

Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2019



Introduction and Background

The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA), commissioned a survey of studs about recruitment, skills and retention in the racing and thoroughbred breeding industry. Similar surveys have been conducted with racing trainers and racing staff.

This followed-up on a baseline survey conducted in 2017 to help measure the impact of the Racing Foundation's three-year £1 million proactive grant in the area of recruitment, skills and retention. In addition, the research provides the industry with up-to-date and comprehensive quantitative information and business intelligence to help inform other relevant initiatives.

The survey of studs took place between mid-January and the end of March 2019. In total, 161 studs responded to the survey, which represents a 50% response rate (49% in 2017).

Key Findings

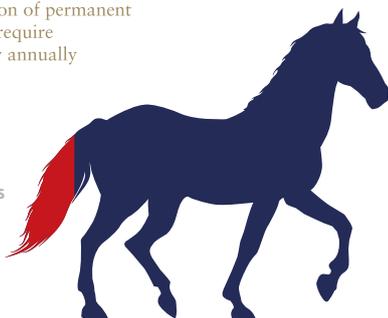
The research estimates that 18% of all permanent posts in studs require recruitment activity annually, due to staff turnover or growth (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs - this vacancy rate is a measure of recruitment demand and not of staff shortages). This compares to 15% in 2017 and a rate of 21% in the racing industry.

26% of studs said that recruitment, skills and retention issues are a problem to their business, compared to 27% in 2017 and 40% of racing trainers.

Estimated proportion of permanent posts in studs that require recruitment activity annually

18%

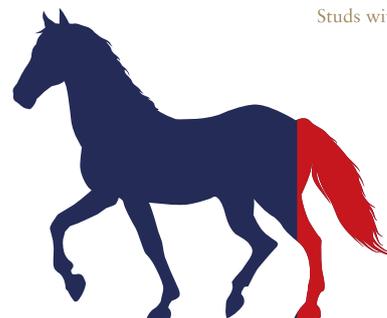
15% in 2017
21% of racing yards



Studs with employment issues

26%

27% in 2017
40% of racing yards



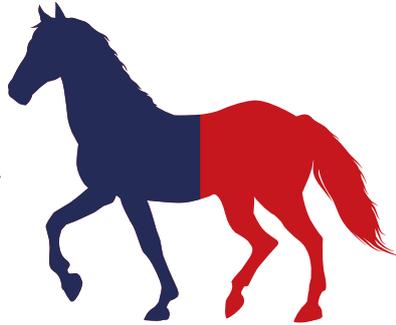
An estimated 49% of permanent vacancies are hard-to-fill, compared to 55% in 2017 and 50% of permanent racing yard vacancies. The national figure, based on the UK Employer Skills Survey, is 33%. Similar to racehorse trainers, studs said the two main reasons for recruitment difficulties are a lack of staff and a lack of sufficiently skilled staff, especially stud hands and stud grooms.

20% of studs have retention difficulties, compared to 17% in 2017, 17% of racehorse trainers and 8% of businesses nationally.

Studs hard to fill positions

49%

55% in 2017
50% of racing yards



National hard to fill positions

33%



Businesses nationally with retention difficulties

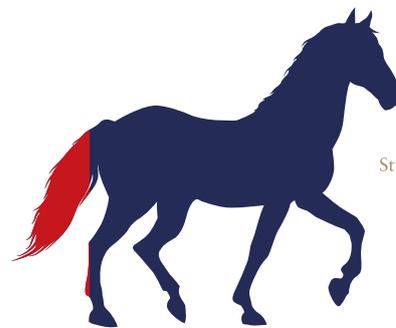
8%



Studs with retention difficulties

20%

17% in 2017
17% of racing yards



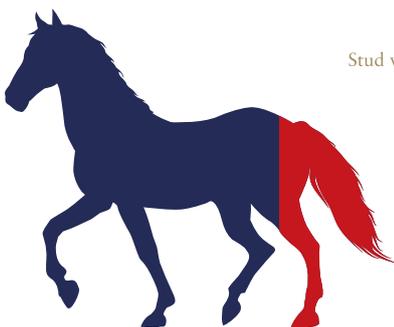
30% of studs said there are gaps in the skills or capabilities of their existing workforce. This compares to 26% in 2017, 27% of racing yards and a national figure of 13%.

60% of studs have not funded or arranged any training in the past 12 months, compared with 54% in 2017 and 43% of racing yards. This compares with 34% of businesses nationally that do not fund or arrange training.

Stud workforce skills gaps

30%

26% in 2017
27% of racing yards



National workforce skills gaps

13%



Businesses nationally that do not fund or arrange training

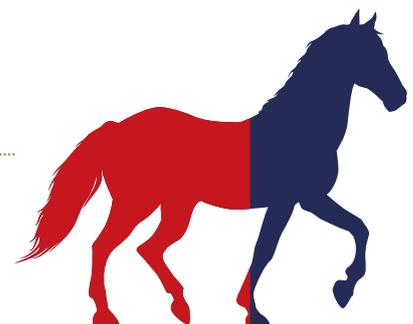
34%



Studs that do not fund or arrange training

60%

54% in 2017
43% of racing yards



The Racing Foundation Personal Development Programme and other industry recruitment, training and retention initiatives

The majority of studs have positive perceptions and attitudes about training and development opportunities, broadly consistent with 2017. 84% agree it is important for staff to engage in training and development, compared to 83% in 2017 and 96% of racing trainers.



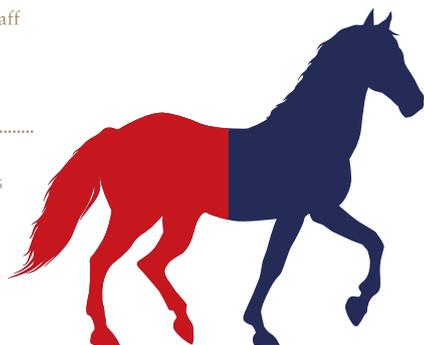
Studs continue to be satisfied with training and development and career progression opportunities, although there is scope to increase this. 53% are satisfied with staff training and development opportunities, compared to 52% in 2017 and 74% of racing trainers. 46% are satisfied with staff career progression opportunities in their business, compared to 48% in 2017 and 74% of racing trainers.

The majority of studs are aware of the training and development initiatives in the industry. For example, on average across all initiatives, 71% of studs are aware of the training and development initiatives. This compares to 78% in 2017 and 80% of racing yards (although some of the initiatives have changed since 2017 and are different to those in racing yards).

Studs satisfied with staff training opportunities

53%

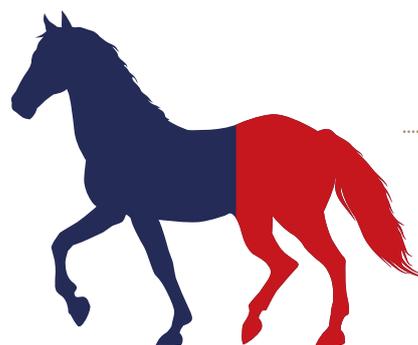
52% in 2017
74% of racing trainers



Studs satisfied with staff career opportunities

46%

48% in 2017
74% of racing trainers



Studs aware of the training and development initiatives in the industry 2019

71%

Studs aware of the training and development initiatives in the industry 2017

78%

Racing yards aware of the training and development initiatives in the industry

80%



A minority of studs have used the training and development initiatives. For example, on average across all initiatives, 13% of studs have used the training and development initiatives. This compares to also 13% in 2017 and 30% of racing yards.

Studs used the training and development initiatives

13%

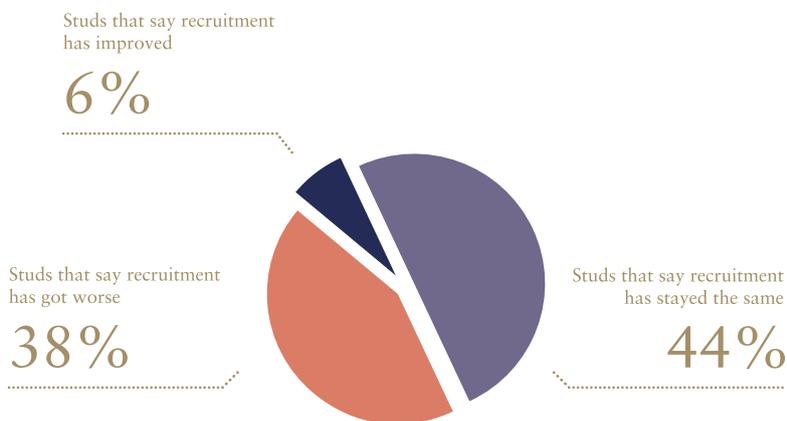
Racing yards used the training and development initiatives

30%

Change over time

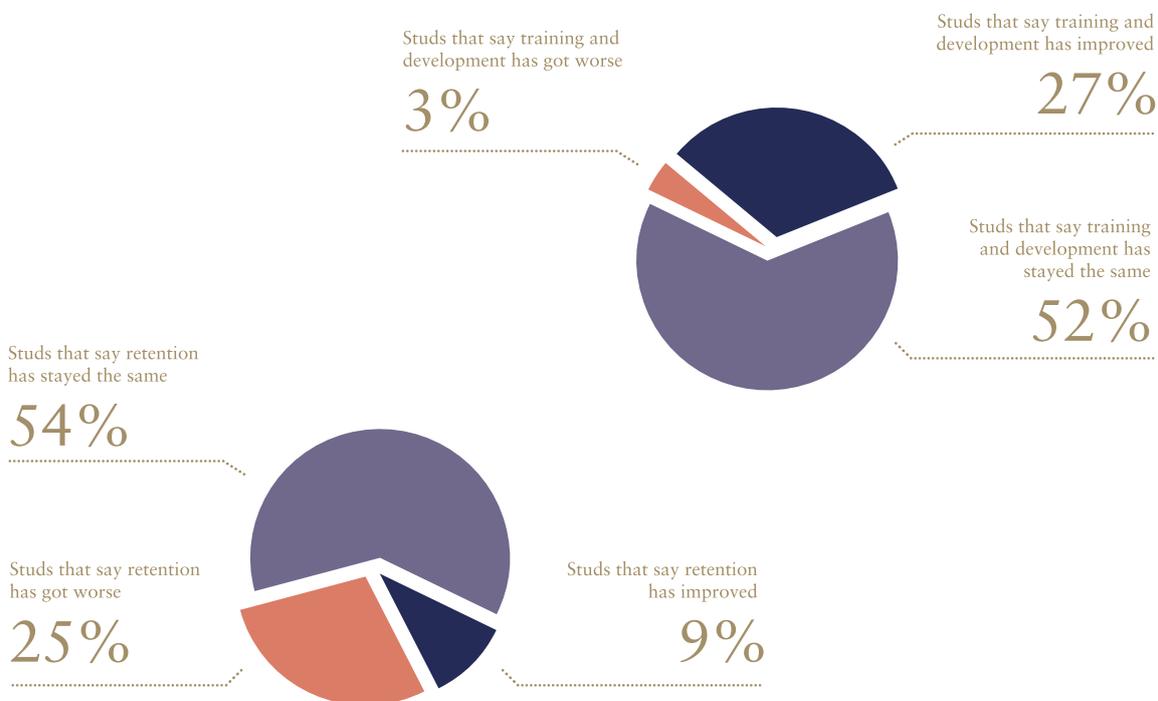
The majority of studs said that training and development for staff has improved or stayed the same in the last two years, but that recruitment and retention has worsened or stayed the same, although half agree that the industry is working effectively to address these issues.

38% said recruitment has got worse, 44% said it has stayed the same and 6% said it had improved (the remainder 'don't know'). This compares with 63% of racing trainers that said recruitment has got worse, 26% said it has stayed the same and 6% said it had improved.



27% said that training and development has improved, 52% stayed the same and 3% got worse (the remainder 'don't know'). This compares with 68% of racing trainers that said that training and development has improved, 22% stayed the same and 3% got worse.

25% said retention has got worse, 54% stayed the same and 9% improved (the remainder 'don't know'). This compares with 42% of racing trainers that said retention has got worse, 42% stayed the same and 11% improved.



50% of studs said that the industry is working together effectively to address recruitment, training and retention issues, while 10% disagree with this (the remainder 'neither agree nor disagree' or 'don't know'). This compares with 66% of racing trainers said that the industry is working together effectively to address recruitment, training and retention issues, while 19% disagree with this.

Implications

Recruitment, skills and retention issues continue to impact on the Thoroughbred breeding industry, with few notable or statistically significant changes since 2017.

The issues appear more significant than the situation nationally and, with most indicators, broadly comparable to those in racing yards. This suggests industry activity to promote recruitment, retention and skills development continues to be relevant and important.

Recruitment of sufficient staff and adequately skilled staff stands out as key issues, with the stud hand and stud groom roles continuing to be the most problematic.

In addition, a notable proportion of studs continue to experience retention difficulties, and therefore reducing the proportion of staff that leave their jobs and the industry should help reduce recruitment pressures. Some skills gaps also exist amongst current staff and there is scope to increase the awareness and exposure of staff to training and development opportunities.

The Future

The Racing Foundation's funding has supported the development of existing activities and the implementation of new initiatives, with the aim of raising awareness of, and improving access to, an increasing number of training, education and recruitment opportunities. Whilst it may take time to change cultures, and for change to have a positive impact on recruitment and retention issues, from the recent surveys it seems that these initiatives are having less of an impact on stud staff than racing staff.

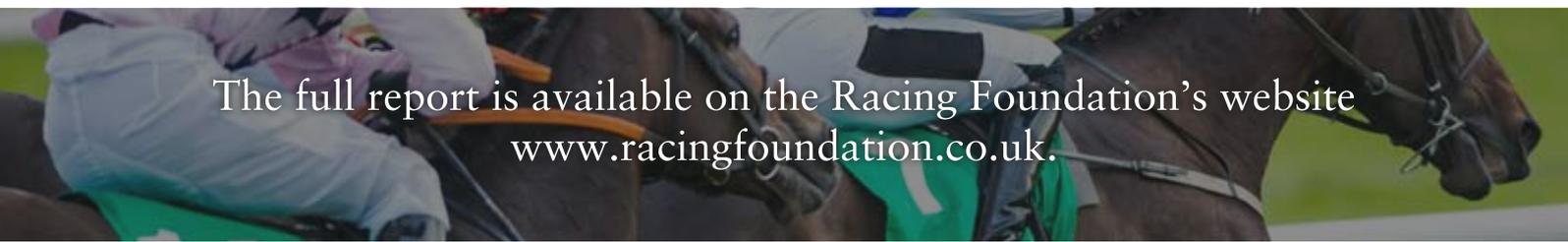
Consequently, a more strategic approach is required to address recruitment, training and retention issues and increase awareness of the activities and opportunities being offered, in order to enable Racing Foundation funding to have a more positive effect.

With this in mind, the Racing Foundation has been working with the Thoroughbred Breeders' Association to develop a 5-year strategic plan and recently announced a funding commitment of £569,752 for 2019-2023 that focuses on several key areas aimed at improving recruitment and retention in the breeding industry:

- **Development of a successful model** for recruitment and training of a more diverse pool of new entrants.
- **Introduction of a Thoroughbred Breeding Industry Training and Qualification Pathway** to provide a career development framework for stud employees from trainee stud hand to senior stud hand level.
- **Development of a Digital Engagement Strategy and Online Learning** facility to improve reach, accessibility and inclusivity.
- **Development of a Breeding Industry Data and Research Capability** to improve traceability, insight, longer term planning and impact analysis.

The Racing Foundation has also committed £3.9million to support Racing Welfare in delivering wellbeing activity over the next three years, including the Careers Advice and Training Service (CATS), a national Occupational Health Service and the development of Mental Health Services. All of these activities will be offered to stud staff, as well as racing staff, with the aim of providing an all-encompassing, holistic service.

In addition, the grant period for the National Stud's regional training courses, offered nationally, has been extended to the end of 2019. The National Stud is also a partner in the new Regional Staff Development Programme funded by the Racing Foundation, and will work with the TBA to develop a structured programme of appropriate regional training across a range of subject areas beyond 2019.



The full report is available on the Racing Foundation's website
www.racingfoundation.co.uk.