BETTER FACILITIES

The BEF Facilities Strategy and Delivery Plan
2013-2017

Prepared by: British Equestrian Federation
1.0 INTRODUCTION

The British Equestrian Federation (BEF) Member Bodies have worked in partnership to prepare this Facilities Strategy to assist facility operators, funding bodies, land owners, local authorities, education establishments, voluntary sector organisations, national organisations and other relevant bodies in the strategic planning and improvement of sustainable facilities which best meet the development and competition needs of the sport at all levels. This strategy is a development of the 2006 BEF Facility Strategy and looks to further enhance all that has already been achieved by using latest insight and best practice from the last seven years.

The BEF is a federation made up of 18 independent member bodies (15 full and three associate), each of which is an equestrian organisation in its own right. Its member bodies work closely together to ensure policies are complementary within a wide range of issues such as equestrian facilities, coaching and volunteering. Between them they represent over 210,000 people with a wide range of equestrian interests, from elite competitive sports to trade and leisure activities.

A significant majority of equestrian facilities are privately owned. This includes riding schools, which play a vital role in introducing and sustaining interest in the sport, equestrian centres, show grounds and centres, livery and other private yards, and trekking centres. The education sector, including colleges, also provides a range of facilities, instructors and horses, and contributes in areas of equine management and sports science. The voluntary sector plays a significant role, with all BEF member bodies relying heavily on volunteer support in providing opportunities for people to participate. The public sector plays a substantial role in introducing people to riding, and opportunities are available to develop stronger links to Local Authority Sports Development and Leisure Services Departments.

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1 BEF Facilities Strategy [2006].
2.0 BETTER FACILITIES
The focus of this strategy is not about increasing the number of centres; it is generally felt that across the country there is appropriate coverage (please see the regional section of this document provides greater localised intelligence). Due to current met demand and latent demand, it is recognised across the sport that there is a need to sustain and improve all existing facilities, and not focus investment on new provision unless this is on a replacement i.e. like for like or like for better.

It is also understood within the sport, that there is great potential for Asset Transfer and where possible, and where it is of benefit to the sport, the BEF and MBs will work with any facility provider to consider all opportunities if it safeguards the provision of equestrian facilities.

Through the Whole Sport Plan, the BEF has identified a range of initiatives which are primarily aimed at growing and sustaining participation, whilst at the same time providing appropriate high quality opportunities which allow all riders to achieve their potential. The BEF encourages all funding providers to align to the strategy to ensure a coordinated approach to facility investment, leading to greater opportunity to increase participation.

3.0 BACKGROUND INFORMATION
In assessing the needs of the sport for investing capital funding, the BEF have drawn together information on the people in our sport and their needs and expectations. The BEF have also explored the key requirements for investment to facilitate the successful launch of the products we are developing and the opportunities we have in order to target new participants. The places eventually targeted for investment will be determined (as shown in the diagram below) by analysis of the overlap between the three core themes:

- **People** – What drives their involvement?
- **Products** – What facilities do we need to maximise the success of our activities?
- **Places** – Where do we need to target the investment geographically to ensure a maximum return on investment?

![Figure 1: Targeting Investment](image-url)
The BEF also recognise the knowledge of who is riding, who wants to ride, where they live and where the opportunities to ride are in the regions is key to determining an effective strategy to increase participation within the sport.

![BEF FACILITY STRATEGY Diagram](image)

**Figure 2: BEF Facility Strategy**

As part of the information gathering process, the BEF undertook analysis from a variety of sources:

- Sport England Market Segmentation;
- Sport England Insight Pack / Trends in your sport;
- Sport England Active People Survey APS2 – APS6;
- Sport England Sports Satisfaction Survey;
- Back to Riding – Qualitative Research Report, Sportswise April 2012;
- British Equestrian Trade Association (BETA) National Equestrian Survey 2011;
- Member Body Intelligence;
- Local and regional intelligence on the ground;
- Centre data capture for facility provision & lesson offerings.

### 4.0 EQUESTRIAN INSIGHT

- Although participation in equestrian has been broadly flat over the medium term, it has started to show a downward trend in the last couple of years. This drop is most noticeable in the female 35/45 age group.²
- The overall market for equestrian is dominated by current riders and therefore following a similar trend to regular participation.²
- Equestrian is a predominantly female sport. A steep drop off between mid-teens and mid-20s is slightly counterbalanced by a late 30s/40s resurgence.²
- Participation in equestrian is dominated by more affluent female segments, with a relatively focused customer base. Equestrian centres need to offer good facilities to meet the standards expected of this market sector.³
- Participation in equestrian by those still in education broadly mirrors that of the overall sport, although there is a smaller proportion of participants riding three times a week or more.
- Equestrian is one of the most popular sports for people with a disability. 48,000 have, on average, taken part in the last month and this market is holding up more strongly than...
overall participation. Not all equestrian centres meet accessibility requirements for disability participation and more investment is required in this area.²

• Current riders like the exhilaration, social opportunities and feeling of being part of a wider group that equestrian gives them. Given that around half of all participants have some interaction with the organised structures of the sport (club, tuition and competition), it is unsurprising that riders expect the people who run venues to be competent and welcoming. There is a need to focus on the social side of the sport and offer spaces for socialising.⁴

• Equestrian participation peaks in the summer, particularly for those who ride three or more times a week. Interest in riding amongst those who have not done so in the last month tends to have a high point in the second half of the winter (January-April).²

• As with many sports, equestrian has a common habit of exactly once a week participation. However, it also has almost as high a peak around every day participation (and five times a week). The proportion of riders with this type of very frequent habit has risen in recent years, suggesting a possible re-entrenchment in the sport around its core audiences. These figures represent those people who own a horse. Horse ownership is, therefore, directly linked to more regular participation.⁵

• Over 50% of riders have taken part in no other sport in the last month. This is dramatically higher than the average across sports, suggesting equestrian has a very different audience to most sports – one who is more focused on riding above all else. Of those who have played something else, only 20% have participated in two or more sports.⁶

• Horse riding is the dominant discipline within equestrian, and shares the late summer peak of the overall sport. The more specialist disciplines, such as dressage, are less seasonal. There has been real growth in pony trekking in the last three years, again focused in late summer, early autumn.⁷

• From a relatively low starting point amongst 11-15 year olds, participation in equestrian drops off steeply in the late teens/early 20s, but stabilises around 1% of the population and grows again later in life.⁸

To maximise this drive, we are involved in delivering a specific product for returning riders; ‘Take Back the Reins’ and customer service training for engaged proprietors.

At the heart of these initiatives is having accessible, high quality facilities offering a wide variety of riding opportunities to our full audience which also align to the rider pathway.

The Sport Satisfaction Survey tells us that participants are reasonably satisfied with facility provision, but we know from our comments there is a problem with the lack of safe off road riding opportunities for both the casual rider and more serious competitive rider. We also know from our own capacity analysis that many riding schools are full at peak times. Both issues can partly be solved by a greater promotion and publicity of the extensive bridleway networks, and secondly by encouraging riding schools and centres to be more flexible in their programming to allow access at off-peak times. There is a great need to develop safe, off road places to ride. BHS are helping in this quest through the development of EMAGIN where the sport can record bridleway routes.

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² Active People Survey 4 and 5Q2
³ Sport England Market segmentation tool
⁴ Satisfaction Survey 2011
⁵ Active People Survey (APS2 and APS5Q2)
⁶ Active People Survey SQ2
⁷ Sport England Trends in your sport document
5.0 WHAT DO WE KNOW ABOUT OUR FACILITIES IN DETAIL?

The charts below provide an overview of the data cleansing we have undertaken and also will serve as the basis of targeted capital investment in 2012-2013 and within the forthcoming funding cycle 2013-17.

We have undertaken some analysis of our riding centres and facilities, and organised this by region as shown below. This totals 1407 without show and event centres, which will be added later.

<table>
<thead>
<tr>
<th>Region</th>
<th>No. Centres</th>
</tr>
</thead>
<tbody>
<tr>
<td>East</td>
<td>220</td>
</tr>
<tr>
<td>East Midlands</td>
<td>172</td>
</tr>
<tr>
<td>London</td>
<td>22</td>
</tr>
<tr>
<td>North East</td>
<td>67</td>
</tr>
<tr>
<td>North West</td>
<td>60</td>
</tr>
<tr>
<td>South East</td>
<td>386</td>
</tr>
<tr>
<td>South West</td>
<td>146</td>
</tr>
<tr>
<td>West Midlands</td>
<td>138</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>196</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>1407</strong></td>
</tr>
</tbody>
</table>

**Figure 3: Number of UK with detailed centres throughout the provision**

**Figure 4: Pie Chart to show riding schools by region**

We know more information than ever about the riding schools’ provision to participants; for example the proportion which have indoor schools, outdoor schools and floodlights. Armed with this level of regional information, gaps in provision for particular products identified in our target segment areas become evident.
We are working closely with other colleagues to define and enhance the talent pathway and excel from a facility perspective, and have performed an analysis of Olympic discipline venues, show centres and competition courses. The inclusion of these venues takes our listings to 1903 analysed by region.
The BEF have recently launched their Hoof portal aimed at people wanting to learn more about our sport. The portal encompasses a ‘Where to Ride’ section and as part of the information gathering process, centres were invited to enter their details on a survey (both web and paper based). This allowed the BEF to clearly identify the nature of provision (amenities/facilities/lessons) offered by each Centre. This information was cross checked against Member Body data and to date the BEF has over 1000 centres with this level of information. This process is ongoing and under constant evaluation and review.

6.0 NATIONAL OVERVIEW

The BEF are continuing to undertake an in-depth regional analysis and prioritisation. Data collections from the facility surveys are ongoing and details are updated regularly.

Sport England’s Active People survey shows us our current participation trends and latent demand on geographical basis. In the most, it identified rural areas on the outside of large urban cities as priority areas.

Priority geographical areas identified include:

Phase 1 priorities:
1. Bristol and surrounding Avon area;
2. Surrey/South London;

Phase 2 priorities:
1. Brighton and surrounding Sussex area;
2. South East London and surrounding Kent area;
3. Sheffield and surrounding South Yorkshire area;
4. Leeds/Bradford and surrounding West Yorkshire area;
5. Liverpool and surrounding Merseyside area;
6. Manchester and surrounding Greater Manchester and Cheshire area.
Sport England social segments indicate four segments which are predisposed to riding. The BEF have worked with these segments, adapting them to better understand the equestrian market:

- Chloe (Young professional 18-25);
- Leanne (Student 18-25);
- Alison (Busy stay at home mum 36 – 45);
- Elaine (Empty nest career lady 46 – 55).

It should also be noted that equestrian is one of the highest participated disability sports, and current data provided by RDA shows latent demand of seven new riders to each current participant. Although RDA generally shows a consistency to latent demand across the country, they have prioritised certain localities based on current readiness to work in partnership with the Member Bodies. The priority areas for RDA match the phase one priority areas with the additional area of Leeds, which falls into phase two priority area for BEF.

7.0 REGIONAL ANALYSIS

7.1 NORTH EAST AND YORKSHIRE REGION

The North East is a significant region for equestrian sport and an area where participation is currently growing. There are a number of high profile training and competition venues (as well as major international competitions such as the Equi-Trek Bramham International Horse Trials) in the region.

New centres and venues are becoming available, through farm diversification in the main, and established centres continue to be busy, especially at peak times. Additional capacity is needed in the region and small grants/investments for flood lights or similar would mitigate some of these issues. Some longer established centres are thought to be in need of investment/improvement with some disciplines withdrawing fixtures and training clinics due to poor quality provision.

There is strong latent demand in the region, with Leeds, East Riding and Sheffield having been identified by Sport England as areas of significant latent demand. The most recent Sports Satisfaction Survey has indicated that provision of safe off road riding is seen as a priority by many within the sport, and lack of the same is cited locally as a major barrier to participation.

A recent MOD investment in access/bridleways across the Catterick Training area is seen as an excellent model for future development.

The BEF has seen great success in recent Capital funding rounds for several centres in the North East and Yorkshire area. £15,000 was awarded to Bishop Burton in Yorkshire towards an off road riding area, a cross country course and a training ground. The funding provided a community engagement programme for local riding schools and centres using existing networks, therefore facilitating a good engagement plan for a growth in community participation use.

Carrington Riding Centre are set to increase their current weekly riding opportunities and private tuition by 77, and increase opportunities to disabled groups through an investment of just over £3000 for the provision of some outdoor lighting.

In 2011, the BEF funded improvements to toilet facilities and additional equipment for teaching and competition at Throstlenest RDA Centre in Bradford. The investment provided an increase of 620 rides over a 40 week period for the Pony Club. As well as increasing the average number of riders per day, the investment provided an additional 20 rides over 52 weeks of the year, equating to 1040 rides. Increased teaching hours of two hours per day allowed 30 extra participants to ride each
weekend. Two new RDA groups were also able to start, which added 624 new rides per annum. The jumps and gymkhana equipment purchased have made a significant contribution to increasing rider satisfaction and the quality of the experience provided.

Figure 8: SE Facility Mapping, 2010 North East

Figure 9: SE Facility mapping, 2010 Yorkshire
7.1.1 Market Segmentation: North East and Yorkshire Region

Data provided by Sport England has been broken down to enable us to better understand the borough by borough location of our target segments. Leeds, Sheffield and Durham show high modeled latent demand, with Leeds being the second greatest local authority in the UK, and Sheffield being the fourth highest.

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Estimated population (from Sport England market segmentation)</th>
<th>Modelled once a month participants</th>
<th>Modelled latent demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leeds (2)</td>
<td>605705</td>
<td>6532</td>
<td>4932</td>
</tr>
<tr>
<td>Sheffield (4)</td>
<td>412438</td>
<td>3939</td>
<td>3145</td>
</tr>
<tr>
<td>Durham (6)</td>
<td>400097</td>
<td>3576</td>
<td>2952</td>
</tr>
<tr>
<td>Bradford (7)</td>
<td>375033</td>
<td>3720</td>
<td>2930</td>
</tr>
<tr>
<td>Kirklees (13)</td>
<td>309286</td>
<td>3139</td>
<td>2433</td>
</tr>
<tr>
<td>East Riding of Yorkshire (15)</td>
<td>273393</td>
<td>3044</td>
<td>2267</td>
</tr>
</tbody>
</table>

Figure 10: Estimating local demand and participation in Equestrian: North East/Yorkshire Region

BEF have received additional specific support from South Yorkshire Sport CSP, and North Yorks CSP around market segmentation, which will assist in targeting funding to meet the latent demand at local level.

Figure 11: North East Market Segmentation
### 7.1.2 SWOT Analysis: North East and Yorkshire Region

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Participation increasing in the NE of the region</td>
<td>- Some longer established centres require investment to prolong lifespan and create social and welfare facilities to meet the standard desired by our target segments</td>
</tr>
<tr>
<td>- Significant number of centres and competition venues</td>
<td>- Greater off road riding access required</td>
</tr>
<tr>
<td>- Sport well established at all levels of the athlete pathway</td>
<td>- Drop off recorded in some centres due to poor quality facilities, feedback indicates this could be reversed if improvements were made</td>
</tr>
<tr>
<td>- Strong HE/FE presence</td>
<td>- Centres largely in private ownership precluding applicants from seeking grants/legacy funding</td>
</tr>
<tr>
<td>- Several High Profile competitions in the areas attracting participants and revenue</td>
<td></td>
</tr>
<tr>
<td>- High demand for tourism and trekking</td>
<td></td>
</tr>
<tr>
<td>- Potential for cross agency work on development of riding routes/access</td>
<td></td>
</tr>
<tr>
<td>- Great relationships with CSPS and excellent market intelligence</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Opportunities</strong></th>
<th><strong>Threats</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Development of Hacking/Off road riding – strong demand for equestrian tourism. Local authorities keen to support</td>
<td>- Access and availability of off road riding</td>
</tr>
<tr>
<td>- Opportunities exist to improve quality of offer at established centres</td>
<td>- Venues almost exclusively (bar HE/FE) in private ownership which restricts funding available and increases competition for access</td>
</tr>
<tr>
<td>- Good capacity to develop sport at all levels</td>
<td>- Some gaps in geographic spread of facilities</td>
</tr>
<tr>
<td>- Investments to increase capacity (i.e. lighting, and all weather sport provision) would have an immediate impact on participation and retention</td>
<td>- Lack of capacity at peak time hinders growth in new participants</td>
</tr>
<tr>
<td>- NGB support for planning applications and new projects is successful</td>
<td>- Fall in quality of facilities provision affecting retention</td>
</tr>
</tbody>
</table>
7.1.3 Gaps in Provision: North East and Yorkshire Region
There are many good venues across the region which meet a growing base of participants; however some are in need of investment to ensure continued retention and to halt any drop off. Geographic gaps in provision have been noted in the Kirklees area – particularly around Huddersfield, and access to safe off road riding is a significant barrier to development of the sport.

It is felt that a greater understanding of needs beyond the urgent requirements for safe off road riding is needed. The BEF aims to undertake on-going market/facility evaluation in this region to gain greater understanding of needs, expectations and requirements as well as current existing provision.

7.1.4 Summary: North East and Yorkshire Region
This is a region with strong latent demand and potential for growth. There are a number of potential investment themes which can be developed, particularly in the areas noted already where demand has been assessed to be high.

Stakeholder engagement, market insight and local knowledge favour:

- Indoor school provision;
- General refurbishments of existing competition venues;
- Toilets and Shower Facilities;
- Customer Welfare and Social Facilities;
- Rights of Way/Access.

7.2 EAST REGION
The sport is well developed in the east region, particularly around Cambridgeshire. BEF Member Bodies are active in the area and there has also been sustained growth in disability sport. Feedback from stakeholder engagement has pointed very strongly towards any further investment in facilities being tied into engagement with BEF products/delivery as a key element of the Whole Sport Plan.

The BEF regional network is well developed in the East, and works closely with the CSPs in the area – Active Norfolk, Team Beds and Luton, Living Sport, Sport Essex, Suffolk Sport and Herts Sport Partnership. Stakeholder engagement was carried out with Member Body representatives and a cross section of venue and facility owners/managers.
### 7.2.1 Market Segmentation: East Region

Data provided by Sport England has been further broken down in order for us to understand the borough by borough location of our target segments.

Colchester and Huntingdonshire local authorities show the highest latent demand in the East region, 91st and 98th respectively, with Bedford and Basildon following.

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Estimated population (from SE market segmentation)</th>
<th>Modelled once a month participants</th>
<th>Modelled latent demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colchester (91)</td>
<td>140133</td>
<td>1679</td>
<td>1207</td>
</tr>
<tr>
<td>Huntingdonshire (98)</td>
<td>132204</td>
<td>1614</td>
<td>1145</td>
</tr>
<tr>
<td>Bedford (108)</td>
<td>122120</td>
<td>1454</td>
<td>1051</td>
</tr>
<tr>
<td>Basildon (109)</td>
<td>131300</td>
<td>1386</td>
<td>1050</td>
</tr>
</tbody>
</table>

Figure 13: Estimating local demand and participation in Equestrian: East Region

Figure 14: East Market Segmentation
### SWOT Analysis: East Region

#### Strengths
- Good network of centres in the region; sport is well linked to CSPs
- Desire to support growth in disability sport is high
- Good grass roots facilities available
- Significant number of livery yards wishing to expand to offer public access riding

#### Weaknesses
- Achieving planning permission for expansion is currently challenging
- Local Authorities are not always supportive or understanding of the sport or its needs/concerns
- Not all centres signpost riders to opportunities to develop
- Lack of relevant facilities for disability sport outside of specialist centres
- Lack of overnight stabling (either temporary or permanent) to support regional competitions or major training clinics

#### Opportunities
- Development of Hacking/Off road riding
- Stakeholders keen to work together to develop regional competition/coaching facilities and infrastructure
- Good capacity to develop disability sport
- Facilities have a strong desire to work with the BEF to support the aims of the whole sport plan
- Smaller equipment based bids would net a significant increase in disabled riders within the sport

#### Threats
- Lack of Local Authority understanding
- Availability of land for expansion
- Little capacity for growth at peak times, both for adults and children without investment in expansion/improvement
- Access to and availability of off road riding
7.2.3 Gaps in Provision: East Region
The network and the BEF have mapped accurate provision and have identified the following gaps in equipment and facilities provision:

- Lack of overnight stabling and related infrastructure regionally to support competition and training camps;
- Specialised equipment for disability sport is hard to access outside of specialist centres;
- Greater investment in equipment and facilities, and equipment for more advanced riders would bring benefits along the whole athlete pathway.

7.2.4 Summary: East Region
Investments based on engagement with BEF programmes are favoured, with smaller equipment and event infrastructure grants being judged as most desirable and effective.

_Potential investment opportunities currently favoured by those providing feedback include:_

- Access and off road riding;
- Social facilities and affordable quality catering;
- Toilets and shower facilities;
- Temporary or permanent stables to support events;
- Showjumping and Dressage equipment;
- Access: Hard standing for lorry parking, gates and access roads to popular facilities.

7.3 EAST MIDLANDS REGION
The facility spread and range in the East Midlands is comprehensive, although there is less accessibility in the most rural areas of Lincolnshire. (It should be noted that demand in that area is also less than average nationally).

There are five country sports partnerships supporting the East Midlands (Derbyshire Sport, Leicestershire and Rutland Sport, Lincolnshire Sport, Northamptonshire Sport and Sport Nottinghamshire), and they are engaged with the BEF network in the region.

Potential hubs exist at Moulton College (already in use as a regional and national training centre) and Vale View in Leicestershire.

One of the world’s leading equestrian competitions, the Landrover Burghley International Horse Trials, takes place in the area at Stamford. In addition, non-Olympic disciplines are very popular and well established in the region, particularly Vaulting and Horseball.

Barleyfields Equestrian Centre in Derbyshire was awarded £15,000 to fund a surface in their new indoor riding school. With the new indoor school, weekly riding opportunities were taken from 250 towards 400. Barleyfields is working with local schools to increase participation by 70 – 100 rides per week, and they have connected with the GetActive campaign offered with Tesco. Barleyfields is also working in conjunction with Rolls Royce to provide a loyalty discount scheme for staff riding opportunities.
7.3. Market Segmentation: East Midlands Region
Data provided by Sport England has been broken down to enable us to better understand the borough by borough location of our target segments.

Central Bedfordshire local authority shows high latent demand, running 35th in all local authorities.

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Estimated population (from Sport England market segmentation)</th>
<th>Modelled once a month participants</th>
<th>Modelled latent demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Bedfordshire (35)</td>
<td>197755</td>
<td>2446</td>
<td>1726</td>
</tr>
<tr>
<td>Charnwood (106)</td>
<td>127290</td>
<td>1439</td>
<td>1059</td>
</tr>
<tr>
<td>East Lindsey (138)</td>
<td>114800</td>
<td>1190</td>
<td>919</td>
</tr>
<tr>
<td>Rushcliffe (170)</td>
<td>87645</td>
<td>1165</td>
<td>805</td>
</tr>
</tbody>
</table>

Figure 16: Estimating local demand and participation in Equestrian : East Midlands Region
Figure 17: East Midlands Market Segmentation
### 7.3.2 SWOT Analysis: East Midlands Region

#### Strengths

- Good network of centres in the region. Sport is well linked to CSPs
- Significant number of high quality centres and competition venues
- Sport well established at all levels of the athlete pathway
- Range of disciplines active within the region
- Strong HE/FE presence

#### Weaknesses

- Centres require investment in customer social and welfare facilities to meet the standard desired by our target segments
- Lack of access in rural Lincolnshire

#### Opportunities

- Development of Hacking/Off road riding
- Opportunities exist to improve quality on offer
- Good capacity to develop sport at all levels
- Facilities have a strong desire to work with the BEF to support the aims of the whole sport plan
- Smaller equipment based bids might net an increase in non-Olympic discipline activity in the region

#### Threats

- Access and availability of Off road riding
- Venues almost exclusively (bar HE/FE) in private ownership which restricts funding available and increases competition for access
7.3.3 Gaps in Provision: East Midlands Region
The sport is generally well served in the region by a good network of private venues for grass roots access, training and competition.

Whilst quality of the pure sporting activity is high, facilities to retain and meet the needs of those wishing to engage in the sport will require investment. Improvements to social areas (club rooms etc), welfare facilities, and changing rooms would all enhance the visitor experience and encourage lapsed riders to return, as well as meet the expectations of new riders from our target segments.

Work to identify gaps in provision as above and in a more broad sense across the grass roots sporting landscape is currently being (and will continue to be) carried out through the regional networks, and our engagement with venues and facilities during the roll out of the various participation products.

5.3.4 Summary: East Midlands Region
Investments based on engagement with BEF programmes are favoured, with smaller equipment and venue infrastructure grants being judged as most desirable and effective.

Potential investment Opportunities currently favoured by those providing feedback:

- Access and off road riding;
- Social facilities and affordable quality catering;
- Toilets and shower facilities;
- Temporary or permanent stables to support events;
- Equipment for Non-Olympic disciplines.

7.4 NORTH WEST REGION
A busy and active region for the sport, the North West region hosts a wide range of activities and competitions across a number of Olympic and Non-Olympic disciplines. Polo and Horse racing are also popular in the region (although not sports within the remit of the BEF) and good links exist between the racing/polo communities and those sports within the brief of the Federation. Cheshire East has been highlighted by Sport England as an area with potentially very strong latent demand.

Provision is generally good, however known gaps exist, and there are also some significant plans currently in place to develop new centres and facilities within the region. Disability sport is strong in the region with potential for growth.

The BEF has a well-established network in the region linking local authorities, county sports partnerships, venues and centres and other stakeholders.

Previous successful interventions in the region have included investments to support off road riding:

- Lauren’s Ride (East Cheshire, 2011) – a joint project with local authorities and stakeholders within the sport. Cheshire and East Council and the BEF funded the development of Lauren’s Ride with an investment of nearly £7,000. The route is 35 miles long with off road rider friendly routes along current public rights of way.
  The investment funded the development of the route and appropriate signage for identified routes as well as development of shorter routes for those seeking regular access. An engagement plan was delivered ensuring centres, individuals and the local community were aware of the opportunities and could access safe Hacking and Off road riding.
There are some 14,000 horses recorded in the Cheshire East area and 974 in the immediate area surrounding the route of the ride (Knutsford-Wilmslow-Chelford) giving scope for a significant expansion in activity.

- Mary Townley Loop (Manchester/Lancashire 2002) – Sport England awarded £1.8m to Natural England to help develop this 47 mile circular loop near Middleton Top for horses, walkers and cyclists as part of the Trans Pennine National Bridleway Trail.
- Liverpool Bridleway (Merseyside 2011) – BHS Merseyside Committee attracted £5k of funding from Merseyside Police Local Authority Fund to reopen part of the Liverpool loop line to the Trans-Pennine Trail.
- Liverpool Bridleway have also received £6,000 from BEF (Sport England) to develop and link the Bridleways.

Data provided by Sport England has been broken down to enable us to better understand the borough by borough location of our target segments.

Manchester local authority shows high latent demand running 9th in all local authorities, with The Wirral and Wigan following at 24th and 27th respectively.
## Estimated population (from Sport England market segmentation) vs. Modelled once a month participants vs. Modelled latent demand

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Estimated population</th>
<th>Modelled once a month participants</th>
<th>Modelled latent demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manchester (9)</td>
<td>357484</td>
<td>3238</td>
<td>2678</td>
</tr>
<tr>
<td>Wirral (24)</td>
<td>243584</td>
<td>2463</td>
<td>1925</td>
</tr>
<tr>
<td>Wigan (27)</td>
<td>241329</td>
<td>2362</td>
<td>1860</td>
</tr>
<tr>
<td>Stockport (28)</td>
<td>220967</td>
<td>2503</td>
<td>1838</td>
</tr>
</tbody>
</table>

### Figure 19: Estimating local demand and participation in Equestrian: North West Region

### Figure 20: North West Market Segmentation
### 7.4.2 SWOT Analysis: North West Region

#### Strengths
- Good network of centres in the region. The sport is well linked to CSPs
- Significant number of high quality centres and competition venues
- Sport well established at all levels of the athlete pathway
- Strong HE/FE presence
- Disability Sport well established with strong demand
- Several High Profile competitions in the areas attracting participants and revenue
- New high profile developments planned across the region
- High demand for tourism and trekking.

#### Weaknesses
- Some longer established centres require investment to prolong lifespan and create social and welfare facilities to meet the standard desired by our target segments
- Lack of facilities along the M62 corridor
- No major competition facilities in Cumbria
- Greater off road riding access required
- General lack of all-weather capability

#### Opportunities
- Development of Hacking/Off road riding – strong demand for equestrian tourism. Local authorities keen to support
- Opportunities exist to improve quality of offer
- Good capacity to develop sport at all levels
- Good local knowledge of gaps in provision
- North West Epicentre development in Knowsley – a cross sport venue currently in advanced planning offering a wide range of competition, training and general sporting opportunities
- Disciplines and stakeholders keen to work together to maximise benefit from facilities access in multi sports coaching days

#### Threats
- Access and availability of off road riding
- Venues almost exclusively (bar HE/FE) in private ownership which restricts funding available and increases competition for access
- Major gaps in geographic spread of facilities particularly to the north of the region.
- Lack of all-weather capability at a number of locations leaves the sport vulnerable to inclement weather
7.4.3 Gaps in Provision: North West Region

The sport is well served in the region by a good network of private venues for grass roots access, training and competition.

Facilities for disability sport could be enhanced by investment in specialist equipment (for example disabled lifts and mounting blocks) for riding centres, enabling new groups to start. Investments in temporary stabling and related infrastructure would enable Pony Clubs and other groups to run more residential (camp) activities, and also permit greater access to specialist training clinics run over 48 hours or more.

The following areas were also identified as specifically lacking in capacity or facilities:

- M62 Corridor – there is a lack of riding and competition facilities but good road access;
- Cumbria – tourism and trekking popular, however there is a lack of show centres/venues suitable for events;
- Kendal/M6 area – sparse provision for those on the talent pathway, as most high performance venues are located further south;
- Pennines – no Showjumping or Eventing competition venues;
- Indoor School provision required in both Cumbria and West Cheshire;
- Greater provision of off road riding is needed.

7.4.4 Summary: North West Region

Alongside developments of major competition and training venues in the region, for example the North West Epicentre Development in Merseyside (Neil Allen Consultants), involving Hurlingham Polo Association and local stakeholders and the BAE Systems’ Woodford site (Cheshire), transforming the 500 acre site into film studios, housing and a leisure complex, including an equestrian centre and point-to-point race course, there are a number of potential investment areas for the BEF.

Stakeholder engagement, market insight and local knowledge favour:

- Indoor school provision;
- Equipment for Disability Sport;
- Toilets and shower facilities;
- Customer Welfare and Social Facilities;
- Temporary or Permanent Stables to support events;
- Equipment for Non-Olympic disciplines;
- Rights of Way/Access.

7.5 WEST MIDLANDS REGION

Despite a significant proportion of the region being urban, with thriving centres such as Hole Farm Trekking Centre in central Birmingham, the mid-point location of the region has made it a favoured location for competition and training across a range of disciplines.

The BEF has a well-established network in the area, supported by county sports partnerships across the region. Stakeholder feedback for the region has indicated gaps in provision and areas of improvement whilst also underlining the quality of all which is currently available.

Potential links with BEF products targeting the ‘Alison’ and ‘Elaine’ are clear. There are also opportunities to build on the success of centres, such as Hole Farm, who have engaged successfully with young people to grow participation and retain sporting activity in what might have previously been regarded as a hard to reach community.
It was noted there is a lack of capacity in competition and high performance venues, particularly as a number of the larger facilities are located within the HE/FE environment. While these facilities are high quality and suitable for performance training, the needs of the educational timetable often make them unsuitable for competition or high performance training. Other facilities are also thought to be in need of refurbishment or general improvement to meet the needs of competitors and coaches.

With retention being a key performance indicator for the BEF, efforts to improve the quality of facilities for those developing along the athlete pathway is of real importance. There is strong latent demand, with Birmingham having a high concentration of individuals predisposed to riding.

7.5.1 Market Segmentation: West Midlands Region
Data provided by Sport England has been broken down to enable us to better understand the borough by borough location of our target segments.

Birmingham local authority region has the highest modeled latent demand, with Dudley and Coventry following closely behind.
<table>
<thead>
<tr>
<th>Local authority</th>
<th>Estimated population (from Sport England market segmentation)</th>
<th>Modelled once a month participants</th>
<th>Modelled latent demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham (1)</td>
<td>753927</td>
<td>7073</td>
<td>5743</td>
</tr>
<tr>
<td>Dudley (29)</td>
<td>239693</td>
<td>2323</td>
<td>1829</td>
</tr>
<tr>
<td>Coventry (31)</td>
<td>238618</td>
<td>2214</td>
<td>1778</td>
</tr>
<tr>
<td>Walsall (63)</td>
<td>194307</td>
<td>1694</td>
<td>1414</td>
</tr>
</tbody>
</table>

Figure 22: Estimating local demand and participation in Equestrian: West Midlands Region

Figure 23: West Midlands Market Segmentation
7.5.2 SWOT Analysis: West Midlands Region

**Strengths**

- Good latent demand
- Sport well established at all levels of the athlete pathway
- Successful urban engagement through existing centres
- Potential for cross BEF work on development of competition and coaching facilities
- Successful regional network

**Weaknesses**

- Some geographical gaps in provision
- Greater off road riding access is required
- Significant number of centres not known/engaged with the BEF, resulting in a gap in the knowledge base
- Centres largely in private ownership precluding applicants from seeking grants/legacy funding
- Competition centres often in need of refurbishment/improvement

**Opportunities**

- Development of Hacking/Off road riding – strong demand for equestrian tourism. Local authorities keen to support
- Opportunities exist to improve quality on offer at established centres
- Investments to increase capacity (i.e. lighting, and all weather sport provision) would have an immediate impact on participation and retention
- Possibility of significant expansion within disability sport

**Threats**

- Access and availability of off road riding
- Venues largely in private ownership which restricts funding available and increases competition for access
- Some gaps in geographical spread of facilities
### 7.5.3 Gaps in Provision: West Midlands Region

West Midlands is low in capacity and resources for top level Performance Hubs. Solihull Riding Centre is limited and in need of refurbishment. Weston Lawns is the only other competition venue but it is outdoor only.

The Herefordshire and Worcestershire CSP area is lacking in riding centres, especially approved centres. Many no longer offer riding but just livery. South Shropshire is the same, and the remoteness of this area also has a detrimental impact; there is a real gap in provision in West Birmingham, Hereford & Worcester, and South Shropshire.

Gaps also exist in coaching development facilities in the region. It is hoped that Hole Farm in Birmingham will become qualified as a training centre.

### 7.5.4 Summary: West Midlands Region

A region with strong latent demand and potential for growth, particularly within products related to adult and youth engagement. Stakeholder engagement, market insight and local knowledge favour:

- **General refurbishments of existing competition/riding venues** – particularly indoor facilities;
- Temporary event infrastructure and equipment (portable jumps and related equipment);
- **Improve accessibility in areas where there is currently no provision** (livery yard to public facility);
- **Improvements to centres to increase peak time capacity**;
- **Customer Welfare and Social Facilities in established centres**;
- **Rights of Way/Access**.

- **Development for hub centre for region with focus on disability riding development.**

### 7.6 LONDON REGION

Approximately 25-30,000 adults (16+) in London ride regularly. But the percentage rate of the adult population riding in London is significantly lower than any other region in the UK (approx 0.5% of 16 – 54 year olds in London ride, compared to 2% across the rest of the South East).

- There is currently only one major equestrian competition in the city;
- There are three Pony Club branches in London and 16 Pony Club centres;
- There are approximately 30 BHS/ABRS approved riding centres across 33 London boroughs;
- There are between 30 and 40 further riding centres and livery yards;
- There are 23 Riding for the Disabled (RDA) Groups in London;
- There are 1800 disabled riders (1400 under 19), supported by over 1000 volunteers.

The Hoof Ride London Legacy project (established by the BEF) has provided almost £250,000 of direct financial investment into improving access to and increasing the capacity of London’s riding centres. One of the greatest challenges for the sport in recent years in London has been halting the decline in the number of accessible riding centres, particularly those in urban areas. Hoof Ride London has worked to challenge the situation and has invested in new facilities in Brixton (the landmark Ebony Horse Club) and with Hadlow College in the London Borough of Greenwich, as well as contributing significant financial support to a broader range of smaller facilities improvement projects. Investments were targeted to give measurable increases in capacity (particularly at peak times) in areas where demand was high but accessibility was low.

Mount Mascal Riding Centre in Bexley is one of London’s largest riding centres and the largest (per head of membership) Pony Club Centre in the UK. Working with the centre which is engaged with
the Sport England London Horse Network, it was established that even with a substantial investment into a community legacy facility in Greenwich itself, latent demand for the sport was of sufficient strength to merit an additional investment into the centre.

An investment was made towards the capital costs of a roof for the outdoor school, which effectively doubled capacity for group and private lessons during the winter months and periods of foul weather. The principle aim was to increase active membership of the Pony Club at the site (an increase of 27% was measured), however significant increases throughout were also noted amongst adults. Parents bringing children to Pony Club activities were impressed with the standard of facilities, and through the Take Back the Reins pilot programme were encouraged to participate themselves. The centre also offered a high quality range of social activities and are hoping to invest further in these as a result of feedback from the programmes. A clear link can be made from Sports Satisfaction Survey feedback, and local intelligence to market information. These threads, if drawn together and supported with investment (as the above case studies show), can have a direct impact on participation. Mount Mascal have added 3774 new participants into the sport since the investment was made.

The BEF, with partners at Sport England and a number of public and private charitable donors, funded the construction of the Ebony Horse Club in London; a landmark centre built in a very challenging part of central London. The primary aims of the Ebony Horse Riding Centre were: to create a community riding centre to enable every child in Coldharbour Ward to have the chance to learn to ride; to continue to develop the club’s specialisation in the full integration of children and young people with a wide range of emotional and behavioural difficulties, and to provide pathways into further training and employment in the equestrian sector in order for young people to develop their talent. The centre, and the programmes run within, have been specifically designed to cater to the needs of the local community, and the development itself (in the heart of the Coldharbour Ward) is ideally located on the doorstep of those who most want (and need) to use the centre. The value of interaction with horses in a sporting and social environment has been particularly beneficial to those in Brixton, with club members staying within the sport and going on to study and work with other disciplines such as racing and dressage. The club enjoys a very low drop off rate and currently has a long waiting list.

In 2011 the BEF match funded an investment in Polocrosse Equipment and marketing material. This enabled Sports Development Officers from the UK Polocrosse Association in the London Region to encourage riding centres in the metropolitan area to offer the sport to their existing participant base and to bring new (and lapsed) players/riders back into the sport. Six centres (in addition to those locations already engaged) now offer the sport on a regular basis, with groups of 8–10 players taking part at least once a week. Most, if not all, riders are below the age of 30 with the male/female ratio breaking the norm for Equestrian, being currently 40/60%.

The Diamond Centre in Carshalton received funding to purchase vaulting equipment. The centre was able to double the numbers attending vaulting classes within the centre and hope to increase this further as additional volunteers are trained as coaches.

An investment was made in Kingston Riding Centre in West London for indoor and outdoor lighting to increase operating hours and capacity. The centre was at full capacity (with a waiting list) and was unable to exploit opportunities for further growth with local schools and colleges, particularly with HE/FE sites in the nearby boroughs. The investment in lighting freed up capacity in the indoor school during the day, permitting the centre to expand class activities and offer specialist clinics and competitions for colleges, in addition to activities such as Polocrosse. The centre is now one of an expanding number of centres offering higher performance equines and higher quality teaching to university and college students in a section of their capacity made possible by a capital investment.
from the NGB. The centre has since gone on to receive additional funding from the PlaySport London Legacy fund to further increase the quality of its offer.

Figure 24: SE Facility Mapping, 2010 London

7.6.1 Market Segmentation: London Region

Figure 25: London Market Segmentation
<table>
<thead>
<tr>
<th>Segment</th>
<th>Catchment pop.</th>
<th>Rgn Pop.</th>
<th>Nat Pop.</th>
<th>Catchment %</th>
<th>Rgn %</th>
<th>Nat %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helena</td>
<td>76673</td>
<td>307175</td>
<td>1829866</td>
<td>5.6</td>
<td>5.2</td>
<td>4.5</td>
</tr>
<tr>
<td>Alison</td>
<td>62414</td>
<td>258460</td>
<td>1766560</td>
<td>4.6</td>
<td>4.4</td>
<td>4.4</td>
</tr>
<tr>
<td>Elaine</td>
<td>48789</td>
<td>278757</td>
<td>2444113</td>
<td>3.6</td>
<td>4.7</td>
<td>6.1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>187876</strong></td>
<td><strong>844392</strong></td>
<td><strong>6040539</strong></td>
<td><strong>13.8</strong></td>
<td><strong>14.3</strong></td>
<td><strong>15</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Borough</th>
<th>Catchment pop.</th>
<th>Rgn Pop.</th>
<th>Nat Pop.</th>
<th>Nearest Centre or Nearest centre children only - would need to go to Deen City or Ham House</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wandsworth</td>
<td>15732</td>
<td>9369</td>
<td>25101</td>
<td>Aldborough Hall and Newham RC</td>
</tr>
<tr>
<td>Richmond upon Thames</td>
<td>12543</td>
<td>10390</td>
<td>22933</td>
<td>Ham House</td>
</tr>
<tr>
<td>Bexley</td>
<td>9750</td>
<td>11524</td>
<td>21274</td>
<td>Mount Mascal</td>
</tr>
<tr>
<td>Hillingdon</td>
<td>9667</td>
<td>11260</td>
<td>20927</td>
<td>Goulds Green - Recently joined network</td>
</tr>
<tr>
<td>Ealing</td>
<td>9562</td>
<td>10701</td>
<td>20263</td>
<td>Ealing RC - not currently linked with network</td>
</tr>
<tr>
<td>Redbridge</td>
<td>7760</td>
<td>11032</td>
<td>17980</td>
<td>Nearest centre - outside of London but in catchment for Trent Park EC</td>
</tr>
<tr>
<td>Harrow</td>
<td>7395</td>
<td>10585</td>
<td>17932</td>
<td>Hyde Park RC - at full capacity and already does similar offer</td>
</tr>
<tr>
<td>Westminster</td>
<td>9751</td>
<td>8181</td>
<td>17932</td>
<td>Nearest centre children only - would need to go to Deen City or Ham House</td>
</tr>
<tr>
<td>Merton</td>
<td>9119</td>
<td>7979</td>
<td>17098</td>
<td>Deen City Farm - Merton</td>
</tr>
<tr>
<td>Kensington and Chelsea</td>
<td>9457</td>
<td>7466</td>
<td>16923</td>
<td>Nearest centre children only - would need to go to Deen City or Ham House</td>
</tr>
<tr>
<td>Lambeth</td>
<td>8680</td>
<td>7166</td>
<td>15846</td>
<td>Vauxhall City Farm</td>
</tr>
<tr>
<td>Hammersmith and Fulham</td>
<td>9170</td>
<td>4978</td>
<td>14148</td>
<td>Wormwood Scrubs</td>
</tr>
<tr>
<td>Lewisham</td>
<td>5455</td>
<td>8476</td>
<td>13931</td>
<td>Willowtree and Mount Mascal</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>6091</td>
<td>7305</td>
<td>13396</td>
<td>Woodreddon</td>
</tr>
<tr>
<td>Hounslow</td>
<td>5606</td>
<td>7414</td>
<td>13020</td>
<td>Ham House (adjacent borough)</td>
</tr>
<tr>
<td>Greenwich</td>
<td>5811</td>
<td>7007</td>
<td>12818</td>
<td>Mount Mascal</td>
</tr>
<tr>
<td>Brent</td>
<td>4382</td>
<td>8163</td>
<td>12545</td>
<td>Ealing RC - not currently linked with network</td>
</tr>
<tr>
<td>Islington</td>
<td>5717</td>
<td>4816</td>
<td>10533</td>
<td>No RC's but in Trent Park (Enfield) catchment</td>
</tr>
<tr>
<td>Southwark</td>
<td>5142</td>
<td>5027</td>
<td>10169</td>
<td>Dulwich Riding Centre</td>
</tr>
</tbody>
</table>

*Figure 26: London Market Segmentation by borough*
### SWOT Analysis: London Region

#### Strengths
- Croydon has a well-developed network of riding routes
- Off road Park Riding in Hyde Park
- Popular sport
- Well known and respected by local authorities
- Strong regional network of centres prepared to work together
- Good network of existing centres working together through the BEF funded London Horse Network
- City Farms and riding centres located in hard to reach community with an excellent retention and engagement record particularly with the 16-25 age range

#### Weaknesses
- Royal Parks difficult to deal with, renewing routes expensive (target fundraising at £250k to renew)
- Hard population, more diverse, ethnic and cultural issues (not disposed to riding)
- People often come to the city to experience ‘city’ life
- Difficult landscape
- Building new centres involves significant fundraising in urban areas
- Lack of riding centres in Croydon
- Expensive
- Weight restrictions – centres operate a limit of 13-13.5 stone

#### Opportunities
- Off road riding
- Hyde Park riding routes
- Croydon riding facilities
- Further expansion of city centres as per previous capital funding bids
- Waiting lists for centres
- Underused government owned centres
- Two potential sites closed circa 1970 under local borough council ownership that could be brought back into use quickly
- Latent demand high across all age ranges
- Olympic venue in city centre will boost profile of sport
- Addressing weight limit – will increase accessibility

#### Threats
- Loss of existing riding routes.
- Parks being pressurised by other sports to become more inclusive and may not be as conducive to safe riding
- Land prices; facilities being lost to developers due to land prices
- Little capacity for growth at peak times, both for adults and children without investment in expansion/improvement
7.6.3 Gaps in Provision: London Region
The London Borough of Croydon was once a home to several thriving centres and has a very well developed network of routes. However, there is currently no centre locally which can either service demand or provide horses for outside users to ride. There are currently two potential existing sites (both closed circa 1970) under the ownership of the local borough council that could be brought back into use very quickly.

The following boroughs of London (this list is not exhaustive but does cover the main gaps in provision) do not have a resident centre, although centres in neighboring boroughs (except possibly those in the south of the city) are reasonably accessible by public transport:

- Hounslow
- Haringey
- Islington
- Croydon (limited coverage)

The BEF is working with partners to accurately map all active centres in the city (including those not currently accredited). We are also researching historic venues currently either underused or in a state of disuse (see notes on Corydond) to establish feasibility of reopening centres and routes.

7.6.4 Summary: London Region
Current investments based on actual capacity increases (extending operating hours or construction of entirely new facilities) have had real success. Feedback from London is that a continuation of this policy would result in continued success.

Potential investment opportunities currently favoured by those providing feedback are:

- Hyde Park Riding Routes - a keen focus on preservation of existing routes;
- Croydon Riding Facilities;
- Incremental increase on existing centres in the city as per previous facilities bids (e.g. Vauxhall City Farm) by providing equipment and capital improvements to extend opening hours and improve all weather capability.

7.7 SOUTH EAST REGION
One of the largest regions in England, the South East is a busy and geographically/socially varied region with much equestrian activity. There are a significant number of well-established and popular centres and competitions venues in the region, and the South East also plays host to a number of major international competitions with the All England Jumping Course at Hickstead being one high profile example.

There are an above average number of competition and higher performance training venues for Olympic and Paralympic Sport, with several potential hubs being located in the region. Many advanced riders from the London region move activities to this area to benefit from the high quality facility provision- it should be noted that investment into some of these facility could lead to greater participation increase.

There is strong latent demand for the sport in this region, with Bromley being particularly noted by Sport England. The drive to increase participation through product based interventions in this region should guide any investment strategy, as the focus for activities are the target segments ‘Elaine’ and
‘Alison’, and the Take Back the Reins (and related) products. There are many centres keen to become involved, however many lack the appropriate facilities to meet expectations.

The South East is also a region being targeted by the RDA as a potential location for a ‘Beacon’ centre (The Weald).

Callum Park Trading Limited in Sittingbourne saw £20,000 of Capital funding to replace their exhausted outdoor riding arena and, with the old surface, to extend an all-weather bridleway network around the farm extending hacking and safe access to remote paddocks in winter months. The investment allowed a total of 3000 riders per the winter season and 18,000 individual rides over the current lifespan of the facility at the current rate of use.

![Figure 27: SE Facility Mapping, 2010 South East](image)

### 7.7.1 Market Segmentation: South East Region

Data provided by Sport England has been broken down to enable us to better understand the borough by borough location of our target segments.

The Brighton and Hove local authority has the most modeled latent demand, with Medway and Milton Keynes following.

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Estimated population (from Sport England market segmentation)</th>
<th>Modelled once a month participants</th>
<th>Modelled latent demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Brighton and Hove (30)</td>
<td>206842</td>
<td>2444</td>
<td>1779</td>
</tr>
<tr>
<td>Medway (47)</td>
<td>194428</td>
<td>2084</td>
<td>1567</td>
</tr>
<tr>
<td>Milton Keynes (54)</td>
<td>174735</td>
<td>2090</td>
<td>1496</td>
</tr>
<tr>
<td>Southampton (59)</td>
<td>186572</td>
<td>1831</td>
<td>1454</td>
</tr>
</tbody>
</table>
Figure 28: Estimating local demand and participation in Equestrian: South East Region

Figure 29: South East Market Segmentation
7.7.2 SWOT Analysis: South East Region

**Strengths**

- Very strong latent demand
- Significant number of centres and competition venues
- Sport well established at all levels of the athlete pathway
- Strong HE/FE presence
- Several high profile competitions in the areas attracting participants and revenue
- High demand for tourism and trekking, particularly on coastal routes
- Potential for cross agency work on development of riding routes/access

**Weaknesses**

- Some geographical gaps in provision
- Greater off road riding access required
- Significant number of centres not known/engaged with the BEF, resulting in a gap in the knowledge base
- Centres largely in private ownership precluding applicants from seeking grants/legacy funding

**Opportunities**

- Development of Hacking/Off road riding – strong demand for equestrian tourism. Local authorities keen to support
- Opportunities exist to improve quality on offer at established centres
- Good capacity to develop sport at all levels
- Investments to increase capacity (i.e. lighting, and all weather sport provision) would have an immediate impact on participation and retention
- Opportunities to drive participation through engagement with major competition venues
- Possibility of significant expansion of disability sport
- Potential links with the National Trust to develop off road riding/tourism

**Threats**

- Access and availability of off road riding
- Venues almost exclusively (bar HE/FE) in private ownership which restricts funding available and increases competition for access
- Some gaps in geographical spread of facilities
- Training facilities for non-Olympic disciplines are geographically widespread. High fuel prices and the cost of transport are limiting participants' ability to develop due to the cost of travel
7.7.3 Gaps in Provision: South East Region
Geographical gaps have been noted in the Brighton and Hove area. It is also clear there is a real need for safe off road riding, particularly around the larger population centres. Lack of the same is a barrier to entry as well as a challenge to retention.

Whilst there is good off road riding available on coastal routes, these routes are not always well serviced by equestrian centres, so access to public and non-horse owners is substantially reduced.

Access to performance coaching and competition facilities for non-Olympic disciplines could be improved as availability across the region (when measured against demand) is currently low.

Further work to note gaps and identify opportunities will need to be undertaken over the period of the strategy, particularly with regards to competition facility provision and off road riding.

7.7.4 Summary: South East Region
This is a region with strong latent demand and potential for growth particularly for products related to adult engagement. Stakeholder engagement, market insight and local knowledge favour:

- General refurbishments of existing competition/riding venues (with focus on Hickstead);
- Improvements to centres to increase peak time capacity;
- Customer Welfare and Social Facilities;
- Rights of Way/Access.

7.8 SOUTH WEST REGION
The South West of England holds one of the greatest concentrations of equestrian activity in the UK. As in the South East, there are a significant number of well-established and popular centres and competitions venues in the region.

There are an above average number of competition and higher performance training venues for Olympic and Paralympic Sport, with several potential regional and national training centres being located in the region, including those historically favoured by the national talent pool and the World Class programme (for example the Unicorn Trust in Stow on the Wold).

There is strong latent demand for the sport in this region, with Wiltshire and Cornwell being particularly noted by Sport England. The drive to increase participation through product based interventions in this region should guide any investment strategy, as the focus for activities are the target segments ‘Elaine’ and ‘Alison’ and the Take Back the Reins (and related) products. There are many centres keen to become involved, however many lack the appropriate facilities to meet expectations. Off road riding is again of importance, with the Southwest being a focus for engagement with the National Trust to extend and improve current access.

Bicton College in Devon received a Capital funding award for just over £8,000 for outdoor lighting in their school. This investment provided significant additional riding hours within an existing outdoor school. Bicton College developed and delivered a community engagement programme for local non college based participants in partnership with local riding schools and centres and existing community networks. The engagement plan is dedicated to community use, and this includes the local Pony Club and the local Saddle Club. The provision of outdoor lighting also increased exam and training usage providing extra hours of accessibility between October to April for the hours of 16:30 to 21:00. 475 new users were targeted.
7.8. 1 Market Segmentation: South West Region

Data provided by Sport England has been broken down to enable us to better understand the borough by borough location of our target segments.

Cornwall local authority tops the South West Region for modeled latent demand, with Wiltshire and Bristol following.

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Estimated population</th>
<th>Modelled once a month participants</th>
<th>Modelled latent demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornwall (3)</td>
<td>427269</td>
<td>4681</td>
<td>3517</td>
</tr>
<tr>
<td>Wiltshire (5)</td>
<td>355387</td>
<td>4253</td>
<td>3048</td>
</tr>
<tr>
<td>Bristol (3)</td>
<td>339949</td>
<td>3659</td>
<td>2762</td>
</tr>
<tr>
<td>South Gloucestershire</td>
<td>200026</td>
<td>2400</td>
<td>1716</td>
</tr>
</tbody>
</table>

Figure 30: SE Facility Mapping, 2010 South West

Figure 31: Estimating local demand and participation in Equestrian: South West Region
### 7.8.2 SWOT Analysis: South West Region

#### Strengths

- Very strong latent demand
- Significant number of centres and competition venues
- Sport well established at all levels of the athlete pathway
- Several high profile competitions in the area attracting participants and revenue
- High demand for tourism and trekking, particularly on coastal routes
- Potential for cross agency work on development of riding routes/access
- Large number of existing centres wishing to take up BEF products such as TBTR

#### Weaknesses

- Some geographical gaps in provision
- Greater off road riding access required
- Significant number of centres not known/engaged with the BEF, resulting in a gap in the knowledge base
- Centres largely in private ownership precluding applicants from seeking grants/legacy funding

#### Opportunities

- Development of Hacking/Off road riding – strong demand for equestrian tourism. Local authorities keen to support
- Opportunities exist to improve quality of offer at established centres
- Good capacity to develop sport at all levels
- Investments to increase capacity (i.e. lighting, and all weather sport provision) would have an immediate impact on participation and retention
- Opportunities to drive participation through engagement with major competition venues.
- Possibility of significant expansion in disability sport
- Potential links with the National Trust to develop off road riding/tourism

#### Threats

- Access and availability of off road riding
- Venues largely in private ownership which restricts funding available and increases competition for access
- Some gaps in geographical spread of facilities
- Training facilities for non-Olympic disciplines are geographically widespread. High fuel prices and the cost of transport are limiting participants ability to develop due to the cost of travel
7.8.3 Gaps in Provision: South West Region
Mapping indicates a good spread of facilities, however recent engagement work through the regional network has shown that while there are many centres serving a broad customer base, some may not have the correct facilities to meet the needs of our target segment.

Improvements in social and welfare facilities as well as interventions to expand capacity at peak time would enable growth and retention.

Further assessment and research is also required to map in detail the depth and quality of provision in this large and busy region. Additional information drawn will further inform investment decisions.

7.8.4 Summary: South West Region
This is a region with strong latent demand and potential for growth, particularly for products related to adult engagement. Stakeholder engagement, market insight and local knowledge favour:

- General refurbishments of existing competition/riding venues;
- Improvements to centres to increase peak time capacity;
- Customer Welfare and Social Facilities;
- Rights of Way/Access.

8.0 LINKING FACILITY DEVELOPMENT TO PROGRAMME DELIVERY
During 2013-2017, the BEF will be prioritising five programmes with the aims of both increasing participation, and developing the excel pathway. All BEF facility funding will look to underpin these products. The five products identified are as follows:

- Take Back The Reins;
- Hoof Match;
- Youth product (title TBC);
- Accessibility;
- Excel.

Of these programmes, four can be significantly accelerated by the use of both the BEF and wider facility funding, these being Take Back the Reins; Youth Product; Accessibility; and Excel.

9.0 BEF FUNDING
It is vital to recognise that although the BEF have the capital facility pot to invest across the federation, thanks to exchequer funding provided from DCMS through Sport England, this funding is only a small part in the ‘bigger picture’ of other funding available across the country. The BEF will work hard to invest its limited capital funding pot, as well as working with potential applicants to enable them to access other funding available. These funds include Sport England small grants, Iconic, Improvement and Inspired and Inclusive.

The BEF budget will therefore be very targeted and invest in both:
1. High performance projects that have been identified as part of World Class Performance and Excel Departments across the federation;
2. Projects which will grow participations.

Projects will be funded in two ways, either through an ‘open’ application or a ‘solicited’ application process. The funding allocation towards both ‘open’ and ‘solicited’ applications has been identified below:
Year 1
£25,000 BE Championship courses across England – solicited application.
£75,000 Contribution towards HPC – solicited application.
£100,000 Open applications aligned to ‘Take Back the Reins’ and ‘Accessibility’ in partnership with Hoof Networks.
Total - £200,000

Year 2
£100,000 Contribution towards HPC (which include £7,500 consultancy support).
£100,000 Open applications aligned to ‘Take Back the Reins’, ‘Accessibility’ and ‘Youth Product’ in partnership with Hoof Networks.
Total - £200,000

Year 3
£100,000 Ring-fenced solicited ‘Accessibility’ and ‘Take Back the Reins’ projects within priority areas.
£100,000 Open applications aligned to ‘Take Back the Reins’, ‘Accessibility’ and ‘Youth Product’ in partnership with Hoof Networks.
Total - £200,000

Year 4
£50,000 Ring-fenced solicited ‘Accessibility’ and ‘Take Back the Reins’ projects within priority areas.
£100,000 Open applications aligned to ‘Take Back the Reins’, ‘Accessibility’ and ‘Youth Product’ in partnership with Hoof Networks.
Total - £150,000

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excel/WC</td>
<td>£100,000</td>
<td>£100,000</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Solicited (priority areas)</td>
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<td>£0</td>
<td>£100,000</td>
<td>£50,000</td>
<td>£150,000</td>
</tr>
<tr>
<td>Open</td>
<td>£100,000</td>
<td>£100,000</td>
<td>£100,000</td>
<td>£100,000</td>
<td>£400,000</td>
</tr>
<tr>
<td>Total</td>
<td>£200,000</td>
<td>£200,000</td>
<td>£200,000</td>
<td>£150,000</td>
<td>£750,000</td>
</tr>
</tbody>
</table>

Solicited applications will be identified by the BEF in partnership with Member Bodies to deliver specific programmes within specific geographical locations that have been identified within Whole Sport Plan 2013-2017. These programmes have been listed in section 8.

Open applications will be open to any affiliated facility to bid into, as long as they are able to directly link to projects within section 8 and in doing so grow participation.

Whether ‘open’ or ‘solicited’ applications, applicants will need to adhere to specific funding criterias and conditions. These criterias and conditions are either as part of regulations of providing exchequer funding or directly related to outcomes required to be achieved as part of Whole Sport Plan 2013-2017. These criterias and conditions are non-negotiable.

10.0 BEF FUNDING CRITERIA AND CONDITIONS
Grants will be awarded for projects which show clear and measurable targets for increasing participation levels, offering more riding opportunities and helping ensure members of the public
are given the opportunity of an enjoyable and satisfying experience. Applicants must be able to demonstrate proposals are sustainable in the long term.

10.1 Critical factors:
- Clear and measurable target to increase 14-25 participation;
- Clear and measurable target to increase 26+ participation;
- Clear and measurable target to increase disabled rider participation (16+);
- Provide members of the public with the opportunity to have an enjoyable and satisfying experience;
- Delivery of either:
  - Accessibility programme;
  - Take Back the Reins;
  - BEF Youth programme (Further detail to be provided by March 2014);
  - Excel programme (solicited applications only).

10.2 Readiness factors (*for stage two application)
- Ability to quantify and measure additional riding sessions/opportunities /cost benefit analysis;
- Evidence of partnership funding in place (£1 for £1);
- Planning permission in place;
- Security of tenure;
- Constitution;
- Three tenders/estimates being in place for the work to be undertaken or the equipment being identified for purchase preferable;
- Evidence of a sports development plan in line with Sport England strategic outcomes;
- Member Body accreditation /engagement preferable;
- Engagement with a local Hoof Network preferable;
- Have customer service focused staff and a positive forward thinking approach to their business;
- Ability to be able to recognise the project risks;
- Evidence the ability to sustain the investment medium to long term;
- Evidence there is an awareness of local, regional or national initiatives and the project fits with these;
- Willingness to extend community access and improve sports development opportunities offered at the site wherever possible;
- Willingness for investment to be continually monitored by BEF once complete.

10.3 What is available for application
- Funding is only available for capital investment in facilities or equipment;
- This means improvement of facilities, or purchase of equipment, which will help increase riding opportunities and participation at the riding school or centre;
- The kind of projects that have previously supported included:
  - a contribution towards putting a roof on an outdoor school ensuring significantly more winter riding days were available;
  - the installation of lighting into an indoor school enabling riding session to take place into the evening, creating three more riding hours per day throughout the year;
  - assistance for the purchase of polocrosse equipment to enable games in London’s parks.
- We are not able to provide funding support towards the purchase of horses.

10.4 Who can apply for grants
- Fully constituted club, association or trust - an organisation, generally within the voluntary sector, with its own constitution or memorandum and articles of association.
Community amateur sports clubs (CASC): an organisation registered with HMRC as a community amateur sports club.

Local authority – county councils, metropolitan district councils, unitary authorities, district councils and the London boroughs.

Local Education Authority – a local education authority on its own behalf, or on behalf of a community school.

Foundation school or college – although run by the local education authority, the school retains control over admissions, employment of staff, land and buildings.

Voluntary aided or controlled school – although financed and maintained by the local education authority, the school’s assets are held and administered by trustees.

Independent school or college – a school or college for fee-paying students which does not receive a government grant.

Institute of further education - a college or other institution that provides further education.

Institute of higher education (including universities) – a university or college which provides higher education.

Other public sector statutory body – other public sector organisations established by statute or statutory powers such as parish and town councils.

Community Interest Company (CICS) – a limited company created for the use of people who want to conduct a business or other activity for community benefit, and not purely for private advantage.

Private sector company or business – Only eligible if:
- the project is not primarily for personal gain or shareholders’ dividends - applicant would be required to demonstrate that any additional profit generated directly from the facility investment will be put back into the development of activities and the facility.
- it helps resolve a real shortage of facilities
- the project delivers significant guaranteed public access. There needs to be an ‘open access’ policy to usage of the facility i.e. not constrained by membership requirements, casual usage opportunities (‘pay and ride’).

Industrial Provident Society – an organisation trading for the benefit of their community which is registered with the financial services authority.

10.5 Who cannot apply for grant (public sector regulations for commercial centres)

Sole Traders.

Partnerships

The BEF will continue to work with Sport England to try and access funding that is available for Sole Traders and Partnerships as it makes up large percentage of equestrian industry. If you are interested in funding and are either Sole Trader or Partnership please complete Stage 1 application of open application. Although we may not be able to provide funding immediately, we will add you to a database, and contact you should terms and condition (provided to the BEF from Sport England) change.

10.6 What cannot be funded

Projects intended primarily for private gain.

Grants which contribute directly to a company’s distributable profits.

Endowments.

Funds to build up a reserve or surplus.

Retrospective funding (costs incurred prior to Fund launch).

Loan repayments.

Activities which primarily promote religious belief.

Minor works, repairs or maintenance (for example, replacing a leaking roof on an existing facility).
• Personal equipment which is not part of a wider capital build.
• This list of examples is by no means exhaustive.

11.0 PRIORITISING OF FACILITY PROJECTS
The BEF continue to ensure any funding is allocated to projects which can meet the BEF’s strategic aims and support the achievement of programmes identified above in 8.0.

The BEF recognise that facility investment may not be solely dependent upon exchequer funding and may in some instances be more suited to Lottery funding or other funding streams. Experience has shown it may be preferable in some instances for the BEF to have the direct contract with the facility.

Priority areas for investments

<table>
<thead>
<tr>
<th>Summary of Investment</th>
<th>Recommended breakdown</th>
</tr>
</thead>
</table>
| Equipment for Disability Sport                           | • Disabled toilets  
• Disability access  
• Accessibility equipment with priority given geographical areas phase 1 and phase 2                                                                 |
| Toilets and shower facilities                            | • Changing and toilet facilities are particularly important when tied to the delivery of youth product (title TBC) and meeting needs of 14+ young girls. |
| Customer welfare and social facilities                   | • Social facilities are a particular focus for the support to sustain youth participations and make Equestrian Centres the hub of the community.  
This is particular important for delivery of the Youth product and Take Back the Reins product (creating family environment) – priority will be given to geographical areas phase 1 and phase 2. |
| Indoor arenas, especially small pens for beginner riding | • Priority areas phase 1 and phase 2 where tied to Take Back the Reins and Accessibility delivery.                                                                 |
| Lighting (outdoor arenas) to extend opening hours        | • All regions – priority given to all areas for delivery of either one or more of Take Back the Reins; Youth product; Accessibility or if Centre is involved in delivery of Excel or World Class programme. |
| Pre-identified performance facilities or courses         | • Facilities or courses which have been identified as focus for investment due to national performance outcomes (solicited application only)  
• These include application for a centrally located venue to be developed to be able to offer excel/WC training – likely funding will be to enhance meeting rooms of existing performance to allow greater technical analysis facilities. (likely Solihull)  
• This also includes improved competition hubs for all Olympic disciplines (likely Hickstead). |

12.0 APPLICATION PROCESS
12.1 ‘Open’ application process

The open application is a two phased process:

1. Stage One: A two page proposal document. This stage is to:
   a. Check the applicant is likely to meet the criteria of public funding, and identify who, due to legal status or other criteria, is unable to progress.
   b. It will also gauge the level of interest and try and prioritise projects which are more likely to receive funding.
   This is to try and manage expectations of potential applicants and to try and not waste (unnecessarily) too much of any potential applicant’s time.

2. Stage Two: A full application form, detailing full aims and objectives.

All applications must submit on the templates provided (as listed in appendix 1 and 2) to ensure each application can be judged fairly by a central funding panel.

12.2 ‘Solicited’ application process

The solicited application is a one phased process where solicited applicants are asked to submit project details. This does not have to be in the set application form of the open application (two stage application form) but must cover the same information. It is recommended the applicant uses the templates, although a business plan containing the information is likely to be sufficient.

Key information includes:

- Organisation;
- Type of organisation (i.e. legal status and legal tenure of facility);
- Name of project;
- Contact details and address;
- Project description;
- Existing provision;
- Summary of how investment will drive BEF strategic outcomes;
- Cost summary (incl VAT) and partnership funding;
- Design summary including planning permission;
- Risk summary (cost, design, procurement partnership funding) and any mitigating actions.

Supporting Documents (not originals):

- Signed copy of application or business plan;
- Copy of constitution or article of association;
- Security of tenure;
- Useage plan/sport development plan;
- Partnership funding evidence;
- Drawings/technical information;
- Tender/cost report;
- Most recent set of accounts and 12 month forecast cashflow statement;
- Copy of Member Body Accreditation Certificate.

12.3 Assessment of Applications

All applications will be assessed through peer review (either virtual or in-person) who will consider the following in relation to the priorities identified through this document:

- Cost benefit analysis;
- Impact;
- Clarity of bid/outcome;
- Evidence base.

Consideration will also be given to:
- Geographical location of the project;
- Increased capacity the project will provide for its own centre but within the local community;
- Existing affiliation and approvals that a centre, school or group may have.

The assessment phase for ‘open’ application will take place in an advertised period once submission closing date has passed.
The assessment phase for ‘closed’ application will take place on a need be basis, as and when required.

Applicants can apply for between £1000 and £25,000, although a preference will be given to grants between £10,000 and £15,000.

**13.0 OTHER FUNDING OPPORTUNITIES**
A range of other funding opportunities exist include Sport England small grants, Iconic, Improvement and Inspired and Inclusive.

To find more about grants available please go to [http://www.fundingcentral.org.uk/](http://www.fundingcentral.org.uk/)

This site will identify a range of funding opportunities available to you from both local and national grant providers.

The most likely grant provider for facility funding is Sport England, for more information on Sport England funding pots available please go to [http://www.sportengland.org/funding.aspx](http://www.sportengland.org/funding.aspx)

**14.0 CONTACT**
The BEF and your Member Body is happy to assist you in trying to access funding where possible, and where it will lead to greater opportunities for people to participate.

To contact BEF please contact:
British Equestrian Federation
Stoneleigh Park
Kenilworth
Warwickshire
CV8 2RH
Or
Call 02476 698871 and ask to speak to the facility administrator.