

---

# EQUESTRIAN WORKFORCE MAPPING AND CENSUS

---

April 2026





## Contents

Background .....	3
Previous research .....	4
Strategic Objectives .....	5
Research Objectives .....	6
Research Audience .....	7
Methodology.....	7
Partnership working .....	9
Deliverables .....	10
Timescales .....	10
Success Measures .....	11
Budget .....	11
Tender requirements.....	11
Proposal selection criteria.....	12
Contact details .....	13



## Background

The equestrian sector is facing critical challenges around workforce recruitment, retention, and sustainability, particularly at the grassroots level. Despite being the backbone of equestrian sport and riding activity, we lack accurate data on who makes up our workforce, how many people are involved, the skills and qualifications they hold, or a holistic view of the barriers they face. We also lack consistent role terminology, which limits clear career pathways for sector-wide understanding, both to those already in the sector and to those joining.

There is also growing external need to demonstrate social value, improve inclusion and human and equine welfare standards, meet safeguarding and workforce development.

Without this understanding, it's impossible to design effective support, training, or recruitment initiatives. Therefore, we have identified a need to map our workforce (both paid and unpaid), to identify the gaps, listen to their experiences and needs to develop targeted solutions to improve conditions and retain talent, whilst ensuring inclusion of underrepresented groups. This would help us to work towards our strategic goal of enabling and supporting a vibrant and healthy equestrian sector by collaborating for workforce excellence. A sustainable, skilled, and diverse workforce is also vital for the survival and sustainability of grassroots equestrian and our aims for delivering wider social outcomes, advocating for the:

- Health and wellbeing benefits of riding
- Inclusive opportunities for disabled riders
- Community cohesion and rural economic activity

If we do not undertake this project:

- Continued confusion around terminologies making career and volunteer pathways complicated
- The recruitment and retention crisis will deepen, leading to further workforce shortages and potential closure of riding schools and equestrian establishments.
- We risk losing grassroots capacity to deliver equestrian activities, affecting both participation and pathway development.
- Without workforce data, we cannot design evidence-based interventions, meaning funding opportunities may be lost and policy decisions will continue to be based on assumptions rather than reality.

- The sector will struggle to meet inclusion, safeguarding, and welfare standards, limiting our ability to deliver wider social impact and risking reputational harm.
- Underrepresented workforce groups will continue to face barriers without effective voice or support mechanisms.

## Previous research

- **BEF Equestrian Coach Audit and Workforce Development Report (2011)** - Provided an early audit of the coaching workforce, identifying skills gaps, training needs, and workforce challenges across the equestrian coaching sector. Recommended structured development pathways.
- **BGA Groom and Employer Survey (2014)** - Early mapping of the working conditions, employer-employee dynamics, and employment practices. Exposed informal work arrangements and lack of legal protections.
- **BGA Grooms Minds Survey (2017)** - Focused on mental health within the grooming profession. Revealed high levels of stress, long hours, lack of support, and stigma around mental health conversations.
- **BGA Workforce Retention Survey (2018)** - Investigated reasons for leaving the industry. Key themes: low pay, poor work-life balance, limited progression opportunities.
- **BGA Freelance/Self-Employed Grooms Survey (2019)** - Highlighted the growing trend of self-employment. Grooms valued flexibility but faced challenges like lack of job security, pensions, and benefits.
- **BGA Grooms Pay and NMW (2019)** - Exposed widespread issues with compliance to National Minimum Wage, particularly where accommodation and variable hours were involved.
- **BGA Training in the Workplace Survey (2019)** - Emphasised inconsistent training opportunities. On-the-job learning was common, but structured development and formal qualifications were lacking.
- **FEI/BGA/SGI International Competition Grooms Survey (2020)** - Explored the experiences of grooms working at international levels. Found issues with travel conditions, recognition, and regulatory inconsistencies.
- **BGA/EEA/BEF – Coronavirus Impact Survey (May 2020)** - Captured the immediate financial and operational impact of COVID-19 on workers and employers. Highlighted lack of access to government support schemes for many freelancers and self-employed.
- **SEIB Cost Impact on Livery Yard Owners and Customers (2022)** - Assessed the financial pressures on yard businesses and their clients due to rising operational costs. Indicated potential impacts on affordability and job security.

- **EEA/BGA Survey of Employers and Workers – Low Pay Commission Report** (July 2023) - Provided detailed insights into pay structures, compliance with employment law, and perceptions of fair remuneration within the industry. Contributed evidence to policy discussions on low pay.
- **BEF Health of Riding Establishments** (2022 & 2023) - Tracked the financial and operational sustainability of riding schools and establishments. Identified staff shortages, cost pressures, and risks of closures.
- **Ole and Wolfram** (2024) - Critically examined whether existing efforts to prevent grooms from leaving the industry have been effective. Highlighted persistent issues such as pay, working conditions, and recognition.

Reoccurring themes:

- **Low Pay & Lack of Legal Compliance:** Many grooms continue to be paid below minimum wage, especially when accommodation is provided.
- **Retention Challenges:** Poor work-life balance, long hours, and limited progression are driving people away from the sector.
- **Mental Health Concerns:** There is increasing awareness but ongoing lack of support for mental wellbeing.
- **Self-Employment Trends:** A growing freelance sector reflects both a desire for flexibility and systemic employment challenges.
- **Training Gaps:** Structured, quality training is often lacking or inconsistent across the workforce.
- **Impact of External Factors:** Economic pressures (e.g. rising costs, pandemic recovery) continue to strain the sector's sustainability.

## Strategic objectives

This project is a critical step towards delivering our strategic priorities: enabling and supporting a vibrant and healthy equestrian sector and driving sustainable growth at all levels to ensure a thriving, accessible, diverse, and inclusive sport.

By building an accurate picture of who makes up our workforce, the roles they perform, and the barriers they face, we will strengthen the sector's foundations and create practical solutions to recruitment, retention, and wellbeing challenges.

This insight will directly inform significant decisions about where to target workforce development programmes, how to improve working conditions and support riding schools, and how to design recruitment campaigns.



The early stages of this project will also help to guide the development of the CIMSPA Equestrian Standards work. Both projects will help influence future investments, partnerships, and policies to ensure they are evidence-based and genuinely meet the needs of our workforce. In doing so, we will not only safeguard the sector's health but also create the conditions for long-term, sustainable growth that is open, equitable, and reflective of our community.

## Research objectives

This project will build a comprehensive picture of the equestrian workforce to better understand its composition, challenges and opportunities. It will support the co-creation of practical solutions to improve recruitment, retention, progression and inclusion across the sector. The key objectives are to:

- Map the equestrian workforce
  - Identify and profile areas of the workforce, including employers, employees, freelancers and volunteers
  - Analyse roles, demographics, employment status and time spent in roles
- Standardise and define workforce pathways
  - Establish clear and consistent role titles to improve understanding and comparability across the sector/disciplines, particularly those new in.
  - Define the knowledge, skills, behaviours and qualifications required for roles
- Identify workforce challenges and barriers
  - Explore the challenges faced across the workforce, with a particular focus on yard staff (including yard employers and freelancers), volunteers and coaches
  - Identify barriers to recruitment, retention, progression and inclusion
  - Examine how these challenges vary by demographic
- Assess workforce gaps and needs
  - Identify current and emerging skills gaps and shortages within the sector
  - Highlight areas where workforce capacity or capability is limited
- Engage underrepresented groups
  - Actively involve underrepresented communities in the research to ensure their voices are heard
- Co-create solutions with our federation member bodies AND the target workforce groups



- Develop a roadmap for sustainable workforce development
  - Produce a clear, evidence-based roadmap to support long-term workforce sustainability
  - Provide actionable recommendations for improving recruitment, retention, inclusion and career development across the equestrian industry

## Research audience

The primary audience for this research is the UK equestrian workforce, including paid and volunteer roles such as coaches, grooms, yard staff, riding school employees and freelancers. We aim to engage a wide demographic mix across age, gender, ethnicity, disability, health status, and socio-economic background, with attention to underrepresented groups. The research will span multiple equestrian disciplines and levels.

Access will be supported through partner networks, riding schools, and member organisations, keeping in mind that freelancers and casual workers could be harder to reach. The exact numbers of our target audience are unknown, however, to ensure a good range we would be wanting a minimum of 500-1000 responses.

Potential challenges include reaching non-affiliated, freelancers and casual workers or digitally disconnected individuals as we might be relying on our social media channels to get the survey out. We may also face some survey fatigue among groups that have participated in more recent communications/research. A clearly targeted call to action with an inclusive approach will be used to ensure broad engagement and meaningful representation.

## Methodology

This project is a large long-term project and is best broken down into a phased approach to ensure robust data collection, meaningful stakeholder engagement and the development of sustainable, evidence-based solutions:

### **Phase 1: Map and standardise roles in the equestrian sector (month 1-3)**

- Develop a clear and consistent categorisation of roles across the equestrian workforce
- Align role titles across the sector for different disciplines to improve clarity, accessibility and comparability

- Establish an initial framework to underpin the subsequent research but may be open to change through the process if necessary.

**Phase 2: Understand the skills and qualifications for each role (months 2-3 to co-inside with the above)**

- Define the knowledge, skills, behaviours, experience and qualifications required for each role
- Engage with industry stakeholders to validate role expectations and requirements
- Ensure alignment with existing training pathways (and CIMSPA equestrian standards)

**Phase 3: Develop a draft workforce pathway map (months 3-4)**

- Map typical entry points, progression routes and career pathways
- Identify key transition points, potential progression barriers and areas of drop-off
- Initial workforce pathway framework drafted to inform survey design

**Phase 4: Call to action soft touch survey (month 5)**

- Co-design the survey with key stakeholders to ensure relevance and clarity
- Define scope, terminology, target audience and narrative
- Develop a balanced survey with both quantitative and qualitative questions to influence groupings for focus groups

**Phase 5: Collect data via online platforms and networks (month 6)**

- Disseminate survey through member bodies, industry networks and other partners where possible
- Use emails and social media channels to maximise reach and engagement

**Phase 6: Analyse initial findings and group respondents for focus groups (month 7)**

- Analyse survey findings to identify trends, demographics and key challenges to direct focus group structure
- Segment respondents to identify priority groups for deeper exploration
- Soft check the workforce frameworks developed in earlier phases

#### **Phase 7: Host focus groups (months 8-9)**

- Conduct targeted focus groups to explore survey trends in greater depth
- Engage specific cohorts including underrepresented groups
- Capture lived experiences, nuanced insights and perspectives not evident in survey data

#### **Phase 8: Analyse focus group findings, audit resources and co-design solutions (months 10-12)**

- Analyse focus group findings and develop a clear insight report demonstrating trends from both data collection methods as well as recommendations

#### **Phase 9: Audit resources and co-design solutions (months 13-15)**

- Undertake an audit of current member body resources, training provisions and support structures
- Identify gaps, duplication and opportunities for alignment
- Facilitate co-design workshops with the target workforce groups and member bodies to develop practical, inclusive solutions
- Draft a workforce development roadmap focused on sustainable, long-term interventions

#### **Phase 9: Embed long-term change and impact (year two and onwards)**

- Establish advisory groups with diverse representation including lived experience
- Define and implement key performance indicators and impact measures
- Create ongoing feedback mechanisms e.g. annual pulse surveys, open feedback channels
- Support continuous improvement and sector-wide adoption of recommendations

## **Partnership working**

This project involves collaboration with several internal partners from the federation, including the British Grooms Association (BGA), the Equestrian Employers Association (EEA), and potentially individual employers and training providers within the equestrian



sector. Their support will provide access to existing data, networks of grooms and employers, and subject matter expertise, ensuring the project is grounded in real-world insight and is practically applicable. Members of the People Steering Group will be engaged early during the briefing and design phase to inform the scope, ensure alignment with sector needs, and facilitate access to participants and then throughout the rest of the project especially during dissemination stages, to support sector-wide adoption of findings. Access to the project outputs should be extended to employers, workforce representatives, policy makers, training providers, and affiliated organisations to ensure broad impact, encourage action on recommendations, and support long-term workforce development planning.

## Deliverables

- Equestrian workforce call to action survey and focus groups
- Workforce database/contact pool
- Insights report
- Co-designed solutions and action plan
- Workforce development roadmap
- KPIs and measurement framework

## Timescales

The timescales for the tender process for this project are as follows:

- Invitation to tender process begins **6 May 2026**
- Deadline for questions of clarification **14 May**
- Deadline for proposals to BEF **27 May**
- Shortlisting **By 29 May**
- Shortlisted organisations: virtual presentations **w/c 1 June**
- Appointment of winning organisation **By 10 June**
- Kick off meeting to finalise approach **w/c 15 June**

With the project phases expected to be delivered in the below deadlines:

- Map and standardise roles with required knowledge, skills, behaviours and qualifications **June-August**

- Develop a draft workforce pathway map **July-September**
- Design survey with stakeholder input **July-October**
- Collect data via online platforms/networks **November**
- Analyse insights and organise focus groups **December**
- Host focus groups **January-February 2027**
- Audit of current MB resources/training/support and co-design solutions with the workforce **February-March**
- Develop roadmap for long-term change with KPIs **March**
- Presentation with BEF and Partnership **April 2027**

## Success measures

- **Co-design, not top-down:** Solutions shaped by those directly impacted
- **Inclusion by design:** Ensure diverse voices from day one
- **Sustainable, not one-off:** Build structures that outlast the project
- **Actionable insights:** Focus on practical change, not just data collection

## Budget

We are seeking an external agency with demonstrable experience in workforce research, insight and stakeholder engagement to support us to achieve the deliverables outlined in this brief. The total budget available for this project is £25,000–£30,000 (inclusive of VAT, expenses and incentives).

## Tender requirements

In responding to this tender opportunity please identify the skills and experience you have aligned to the tender requirements outlined in this brief. The written tender proposal should include the components outlined below:

- Approach to project delivery - detail your methodology for delivering the project, including a clear and structured approach. Provide a detailed project timeline, with key milestones and deadlines, explaining how each phase contributes to meeting the overall objectives.
- Why BEF should select you for this project - highlight why you are the ideal choice for this project, focusing on your relevant experience, capabilities, and alignment with BEF's strategic goals.

- Familiarity with sport/equestrian workforce. Please detail your understanding and experience of the complexities and diversity of our workforce, including paid and unpaid workforce.
- Quality and insightful deliverables - explain how you deliver high-quality, insightful outputs that maximise the benefits of the project. Demonstrate how your deliverables will help BEF influence the wider sector.
- Past reports and case studies - provide examples of previous reports or deliverables. Ideally, include projects related to sport or physical activity, and/or rural sector along with case studies showcasing your expertise and relevant project team credentials.
- Risk management - submit a clear risk register, including:
  - A list of risks that may affect your ability to deliver the project.
  - Scores for the likelihood and impact of each risk.
  - Mitigation strategies for each risk, and a contingency plan outlining actions if those strategies fail.
- Cost breakdown - provide a detailed breakdown and explanation of all costs associated with delivering the project.

## Proposal selection criteria

For this project, proposals will be scored against the following criteria:

Criteria	Weighting
Understanding of the BEF's and sport workforce landscape and project requirements, including strategic importance	15%
Proposed approach	20%
Project team skills, experience and capacity	15%
Demonstrable expertise in sports standards, qualifications and career/volunteer mapping	20%
Risk register and mitigating actions	5%
Added value	5%
Value for money	20%

- Proposals will be reviewed by a balanced panel of BEF stakeholders and members of staff



- o If shortlisted, the potential supplier will be invited to attend a virtual interview w/c **1st June**
- o The interview will comprise a 20-minute presentation, covering the main elements of the potential supplier's response to this ITT, and 20 minutes for questions from the panel, with interviews lasting no more than one hour.
- o Potential suppliers should indicate in their tender response whether they are available to attend on this date. If unavailable, an alternative date may be agreed with BEF.
- o On appointment, the successful organisation will be expected to attend a kick off meeting with the project team **w/c 15<sup>th</sup> June**
- o The BEF reserves the right to change the tender process including the timetable, to reject any or all the proposals received, not to invite any tenderer to proceed further and not to provide any tenderer with additional information. Each potential supplier should identify any conflict of interest that would affect their submission.

## Contact details

The project will be managed for the BEF by Abbie Bevan, the Research and Insight Manager. Please direct any enquiries and questions on this tender and process to Abbie, whose contact details are: [abigail.bevan@bef.co.uk](mailto:abigail.bevan@bef.co.uk)