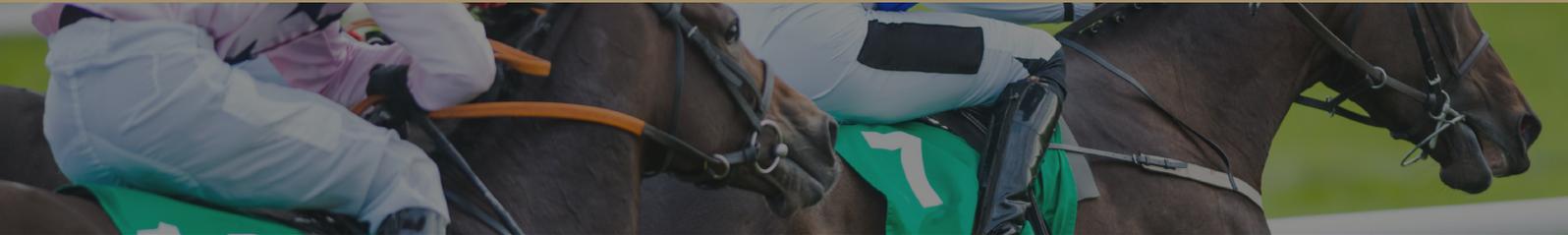




THE RACING FOUNDATION

Racing Industry Recruitment, Skills and Retention Research 2018



Introduction and Background

The Racing Foundation, in association with the British Horseracing Authority (BHA), National Association of Racing Staff (NARS) and National Trainers Federation (NTF), commissioned a survey of racing trainers and racing staff about recruitment, skills and retention in the racing industry.

This followed-up on a baseline survey conducted in Autumn 2016 to help measure the impact of the Racing Foundation’s three-year £1 million proactive grant in the area of recruitment, skills and retention. This grant has funded activity such as accessible learning for stable and stud staff delivered by the Racing Schools and the National Stud; the Careers Advice and Training Service (CATS) managed by Racing Welfare; Personal Development Planning for Jockeys delivered by Jockeys Education and Training Scheme; and enhanced careers marketing activity to increase recruitment to the industry.

In addition, the research provides the racing industry with up-to-date and comprehensive quantitative information and business intelligence to help inform other relevant initiatives.

The surveys took place between October and December 2018. In total, 459 racing trainers participated via telephone and online, representing 79% of all trainers and 85% of all horses in training. In addition, 1,228 racing staff participated via a postal survey and on-line, representing some 17% of all racing staff.

Key Findings

Trainers

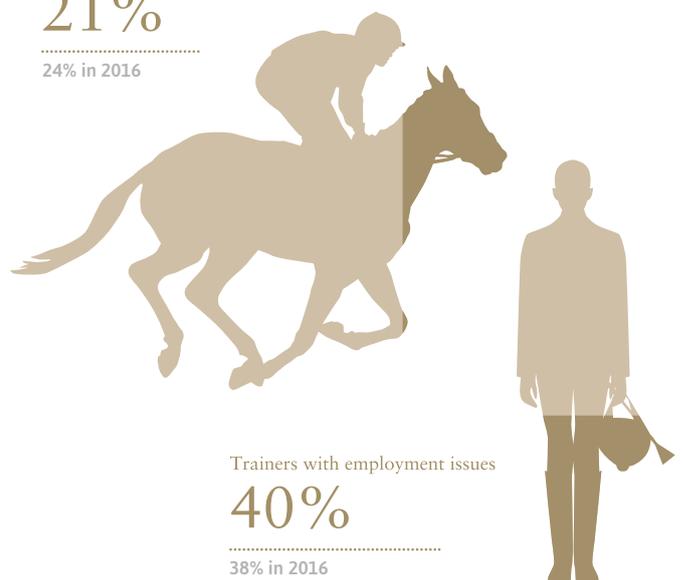
The research estimates that 21% of all permanent posts in racing yards require recruitment activity annually, due to staff turnover or growth (24% in 2016) (this vacancy rate is a measure of recruitment demand and not of staff shortages). This equates to an estimated 1,450 jobs per annum that require recruitment. The research did not identify if these posts are successfully recruited or not, although there is evidence of hard-to-fill vacancies and issues with the retention of staff within their existing yards and the industry as a whole.

Of the survey respondents, 40% of trainers indicated that recruitment, skills and retention issues are problematic for their businesses (38% in 2016).

Estimated proportion of permanent posts that require recruitment activity annually

21%

24% in 2016



Trainers with employment issues

40%

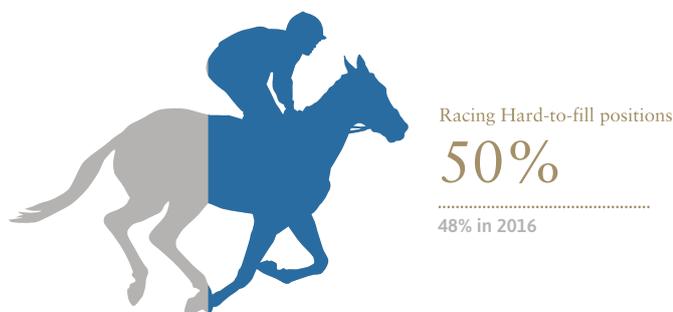
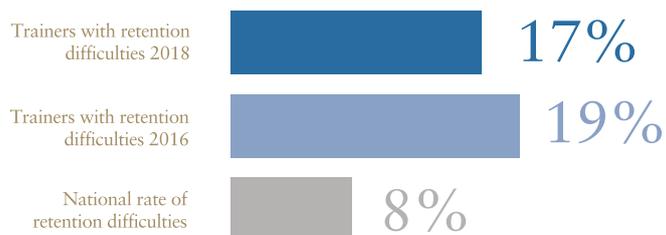
38% in 2016

50% of permanent vacancies in the racing industry are hard-to-fill, compared with 48% in 2016 and 33% nationally. Trainers said the two main reasons for recruitment difficulties are a lack of available staff in general and a lack of available sufficiently skilled staff, especially amongst work riders and also rider/grooms and yard staff.

17% of trainers said they have retention difficulties, compared with 19% in 2016 and 8% of businesses nationally. This equates to an estimated 23% of permanent racing staff jobs that are vacated by staff per annum (28% in 2016).

27% of trainers said there are skills gaps amongst their existing workforce, compared to 29% in 2016 and 13% of businesses nationally.

There has been an increase in the proportion of trainers that fund or arrange training - 43% of trainers did not fund or arrange training or development for their staff in the last 12 months, compared with 51% in 2016 and 34% of businesses nationally.



Larger yards are more likely than smaller yards to experience hard-to-fill vacancies, retention difficulties, and skills gaps, and for recruitment, skills and retention issues to be a problem to their business. Smaller yards are less likely to fund, arrange or support training or development for their staff.

Staff

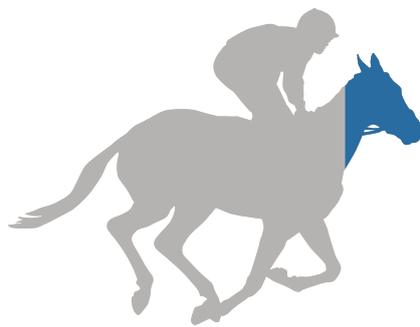
According to the survey, 75% of staff are satisfied with their job (80% in 2016). 19% are planning to leave the industry within two years (21% in 2016). The reasons staff cited for planning to leave the industry are similar to those cited in 2016 and for lack of job satisfaction – i.e. mainly working conditions and pay, with some mention of lack of career progression opportunities and perceived poor management. 30% would like to train to start another career in a different industry (31% in 2016).



Job Satisfaction

75%

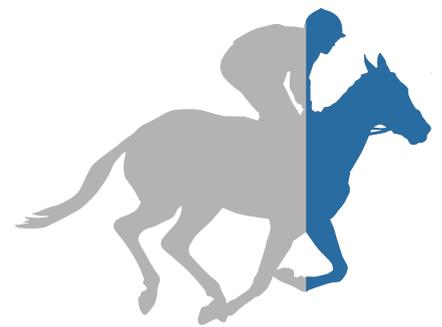
80% in 2016



Planning to leave industry in 2 years

19%

21% in 2016

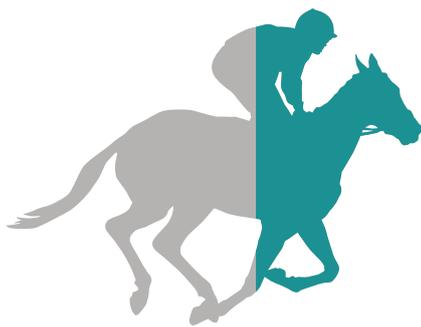


Would like to train for another industry

30%

31% in 2016

There has been an increase in the incidence of staff receiving training - 40% of staff received training and development in the last 12 months (29% in 2016). 67% are satisfied with training and development opportunities (57% in 2016). 66% are satisfied with career progression opportunities (55% in 2016).



Staff that received training and development in last 12 months

40%

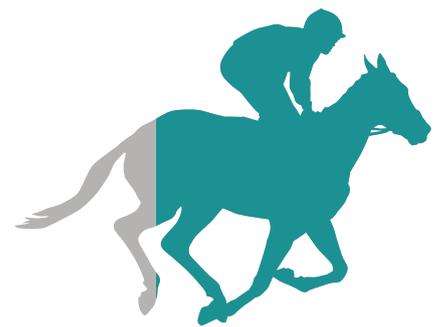
29% in 2016



Staff satisfied with training and development opportunities

67%

57% in 2016



Staff satisfied with career progression opportunities

66%

55% in 2016

There are close relationships between these issues. For example, staff that are unsatisfied with training, development and career opportunities are less likely to be satisfied with their job and more likely to plan to leave the industry.

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

Trainers (96%) and staff (84%) agree it is important for staff to engage in training and development. The majority of trainers and staff are increasingly more satisfied with training and development and career progression opportunities.

Trainers agree it is important for staff to engage in training and development



96%

Staff agree it is important for staff to engage in training and development



84%

The majority of trainers (80%) and staff (77%) are now aware of the training and support initiatives being offered by the industry.

There has been an increase in the number of trainers enabling staff to make use of these initiatives. One of the most used initiatives has been the regional work rider training.



Despite all of the above, the number of work rider vacancies that are hard to fill and the difficulty with retaining work riders has increased. Lack of capability to ride continues to be a growing concern and the main skills gap increasingly appears to be for work riders (cited by 76% of trainers that have skills gaps compared with 49% in 2016).

Change over time

The majority of trainers said that training and development for staff has improved in the last two years, but that recruitment and retention has worsened or stayed the same, although two-thirds agree that the industry is working effectively to address these issues. 63% of trainers said recruitment has got worse, 26% said it has stayed the same and 6% said it had improved.

68% said that training and development has improved, 22% stayed the same and 3% got worse. 42% said retention has got worse, 42% stayed the same and 11% improved. However, 66% of trainers said that the industry is working together effectively to address recruitment, training and retention issues.



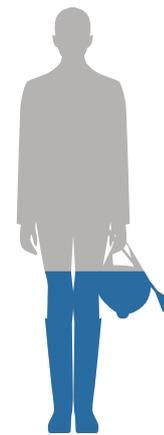
Trainers said recruitment has got worse

63%



Trainers said training and development has improved

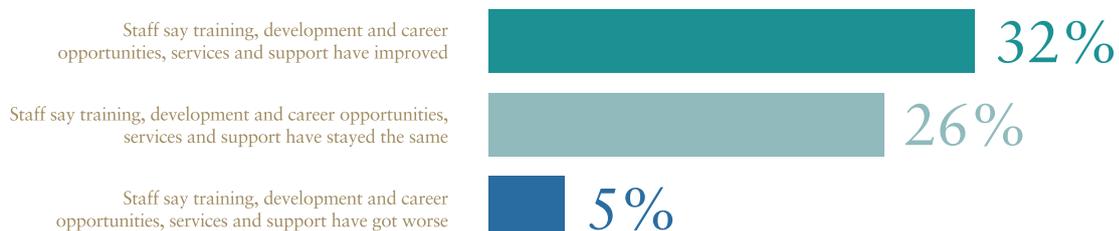
68%



Trainers said retention has got worse

42%

In addition, 32% of racing staff said that training, development and career opportunities, services and support have improved, 26% stayed the same and 5% got worse (the remainder said 'don't know').



Implications

This research highlights that recruitment, skills and retention issues continue to impact on the industry.

Key indicators such as vacancy rate (a measure of recruitment demand), retention rate (a measure of staff churn), hard-to-fill vacancies, perceptions of retention difficulties and perceptions of skills gaps remain a concern.

However, some progress has been made over the last 2 years. There are notable increases in yards providing training for their staff and there are improvements in staff perceptions around training, development and career progression opportunities.

There have also been improvements in the awareness and use of the various industry recruitment, training and retention initiatives. These changes have yet to filter down into improvements in trainers' perceptions of skills gaps and retention amongst their existing workforce and racing staff's job satisfaction and intention to remain working in the industry.

The Future

The Racing Foundation's £1 million funding support, between 2015 and 2018, has funded new initiatives and developed existing activities to help raise awareness of, and improve access to, an increasing number of training, education and recruitment opportunities. Whilst it may take time to change cultures and for the effects of change to have a positive impact on recruitment and retention issues faced by the industry, it is clear that progress is being made.

The Foundation's purpose is to act as a catalyst and a funder of improvement and the improved statistics, including improved training and development, increased training activity and in increasing satisfaction with career development opportunities, indicate the funding is having a positive effect.

The programme will be fully reviewed in the summer. However, to build on the progress made so far, the Foundation has already committed funding and support to help with wellbeing, skills and retention:

- **£3.9m to support Racing Welfare** in delivering well-being activity over the next three years, including the Careers Advice and Training Service, the development of a full Occupational Health Service for racing and mental health services.
- **£0.2m over the next 18 months** to fund the development and delivery of a Regional Staff Development Programme, in partnership with the Northern Racing College and British Racing School. This will see an expansion of training provision in Middleham, Malton, Lambourn and Newmarket, as well as the expansion of a national Rider Coaching Programme.
- **Grant periods have been extended** for the continued delivery of the Personal Development Planning for Jockeys and regional training for stud staff.

The survey findings demonstrate the challenges that remain to meet the staffing demands of the industry, especially providing sufficient numbers of adequately skilled staff. We believe that for this to happen a strategy has to be put in place that is created after some fundamental questions about the roles and responsibilities of individuals, businesses, regulators and others are considered.

The Racing Foundation stands ready to support such a purpose: to create affordable and effective recruitment, training and retention industry support for employers.



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