

Scoping Report on the Racecourse & Equestrian Sector in Epsom & Ewell Borough



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Panel Expert
OPE Programme



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1.0 Preface:

Matthews Associates (UK) Ltd have provided economic development support to Epsom and Ewell Borough Council since 2014. We work across the South East providing economic development services to primarily Local Authorities and Local Enterprise Partnerships. We are a registered Cabinet Office One Public Estate 'pool of experts' consultancy.

2.0 Introduction:

Epsom & Ewell Borough Council commissioned this scoping study to investigate the wider equestrian sector within the Borough, primarily utilising existing published research and datasets (Annex A), supplemented by additional qualitative intelligence from sector leaders and representatives (Annex D).

2.1 Epsom Borough

Epsom Borough is one of the smallest local authorities in the England, covering an area of just 34 km sq, is ranked by size at 289th out of 317 English local authorities. Often considered as predominantly urban and perceived as part of the Greater London Conurbation, the Borough outside the core urban centres of Epsom Town, Ewell Village and Stoneleigh, the Borough is relatively rural, especially around Epsom Common to the west and the Epsom and Walton Downs to the south. These open Downs directly transition into the new 260 hectare Langley Vale Centenary Wood, extending into neighbouring Mole Valley and Reigate and Banstead Districts, bordering the M25 orbital motorway.

Annex B is a map showing the areas officially classed as rural within an LEP area as defined by Defra Magic Mapping. Epsom is not within the Surrey Hills AONB but is adjacent to it, via an AGLV¹ corridor running north from Reigate and Banstead. Businesses based in this southern sector of the Borough would be eligible to participate with Surrey Hills Enterprises.

2.2 The Epsom and Walton Downs

The Epsom and Walton Downs are located to the south of Epsom Town, linked to the town by road, public footpaths and bridleways. The Epsom and Walton Downs covers 600 acres of rural space, much of it open to the public for leisure and recreation. Epsom Racecourse is located within Downs, as are the horse training areas, the grass gallops, the all-weather gallops and the majority of the racing horse training stables. Many of these professional training areas are inter-crossed by public footpaths, public bridleways, designated cycle routes and public hack routes. The Epsom & Walton Downs are subject to a unique Act of Parliament² and are managed by the Epsom and Walton Downs Conservators.

Annex C (a) is a map showing the Downs area and complex arrangement of footpaths, bridleways, cycle routes, hack routes, training gallops that are located within it. Annex C (b) shows the distribution across the Borough of Racehorse Training stables (in blue) and general equestrian businesses (in orange).

¹ Area of Great Landscape Value: <https://mk0surreyhillsnif4k.kinstacdn.com/wp-content/uploads/2016/02/Recommended-additional-areas-Oct-2013-low-resolution-OS-base.pdf>

² Epsom and Walton Downs Regulation Act 1984 see: <http://www.edmac.org.uk/Byelaws%20Epsom%20and%20Walton%20Downs%20Conservators.pdf>

3.0 'A Vision For Epsom'

Recognising the challenges facing the equestrian sector, in 2017 the Jockey Club, British Horseracing Authority, Epsom & Ewell Borough Council and University of Surrey developed a 'Vision for Epsom'³ this document and the working groups formed to deliver it shared the following objectives:

- Increase the number of horses in training to 250 by 2021 and more beyond 2021;
- Make Epsom a centre for digital innovation in horseracing;
- Increase the economic value of the local horseracing;
- Conserve and improve the Downs for the local community and for horseracing; and
- Work across the horseracing industry to develop wider economic and social proposals to benefit Epsom.

Progress has been slower than anticipated and it is unlikely that the number of horses in training will rise to 250 by 2021, but the core workgroup members remain fully committed to bring forward the vision objectives, albeit on an extended timeframe.

4.0 Equestrian Context:

This information scoping report aims to synthesise a large amount of information, data and research contained within a number of externally published reports referenced within Annex A. This has been supplemented by interviews with representatives from both the racehorse training sector and the Racecourse (Jockey Club) itself (see Annex D).

Key messages from the consultation:

The professional horse racing sector in Epsom is at a tipping point of viability, measures must be taken to stop the decline and facilitate investment in essential infrastructure.

Epsom has many unique advantages as a training centre of excellence, its location and proximity to London is one of them, the adjacent Downs and racecourse are others.

Formal recognition of the sector and appropriate planning policies to both protect it and enable future investment and sustainable growth are needed.

It is also important to clarify the individual elements that make up the wider term 'equestrian' sector especially in relation to Epsom's racehorse training sector:

4.1 The Racecourse

Epsom racecourse is internationally renowned as the home of the Derby, flat racing's 'blue riband' event. Currently holding 11 racing fixtures per annum, the remaining time the racecourse is a key meetings, conferences, events and functions venue (MICE), hosting over

³ <https://www.epsom-ewell.gov.uk/sites/default/files/documents/business/economic-development/Epsom%20Vision%20leaflet.pdf>

500 such events each year. Owned by the Jockey Club⁴ Epsom is considered one of their key venues, although only ranked as number 10 out of 60 racecourses by the Racing Post⁵. In terms of Epsom's wider economy the racecourse would rank as the Borough's leading visitor attraction and among the largest employers within the Borough, albeit most employees being on casual contracts. The racecourse has a substantial supply-chain of nearly 500 suppliers and contractors with over half locally based in the Borough.

4.2 The Training Sector

The UK's racehorse training sector supplies horses for both flat and jumps racing, with the British Horseracing Authority estimating around 14,000 horses in training. Newmarket and Lambourn are considered to be the UK's leading areas for training, with an estimated 3,500 horses at Newmarket and 1,500 horses at Lambourn. Epsom in the 1970's trained around 500 horses in 19 training stables, by 2019 this has dropped to around 150 horses in 12 training stables⁶.

4.3 Livery Stables & Riding Schools

In addition to professional racing training stables, the Borough also has a number of livery stables and riding schools providing horse accommodation, training and riding facilities for horse owners and riders outside the professional racing sector. Although both are considered within the wider 'equestrian sector' there is a significant delineation between them, with livery stables and riding schools aimed at mainly amateur and leisure horse owners & riders. These riders tend to transport their horses to other leisure riding locations or take advantage of the extensive network of local bridleways and byways in Epsom and adjacent areas. There was historically some perceived tension between the professional sectors and amateur leisure owners and riders, often caused by non-adherence to prescribed training times and the close proximity of some leisure bridleways and hack routes to the professional gallops.

4.4 Bloodstock and Stud

Although valued at an estimated £427m⁷, Epsom even with its strong racing heritage is not considered a major area within the equine bloodstock and stud sector. The County of Surrey is listed⁸ as having 75 breeders, housing 156 mares (2.5% and 1.8% of GB respectively) the largest number being in Suffolk and Yorkshire. Online bloodstock/stud directories indicate under five bloodstock/stud farms in Epsom.

4.5 The Equestrian Supply Chain

The wider equestrian sector in Epsom supports an extensive and diverse supply chain, ranging from conference and event support businesses for the racecourse (estimated at nearly 500 companies), general equestrian supplies providers (feeds, consumables, tack, grooming, clothing etc), horse transportation providers, farriers, saddlers, hotels and accommodation, through to the highly specialist equine veterinary practices and therapists supporting the thoroughbred training stables. Although some are based within the

⁴ Jockey Club owns 15 racecourses across the UK, 3,000 acres of training land, and the National Stud. The Jockey Club Group had an annual turnover of £215m in 2018 (68% increase over a decade).

⁵ <https://www.racingpost.com/guide-to-racing/top-ten-racecourses/>

⁶ Rapleys LLP: Epsom Downs Racecourse and Racehorse Training Industry, draft report 2019, data source The Jockey Club.

⁷ PWC 'The contribution of thoroughbred breeding to the UK economy and factors impacting the industry's supply chain' Sept 2018

⁸ Weatherbys General Stud Book Factbook 2018

Borough, many are based locally in adjacent Boroughs and Districts. There is insufficient local data to calculate the direct, indirect and induced economic contribution, however using the SQW data model from Lambourn⁹ crudely applied to Epsom's training numbers, Epsom's training sector alone (excluding racecourse) could be making a £2.1m contribution to the local economy.

4.6 Riding for the Disabled

Epsom is also home to the well-respected equestrian charity, Epsom Riding for the Disabled, operating out of St Ebba's Farm, a 16 acre site currently working to capacity to provide 3,000 rides to over 300 people annually. The charity has ambitious plans to extend the indoor school and arena, granted planning permission in 2019.

4.7 The Geography

Although this report is primarily focussing on the sector within Epsom & Ewell Borough, it should be noted that there is a considerable overlap into adjacent and neighbouring Districts and Boroughs, of note Mole Valley District Council, where a number of equestrian businesses are technically based although consider themselves part of the wider Epsom racing and training sector.

4.8 The Epsom & Walton Downs

The ownership and interrelationship between the racecourse and Downs should also be noted within the context of the wider racing sector. Although the actual racecourse and majority of the Downs is in the ownership of the Jockey Club, the Downs have certain public access rights granted via a specific Act of Parliament¹⁰ which in effect gives open access to (although not use of) many key training areas such as the gallops. The Downs are managed by the Conservators, funding to maintain the Downs is generated by a precept levy arrangement between the Council, Racecourse, Landowner and Training Ground Management Board (TGMB). There are set times allocated when training use of the Downs has priority over leisure uses, this can sometimes cause conflict between professional and leisure users.

5.0 Socio-Economic and Wider Benefits

5.1 Economic Benefits

The extensive research undertaken at other racing venues and training areas (see Annex A) clearly demonstrate the economic value of the wider equestrian sector to the economy. Epsom benefits from having both an internationally recognised racecourse (and MICE¹¹ venue) and an allied training sector based within the Borough. The Vision For Epsom document¹² estimates the value of the sector at £13m, the SQW methodology for Lambourn would, based on the number horses in training at Epsom estimate this to be around £2m. This disparity notwithstanding, Epsom's combined horse training, horse racing, wider equestrian and racecourse MICE operation represents a significant multi-million pound sector group to the Borough's economy.

⁹ Lambourn Report, SQW, March 2019, estimated contribution for 1,547 horses £22.6m, £14.6k per horse, Epsom 146 horses, £2.1m

¹⁰ Epsom and Walton Downs Regulation Act 1984 see: <http://www.edmac.org.uk/Bvelaws%20Epsom%20and%20Walton%20Downs%20Conservators.pdf>

¹¹ MICE stands for Meetings, Incentives, Conventions and Exhibitions, although recently rebranding as 'the meetings & events industry'

¹² <https://www.epsom-ewell.gov.uk/sites/default/files/documents/business/economic-development/Epsom%20Vision%20leaflet.pdf>

5.2 Social and Community Benefits

The racecourse in addition to its racing dates and commercial MICE activities, also supports the local area with community hire rates, in-kind support and occasional financial sponsorship. The management of the racecourse also supports local partnerships such as Visit Surrey Destination Management Organisation and the Epsom Business Improvement District, and are considered to be key local stakeholders. Many training stables also participate in community open days to enhance local appreciation of their sector and foster good relationships with their local communities.

5.3 Leisure and Wellbeing Benefits

These can both be overlaid onto the considerable environmental and natural capital benefits of the adjacent Epsom and Walton Downs and developing Woodland Trust Centenary Wood at Langley Vale. The combination of Jockey Club ownership, Epsom & Ewell Borough financial and operational support (via the Conservators) and the TGMB funding contribution, allow this important open leisure space and 'managed' landscape to be maintained and ultimately preserved. Not only for equestrian pursuits, but also for wider walking, running, cycling, dog-exercising, events and even a simple appreciation of the countryside setting and spectacular views over London.

5.4 Visitor Economy

The annual racing fixtures and especially the Derby are well-known and attract many visitors to the Borough supporting the hospitality and accommodation sectors. The challenge remains on how to capitalise on this unique asset, so close to the London conurbation outside racing and event days. The Downs as a high-quality managed open-space and presence of a thoroughbred racing sector, equestrian facilities and opportunity for wider leisure and recreation activities presents future opportunities.

5.5 Establishing Place

Epsom is a comparatively small local authority in Surrey, directly adjacent to the Greater London conurbation. Epsom Racecourse, The Derby and the allied equestrian sector gives the Borough a unique selling point, international point of reference and identity as 'The home of the Derby'. Whereas historically Epsom was linked to Epsom salts, its wider equestrian heritage, racecourse and training sector provides a current and potentially key future identifier for the Borough. Such positive identifiers will become increasingly important in attracting inward investment, the recruitment and retention of staff, the aforementioned visitor economy and contributing towards social cohesion through experiencing and sharing a common place value.

6.0 Key Issues Facing the Sector:

6.1 Epsom Racecourse

Although host to the Derby, an internationally renowned 'Blue Riband' event, Epsom currently only has 11 actual horseracing days within its normal annual calendar. Although currently able to hold up to 16 racing days per annum, additional meetings have to be 'bid' for from the British Horseracing Authority. Considerations such as viability, racing surface, competing races, annual UK calendar need to be considered before adding any new races.

Outside these core racing days, the racecourse is a key MICE venue for both the Borough and wider East Surrey. Although holding over 500 such events each year, the venue must maximise its utilisation to generate essential revenue and profits to operate and maintain it every year. To compete with other GB racecourses and local 'MICE' venues the Jockey Club must be able to justify continued capital investment in the venue. There are currently aspirations to invest in the site across a number of key areas: including Prince's Stand (Grade II Listed Building located to the west of Queen's Stand); The Stables, Stable Staff Accommodation and Paddock Office areas; Derby Stables; and Warren House. These will require the Jockey Club to make a significant capital investment in Epsom, against competition from the other 15 venues and wider Jockey Club estate.

6.2 The Racehorse Training Sector

Epsom's racehorse training sector has been in gradual decline, in the 1970's with 19 trainers with 520 horses, has fallen to 12 trainers with 174 horses in 2010, to the most recent figures (2019) indicating the same number of trainers (12) but with only 146 horses in training. This is widely believed to be nearing lowest level of horses in training to retain viability of the sector locally. Many factors are cited as reasons for this decline: ranging from structural changes within the racing sector; concentration of GB training at Newmarket and Lambourn; increased competition from overseas trainers; retirement of long-established trainers; loss of training stables to residential development; restrictions on land-use and ability to generate investment capital from enabling development; lack of modern, suitable and affordable staff accommodation; limitations of local specialist support and supply-chain. It has also been noted that a lack of cooperation among the Epsom training stables to collaborate and compete with other training areas and competition from outside the UK is a contributory factor, see: 'A Vision For Epsom' (section 3.0).

6.3 Livery Stables & Riding Schools

There is little empirical data on the number of general livery stables and riding schools operating within the Borough although local intelligence indicates that in-line with the thoroughbred racing training sector there has been a similar decline as owners retire, stables have been sold for residential or solely private use, and existing livery stables find challenges with staff recruitment, retention and accommodation. A recent East Surrey tourism research project¹³ included equestrian tourism within its remit; the feedback from this study mirrored the local Epsom intelligence that there had been a general decline in livery stables and riding schools across wider East Surrey for similar reasons.

6.4 Bloodstock and Stud

Epsom is not a primary bloodstock and stud area for the wider racing sector, although with many breeders based across the wider South East it does form an important element of supply chain to the thoroughbred training sector in Epsom. Some Epsom training stables also provide some bloodstock/stud services in addition to their core training offer.

¹³ Tourism South East: Wheels, Feet & Hooves (Mole Valley) & East Surrey Tourism Cooperation - 2018

6.5 Equestrian Supply Chain

Taking out the racecourse MICE supply chain, the specific supply chain supporting the training, livery, stable and school sector could be worth over £2m using the Lambourn SQW model, applied to Epsom. Our discussions with key local sector representatives indicate that the declining and now historically low number of horses in training are providing viability challenges to some specialist businesses. The ability to justify recruitment of new staff and investment in their business needs to be predicated on the growth of the sector. Therefore it is important if the symbiotic relationship between training sector and its supply chain is to remain viable and grow, Epsom needs to attract greater numbers of horses in training.

6.6 Future Developments

Like any commercial sector and performance sport, the equestrian sector has had to evolve and develop to maintain its competitive edge. Equine veterinary, therapy and training method related developments have been happening at pace internationally. Affiliations with centres of excellence such as Surrey University's School of Veterinary Medicine will be key to the sector's future success. These developments will require changes to the core infrastructure of the sector, modern new facilities, specialist buildings, redesign of existing facilities, not only for the horses but also the trainers, jockeys and stable staff employed.

7.0 Support from the Local Authority

Although many of the challenges facing the racecourse and wider sector are outside the direct purview and influence of a local authority, a local authority does have some key levers available to support the wider equestrian sector.

7.1 Economic Development Function

The Borough via its economic development function has the ability to positively engage with and support the sector. Acting as a conduit to both Officers and Members, including the Chief Executive, the Borough's economic development function can be an advocate for the importance of the sector, identifying areas within the Borough and partner authorities such as County and Local Enterprise Partnership where assistance and support can be found.

7.2 Planning Policy

The development of the new Epsom & Ewell Local Plan presents an rare opportunity to review and potentially revise local planning policy to recognise and support the wider equestrian sector development needs, but within the parameters of the National Planning Policy Framework and Green Belt considerations.

8.0 Interventions to Consider:

8.1 Racing Zone

Formal recognition of the wider equestrian and specific racing training sector within a designated 'racing zone' or contained within supplementary planning guidance, policies or area delivery plan should be considered. Finding appropriate enforceable mechanisms to recognise the wider equestrian sector, specifically the racing training sector, giving them

suitable protection against speculative development, yet supporting their viability and future growth potential should be considered. Best practice in other similar areas such as Newmarket and Lambourn should be reviewed and considered.

8.2 The Racecourse

Epsom racecourse itself should be supported to remain viable and profitable to enable capital investment in current and future infrastructure. Although horseracing should remain its core baseline activity, formal recognition should be given to the need for the racecourse as a venue to be fully utilised outside racing fixtures via its conference centre MICE activity and wider tourism and event activities. Future planning policies and operating restrictions should be flexible enough to allow all-year utilisation of the main site and its ancillary locations across the Jockey Club estate.

8.3 Employee Accommodation

The housing and accommodation needs of employees, stable staff, trainees and key workers within the wider equestrian sector should be considered in-light of unaffordable local house prices¹⁴ and rental levels¹⁵. Employee accommodation that meets modern safeguarding requirements, industry best-practice and regulations on overnight cover¹⁶, should be considered both on-site and nearby to the core operating locations. Strict planning policies, Section 106 requirements etc, can be used to prevent inappropriate 'back-door' commercial residential development.

8.4 Visiting Accommodation

Visiting stables competing at the racecourse also require affordable adjacent accommodation, which could be utilised as touristic accommodation outside race meetings. Lack of such affordable accommodation for visiting stables can be perceived as a negative by potential stables wishing to compete at Epsom racecourse.

8.5 Capital Investment

The need for capital investment in the sector's infrastructure should be recognised and accommodated for within future planning policy. The requirement for enabling residential development to release capital should be considered, yet ensuring via mechanisms such as S106 agreements, that capital released is ring-fenced for direct investment in the sector infrastructure such as improved facilities, staff accommodation or specialist equipment.

8.6 Inward Investment

Although linked to 7.4 Capital Investment, the need to attract wider inward investment to the sector should be considered as a priority. In addition to improvements to the racing training stables themselves, allied support sectors such as specialist veterinary practices, equine therapy facilities, specialist transportation companies, equestrian sector training providers (for employees), bloodstock/stud farms, farriers, saddlers, feed, livery and tack suppliers, equestrian holidays and equestrian experience operators, etc all may be valid components of a wider industry and have a justifiable place within a designated equestrian

¹⁴ Ratio lower quartile house price to lower quartile gross annual (workplace-based) earnings (2013 to 2018) is 15.5 (LGA)

¹⁵ Average monthly rent £1,924pcm, median rent £1,651pcm: source [home.co.uk](https://www.home.co.uk)

¹⁶ Example of best practice, Lambourn: <https://lambourn.org/public-consultation-collingridge-farm-development/>

zone or within specific policy guidelines. Policies should acknowledge the current and potential future needs of the wider rather than narrow sector.

8.7 Visitor Economy

The wider visitor economy potential of the equestrian sector and the leisure and tourism use of Epsom and Walton Downs should be considered within future planning policies. Such a high quality managed open green-space and the new adjacent Langley Vale Centenary Wood offer opportunities to appropriate small-scale and limited developments such as restricted use visitor accommodation, bunk houses, camping and glamping sites, waymarked trails & routes and associated supporting infrastructure.

8.8 Industry Support

Although Epsom & Ewell Borough Council is a founder member of the 'Vision for Epsom' initiative and working group, its progress has been slow and to date few hard outputs and outcomes achieved. In order to compete with other UK and International training areas Epsom's racing sector must coalesce around a shared objective to stabilise and grow the sector. Support via a positive Local Plan will only go some way to achieve future viability and success. Epsom and Ewell Borough Council through strategic support via the political leadership, officers and its functions such as Economic Development can help achieve this.

8.9 Place Recognition

Epsom is generally recognised as the 'Home of the Derby' with many local organisations and some public signage adopting a horse racing theme. Although this is in itself positive, the association really only links to a single race rather than the wider racing industry and equestrian sectors based across the Borough. Future consideration should be given how best Epsom's wider equestrian and thoroughbred racing associations can be exploited in terms of place management and place promotion. This would help both the sector to raise its profile to owners, syndicates and other trainers but also give the residents and businesses within the Borough an enhanced sense of identity and place.

9.0 Conclusion:

Epsom's wider equestrian sector is uniquely located adjacent to London, is accessible to both national and international markets, boasting both a significant thoroughbred training sector and internationally renowned racecourse, sited within the managed beauty and tranquillity of the Epsom & Walton Downs. Recent challenges have resulted in a decline in the number of horses being trained on the Downs and commensurate loss of training stables. There is an opportunity through the development of the new Local Plan to put into place policies and measures to help protect and support the wider local equestrian sector, providing a secure and stable base from which it can gain viability and future growth potential.

Annex A – Literature Review

Epsom Downs Racecourse and Racehorse Training Industry

Draft report October 2019 (to be published)

Contact: Wakako.Hirose@rapleys.com

Vision For Epsom

Leaflet produced by Jockey Club, Epsom & Ewell Borough Council & Surrey University

<https://www.epsom-ewell.gov.uk/sites/default/files/documents/business/economic-development/Epsom%20Vision%20leaflet.pdf>

Horse Racing in Lambourn Valley - The Industry's Economic and Social Impacts January 2019

SQW – January 2019

<https://d1jxmchgl7b0ql.cloudfront.net/documents/Lambourn-FINAL-v10.pdf?mtime=20190325112802>

The General Stud Book

Weatherbys Fact Book 2018

<http://edition.pagesuite-professional.co.uk/Launch.aspx?EID=67f57b97-f5a6-4c9d-91b4-ad377a693f23>

The contribution of thoroughbred breeding to the UK economy and factors impacting the industry's supply chain

PWC - Sept 2018

<https://www.thetba.co.uk/wp-content/uploads/2018/09/TBA-Economic-Impact-Study-2018.pdf>

British racing – the structure of the industry

BHA – Sept 2018

<https://www.thenhc.co.uk/wp-content/uploads/2018/09/Structure-of-the-industry-26-Sep-2018.pdf>

Newmarket's Equine Cluster

SQW - 2017 update on their 2014 report for West Suffolk Council

https://www.westsuffolk.gov.uk/planning/Planning_Policies/local_plans/upload/D12-Newmarket-s-Equine-Cluster-a-short-update-to-the-2014-report-2017.pdf

British Horseracing's International Influence

Henham Strategy – 2019

<https://www.britishhorseracing.com/wp-content/uploads/2019/06/British-Horseracings-International-Influence-June-2019.pdf>

Economic Impact of British Racing

Deloitte – 2013

<https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/sports-business-group/deloitte-uk-economic-impact-british-racing-2013.pdf>

Impact of the Horseracing Industry in Yorkshire

Centre for Regional Economic and Social Research Sheffield Hallam University – March 2011

<https://www4.shu.ac.uk/research/cresr/sites/shu.ac.uk/files/impact-horseracing-yorkshire.pdf>

A report of research on the horse industry in Great Britain

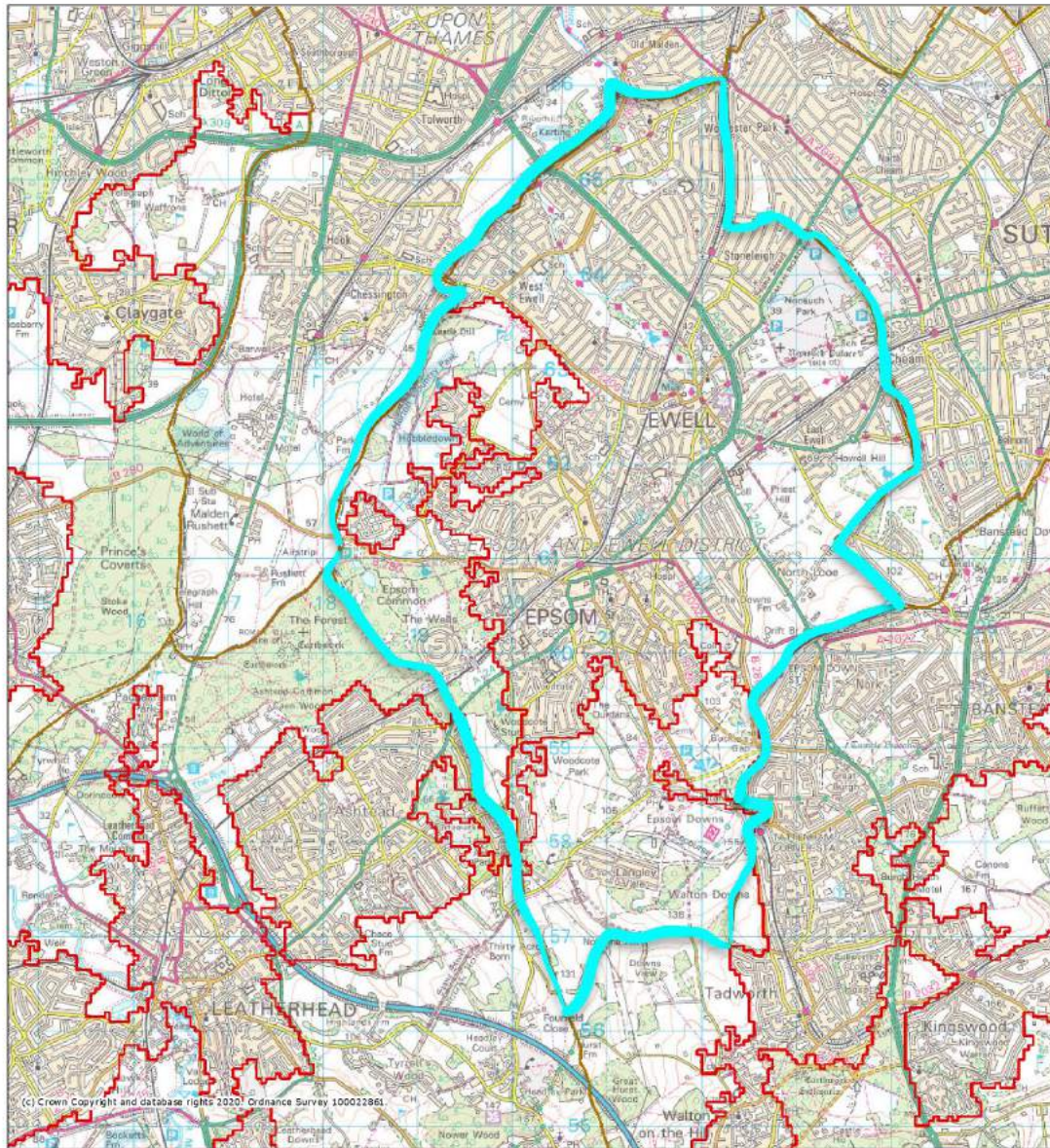
The Henley Centre March 2004 (Commissioned by DEFRA and the BHIC)

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/69259/pb9255-bhic-report-040318.pdf

Annex B – Magic Mapping of Epsom Borough

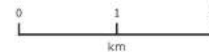
MAGiC

Magic Map



Legend

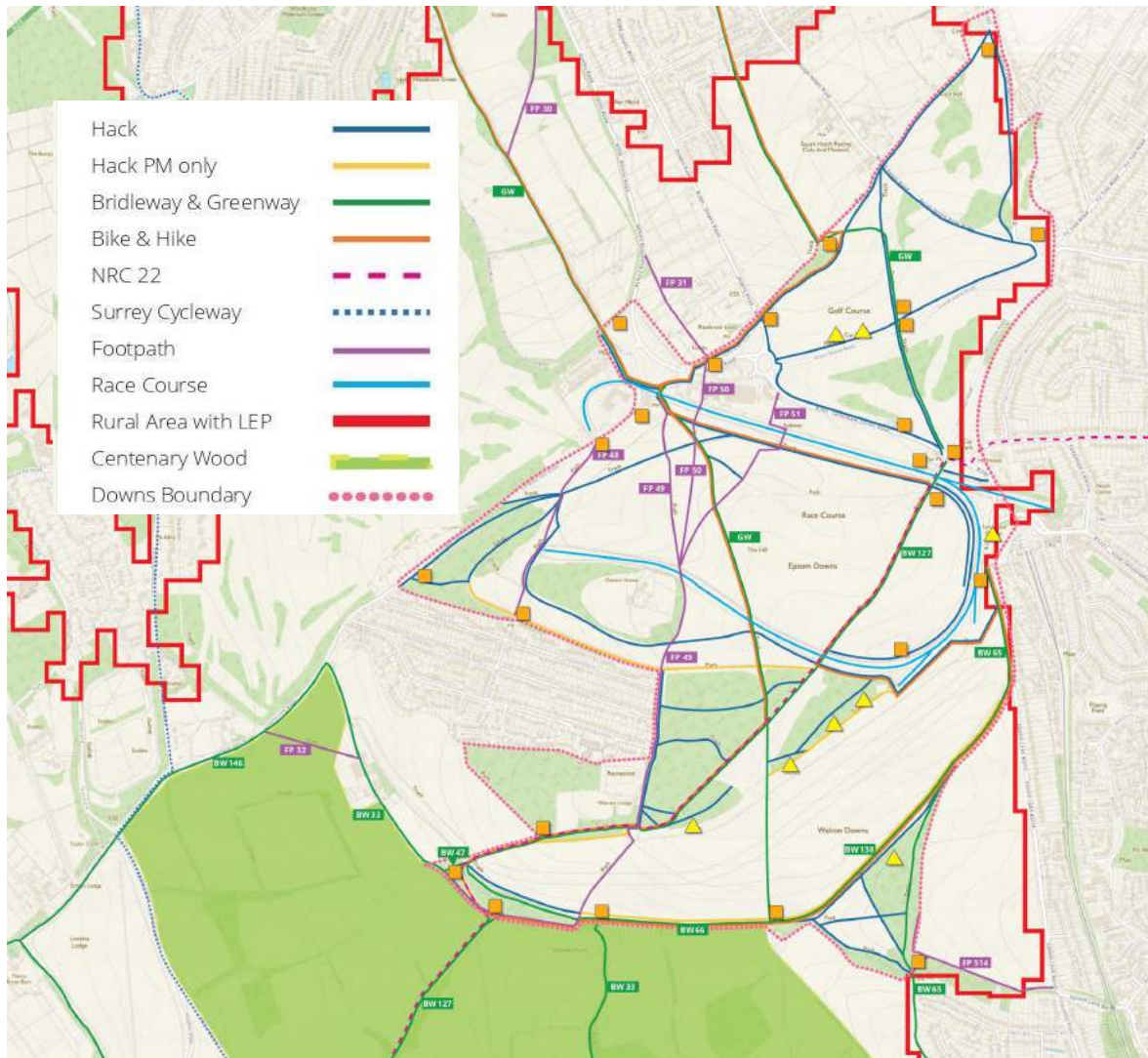
-  LAU1 - Districts and Unitary Authorities (England and Wales)
-  Rural areas within Local Enterprise Partnerships (England)
-  Epsom & Ewell Borough Boundary



Projection = OSGB 36
 xmin = 513300
 ymin = 156800
 xmax = 527100
 ymax = 164500
 Map produced by MAGiC on 7 January, 2020.
 Copyright resides with the data suppliers and the map must not be reproduced without their permission.
 Some information in MAGiC is a snapshot of the information that is being maintained or continually updated by the originating organisation. Please refer to the metadata for details as information may be illustrative or representative rather than definitive at this stage.

Annex C – Map of Epsom Downs & Distribution of Equestrian Businesses

Map (a) showing various access methods to the Downs



Map (b) showing equestrian business distribution across Epsom Borough and adjacent area



Horse Trainers: note some pins are overlaid on the same postcode.



Equestrian related businesses i.e. riding schools, liverys, equine supplies etc

Annex D – Consultees



Simon Durrant – General Manager Epsom Racecourse (Representing The Jockey Club and Racecourse)

Simon Durrant has considerable experience in racecourse management, having previously worked for Jockey Club Racecourses for 11 years, including management stints at all three racecourses in the group's London region - Epsom Downs, Sandown Park and Kempton Park. In his role, Durrant is part of a senior team running race Epsom's meetings, including the Investec Derby, one of the best attended days in the UK sporting calendar. He is also responsible for continued growth across all areas of the Epsom Downs business, including the racecourse's conference and events operation. (extracts from SportsPro Nov 2012).



Simon Dow - Clear Height Stables (Representing the Professional Training Stables)

Born 13th June 1961, Simon is a first generation trainer. Often considered to be the most forward thinking of workaholics, he still finds plenty of time to keep clients informed and entertained.

Simon was a committed athlete himself, having held the record over 800 metres as Surrey County champion, before directing his energies into horses and eventually the training of racehorses.

His career commenced when serving his apprenticeship as a lad, before quickly turning his attention to the business side of things. An opportunity to combine an Assistant Trainer's position with Philip Mitchell with his own small yard quickly led to bigger things and Simon moved to Epsom in 1987 to take over Wendover Stables, owned by Arthur Pitt.

Since moving to Clear Height Stables in the early 90s the stable has seen much success over the years recording in excess of 600 winners. This has been the result of a wide range of races, from local all-weather meetings, to black type victories at home and abroad.

The most successful horse so far was Young Ern who won the Group 3 Hungerford Stakes, the Group 3 Prix Du Palais Royale and was narrowly denied victory in a Group 1 at Deauville. The late, Chief Song won ten races and nearly £200,000 in prize money, would have been the most successful of our National Hunt runners. More recently, Simon sent Mr Scaramanga to Qatar to win the Group 2 Al Biddah Mile and Forceful Appeal won The Apprentice Handicap on All Weather Championship day.

Other horses that have progressed into multiple winners include Dark Honey, Confronter, Chakalak, Quantum Leap, Space Station, Clear Praise, Mustakmil, Seasonal Cross, Diamond Charlie, Poppanan and of late Forceful Appeal, El Campeon and Presumido. (Source simondow.co.uk).