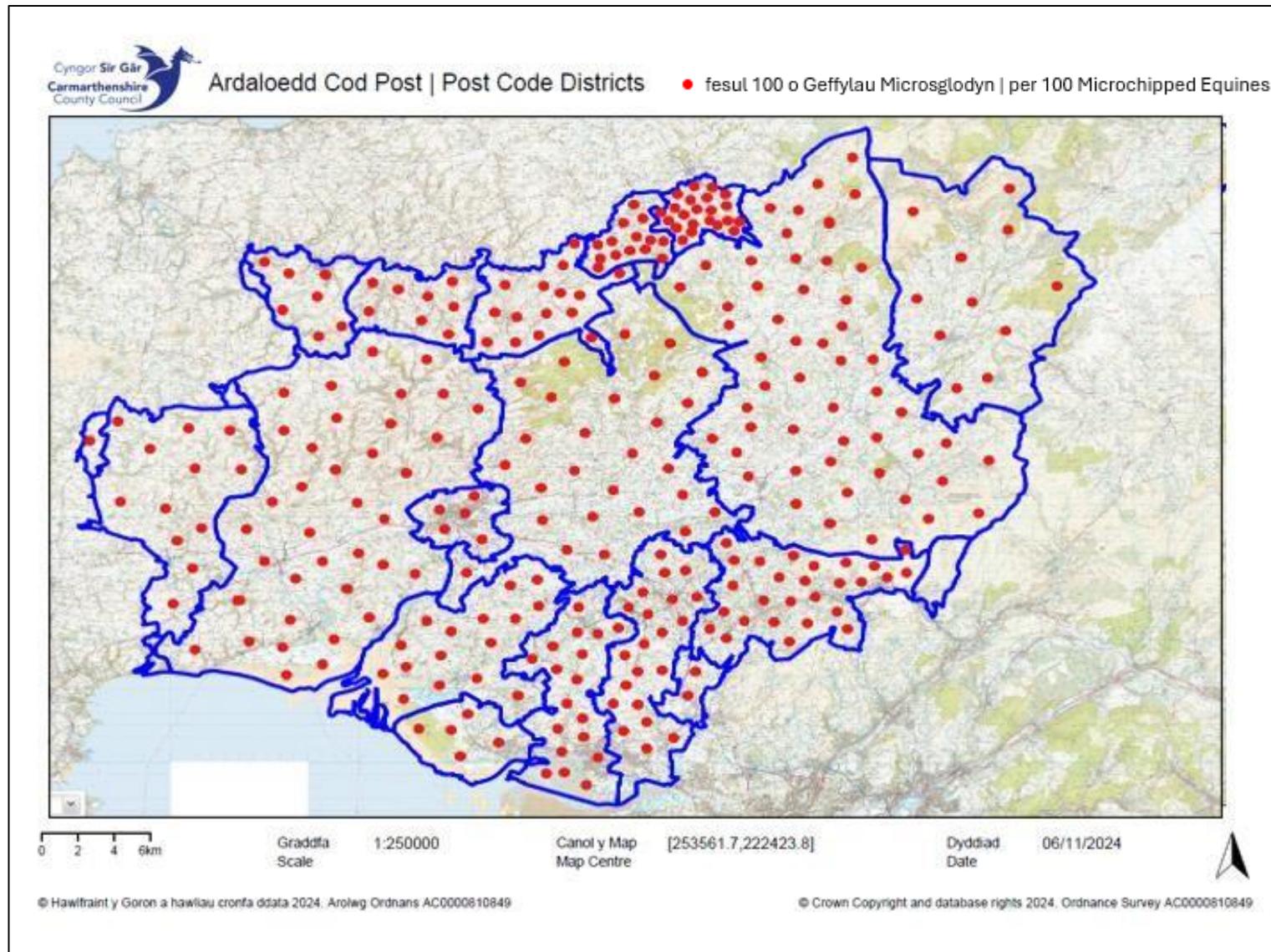
Given the extent of the differences in data from the north of the County, it is unlikely that the passage of time (2021-2023) has created such disparity, more likely is a lack of engagement in the 2021 survey from residents living in north Carmarthenshire.

With the Defra data being more comprehensive, map 6 produced from Defra data, creates the more reliable picture of the equestrian population in Carmarthenshire, backed up in part by map 5.

MAP 5 – Where Carmarthenshire Residents keep their Horses (CCC Survey 2021)



Map 6 – Where microchipped horse owners live in Carmarthenshire (Defra 2023)



7.6 Barriers to Adult Equestrian Participation

The most popular equestrian activities and the areas they take place outlined in 7.3 were hacking and non-competitive riding, most commonly on the road and PROW network.

67% of adults reported often encountering hazards whilst riding/driving both on and off-road. 26% of participants reported that hazards were encountered occasionally; 2% reported that they did not encounter any hazards.

7.6.1 On Road (traffic)

The most significant reported barrier to on-road riding/driving with 97% of respondents identifying it as an obstacle to participation was traffic.

With the number of traffic movements on some of the County's roads and the recognised vulnerability of horses highlighted in 3.2, it is perhaps not surprising that traffic was reported to be of greatest concern to those making use of the road network.

Articles such as the one published 6 January 2021 in Horse and Hound (*I won't let my horse die for nothing': heartbroken owner's determination to make roads safer*) highlight the severity of injuries to both rider/driver and horse that can result from vehicles and horses colliding.

2010-2024 Police accident data (personal injury collisions) has not revealed any road accidents involving a motor vehicle(s) and a horse(s) in Carmarthenshire. Only instances involving personal injury are recorded on the police database; this might explain such a low figure where our data suggests it might be more significant.

Police data alone does not support the findings of our survey.

Since 2010 the BHS have been collecting their own incident data via BHS www.horseaccidents.org.uk. The data is not collected through compulsory reporting so is not conclusive but horse related incidents or accidents involving motorised vehicles can be reported and mapped by individuals.

BHS statistics on horse related road incidents reported via horse accidents site during 2023 have been published this year. In 2023 across the UK, 3,383 road incidents involving horses were recorded. Statistics also reveal that because of these incidents 3 people died and 94 people were injured alongside 66 horse deaths and 86 injured horses. According to reports on the BHS site, 85% of incidents occurred because a driver passed too close or too fast.

The number of incidents recorded by the BHS align with our survey data more so than the police data.

It is safe to say the apparent risk from motor vehicles on Carmarthenshire's roads is a significant barrier to participation in respect of the respondents involved in our consultation, not forgetting that our respondents amounted to an estimated 73% of the total active equestrian community in Carmarthenshire.

The actual incident levels reported to the Police are lower than we would expect to create such a noteworthy barrier to participation, but BHS data does support the concerns raised by respondents in our survey.

The new 'Hierarchy of Road Users' and associated requirement for drivers to give equines 2 metres space whilst passing at no more than 10mph has the potential to reduce the risks associated with riding/carriage driving on roads but with the changes in their infancy we cannot measure any safety improvement at this time.

Although the evidence illustrates a somewhat varied picture of risks to equestrians on our roads, on balance there seems to be more evidence of notable risk and this must be considered when determining the need for mitigation measures in this regard.

7.6.2 On Road (cyclists)

Over half of respondents (62%) identified cyclists as a barrier to on road horse riding/driving.

Cycling is growing in popularity. In 2010 46% of households in Wales owned a bike (*Welsh Transport Statistics 2010*). By 2013-2014, data gathered by Cycling UK saw that across all age groups from 16yrs upwards, 51% of people in Wales owned or had access to a bike. The 16–24 and 25-44 yrs age groups reported the highest figures in this exercise with both groups reporting 63% owning or having access to a bike (*CyclingUK Statistics Wales 2013-14*).

The Active Travel Act (Wales) Act 2013 places a statutory duty on local Authorities to plan and provide a network of routes to make walking and cycling the most desirable way to complete everyday journeys.

Carmarthenshire published a Strategy in 2018 presenting a vision designed to make Carmarthenshire ‘The Cycling Hub of Wales’. The strategy aims to deliver for both everyday local journeys and infrastructure for major events.

Taking all of this into account, it is inevitable that Carmarthenshire is seeing increasing numbers of bicycles on the County’s roads.

A partnership between the BHS and We Are Cycling UK has formed, recognition of the potential issues between these two vulnerable user groups and has led to the ‘Be Nice Say Hi’ campaign.

Positive partnerships such as this and the good practice campaign that has come about as a result might see this barrier overcome to some extent, however it should be recognised within this strategy as an identified barrier that requires consideration.

7.6.3 On Road (dogs)

Just under half of our survey participants (47%) reported dogs as a barrier to on road horse riding/driving.

The BHS incident database also invites reporting of incidents involving dogs. Again, this data is mapped and published on the BHS website however the incidents reported to the BHS are predominantly off-road so do not support the views of respondents in our consultation.

BHS reporting is elective so its data, although useful, is not definitive.

In the absence of any other data, we need to make reasonable and proportionate deductions in respect of dogs as a genuine barrier to on road riding.

7.6.4 On Road (road conditions)

Route condition, infrastructure and maintenance-based options were the lesser identified barriers to

enjoying on-road riding/driving. This result is an encouraging endorsement of the ongoing maintenance of the County's significant road network, despite the budget challenges in this regard.

The Carmarthenshire HAMP and Highways Maintenance Manual will serve to ensure maintenance of the road network will continue to be appropriately prioritised in accordance with risk to safeguard users.

7.6.5 Off-Road (gates)

One of the most common barriers to off-road riding reported by respondents was 'difficult gates' (59%)

Gates, and all path furniture on the PROW network, are a landowner responsibility. Current PROW data for gates on bridleways and byways shows 32 gate related issues reported on the network. In the absence of comprehensive survey data of all bridleways and byways we cannot be certain that this figure represents all gate issues, but it highlights an ongoing need for enforcement and/or improvement by the Countryside Access team.

Responsibility for the maintenance of gates on permissive off-road access sites similarly fall to the landowner however it is not always clear to the user(s) who the landowner might be.

7.6.6 Off Road (surface)

Poor surfaces were reported to be a barrier to participation by 53% of participants.

The surface of PROWs are a local authority responsibility. Surfaces reported as 'poor' are assessed in terms of risk and repaired/improved on a priority basis as resources allow. Presently there are 25 surface related issues logged on either bridleways or byways for attention by either the Countryside Access (bridleways) or Highways teams (byways).

The surface of permissive off-road sites is a landowner responsibility. As with gates, identifying the landowner can be challenging.

7.6.7 Off Road (dogs)

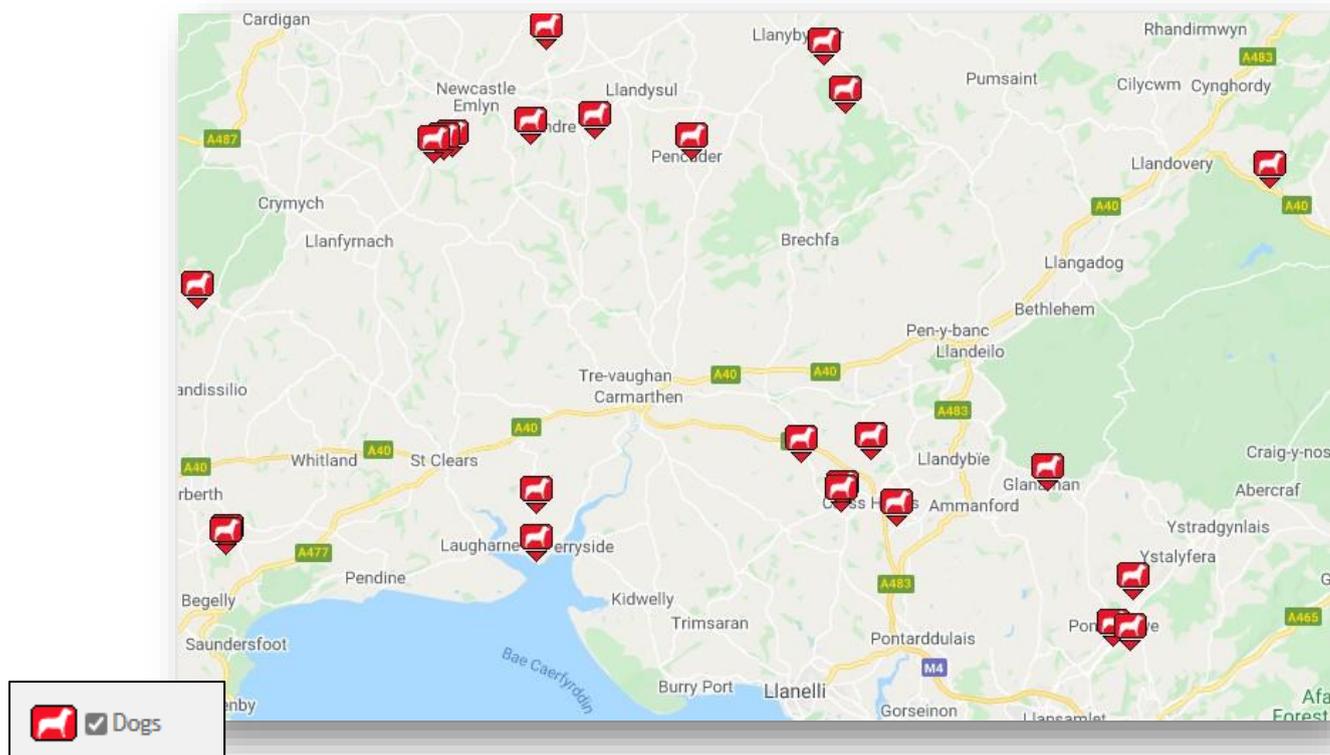
Dogs were reported by 52% of respondents as a barrier to off-road participation.

BHS incident data is also collected in respect of dogs. Map 7 shows the number of reported dog incidents in and around Carmarthenshire between 2010 and 2021. Closer interrogation of the mapping confirms most of these incidents occurred off-road.

The overall picture illustrated by the mapping shows a moderate number of incidents but when broken down year on year, there are on average 1 to 3 reported incidents per annum.

This is a figure that does not correlate with the results of our survey however as with the reported concern over dogs on road, the BHS reporting is elective, so its data is useful but not conclusive and similarly our deductions need to be reasonable and proportionate based on the available data.

Map 7 - BHS Incident Data involving Dogs (2010-2021)



7.6.8 Off Road (cyclists)

37% of respondents reported cyclists as a barrier to equestrian use of the off-road network. Based on the findings of the BHS, it is probable that these concerns are more common on routes that lend themselves to greater cycling speeds such as those that have an incline.

Concerns in respect of cyclists when riding/driving off-road were of a lesser degree when compared to on-road data however the issues and mitigation measures are applicable in both circumstances.

National recognition of the potential conflict and the UK wide campaign already launched will hopefully improve the perception of cycling/equestrian interactions and lessen the extent to which cyclists are seen as a barrier to participation.

7.6.9 Off Road (livestock)

Livestock is a hazard that is fairly unique to off-road riding/driving, most commonly found on PROWs.

Livestock as a barrier to participation was only identified by 29% of respondents. Although a reassuringly low figure, when combined with fragmented and in some areas very limited off-road riding facilities that cannot reasonably be accessed by all of our respondents it becomes a more significant outcome which should not be disregarded.

7.6.10 Off Road (other)

The other barriers identified (vehicles/machinery, landowners, pedestrians) and their impact on participation were combined to produce results of less than 30%.

Again, these are relatively low figures that might illustrate a more minimal concern but when taking the availability of off-road riding/driving in the County into account they are outcomes that should not be overlooked.

7.7 Overcoming Barriers to Adult Participation

As part of the consultation and to obtain some data that might help to inform our future actions to reduce barriers to adult participation, participants were asked what would help them ride or drive more often.

Figure 2 below shows how the options given were ranked by our respondents.

The most common outcomes in the list were in respect of improved provision of equestrian facilities rather than for reasons relating to personal circumstances that could conceivably affect participation.

More off-road riding was the most popular response which suggests that this form of equine access is preferred by most participants despite the higher number of potential hazards and less controllable environment.

Figure 2 – Options Ranking

<i>Rank</i>	<i>Options</i>
1	More off-road riding
2	Circular routes
3	Horse friendly surfaces
4	Parking provision
5	Improved maintenance
6	More local equestrian facilities
7	Easier to use gateways
8	More time
9	Fewer competing demands
10	More money

7.8 Children

Data returned in respect of child participation was more limited however the outcomes from the survey did provide some useful and illustrative data.

76% of participants reported that they did not allow their children to ride unaccompanied. Over three quarters of respondents stated this was because the child/children were **too young**, over half stated it was because of **on-road hazards** and **limited off-road** riding opportunities.

In terms of children, 66% of respondents reported their children could not access any form of off- road riding. 21% noted that off-road access was available but only if the child/children were accompanied.

The results above demonstrate that children under the age of 13 are predominantly accompanied when riding/driving. This outcome was largely assigned to the age of the child/children. This result was expected, horse riding/driving is a sport which can be hazardous, irrespective of outside influences, dependant on the age and experience of both horse and rider.

59% of respondents selected on road hazards and limited off-road riding a secondary reason for accompanying children. With an outcome that identifies concern in respect of on road hazards, a corresponding outcome identifying a lack of off-road provision is to be expected.



7.9 Resources

Most of the respondents (45%) to our survey fell into the £25,000 to £49,999 annual household income bracket, 33% have a household income of less than £25,000 and 22% have a household income of over £50,000.

A report commissioned by the North Lancashire Bridleways Associated (2009) gave the annual cost of keeping a horse as £4,752. The more recent 2023 BETA survey revealed horse owners spent between £1,548 and £3,092 monthly on livery fees (horse accommodation) alone. The BHS produced a leaflet in 2014 detailing the various costs of keeping a horse or pony, see appendix 3.

Most respondents in our survey (70%) paid, on average, between £100 and £399 on each horse. Rounded up to annual spend, the average monthly outlay equates to £2,400 per annum, per horse. This figure, based on Carmarthenshire data, illustrates that most horse owners typically commit approximately 8% of their total annual household income to keeping one horse.

For the 28% of respondents who keep two horses, the financial commitment increases to 16% of the average

reported annual household income.

In 2008 Yorkshire Bank research revealed the average cost of an active UK hobby is £279 per year. More recent comparable research has not been undertaken but even after adding annual inflation to the 2008 figure the total annual spend on an equestrian hobby evidently far exceeds the UK average.

In financial year ending 2020, the period leading up to the coronavirus (COVID-19) pandemic, median household income in the UK was £29,900 (*Office for National Statistics Household Finances Survey*). HMRC data shows that the average UK salary at the start of 2022 was £24,600.

Our survey data shows that at least 33% of Carmarthenshire horse owners are funding their horse ownership on a lower than UK average household income. This indicates a considerable commitment to the sport given the financial strain an expensive hobby is likely to place on the household income.

We can however see from the data that most respondents have a household income that meets or exceeds the UK average and, in these cases, the much higher than average annual cost of horse riding/carriage driving could be considered more affordable.

7.10 Equestrianism and the County's Economy

Earlier figures provided an estimated active equine population of over ten thousand within Carmarthenshire. If we assume that the most common £200 to £399 spend per month (£3,600 per year) is on those horses that are in work, we can estimate equestrian-based spending per annum by Carmarthenshire residents exceeds £46,000,000.

Survey outcomes show that 136 respondents reported spending 76%-100% of their equestrian budget in their local area (within 5 miles) with 120 respondents spending between 50% and 75% of their equestrian budget locally. Based on the estimated total equestrian-based spending above, these reported spending habits contribute a considerable amount to the Carmarthenshire economy.

42 respondents from outside of Carmarthenshire responded to the consultation. The majority reported visiting the County for equestrian purposes monthly with a significant proportion visiting weekly.

Some respondents reported travelling over 50 miles although the largest proportion travel an average of 30 miles.

59% of the equestrian-based visits were reportedly for pleasure riding facilities. Visiting for competition, equestrian services or to see friend/family were all reportedly very infrequent reasons, 15%, 12% and 12% respectively.

Most non-residents reported spending less than £100 per equestrian-based visit, likely due to the duration of stay and distance travelled not requiring accommodation.

With only 42 survey respondents from outside of Carmarthenshire we do not consider that there is sufficient data to accurately calculate the contribution equestrianism makes to the tourism industry in Carmarthenshire.

We can however see from the data collected that currently, equestrian visitors to the County do not appear to contribute a great deal to the economy with notable spending.

With visitors largely enjoying facilities that are free at point of use and keeping spend under £100 it appears to be Carmarthenshire residents keeping horses rather than equine tourists/visitors who contribute most to the County's economy.

To inform any future developments to equestrian facilities in the County that might encourage non-residents, survey participants were asked what would encourage them to visit Carmarthenshire more often. From the 7 options, those most selected were horse¹friendly surfaces, ²circular routes and ³parking provision for horseboxes.

It cannot be proven that these types of enhancement to equestrian facilities would lead to significant additional spending by visitors, particularly as they are likely to apply to facilities free at point of use. However, as they are enhancements that Carmarthenshire's resident equestrian community have also prioritised, they could improve equestrian opportunities for residents whilst also attracting more visitors who may stay longer and spend more.

7.11 Equestrian Business in Carmarthenshire

17 businesses participated in the survey with 88% of respondents reporting that 80-100% of their business model is equestrian.

The businesses who took part were largely small employers with 65% employing less than 2 members of staff. Only 6% of participating businesses reported employing 10-20 people, none employed more than 20. UK government statistics consider any business with fewer than 50 employees to be 'small' (www.gov.uk *Business population estimates 2021*).

More than half of businesses who responded to the survey are located over 20 miles from their clients, very few therefore considered their clients to be 'local' (defined in the survey as less than 5 miles away).

Visits to the businesses who participated were reported to be typically between 1 and 20 per day. Less than 5 visitors returned the highest result but only exceeding 5-10 and 10-20 visitors by a small margin. Only 1 business reported more than 20 visitors per day.

35% of businesses that took part reported an annual turnover of between £10,000 and 20,000 per annum, 29% reported £20,000 to £50,000.

A UK or national average for direct comparison is not available and the number of staff employed affects how ultimately profitable/viable equestrian business is in Carmarthenshire.

7.12 Non-Equestrian Opinions

The survey also gathered data from those who do not ride or carriage drive but who encounter equestrians whilst making use of some of the same facilities.

39 individuals took the opportunity to take part in the online survey.

7.12.1 90% of participants encountered equestrians on the public road network, 32% met them on the roadside and 16% on roadside verges. In each case over 80% were comfortable meeting horses in this environment, in the case of verges the result was 100%.

This result is not unexpected when you consider the physical environment involved. The majority of the County's Road network sees highways with a usable width of at least 3 metres plus a roadside verge in a lot of cases. This provides adequate space to pass equestrians at a reasonable distance, within the highway limits.

7.12.2 32% of respondents reported meeting horse riders/carriage drivers on public rights of way and 75% were comfortable doing so.

With such a small proportion of the PROW network being multi-user the 32% figure is not surprising. Instances of equestrians meeting other users is likely to be relatively low where equestrians are entitled to access only 10% of the whole PROW network.

Having evidence to indicating that $\frac{3}{4}$ of respondents who do meet horses on PROWs are comfortable to do so suggests a trend of cooperation between users on the PROW network.

7.12.3 Off road cycle paths were the next most common environment where non-equestrians reported meeting equestrians. Contrary to almost all other situations, 70% of participants reported that they are not comfortable sharing the space with horses.

Complaints to the Highways and Transport division regarding equestrians using cycle paths in Carmarthenshire are reasonably frequent. Complaints usually relate to the impact horses have on the surface of the cycle paths, either the damage they cause to the surface material or that they leave droppings on the surface. Less frequently the reported concern is the safety of passing close to horses when cycling or walking. These complaints support the results of our survey.

Many cycle paths have been developed for Active Travel and/or sustainable travel purposes. The types of users along these routes are therefore likely to be travelling to work or school so a clean environment where clothing and shoes suitable for the destination can be worn is expected. In these settings it is probable that the presence of horses is not accepted

As mentioned in 6.1, survey data reveals that cycling and horse-riding participants have very different demography both in age and gender. Demographics are important because they 'provide a broad understanding of the different characteristics of a population'. (*Indeed.com 2020, Career Guide, What are Demographics?*)

Opposing demography can lead to differing values and tolerances with the potential for different external marketing and social media influences reinforcing those views. If cyclists are the majority users of the County's off-road cycle path network, then the opposing demographics might have contributed to this survey result.

7.12.4 Roughly $\frac{1}{4}$ of participants in this part of the survey met equestrians either in public open spaces or private facilities. 78% were comfortable sharing public open spaces, 100% were happy to share private facilities.

Similar to public roads, public open spaces do not often push equestrians into close proximity with other public users. Open spaces are not usually restricted therefore the result here is expected. Similar to cycle paths, surface damage and droppings are likely the reasons for the 22% who did not enjoy sharing the space.

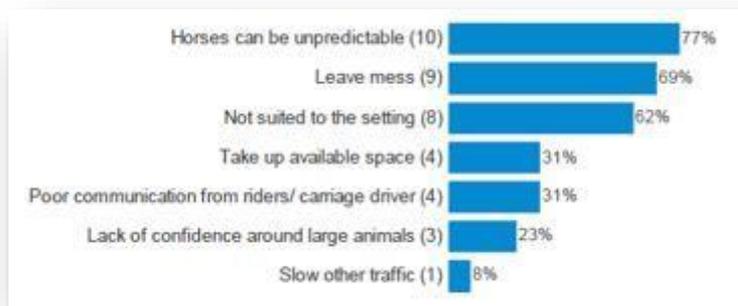
Private facilities in this context, as described in chapter 3 are for the purposes of equestrian use. It would be unexpected to find any individuals uncomfortable sharing an equestrian specific space with equestrian users.

7.12.5 The remaining two environments in the survey saw low results, pavements 16% and 'other' 11%.

Pavements were the only other environment where non equestrians were not happy to share the space with equestrians.

This result is to be expected; The Highway code states that 'you must not take a horse on a footpath or pavement'. Traditional roadside pavements are usually of a restricted width with a primary use as a pedestrian highway not a shared use or multiuser space.

7.12.6 For those survey participants who were not happy sharing space with equestrians the reasons given are illustrated below:



The top two results support the trends identified in 6.10.3 from complaints to the Authority about equestrians in shared use/multi-user spaces.

Suggestions to mitigate the concerns highlighted followed the same theme, minimising horse mess was the most popular measure, with widening routes and passing places suggested frequently.

7.12.7 Non-equestrians were finally asked whether they felt there was adequate provision for equestrians in the County. 70% felt that there was not.

Suggested additional provisions was ranked by participants. More dedicated off-road routes was the top answer (79%) with more access to existing open space facilities the second most popular (64%). 61% felt on road provision needed improvement and 43% felt more private facilities were required.

These results reflected the general trends of the earlier questions where certain spaces were favoured for multi user activities and but where the only public off road routes that were considered appropriate were those 'dedicated' to equestrian use such as bridleways and BOATs.

7.13 Local Members and Community Councils

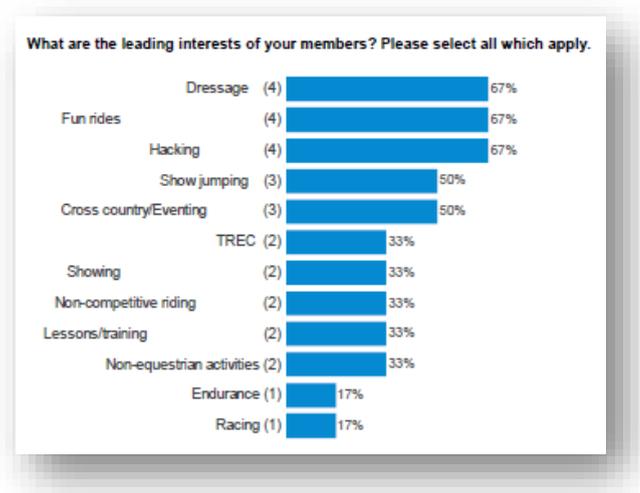
There was a disappointingly low level of participation in the survey from Local Members and Town and Community Councils with only one Local Member and one Community Council taking part.

A high number of equestrians and a demand for improved horse-riding provision was reported by the participants but due to the low participation the data from this part of the survey does not have much value.

7.14 Organisations and Groups

A total of 6 Equestrian or predominantly equestrian organisations/groups took part in the survey some of which (17%) had between 201 and 500 members.

For most, the majority of members were Carmarthenshire residents whose top interests were dressage, fun rides and hacking. This offered some difference to our earlier survey results where dressage did not feature as a most popular discipline. Competitive disciplines in general featured far more in this section of the survey than in the sections that equestrians themselves completed (see below) this suggests that competitive equestrians may not have engaged with the survey.



83% of the organisations/groups felt that there are not adequate equestrian facilities in the County for their members needs.

Even though there was less of a focus on non-competitive riding/driving, 100% of respondents still felt more off-road riding provision was needed in the County and that more horsebox parking provision was a necessary improvement.

Improvements that featured quite strongly earlier in the survey and related more to 'public facilities' were lower in the ranking in this section, maintenance, horse friendly surfaces and improved maintenance achieved only 40%.

67% of organisations/groups charge a subscription fee for membership and the majority invested that money back into the club, its members and facilities. 33% reported making a contribution public sector facilities/projects and 17% reported donating to charity.

With more competitive based groups and organisations featuring in this part of the survey, it is not surprising that the reinvestment from subscriptions go towards re-investment of some sort rather than passing the funds on to external bodies.

7.15 Additional Comments

A summary of the 98 additional comments submitted as part of the survey support earlier findings from the survey.

Participants state that access to safe off-road riding is needed, that there are a lack of bridleways and that additional safe routes need to be made available for equestrians with better information on where equestrians can access those facilities.

Access to cycle paths for equestrians is specifically raised.

The maintenance of the PROW and Highway network featured as a repeated comment.

8.6 The multiuser PROW network in Carmarthenshire is limited and fragmented, amounting to less than 10% of the whole PROW network.

8.7 There is some evidence to suggest that there are numerous PROWs in the County with under-recorded rights, specifically routes recorded as public footpaths that might be more correctly recorded as bridleways or byways.

8.8 Horse riders and carriage drivers raised several concerns in respect of using the road network safely. There is no conclusive accident data to support actual road risks when horse riding or carriage driving however published statements in the Road Safety Framework (Wales) 2013, BHS data and media articles do demonstrate that some of the risk perception is reasonable.

8.9 Barriers to participation were raised in respect of both PROW and Road based equestrian access.

8.10 There is a lot to consider in terms of suggested measures to improve the public facilities that exist in the County for the equestrian community. Consideration and any future delivery of those measures span multiple divisions and services within the County Council.

8.11 Of the reported equestrians in the County, carriage drivers are in the minority, horse riding is by far the more popular equestrian pastime.

8.12 Residents keeping horses in the County make a regular contribution to the local economy, more than the average contribution from other popular hobbies, largely due to the ongoing costs of keeping a horse(s).

8.13 The preferred activities of the equestrian community are those that are free at the point of use. These are facilities primarily managed by public bodies.

8.14 According to our survey data, equestrian tourism and people visiting the County with horses for other reasons does not make a significant contribution to the local economy. Reported visitor numbers are low, and the average spend of those who do visit is also low. It is likely that better provision of safe off-road riding opportunities may result in increased opportunities for equestrian tourism.

8.15 Businesses operating in Carmarthenshire with a significant equestrian aspect to their business model are predominantly small, with low employee numbers which provide an indication of their profitability. The relatively high cost of keeping horses, the economic figures published by BETA and mainly low figures reported by Carmarthenshire's businesses suggests that:

1. business participation in the survey was low
2. equestrian spending is going into businesses that do not consider themselves to have an equestrian based business model.

8.16 Our survey suggests that non-equestrian residents in Carmarthenshire who make use of recreational, and access facilities are happy to share spaces with horse riders and carriage drivers in most situations. The notable exception to this is cycle paths where most were not comfortable sharing with horses.

8.17 There was very little interest in the survey from Local members and Town and Community Councils. There were no trends that could be identified from the small amount of data gathered.

8.18 Organisations and groups in Carmarthenshire seem to be more centred on competitive disciplines than non-competitive hacking/fun rides which were most popular with our survey respondents. This suggests that perhaps we did not get full engagement in the survey from those pony & riding club members and affiliated competition riders interested in competitive disciplines.

8.19 Interestingly, the clubs, organisations and groups did identify similar needs for their members and a similar view that provision in the County is inadequate.

8.20 From general comments, the strongly held view of Carmarthenshire's equestrian community is that there is a lack of off-road provision available to those who wish to horse ride and carriage drive.

8.21 In respect of on-road riding which is prevalent in the County, mitigation measures are considered necessary to make the road network safe to use.

8.22 There is a generally held view amongst equestrians that horses should be permitted on cycle paths and for those routes that are available and suitable for equestrian use however, walkers and cyclists hold an opposing view.

For a summary of all consultation results which contributed to the strategy, see Appendix 1

Actions

Based on the data and evidence collected to inform this strategy and taking account of Policy and Legislation that steers the delivery of public access in Carmarthenshire, the following actions have been developed.

Committing to these actions and striving to deliver them by the timetabled target dates will help the authority to achieve the vision set out in this strategy.

Actions have been carefully developed to both deliver positive change, primarily within available resources. Those actions that require additional resources are aspirational and would be largely reliant on external resources, whether that is financial, physical or human.

Action	Dept	Demonstrable Need	Potential Benefit to Equestrian Access	Target Date	Within Available Budgets?	Risk/Challenge
1) Create an equine User Group (EUG)	PROW	Engagement in Equestrian Strategy survey by over 500 members of the equestrian community	Provides equestrian stakeholders with an opportunity to contribute towards prioritising maintenance and planning enhancement across the equestrian access network, according to available resources. Existing Byway user group can be used as a model for new EUG.	2025	Yes	Diverting staff resource to appointing, coordinating and effectively managing an additional stakeholder group. Managing expectations of group members
2) Develop a volunteer equestrian maintenance workforce	PROW	Improved maintenance ranked 5 th in actions considered necessary to overcome barriers to more frequent participation. Participation in survey illustrates potential source of volunteers with clear enthusiasm access from equestrian community.	A volunteer workforce would not be constrained by limited local authority budgets. Volunteers would have a vested interest in keeping equestrian access facilities open and available.	2026	Yes	Retaining current staff resource to manage and coordinate volunteer workforce

<p>3) Develop PROW/Road network rating system for equestrian use</p>	<p>PROW/Highways</p>	<p>Survey data suggests that there is a strongly held view that there is not enough off-road provision for safe horse riding/carriage driving in Carmarthenshire.</p> <p>Multiuser PROWs open to equestrians less than 10% of overall PROW network.</p> <p>UC Road network has potential to create valuable links between PROWs and other equestrian access facilities.</p> <p>Survey showed preferred activities for equestrians primarily use those types of facility managed by public bodies.</p>	<p>A rating system would compile all available data on PROWs and Roads in one place.</p> <p>Rating system would create a prioritised database of routes that cater to equestrians or could do, with some improvement/enhancement</p>	<p>2027</p>	<p>Yes</p>	<p>Diverting staff resource to developing new system.</p> <p>Potential conflicts between rating outcomes and PROW & Highway network hierarchies.</p>
<p>3b) Improve/enhance routes beneficial to equestrians when resources allow</p>	<p>PROW/Highways</p>	<p>See 3</p>	<p>Improvement to equestrian access routes with proven benefits to the equestrian community.</p>	<p>Ongoing</p>	<p>No</p>	<p>Resources required to implement and maintain improvements/enhancements.</p>

<p>4) Assess existing Public Footpaths over CCC owned land for suitability for upgrade to Bridleway</p>	<p>Property/ PRPs</p>	<p>Survey data suggests there is a strongly held view that there is not enough off-road provision for safe horse riding/carriage driving in Carmarthenshire.</p> <p>Survey revealed that the preferred activities of the equestrian community primarily use those types of facility managed by public bodies.</p> <p>Non-equestrian residents who took part in the survey and who make use of recreational, and access facilities are happy to share spaces with horse riders and carriage drivers in most situations.</p>	<p>Potential to increase the Bridleway network over land in Local Authority control.</p> <p>By using Express Dedication at Common Law (EDCL), upgrade process can be implemented quickly and inexpensively, delivering user benefits promptly.</p>	<p>2028</p>	<p>Yes</p>	<p>Suitability of existing footpath infrastructure.</p> <p>Impact on land Management</p> <p>Resistance from existing users</p> <p>Diverting staff resource to undertaking assessments.</p>
<p>4b) Deliver reclassification/ upgrade of those Public Footpaths identified as suitable for higher rights across CCC owned land.</p>	<p>Property/ PRPs/ PROW</p>	<p>See 4</p>	<p>An increased Bridleway network over land in Local Authority control.</p> <p>Potential to increase equestrian access that is more widespread and to provide links between existing access opportunities.</p>	<p>Ongoing</p>	<p>Yes</p>	<p>Diverting staff resource to formalise EDCLs.</p> <p>Resources required to maintain upgraded routes that will be subject to increased user numbers.</p>
<p>4c) Deliver reclassification/ upgrade of those Public Footpaths identified as suitable, subject to improvements, for higher rights across CCC owned land.</p>	<p>Property/ PRPs/ PROW</p>	<p>See 4</p>	<p>See 4b</p>	<p>Ongoing</p>	<p>No</p>	<p>Securing funding to improve/enhance routes so that they can be reclassified and used for equestrianism</p> <p>Resources required to maintain upgraded and enhanced routes that will be subject to increased user numbers.</p>

<p>5) Assess CCC owned land suitable for additional permissive equestrian access opportunities</p>	<p>Property/ PRPs</p>	<p>Survey data suggests there is a strongly held view that there is not enough off-road provision for safe horse riding/carriage driving in Carmarthenshire.</p> <p>Survey revealed that the preferred activities of the equestrian community primarily use those types of facility managed by public bodies.</p> <p>Non-equestrian residents who took part in the survey and who make use of recreational, and access facilities are happy to share spaces with horse riders and carriage drivers in most situations.</p>	<p>A potential increase in equestrian access over land in local authority control.</p> <p>Permissive access can be appropriately managed to minimise conflict with other users.</p>	<p>2028</p>	<p>Yes</p>	<p>Suitability of existing infrastructure.</p> <p>Impact on land Management</p> <p>Conflict between users</p> <p>Resistance from existing users</p> <p>Diverting staff resource to undertaking assessments.</p>
<p>5b) Deliver permissive equestrian routes across CCC owned land where assessments have found they are suitable & appropriate.</p>	<p>Property/ PRPs</p>	<p>See 5</p>	<p>Increased equestrian access opportunities over land in Local Authority control.</p> <p>Potential to increase equestrian access that is more widespread and to provide links between existing access opportunities.</p>	<p>Ongoing</p>	<p>Yes</p>	<p>Diverting staff resource to developing and monitoring permissive arrangements.</p> <p>Resources required to maintain land subject to the wear and tear of permissive equestrian access.</p>
<p>5c) Deliver permissive equestrian routes across CCC owned land where assessments have found they are suitable and appropriate, subject to improvements.</p>	<p>Property/ PRPs</p>	<p>See 5</p>	<p>See 5b</p>	<p>Ongoing</p>	<p>No</p>	<p>Securing funding to improve/enhance land so it can be used for equestrianism</p> <p>Resources required to maintain upgraded and enhanced land that will be subject to the wear and tear of permissive equestrian access.</p>

6) Prioritise investigation of unrecorded Higher Rights across PROW network.	PROW	Evidence in the PROW record that several public paths are under recorded and should carry higher rights.	Correct recording of rights has the scope to enhance the access offer for horse riders and carriage drivers by adding bridleways, restricted byways and/or byways.	2030	Yes	Significant increased burden on Order making staff within Countryside Access team. Time required for investigation likely to require reduction in other operational work.
6b) Process appropriate Orders to amend the legal record where higher rights are reasonably alleged and staff resource allows.	PROW	It is a duty of the Local Authority to process an appropriate Order to correct the Definitive Map and Statement when an error or omission is identified.	Potential increase in definitive equestrian public rights of way.	2035	No	Increased spend on legal Order processing with no recourse for recouping costs. Resource implications for increasing specification of PROW assets from footpath to bridleway/byway. Failure in statutory duty if Order process is not initiated where probable under-recorded rights are identified.
7) Create and prioritise a record of Public Footpaths suitable for higher rights.	PROW	Survey data suggests strong view that there is not enough off-road provision for safe horse riding/carriage driving in Carms. Multiuser PROWs open to equestrians amounts to less than 10% of overall PROW network.	Identifying suitable PROWs for upgrade to higher rights may lead to an increase in equestrian PROWs in the future. <i>Note: PROWs physically suitable for higher rights are being identified through the 2024-25 volunteer network survey.</i>	2026	Yes	
7b) Seek dedication through landowner negotiation where opportunities arise & resources allow	PROW	See 7	Successful negotiation with relevant landowners may lead to the dedication of more equestrian PROWs in Carmarthenshire.	Ongoing	50:50	Some negotiations likely to require financial compensation to reach a successful outcome. Diverting staff resource to negotiating and recording higher rights.

<p>8) Invite equestrians to respond to future consultations* for the update of the Active Travel Network Map (ATNM) to identify areas where they feel multiuser routes could be created as part of new or existing cycling infrastructure.</p> <p><i>*Next ATNM consultation 2026</i></p>	<p>Transport Strategy/ Highways/ PROW/ Outdoor Recreation</p>	<p>Survey data revealed a generally held view amongst equestrians that horses should be permitted on cycle paths.</p> <p>Sustrans review of routes suitable for wider access underway.</p> <p>Current Active Travel guidance states where there is high demand along a route from horse riders, the feasibility of accommodating them should be assessed.</p>	<p>Opportunity for equestrian community to provide comments and insight into ATNM development and where benefits to equestrians could be derived.</p>	<p>Ongoing</p>	<p>Yes</p>	<p>Welsh Government Ministerial changes may impact Active Travel Policy.</p>
<p>8b) Deliver multiuser access over identified parts of the Active Travel network where resources allow.</p>	<p>Transport Strategy/ Highways/ PROW/ Outdoor Recreation</p>	<p>Survey data revealed a generally held view amongst equestrians that horses should be permitted on cycle paths.</p> <p>Current Active Travel guidance states where there is high demand along a route from horse riders, the feasibility of accommodating them should be assessed.</p>	<p>Potential for access to suitable sections of an off-road network of paths where appropriate standards can be met.</p> <p>Potential access to on-road cycle paths often segregated from traffic flows and/or subject to additional user safety provisions.</p> <p>Potential to increase equestrian access that is more widespread and to provide links between existing access opportunities.</p>	<p>Ongoing</p>	<p>No</p>	<p>Suitability of existing infrastructure.</p> <p>Impact on land management</p> <p>Conflict between users & resistance from existing users (see survey results).</p> <p>Securing funding to cover infrastructure costs not met by AT funding.</p> <p>Increased maintenance costs with increased users and wear and tear implications of equestrian use.</p>
<p>9) Take account of future legislative change, proposed under the WG Access Reform Bill, when planning any PROW maintenance or improvement schemes.</p>	<p>PROW</p>	<p>Proposed access reform proposals would see access to some/all of public footpath network widened to horse riders and cyclists.</p>	<p>Accommodating potential future equestrian rights where feasible, would lead to more prompt delivery of reform provisions if they are enacted.</p> <p>This would see long term benefits to both equestrian users and cyclists.</p>	<p>Ongoing</p>	<p>No</p>	<p>Significant increase in infrastructure costs.</p> <p>Access Reform bill not leading to legislative change.</p>

<p>10) Review of approval process for Horse Warning signs requests on public roads</p>	<p>Traffic Management</p>	<p>Horse riders and carriage drivers who took part in the survey raised several concerns in respect of using the road network safely.</p> <p>Risks associated with horse riding/driving on-road supported by BHS road accident statistics</p> <p>On-road riding survey responses suggest mitigation measures are considered necessary to make road network safe to use.</p> <p>Equine population heat maps & survey data show equines are kept/exercised across the whole County, not restricted to bridleway/byway networks.</p> <p>Current horse warning sign approval criteria is the presence of bridleways or byways in the vicinity.</p>	<p>Addition of more strategically positioned horse warning signage.</p> <p>Parts of the road network frequently used by equestrians who have no off-road alternative may also benefit from safety signage.</p>	<p>2028</p>	<p>Yes</p>	<p>Cost to install and maintain additional signage.</p> <p>Sign clutter - too many signs can result in drivers failing to process the information displayed, leading to an increased risk of an incident.</p>
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11) Local business Sponsorship of Access Infrastructure	All	<p>Survey data revealed high equestrian-based spending per annum to keep horses.</p> <p>Equine business data received was limited however economic benefits to local businesses benefitting from equestrian spending may see marketing value in sponsoring equestrian infrastructure.</p>	Funded, fit for purpose, equestrian infrastructure not constrained by limited local authority budgets.	Not definite	Yes	Administration of sponsorship scheme
12) Interactive Equine Access map	IT/All	N/A	Map would provide a clear, one-stop resource to identify access opportunities in Carmarthenshire for equestrian residents, tourists etc.	2030	No	<p>Cost to develop</p> <p>Resources required to keep mapping licensed and up to date.</p>