

Racing Industry Recruitment, Skills and Retention Research 2018

Report: January 2019

THE
RACING
FOUNDATION



Research
Evaluation
Community Engagement
Strategy Development

www.publicperspectives.co.uk

Contents

Executive Summary.....	1
Main Report.....	5
Section 1: Introduction.....	5
Section 2: Labour force statistics, business performance and workforce demand	9
Introduction	9
Labour force statistics.....	9
Business performance	10
Workforce demand.....	11
Section 3: Recruitment.....	12
Introduction	12
Vacancy rates	12
Hard-to-fill vacancies.....	14
Reasons for hard-to-fill vacancies.....	15
Section 4: Retention	17
Introduction	17
Retention rates	17
Retention difficulties.....	18
Reasons for retention difficulties	20
Staff and retention	20
Section 5: Skills, training and support.....	23
Introduction	24
Skills gaps	24
Staff and skills.....	25
Training and development prevalence.....	27
Awareness and use of training and support initiatives	29
Perceptions and attitudes about training and development	31
Section 6: Concluding points	33
Introduction	33
Perceptions about key recruitment, skills and retention issues.....	33
Perceptions of change over time.....	35

Racing Industry Recruitment, Skills and Retention Survey 2018

Executive Summary

Introduction and aims of the research

1. The Racing Foundation, in association with the British Horseracing Authority (BHA), National Association of Racing Staff (NARS) and National Trainers Federation (NTF), commissioned Public Perspectives Ltd to conduct a survey of racing trainers and racing staff about recruitment, skills and retention in the racing industry. This was to follow-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. 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.

Approach to the research

2. The research involved surveys of racing trainers and racing staff, with separate, but related, questionnaires developed for each audience.
3. **Racing trainers:** At the time of the research there were 592 licenced racing trainers. Between the end of October 2018 and mid-December 2018 (a six-week period) a telephone survey of racing trainers was conducted. In addition, an online version of the survey was e-mailed to non-respondents towards the end of the data collection period to help maximise the response. In total, 459 trainers responded to the survey, which represents a 78% response rate (the response rate was 79% in 2016). This sample also covers some 80% of all racing staff and 85% of all horses in training.
4. **Racing staff:** At the time of the research there were 7,151 racing staff, including licenced jockeys, on the BHA's register with valid postal addresses. Racing staff were sent a postal survey via their registered trainer at the start of November 2018, with a postal return date of the end of November 2018. In addition, racing staff had the opportunity to complete the survey on-line. Non-respondents were sent an e-mail reminder at the end of November 2018 to an e-mail address registered to their name, where data existed (some 60% of racing staff provided a valid e-mail address). In total, 1,228 racing staff and jockeys responded to the survey (including over 30% responding on-line/via e-mail), with a further 112 where there was a combination of the postal survey returned to sender and no valid e-mail address. This represents an adjusted response rate of 17% (the adjusted response rate was 14% in 2016).¹

Key findings

5. By way of context, 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.² 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

¹ Although this is a relatively low response rate, it is in line with expectations and exceeds past exercises with racing staff.

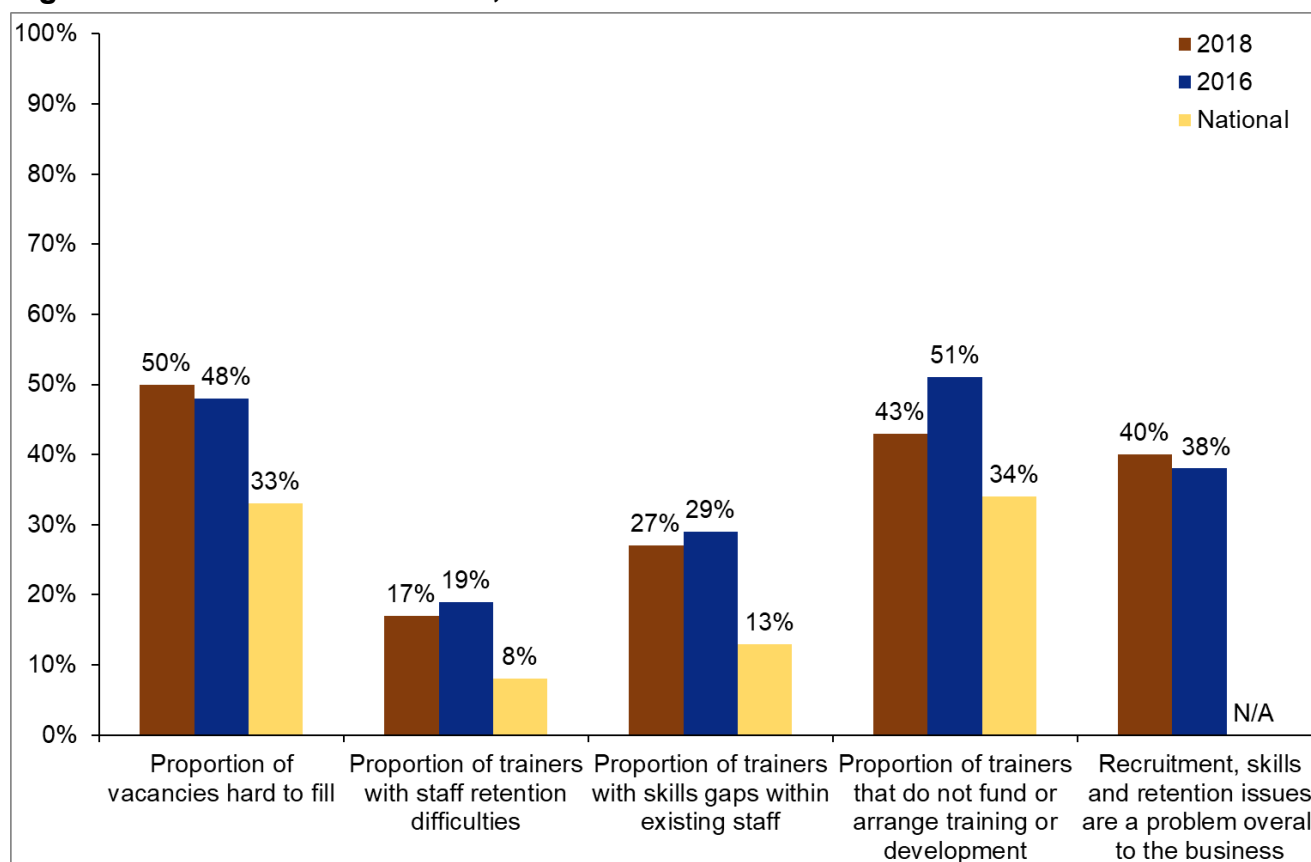
² Not all of these will be individual roles as it is possible that some roles will be vacant more than once per annum.

industry as a whole. The following graph highlights the extent of recruitment, skills and retention issues from the perspective of trainers, compared over time and against national data (from the UK Employer Skills Survey 2017):

- 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 – a statistically significant improvement) (this retention rate is a measure of staff churn).
- 27% of trainers said there are skills gaps amongst their existing workforce, compared to 29% in 2016 and 13% of businesses nationally.
- 43% of trainers did not fund or arrange training or development for their staff in the last 12 months, compared with 51% in 2016 (a statistically significant improvement) and 34% of businesses nationally.
- 40% of trainers said that recruitment, skills and retention issues are a problem for their business, compared with 38% in 2016.

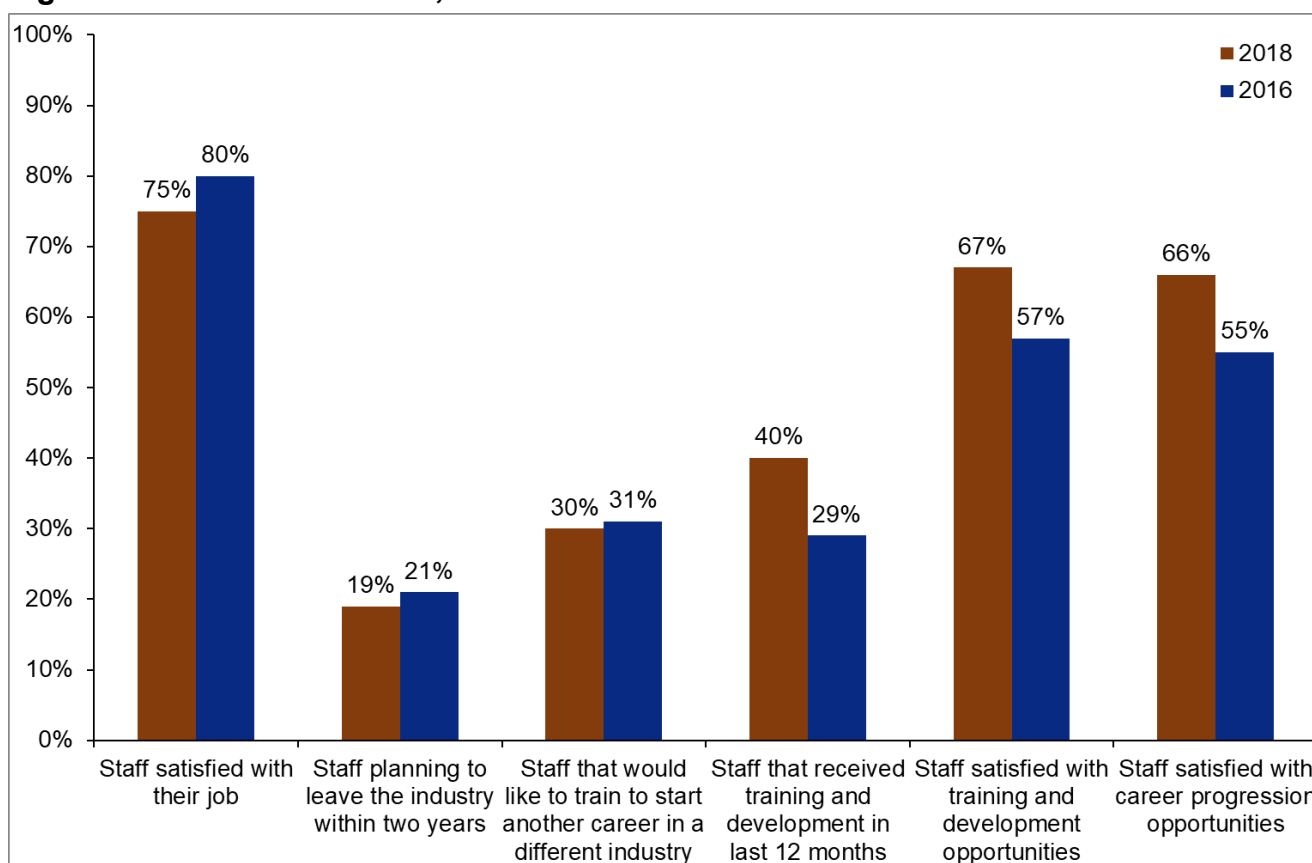
6. The size of yard matters. Larger yards are more likely than smaller yards to experience hard-to-fill vacancies, retention difficulties, and skills gaps, and for recruitment, skills and retention issues to be a problem to their business. Smaller yards are less likely to fund, arrange or support training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

Figure 1: Trainers – recruitment, skills and retention issues



7. The following graph highlights the extent of recruitment, skills and retention issues from the perspective of staff:
- 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).
 - 40% of staff received training and development in the last 12 months (29% in 2016 – a statistically significant improvement).
 - 67% are satisfied with training and development opportunities (57% in 2016 – a statistically significant improvement).
 - 66% are satisfied with career progression opportunities (55% in 2016 – a statistically significant improvement).
8. 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.

Figure 2: Staff – recruitment, skills and retention issues



Concluding points

9. By way of conclusion, the research highlights the following key points:
- Recruitment, skills and retention issues are important to, and continue impacting on, the industry. This suggests the continued need for strategy, resources and action to address the issues identified.
 - 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 stable in percentage terms between 2016 and 2018. There are notable increases in yards providing training to 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, although there is scope to further enhance this. These changes have yet to filter down into improvements in trainers' perceptions of skills gaps and retention amongst their existing workforce and staff's job satisfaction and intention to remain working in the industry.
 - The research indicates that the following points should be focussed upon to address recruitment, training and retention issues:
 - The availability of staff in general and adequately skilled staff stands out as a key issue.
 - A notable proportion of trainers experience retention difficulties and therefore reducing the proportion of staff that leave their jobs and the industry should reduce recruitment pressures, especially amongst skilled staff. The reasons staff cited for planning to leave the industry are mainly working conditions and pay, with some mention of lack of career progression opportunities and perceived poor management, despite improvements in these areas.
 - Skills gaps exist amongst existing staff and there continues to be scope to increase the awareness and exposure of staff to training and development opportunities, despite improvements.
 - The work roles with the greatest problems are primarily work riders, which has increased as a problem area since 2016, followed by grooms/riders and yard staff (both of which have decreased as problems since 2016 but still remain prominent).
 - Recruitment, skills and retention issues are greater in larger yards, although smaller yards engage in less training and development of their staff.

Racing Industry Recruitment, Skills and Retention Survey 2018

Main Report

Section 1: Introduction

Introduction and aims of the research

- 1.1. The Racing Foundation, in association with the British Horseracing Authority (BHA), National Association of Racing Staff (NARS) and National Trainers Federation (NTF), commissioned Public Perspectives Ltd to conduct a survey of racing trainers and racing staff about recruitment, skills and retention in the racing industry. This was to follow-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. 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.

Approach to the research

- 1.2. The research involved surveys of racing trainers and racing staff, with separate, but related, questionnaires developed for each audience.
- 1.3. **Racing trainers:** At the time of the research there were 592 licenced racing trainers. Between the end of October 2018 and mid-December 2018 (a six-week period) a telephone survey of racing trainers was conducted. In addition, an online version of the survey was e-mailed to non-respondents towards the end of the data collection to help maximise the response. In total, 459 trainers responded to the survey, which represents a 78% response rate (the response rate was 79% in 2016). This sample also covers some 80% of all racing staff and 85% of all horses in training.
- 1.4. **Racing staff:** At the time of the research there were 7,151 racing staff, including licenced jockeys, on the BHA's register with valid postal addresses. Racing staff were sent a postal survey via their registered trainer at the start of November 2018, with a postal return date of the end of November 2018. In addition, racing staff had the opportunity to complete the survey on-line. Non-respondents were sent an e-mail reminder at the end of November 2018 to an e-mail address registered to their name, where data existed (some 60% of racing staff provided a valid e-mail address). In total, 1,228 racing staff and jockeys responded to the survey (including over 30% responding on-line/via e-mail), with a further 112 where there was a combination of the postal survey returned to sender and no valid e-mail address. This represents an adjusted response rate of 17% (the adjusted response rate was 14% in 2016).³
- 1.5. With this number of respondents, the surveys provide robust data. The accuracy of the survey result is no worse than +/- 2.2% at a 95% confidence level for the trainer survey, and +/- 2.5% at a 95% confidence level for staff.⁴ This means that we can be 95% confident that

³ Although this is a relatively low response rate, it is in line with expectations and exceeds past exercises with racing staff.

⁴ Sampling error, as the measure of survey accuracy is known, exists because even when surveying as robustly as has been the case with this research, only a proportion of the population has responded. Sampling error, therefore, is

the 'real' result for any given question would be within 2.2% and 2.5% of those stated within the survey findings for trainers and staff respectively. This provides for robust data when the results are analysed at a headline level and over time.

- 1.6. The above figures about sample accuracy are important because they help determine whether differences in results over time are statistically significant, once sample accuracy is taken into account. This report will make it clear when differences over time are large enough to be statistically significant.
- 1.7. Respondents to the surveys provide a reasonable representation of all racing trainers and staff, with only a slight imbalance. The main imbalance for the trainers' survey is that there is a slight skew towards yards with 40+ horses in training away from yards with under 10 horses in training and this is also reflected in an over-representation of yards with larger prize earnings (this was also the case in the 2016 survey). For the staff survey, a higher proportion of women responded, as in 2016. The survey results have been 're-weighted' to bring them fully in line with the profile of the wider racing trainer and staff populations to help ensure their accuracy and representativeness.
- 1.8. The following table shows the profile of respondents to the surveys against key demographics, and compared against the wider trainer and staff populations:

the measure of accuracy between the survey results and those that would have been obtained if all trainers and staff had responded, i.e. had a census been conducted.

Profile	Percentage of respondents	Percentage of all trainers/staff
Trainers		
No. of horses in training		
1-9	27%	34%
10-19	24%	25%
20-29	15%	13%
30-39	8%	8%
40+	25%	20%
Prize money		
Under £20,000	44%	54%
£20,000-£49,999	15%	15%
£50,000-£99,999	11%	9%
£100,000-£249,999	14%	11%
£250,000 and over	16%	11%
Geography		
South East	16%	15%
South West	20%	21%
East Anglia	15%	13%
Midlands	18%	19%
North	22%	22%
Scotland	4%	4%
Wales	4%	6%
Staff		
Gender		
Female	61%	47%
Male	39%	53%
Age		
16-24	30%	26%
25-34	26%	25%
35-44	15%	18%
45-54	15%	16%
55-64	11%	9%
64+	3%	5%
Employment status		
Employed full-time	67%	59%
Employed part-time	17%	28%
Self-employed	13%	13%

Reporting

1.9. The following report summarises the key findings from the surveys. Each relevant question has been analysed against key demographic and conceptual variables to identify any relevant patterns, trends, similarities or differences by different types of trainers and staff. Commentary is only provided where significant or meaningful findings are identified. The variables analysed include:

Trainer survey:

- Business size
- Number of horses trained
- Prize money earned

- Geography
- Flat or jump trainer, or both (determined by the proportion of prize draw money earned)
- Business performance

Staff survey:

- Gender
- Age
- Length of time in industry
- Length of time in job
- Employment status
- Job type
- Geography

- 1.10. Importantly, the results are analysed over time, comparing the 2018 results with those in 2016.
- 1.11. In addition, where data exists, questions are compared against national data, primarily the UK Employer Skills Survey 2017 (reported in August 2018) – a telephone survey of some 90,000 employers conducted nationally by the Department for Education.
- 1.12. The questionnaires contain satisfaction and agree/disagree questions on a scale of 1-10. This approach was taken as it allows for a greater degree of opinion to be provided, which offers more robust opportunities to monitor change in perceptions over time. As per convention, these questions are analysed by grouping responses. For example, responses 1-4 are combined to form 'disagree', 5-6 to form 'neutral' and 7-10 to form 'agree'.
- 1.13. The remainder of this report is divided into the following sections:
 - Section 2: Labour force statistics, business performance and workforce demand
 - Section 3: Recruitment
 - Section 4: Retention
 - Section 5: Skills, training and support
 - Section 6: Concluding points

Section 2: Labour force statistics, business performance and workforce demand

Introduction

2.1. This section presents findings about the size of training yards operating in the racing industry, business performance and workforce demand.

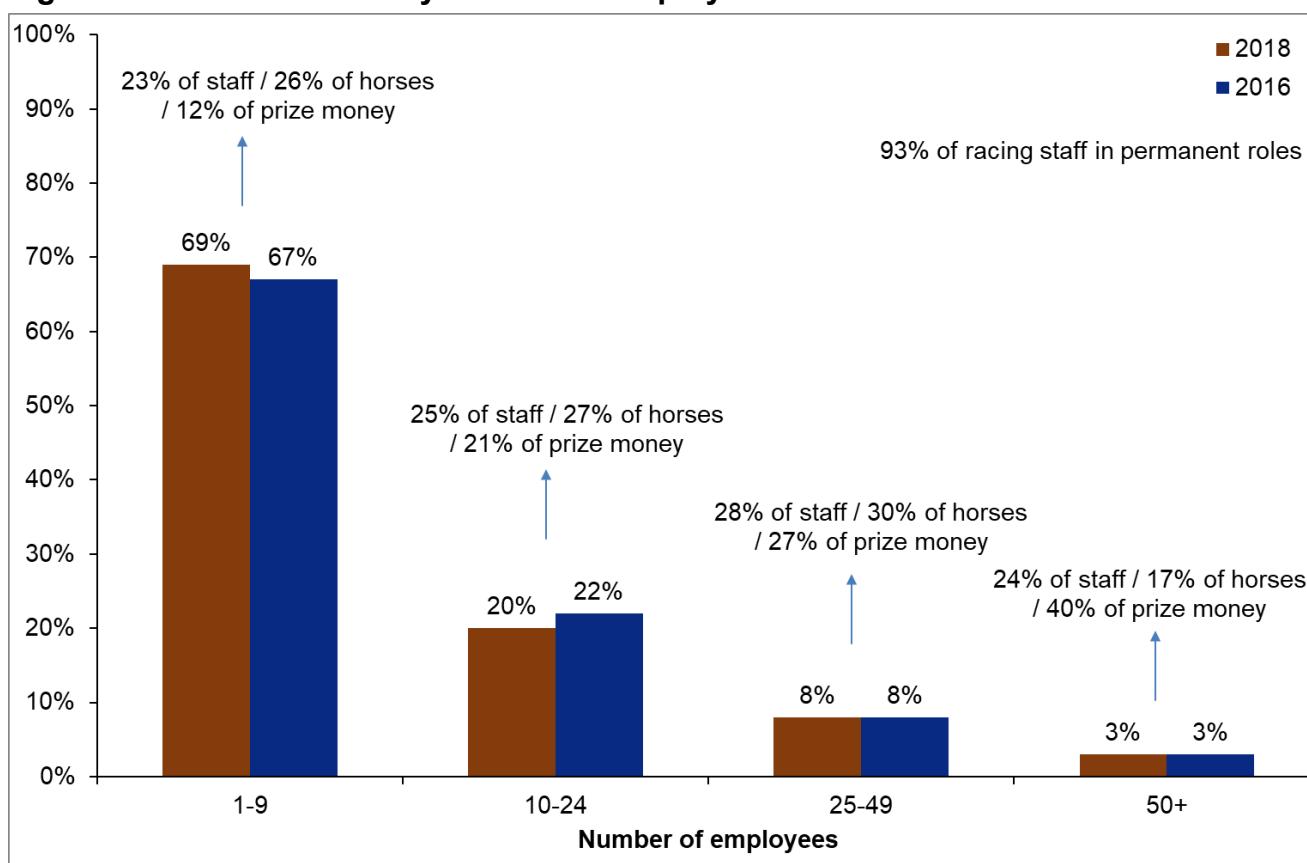
Labour force statistics

The structure of the labour force remains similar since 2016 – Over two-thirds of trainers have 1-9 staff, while a tenth have 25+ staff but account for over half of all racing staff

2.2. 69% of trainers have 1-9 staff, accounting for 23% of racing staff, 26% of horses in training and 12% of prize money earned. 20% of trainers have 10-24 staff, accounting for 25% of racing staff, 27% of horses and 21% of prize money. The remaining 11% of trainers have 25+ staff, accounting for 52% of racing staff, 47% of horses and 67% of prize money.

2.3. As in 2016, 93% of racing staff are in permanent roles, with the remainder in temporary, seasonal or casual roles.

Figure 2.1: Business size by number of employees



Number of respondents: 459 trainers.

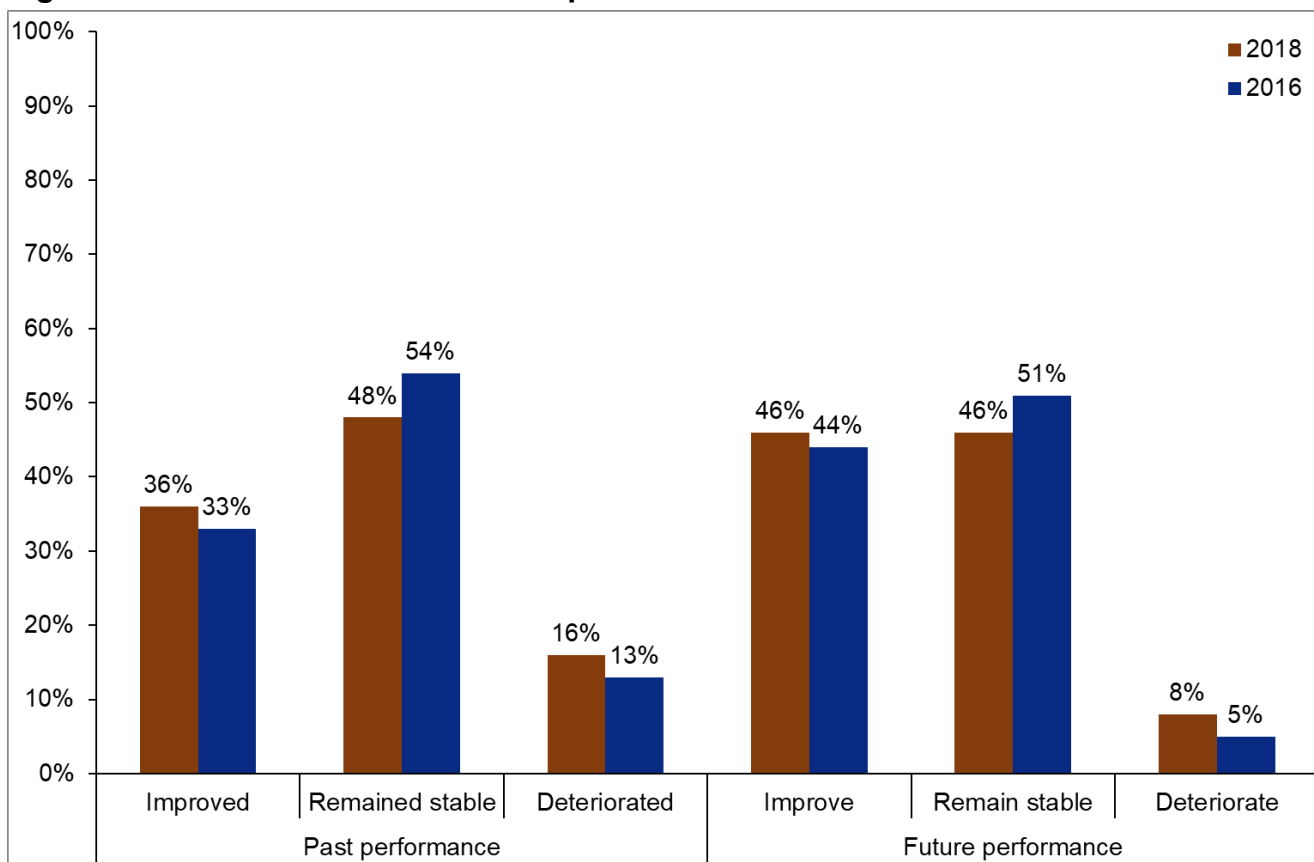
Question asked: Including you and any working proprietors/owners, how many people are employed by your business during your peak season?

Business performance

A third of trainers reported improved business performance and over two-fifths expect performance to improve in the future, similar to 2016

- 2.4. 36% of trainers said their business performance improved over the past 12 months, 48% said it remained stable and 16% said it deteriorated. Of the 16% of trainers that said performance deteriorated, 33% expect it will improve, a further 35% expect it will remain stable and 31% expect it will deteriorate further in the next 12 months.
- 2.5. 46% of trainers expect performance will improve over the next 12 months, 46% said it will remain stable and 8% said it will deteriorate.
- 2.6. These results are consistent with 2016 and there are not any statistically significant differences.
- 2.7. Trainers with 1-9 staff are less likely to state that business has improved (29%) and more likely to state it has deteriorated (19%) than larger yards.

Figure 2.2: Past and future business performance



Number of respondents: 459 trainers.

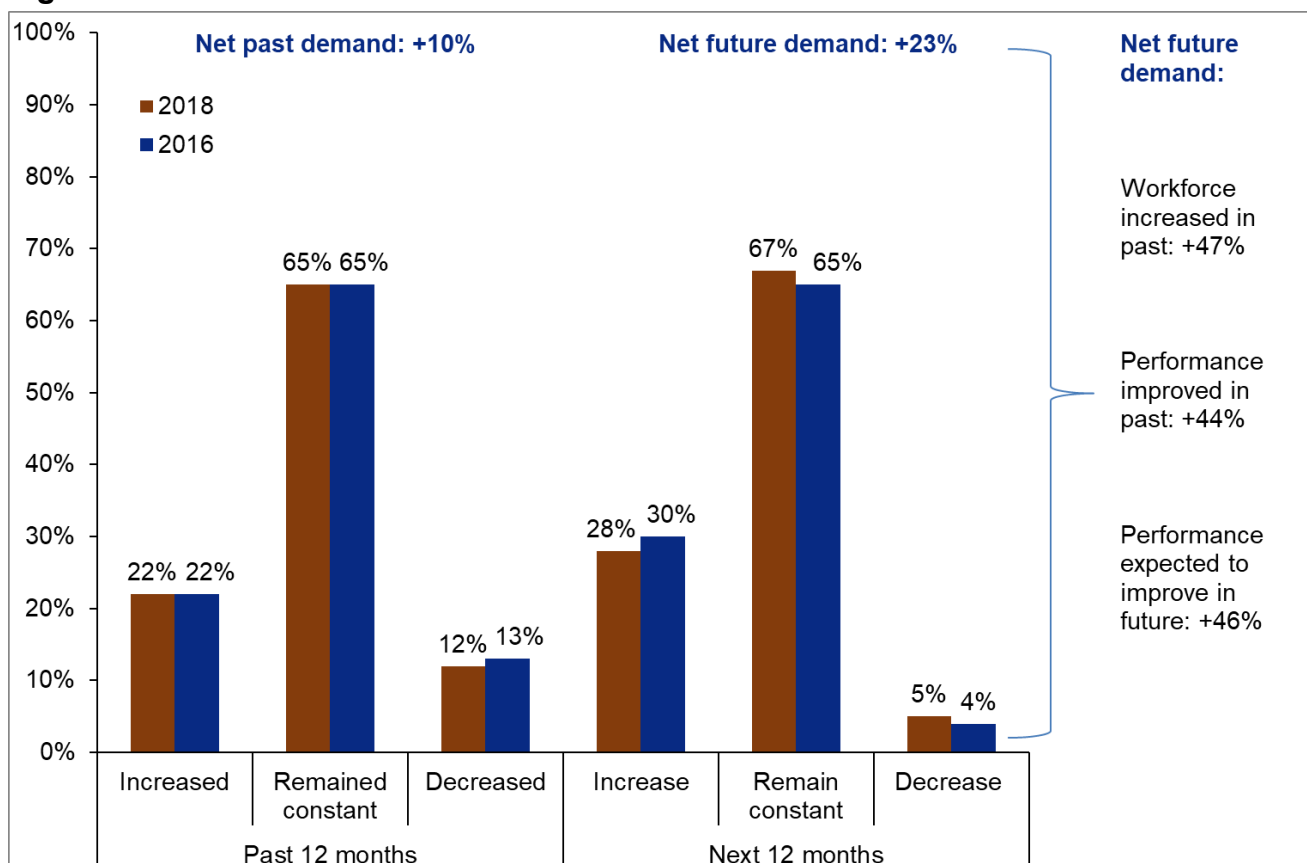
Questions asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? / Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?

Workforce demand

Consistent with results two years ago, over a fifth of trainers reported that their workforce increased and just under a third expect it to increase in the future

- 2.8. 22% of trainers said that their workforce increased over the past 12 months, while 12% reported it decreased. This results in net past demand (i.e. the difference between the increase and decrease in workforce) of +10%. Trainers that said their performance had improved over the past 12 months had a higher net past demand of +45%, compared with -8% of other trainers. Net demand is broadly similar across other trainer demographics.
- 2.9. 28% of trainers expect their workforce to increase in the next 12 months, while 5% expect it to decrease, resulting in a net future demand of +23%. Net future demand is greatest amongst trainers that increased their workforce in the past 12 months (+47%), trainers that reported improved performance in the past (+44%) and trainers that expect improved performance in the future (+46%). Net demand is broadly similar across other trainer demographics.
- 2.10. Results are consistent over time.

Figure 2.3: Workforce demand



Number of respondents: 459 trainers.

Questions asked: On average, over the past 12 months, has your workforce increased, remained constant or decreased? / And over the next 12 months, on average, do you expect your workforce to increase, remain constant or decrease?

Section 3: Recruitment

Introduction

3.1. This section presents findings about recruitment, including information about vacancy rates, hard-to-fill vacancies, the types of trainers and occupations most affected, and the reasons for recruitment difficulties.

Vacancy rates

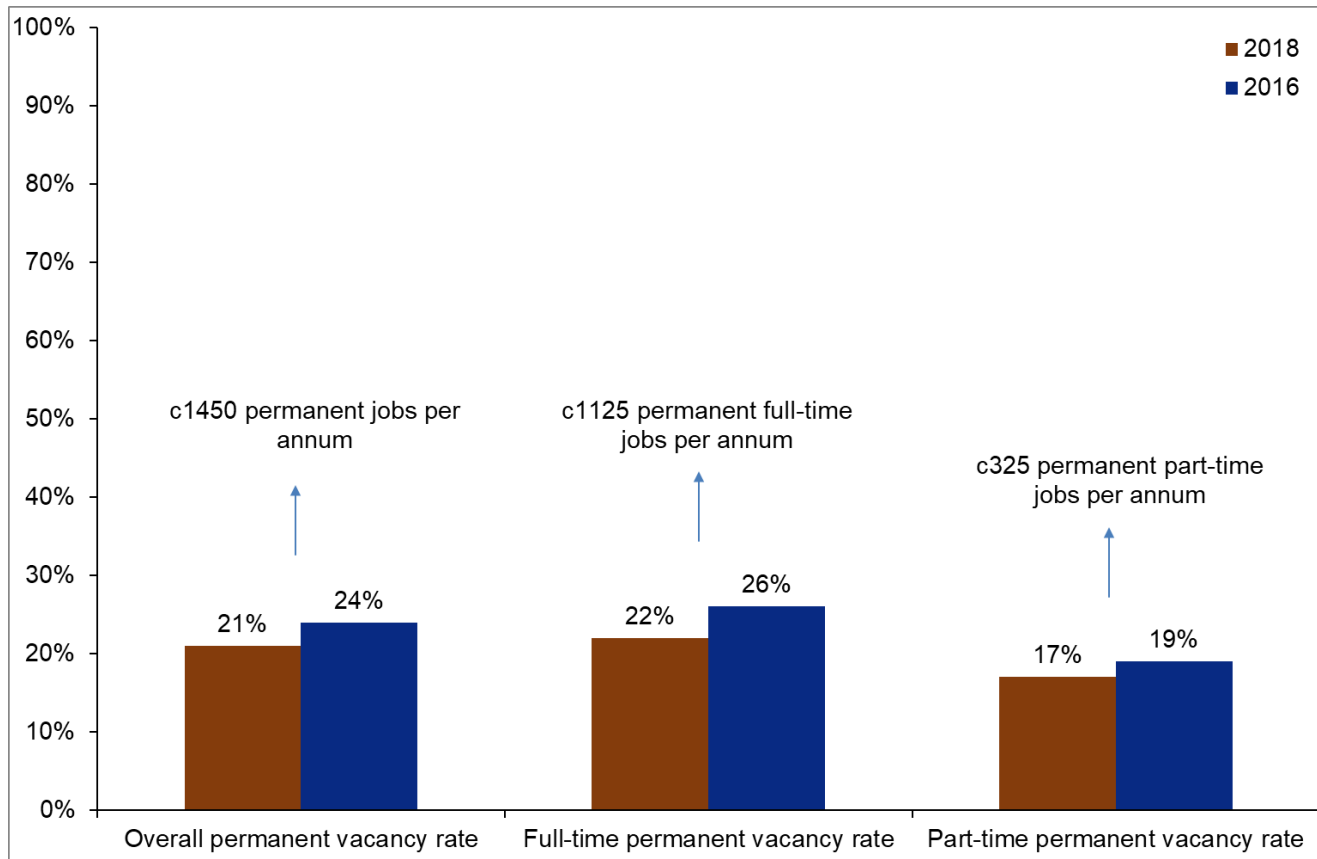
Over a fifth of permanent racing staff jobs are vacant annually, which represents a slight decrease since 2016

- 3.2. Overall, there is an estimated annual vacancy rate of 21% of all permanent racing staff jobs (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs – this is essentially a measure of recruitment demand and is not a measure of staff shortages). These are permanent posts in racing yards that require recruitment activity annually, due to staff moving jobs within a yard, moving to another yard, leaving the industry and/or business growth creating new roles. This figure is down slightly from 24% in 2016, although the difference is not statistically significant, so in essence the result is stable.
- 3.3. A vacancy rate of 21% equates to an estimated 1,450 jobs per annum that require recruitment, including some 1,125 that are full-time and 325 that are part-time roles. Not all of these will be individual roles as it is possible that some roles will be vacant more than once per annum.⁵
- 3.4. All businesses with 25 or more staff had vacancies requiring recruitment, 93% of businesses with 10 or more employees had vacancies and 57% of businesses with 1-9 employees had vacancies requiring recruitment at some point in the past year.
- 3.5. The UK Government's Labour Force Survey (LFS) calculates a vacancy rate quarterly, based on asking businesses how many vacancies they currently have.⁶ This figure fluctuates between 2%-2.6% and is currently at 2.6%. Based on an assumption that on average a post takes between one and three months to fill, the likely annual vacancy rate would be between 10% and 30%. Therefore, the racing industry vacancy rate is in the middle of this range.

⁵ A BHA/ITV Racing survey in December 2018 of 81 trainers indicates that the industry requires an extra 1000 racing staff, including work riders, grooms and experienced yard staff.

⁶ The vacancy rate in this survey was calculated annually given the seasonal nature of the industry, which meant asking it at a given point in time would be problematic.

Figure 3.1: Vacancy rates



Number of respondents: 459 trainers. Questions asked: Overall, how many full-time and part-time vacancies have you had in the last 12 months? / And roughly, in the last 12 months, how many vacancies have been permanent, temporary, seasonal and casual?

3.6. Trainers with vacancies tended to cite several recruitment methods, including Careersinracing.com, yardandgroom.com, social media advertising, advertising in local press and shops and word of mouth.

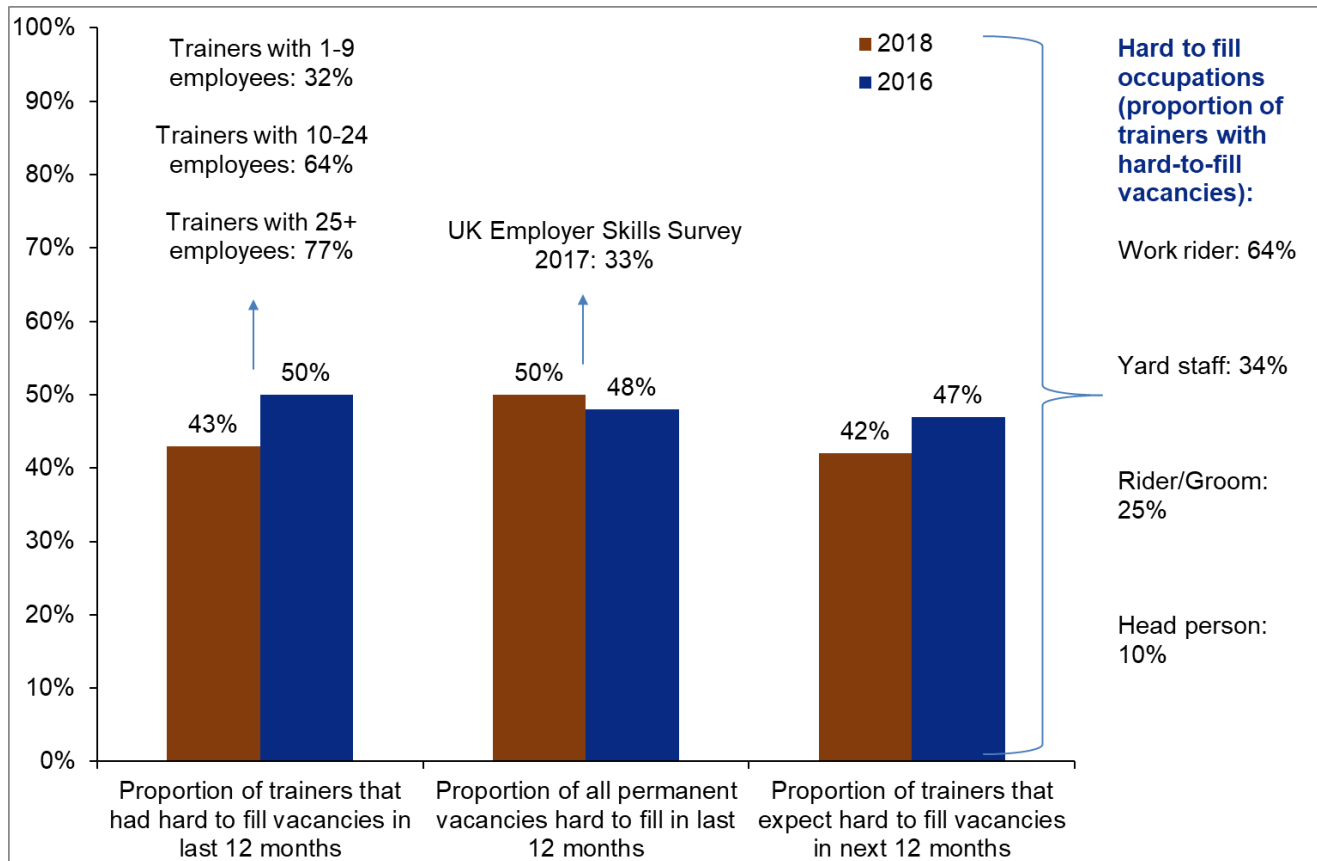
Hard-to-fill vacancies

Although fewer trainers are affected in 2018 compared with 2016, some half of all permanent vacancies remain hard-to-fill, with larger yards most affected and work riders most difficult to find

- 3.7. 43% of trainers (which account for some 64% of racing staff) said they had hard-to-fill vacancies in the last 12 months, and these trainers estimated on average that 75% of their vacancies are hard-to-fill. This translates into an estimated 50% of permanent vacancies that are hard-to-fill.
- 3.8. In 2016, 50% of trainers said they had hard-to-fill vacancies, of which on average 78% of their vacancies were considered hard-to-fill. This translated into an estimated 48% of permanent vacancies that were hard-to-fill.⁷
- 3.9. The national figure, based on the UK Employer Skills Survey 2017, is 33%. This national figure has remained consistent since 2015.
- 3.10. Larger yards are more likely to say they had hard-to-fill vacancies (this was also the case in 2016, but is more exaggerated in 2018). For example, 32% of trainers with 1-9 employees said they had hard-to-fill vacancies, compared with 64% with 10-24 employees and 77% with 25+ employees. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 3.11. In addition, there are some geographical variations, where 54% of trainers in East Anglia (which covers Newmarket), 50% in the South East, 47% in the South West and 42% in the Midlands said they had hard-to-fill vacancies, compared with 41% in Scotland, 35% in the North (which covers Malton and Middleham) and 19% in Wales. Similar trends existed in 2016.
- 3.12. 42% of trainers expect to have hard-to-fill vacancies in the next 12 months, compared with 47% in 2016. 77% of trainers that had hard-to-fill vacancies in the past also expect to have hard-to-fill vacancies in the future, and 18% that did not have any hard-to-fill vacancies in the past expect to have them in the future.
- 3.13. The occupations which were most commonly cited as being hard to fill are work riders (cited by 64% of trainers that said they had hard-to-fill vacancies, increased from 47% in 2016), yard staff (34% in 2018 compared with 33% in 2016), Rider/Groom (25% in 2018 down from 48% in 2016) and head person (10% in 2018 compared with 8% in 2016).

⁷ The reason why the proportion of vacancies that are hard to fill has increased, despite the proportion of trainers experiencing hard to fill vacancies decreasing, is because there are a relatively larger number of vacancies concentrated amongst a smaller group of trainers that are experiencing hard-to-fill vacancies.

Figure 3.2: Hard-to-fill vacancies



Number of respondents: 459 trainers. Questions asked: Have you had any vacancies in the last 12 months that you have found hard to fill? / Roughly, what proportion of your vacancies have been hard to fill? / Which specific occupations have you found hard to fill? / Do you expect to have any vacancies that will be hard to fill in the next 12 months?

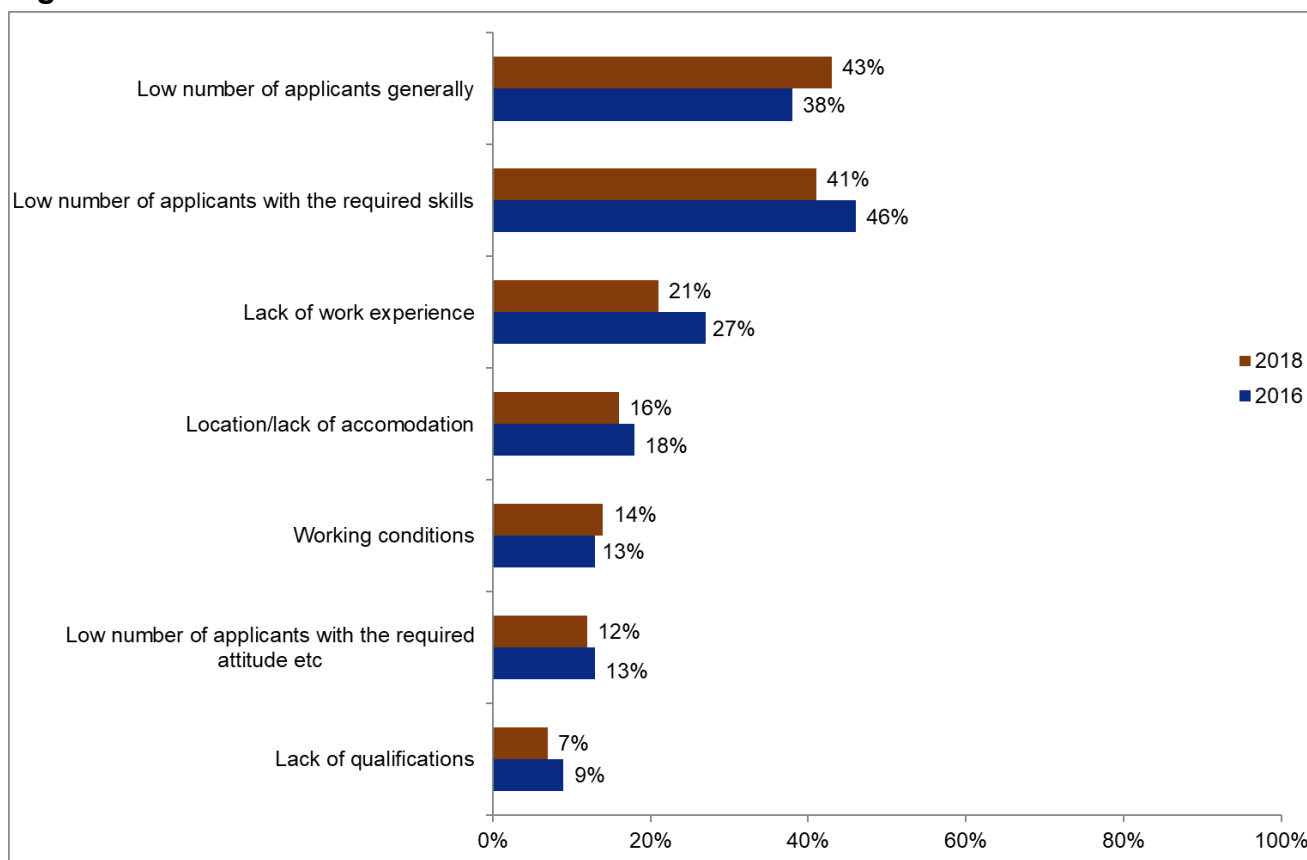
Reasons for hard-to-fill vacancies

The number of applicants with the required skills, and the number in general, are cited as the main reasons for hard-to-fill vacancies, consistent with the previous survey

3.14. The reasons for hard-fill-vacancies remains consistent over time, with the low number of applicants (cited by 43% of trainers with hard-to-fill vacancies, which includes some 10% that also mentioned that Government immigration policy has affected the availability of staff) and the low number of applicants with the required skills (41%) the two most cited reasons. In addition, other factors, such as lack of experience (21%), location/lack of accommodation (16%), working conditions such as low pay and long working hours (14%), and attitude/motivation issues (12%) remain prevalent.

3.15. The reasons cited are consistent across different types of trainers/different demographics.

Figure 3.3: Reasons for hard-to-fill vacancies



Number of respondents: 197 trainers (only trainers that said they had hard-to-fill vacancies).

Note: Respondents could select more than one answer.

Question asked: What have been the main causes of having hard-to-fill vacancies?

Section 4: Retention

Introduction

4.1. This section presents findings about staff retention from the perspective of trainers and staff, including information about retention rates, retention difficulties, the types of trainers and occupations most affected, and the reasons for retention difficulties.

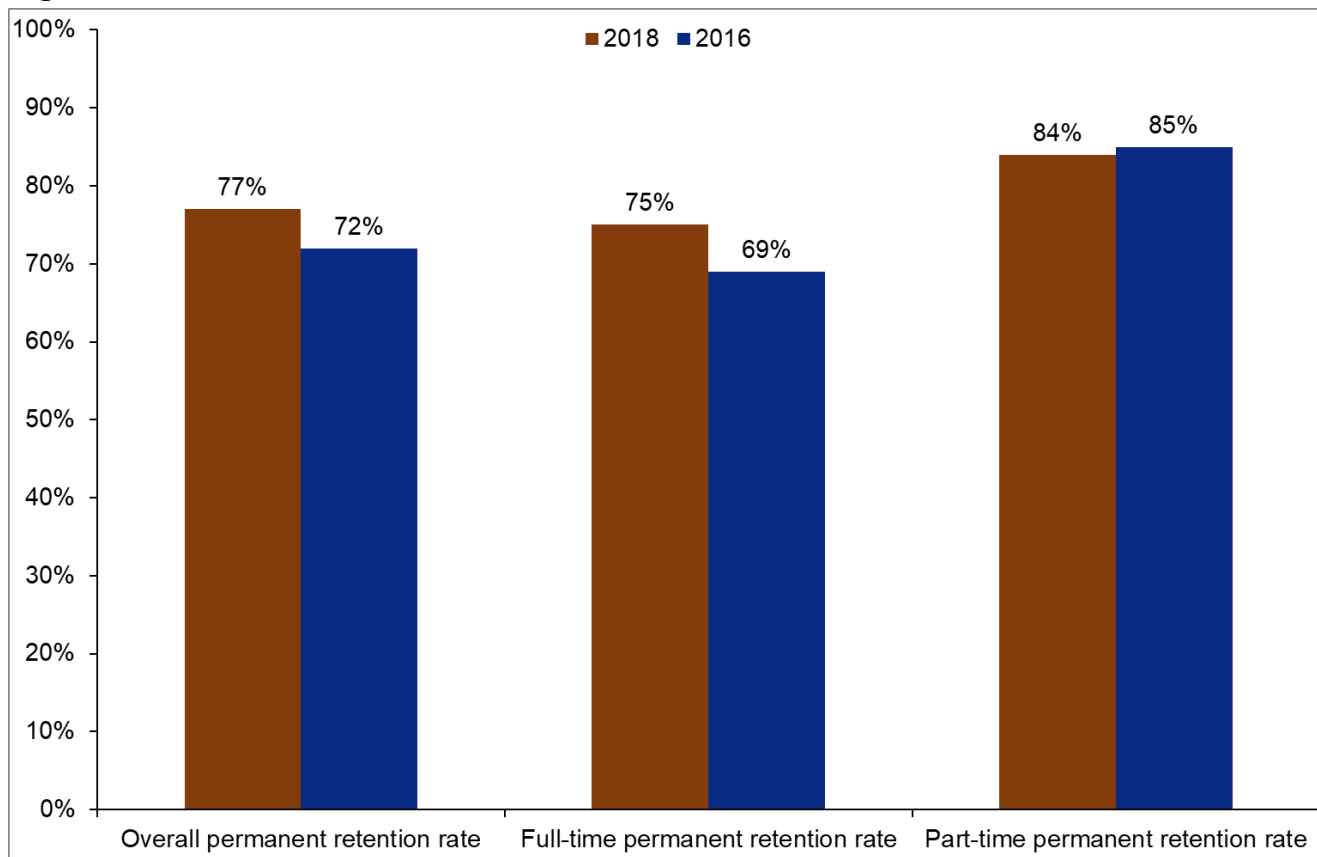
Retention rates

Under a quarter of staff leave their job roles per annum, a slight improvement on 2016

4.2. Overall, there is an estimated retention rate of 77% of all permanent racing staff in their job roles per annum. In other words, some 23% of racing staff leave their jobs each year (some of these may change jobs within the same organisation). Racing staff in full-time roles are less likely to stay in their jobs (75%), compared with part-time staff (84%). This so-called retention rate is a measure of staff churn.

4.3. The retention rate has improved slightly over time, from 72% in 2016 to 77% in 2018 (this is statistically significant).

Figure 4.1: Retention rates



Number of respondents: 459 trainers.

Question asked: Overall, how many permanent full-time and part-time staff have left their roles in the last 12 months?

Retention difficulties

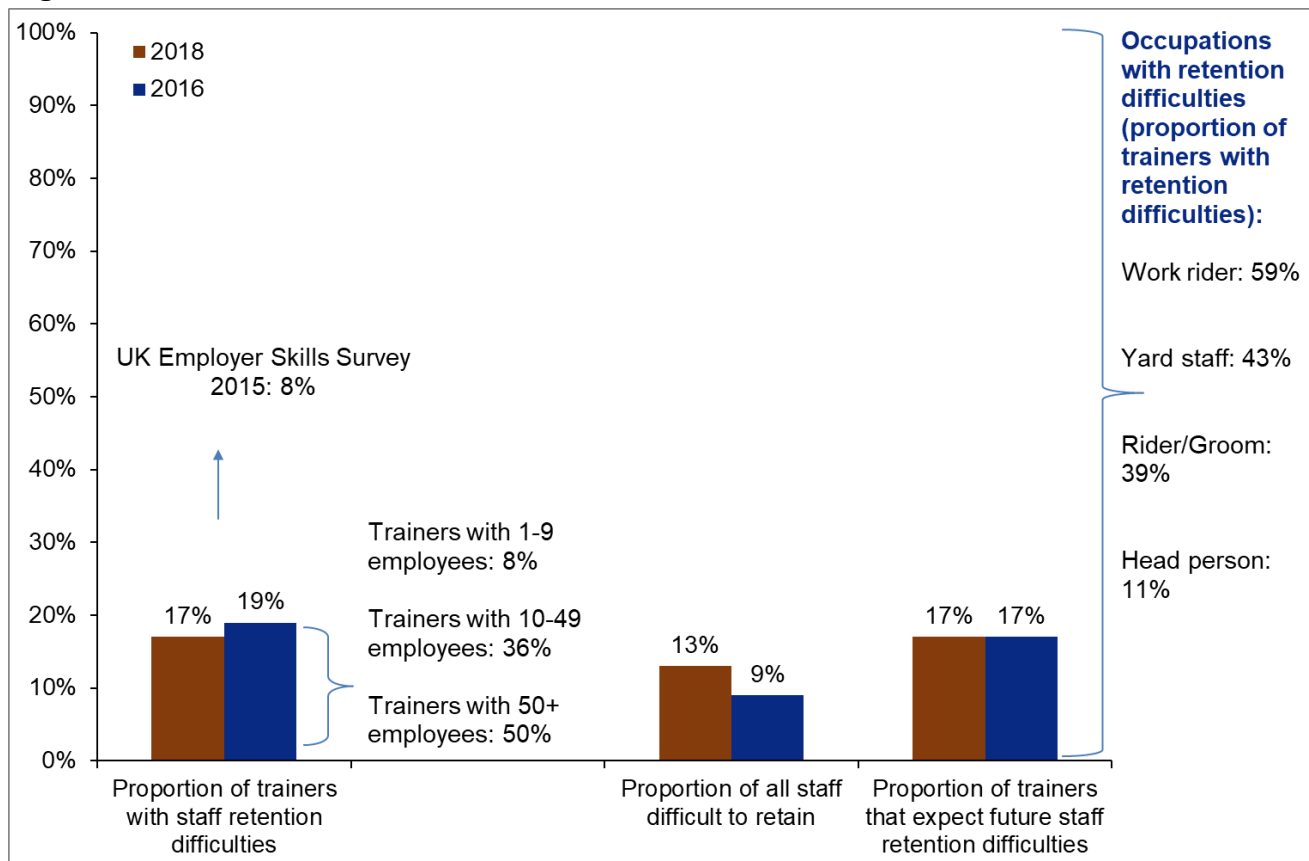
Broadly consistent with the past, under a fifth of trainers said they have retention difficulties, with larger yards most affected

- 4.4. 17% of trainers (which account for some 21% of racing staff) said they had difficulties retaining staff in the last 12 months. This is broadly consistent with 19% in 2016. The national figure, based on the UK Employer Skills Survey, is 8%.⁸
- 4.5. 14% of trainers face a double problem of hard-to-fill vacancies and retention difficulties (17% in 2016).
- 4.6. Trainers with retention difficulties estimated, on average, that about 45% of their staff are difficult to retain (compared with 41% in 2016). This translates into an estimated 13% of all staff that are difficult to retain, compared with 9% in 2016.⁹
- 4.7. As in 2016, but even more so in 2018, larger yards are more likely to say they have retention difficulties. For example, 8% of trainers with 1-9 employees said they had retention difficulties, compared with 36% with 10-49 employees and 50% with 50+ employees. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 4.8. In addition, there are some geographical variations, where 21% of trainers in East Anglia (which covers Newmarket), 21% in the South East, 19% in the South West and 19% in the Midlands said they have retention difficulties, compared with 12% in Scotland, 12% in the North (which covers Malton and Middleham) and 5% in Wales. Similar trends existed in 2016.
- 4.9. As in 2016, 17% of trainers expect to have retention difficulties in the next 12 months. Similar to 2016, 73% of trainers that had retention difficulties in the past also expect to have difficulties in the future, and 5% that did not have any difficulties in the past expect to have them in the future.
- 4.10. The occupations that were most commonly cited as having retention difficulties are work riders (cited by 59% of trainers that said they have retention difficulties increased from 40% in 2016), yard staff (43% in 2018 down from 51% in 2016), Rider/Groom (39% in 2018 down from 54% in 2016) and head person (11% in 2018 compared with 5% in 2016).

⁸ This is the figure for 2015. This question was not asked in the most recent survey in 2017.

⁹ This figure has increased in 2018, despite the proportion of trainers with retention difficulties decreasing, due to retention problems persisting and increasing in larger yards.

Figure 4.2: Retention difficulties



Number of respondents: 459 trainers.

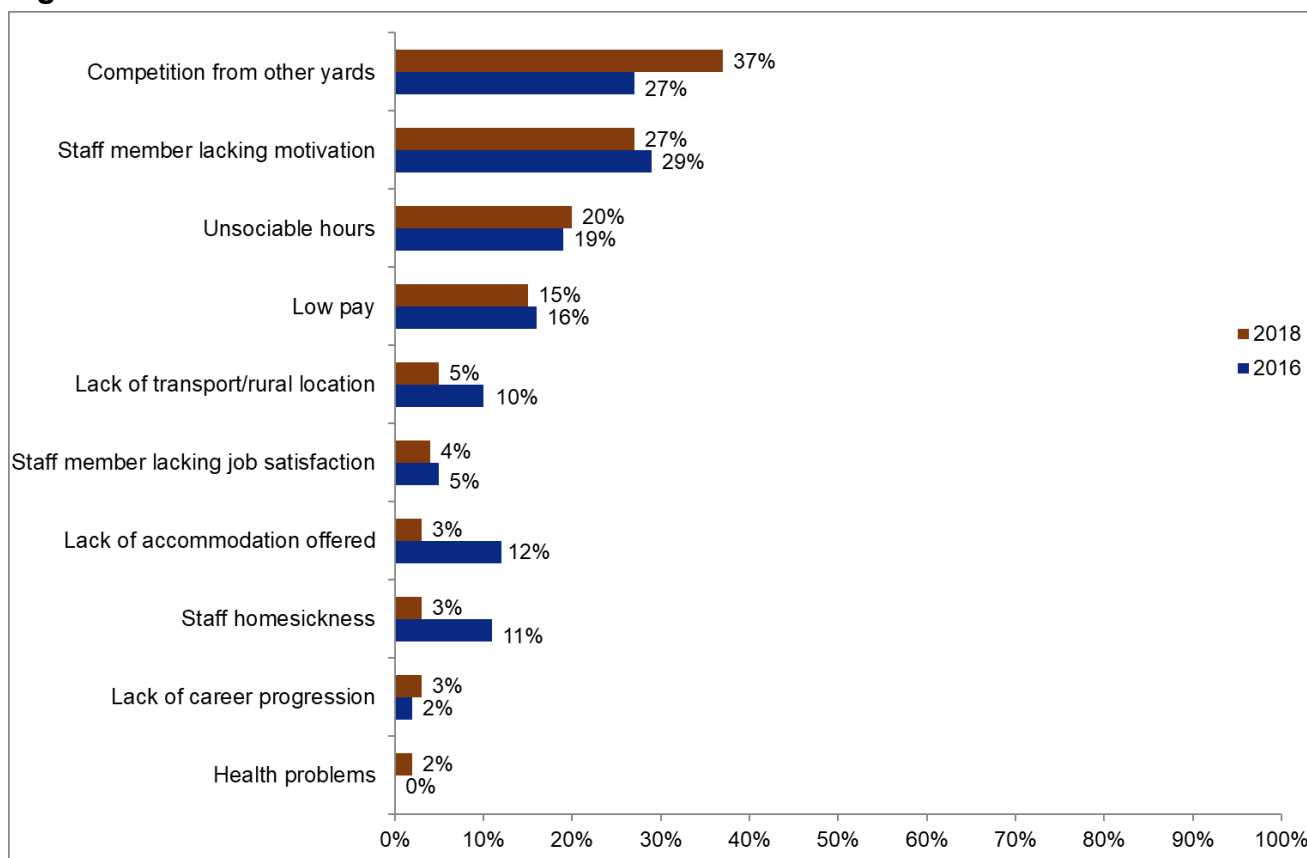
Questions asked: In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal, such as retirement or leaving a temporary role) / Roughly, what proportion of your staff have been difficult to retain? / Which specific occupations have you had difficulties retaining staff? / Do you expect to have any staff retention problems in the next 12 months?

Reasons for retention difficulties

Competition from other yards and staff lacking motivation are the most cited reasons for retention difficulties, consistent with the past survey

- 4.11. Competition from other yards (cited by 37% of trainers with retention difficulties in 2018 and 27% in 2016) and staff lacking motivation (cited by 27% of trainers in 2018 and 29% in 2016) remain the main reasons for retention difficulties.
- 4.12. In addition, other factors such as unsociable hours (20%) and low pay (15%) remain prevalent.¹⁰

Figure 4.3: Reasons for retention difficulties



Number of respondents: 78 trainers (only respondents that said they had retention difficulties).

Note: Respondents could select more than one answer.

Question asked: What have been the main reasons why you have found it difficult to retain staff?

¹⁰ Although the percentages vary, the broad order of reasons for retention difficulties remains similar between 2016 and 2018. The percentage differences are minimal, once sampling accuracy is taken into account.

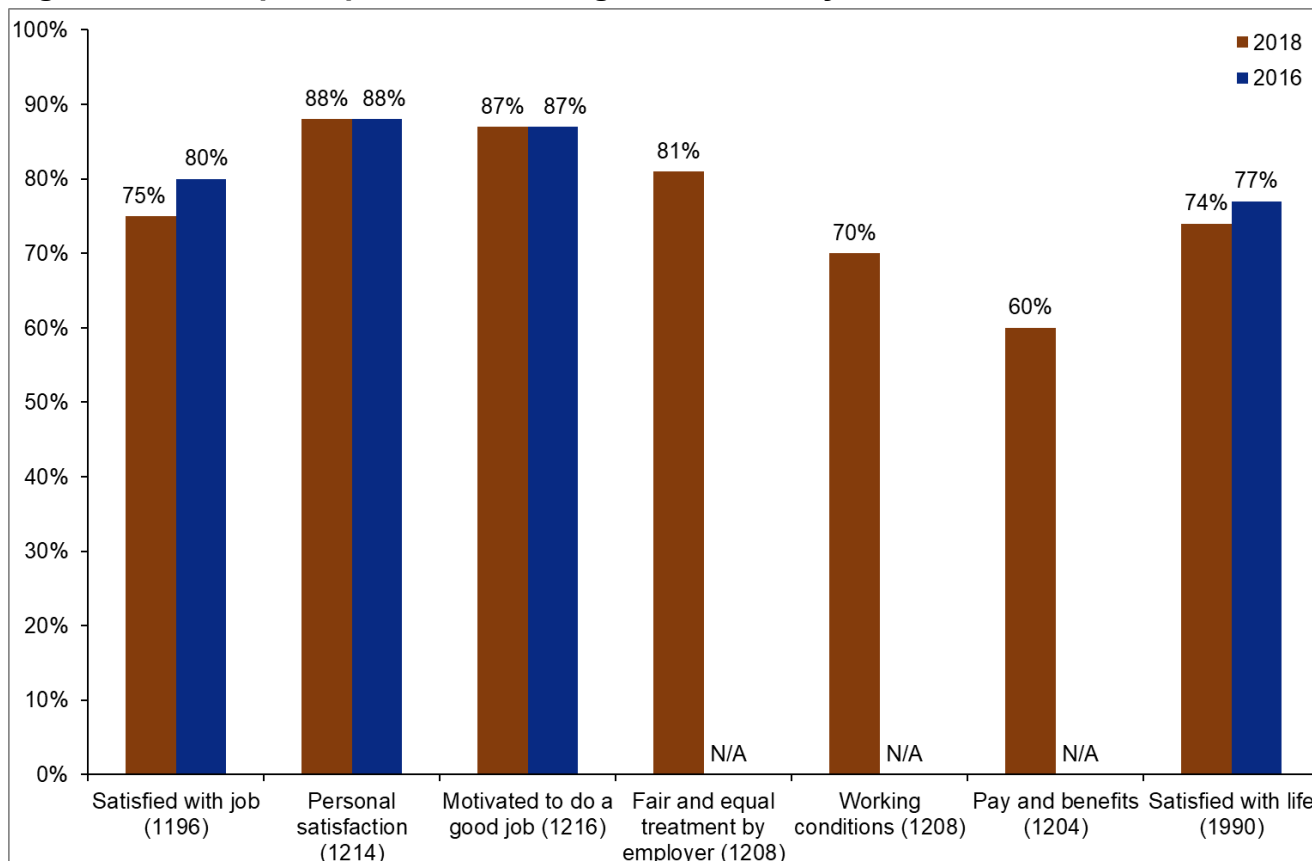
Staff and retention

Three-quarters of staff are satisfied with their job, which effects motivation and emotional wellbeing, with working conditions, pay and management drivers of job satisfaction

4.13. Staff said the following about job satisfaction:

- **Job satisfaction:** 75% of racing staff are satisfied (compared with 80% in 2016, which represents a statistically significant albeit small decrease). The main reason staff cited for being satisfied was a love of or passion for riding and working with horses. The same reasons behind lack of job satisfaction persist since 2016 – mainly long hours and low pay, with a lesser number also citing poor career opportunities. A small number also cited perceived poor management and not being valued.
- **Personal satisfaction:** 88% of racing staff gain personal satisfaction from their job (also 88% in 2016). Staff that are not satisfied with their job are less likely to get personal satisfaction from their work (62% personal satisfaction).
- **Motivation:** 87% of racing staff are motivated to do a good job (also 87% in 2016). Staff that are not satisfied with their job are less likely to be motivated (63% motivated).
- **Fair and equal treatment:** 81% of racing staff said they receive fair and equal treatment from their employer. Staff that are not satisfied with their job are less likely to agree they receive fair and equal treatment (52% agree they receive fair and equal treatment).
- **Working conditions:** 70% of racing staff are satisfied with their work conditions. Staff that are not satisfied with their job are less likely to be satisfied with working conditions (35% are satisfied with working conditions). In addition, 63% of staff agreed that working a maximum 40 hour working week would improve their experience of working in racing (and a further 9% said they did not know). 14% disagreed, with the remainder neutral.
- **Pay and benefits:** 60% of racing staff are satisfied with their pay and benefits. Staff that are not satisfied with their job are less likely to be satisfied with pay (27% are satisfied with pay).
- **Life satisfaction:** 74% of racing staff are satisfied with their lives (77% in 2016). Staff that are unsatisfied with their job are less likely to be satisfied with life (30% satisfied with life) than other staff (90% satisfied with life).

Figure 4.4: Staff perceptions of working in the industry



Numbers in brackets are the number of staff that responded to each question (2018 only).

Questions asked: Overall, how satisfied are you with your job? / Do you agree or disagree with the following statements about your job? / Thinking about training, development and career issues, do you agree or disagree with the following statements? / Overall, how satisfied are you with your life nowadays?

A fifth of staff plan to leave the industry within two years, closely linked to job satisfaction, working conditions, pay and to a lesser extent lack of opportunities for career progression and perceived poor management

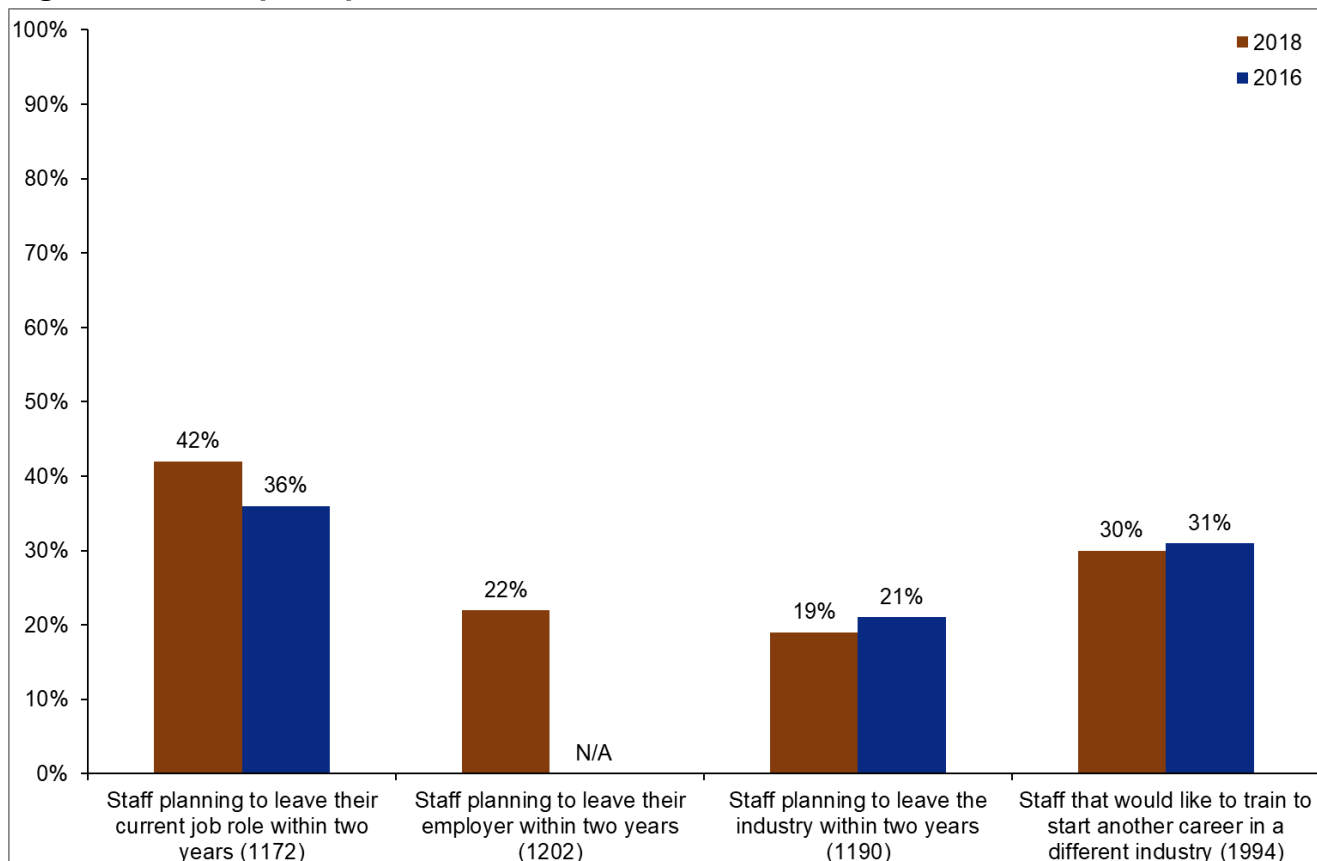
4.14. Staff said the following about retention:

- **Plan to leave current job within two years:** 42% of staff plan to leave their current job within two years (36% in 2016). Nearly half of these staff (46%) intend to leave the industry all together within two years. Staff that have been working in the industry for 10 years or more (30%) are less likely than other staff to say they plan to leave their current job (54%).
- **Plan to leave employer within two years:** 22% of staff plan to leave their current employer within two years. Half of these (52%) plan to leave the industry all together within two years.
- **Plan to leave industry within two years:** 19% of staff plan to leave the industry within two years (21% in 2016). Staff that are unsatisfied with their job (42% plan to leave industry) are more likely than satisfied staff (13% plan to leave industry) to plan to leave the industry within two years. And staff that have been in the industry for 1 to 10 years are more likely than new staff or staff that have been in the industry for 10 years or more to plan to leave the industry within two years. 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.¹¹ In addition, a small number of staff cited illness/injury or the demanding nature of the job not being conducive to bringing up a young family. A small proportion (under 10% of those that plan to leave within two years) cited old age/retirement.

- **Like to start career in different industry:** 30% of staff would like to start a career in a different industry (31% in 2016). This is more common amongst staff that have worked in the industry for three years or more and staff unsatisfied with their job.

Figure 4.5: Staff perceptions and retention



Numbers in brackets are the number of staff that responded to each question (2018 only).

Questions asked: How much longer do you intend to be working in your current job role? / How much longer do you intend to be working with your current employer? / How much longer do you intend to carry on working in racing?

¹¹ These findings are consistent with the BHA's research into the reasons for stable staff leaving working in racing yards conducted in 2018.

Section 5: Skills, training and support

Introduction

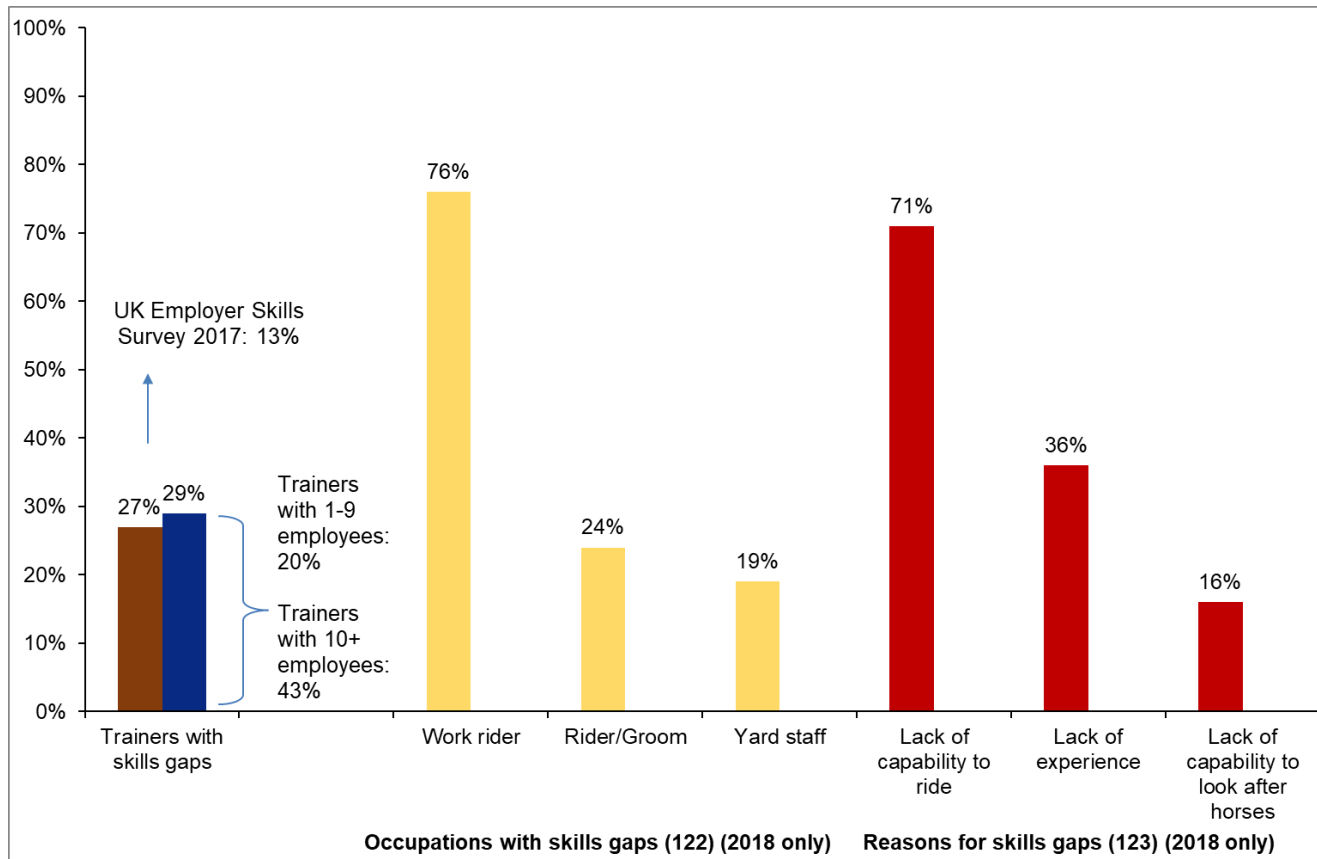
5.1. This section presents findings about skills gaps, training and support from the perspective of trainers and staff.

Skills gaps

Over a quarter of trainers have skills gaps within their existing workforce, especially amongst work riders, with larger yards most affected

- 5.2. 27% of trainers said there are gaps in the skills or capabilities of their existing workforce (29% in 2016). This compares to a national figure of 13%.
- 5.3. 9% of trainers have a combination of skills gaps, hard-to-fill vacancies and retention difficulties (also 9% in 2016).
- 5.4. Larger yards with 10 or more staff (43% have skills gaps) are more likely than smaller yards (20% have skills gaps) to state they have skills gaps, as was also the case in 2016. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 5.5. The occupations most likely to have skills gaps are work rider (cited by 76% of trainers that have skills gaps compared with 49% in 2016), rider/groom (24% in 2018 and 40% in 2016) and yard staff (19% in 2018 and 26% in 2016). 7% also cited skills gaps amongst head persons.
- 5.6. The main reasons for skills gaps are a lack of capability to ride (cited by 71% in 2018 compared with 49% of trainers with skills gaps in 2016) and lack of experience (36% in 2018 and 42% in 2016). Other skills gaps cited include lack of capability to look after horses (16%), wrong attitude/lack of motivation (10%), lack of confidence (9%) and lack of management experience (8%).

Figure 5.1: Skills gaps



Number of respondents: 459 trainers / numbers in brackets are the number of respondents to follow-up questions asked only to trainers with skills gaps.

Questions asked: Are there any gaps in the skills or capabilities of your existing workforce i.e. areas where existing staff lack the skills or capabilities to do their jobs as well as possible? / Which specific occupations have skills gaps? / What skills gaps exist?

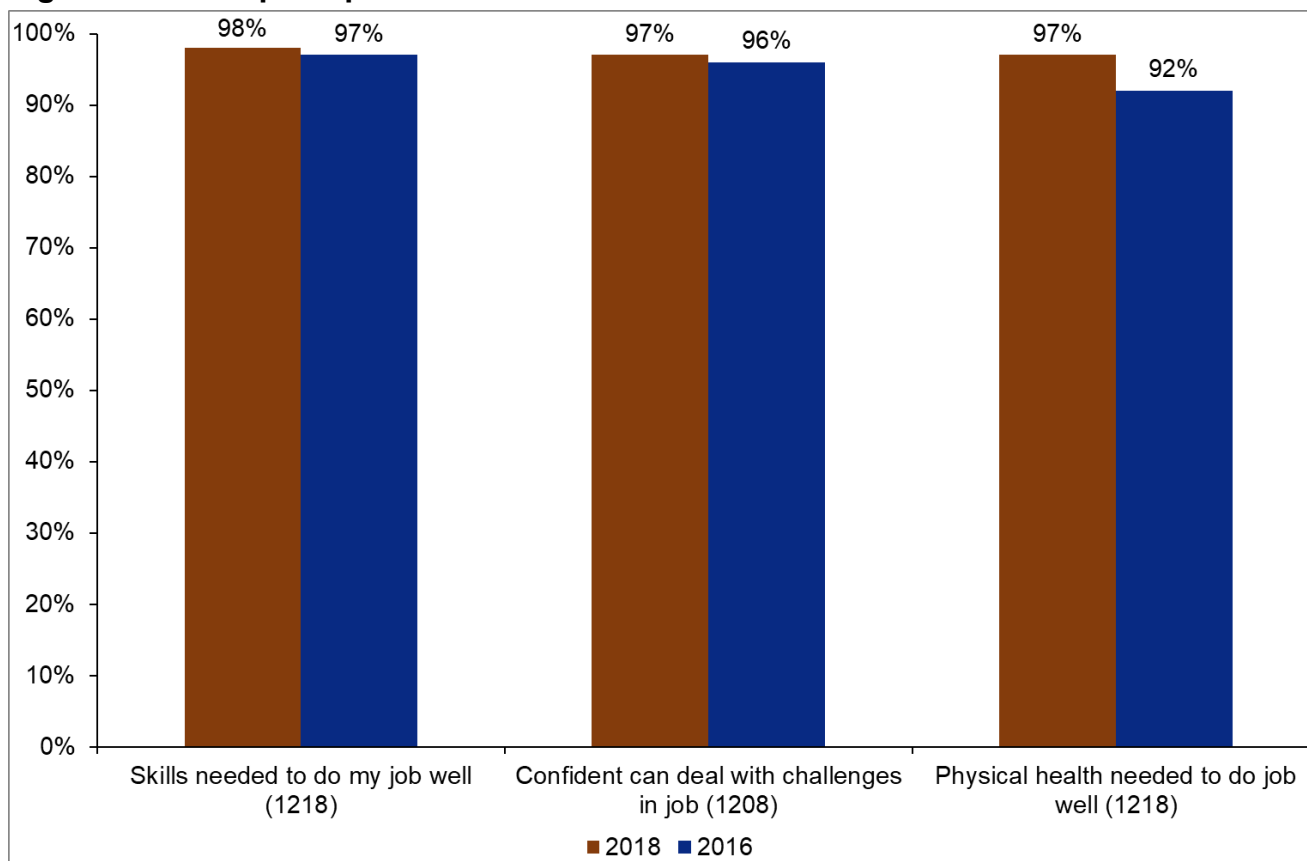
Staff and skills

The vast majority of staff said they have the skills, confidence and physical health to do their jobs well, consistent with the previous survey

5.7. The perceptions of staff about their skills contrast with those of trainers and are consistent with the previous survey:

- 98% said they have the skills they need to do their job well (97% in 2016).
- 97% said they are confident they can deal with challenges in their job (96% in 2016).
- 97% said they have the physical health they need to do their job well (92% in 2016 and a statistically significant, albeit small improvement).

Figure 5.2: Staff perceptions about skills



Numbers in brackets are the number of respondents to each question (2018 only).

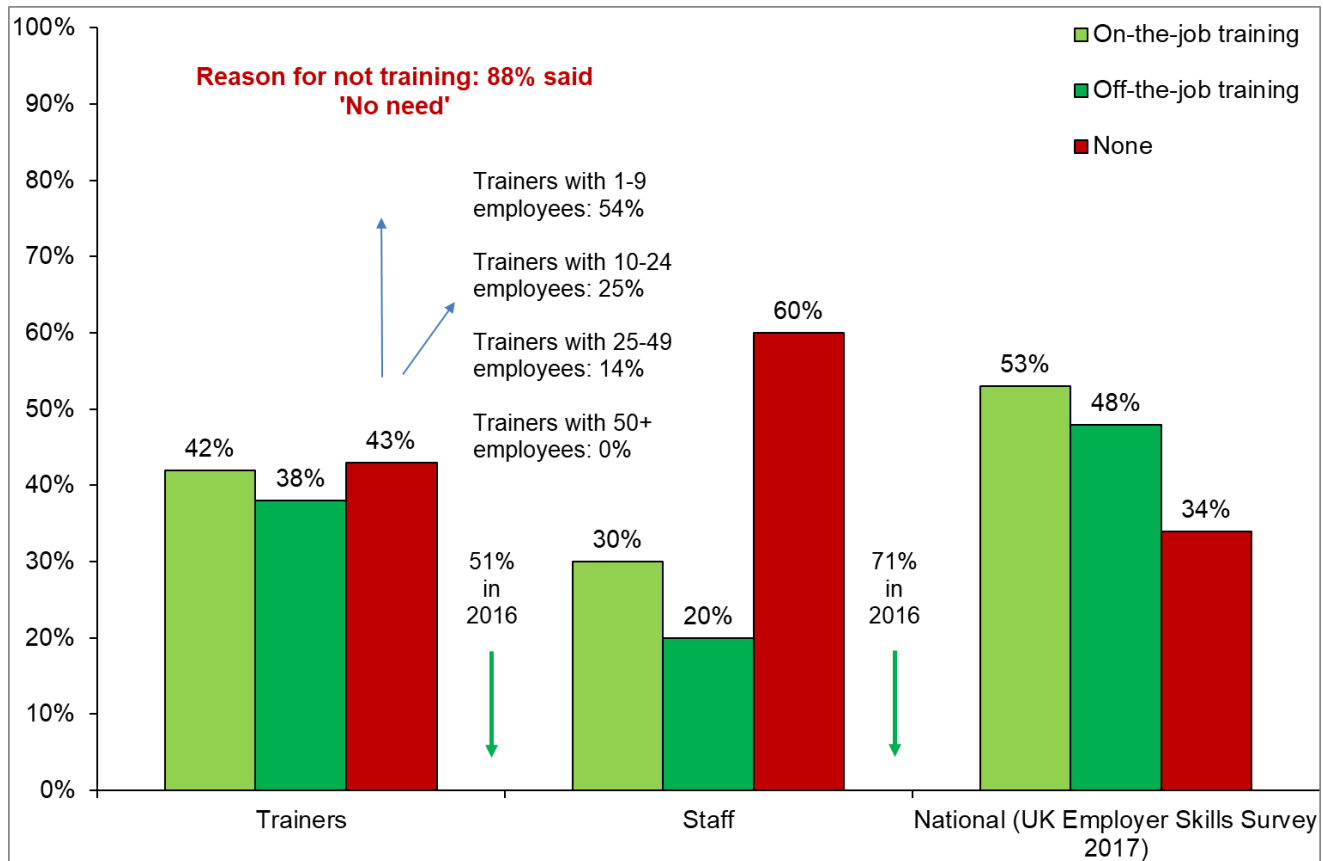
Question asked: Do you agree or disagree with the following statements about your job?

Training and development prevalence

Over two-fifths of trainers and nearly two-thirds of staff do not engage in training and development activities, with prevalence less in smaller yards, although there has been a notable improvement since 2016

- 5.8. 43% of trainers have not funded or arranged any training in the past 12 months (51% in 2016 – a statistically significant improvement) and 60% of staff have not taken part in any training or development in the past 12 months (71% in 2016 – a statistically significant improvement) (this is consistent across different demographic groups, although part-time staff are less likely to receive training – 26% received training). These are statistically significant improvements but still compare unfavourably with 34% of businesses nationally that did not fund or arrange training (based on the UK Employer Skills Survey 2017).
- 5.9. 27% of trainers that said they have skills gaps do not provide training (33% in 2016).
- 5.10. As in 2016, smaller yards are less likely to train their staff, with 54% of trainers with 1-9 staff not providing training or development in the past 12 months, compared with 25% of trainers with 10-24 staff, 14% with 25-49 staff and 0% with 50+ staff. Similar trends also exist with the number of horses trained and amount of prize money earned. In addition, trainers that report improved business performance are more likely to train their staff - 70% train their staff compared with 49% of other trainers.
- 5.11. As in 2016, the main reason cited by employers that do not provide training is that there is 'no need' – cited by 88% of trainers that did not provide training or development in the past 12 months. In addition, 5% cited a lack of interest amongst staff, 3% a lack of time and 1% a lack of funds. No trainers cited a lack of appropriate training and courses locally.
- 5.12. The main reasons staff cited for not taking part in training are a lack of awareness of training available, lack of support or encouragement from their employers and a lack of time. In addition, some said they have a lack of interest or need.
- 5.13. 44% of trainers said they do not expect to fund or arrange training or development in the next 12 months (47% in 2016). 84% of employers that did not provide training in the past 12 months said this (83% in 2016). This means that overall 37% of trainers will not provide training/development either in the past 12 months or next 12 months.
- 5.14. Staff were asked about the type of training and development they would like in the future. About a quarter mentioned development opportunities that would help them progress their career and improve their capabilities, such as management training, racing secretary training, support to become a trainer, training to become a head person, equine management/science and getting an HGV licence. Just over a tenth said they wanted jockey coaching and help to improve their work rider skills. About a tenth said they wanted opportunities to develop basic skills such as IT, maths and languages.

Figure 5.3: Training and development prevalence



Number of respondents: 459 trainers / 1228 staff.

Note: Respondents could select both on-the-job and off-the-job training response options.

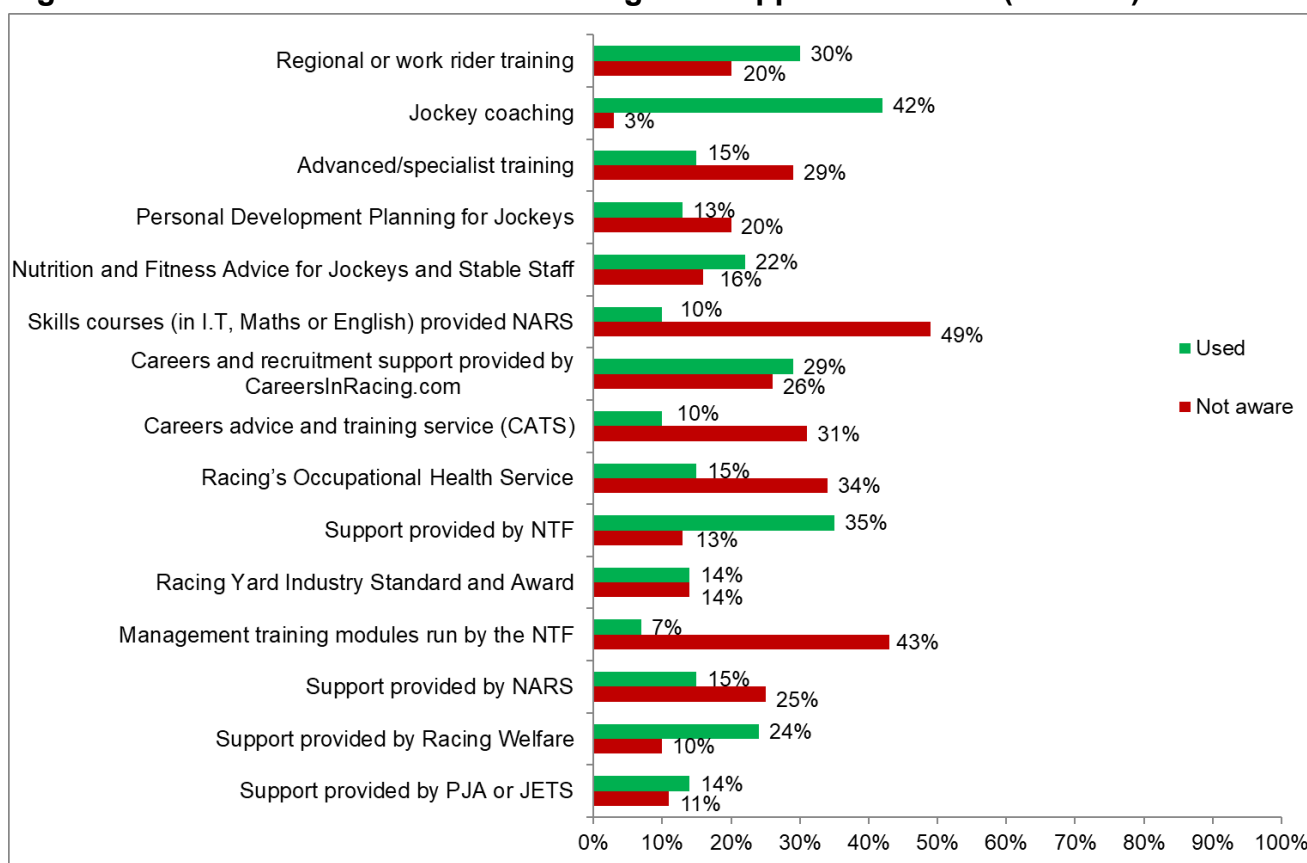
Questions asked: Over the past 12 months have you funded or arranged any off-the-job training or development or on-the-job or informal training or development for your staff? / Why have you not funded or arranged any training or development for staff? / In the last 12 months, have you taken part in any on or off the job training or development?

Awareness and use of training and support initiatives

An increasing majority of trainers are aware of the training and development initiatives in the industry, and more are using them

- 5.15. The majority of trainers are aware of the training and support initiatives in the industry. For example, on average across all initiatives, 20% of trainers are not aware of the training and support initiatives. This has improved from 32% that were not aware in 2016 (although the list of initiatives has been added to since then).
- 5.16. An increasing number of trainers have used the training and support initiatives. For example, on average across all initiatives, 30% of trainers have used the training and support initiatives. This has improved from 15% in 2016.
- 5.17. Smaller yards are less likely to be aware of, or have used, the initiatives (which may simply be a result of having fewer staff and therefore less need/opportunity). For example, on average across all the initiatives, 75% of trainers with 1-9 employees were aware of the initiatives and 12% have used the initiatives compared with 82% of trainers with 10+ employees that are aware of the initiatives and 37% that have used them.

Figure 5.4: Awareness and use of training and support initiatives (trainers)



Number of respondents: 459.

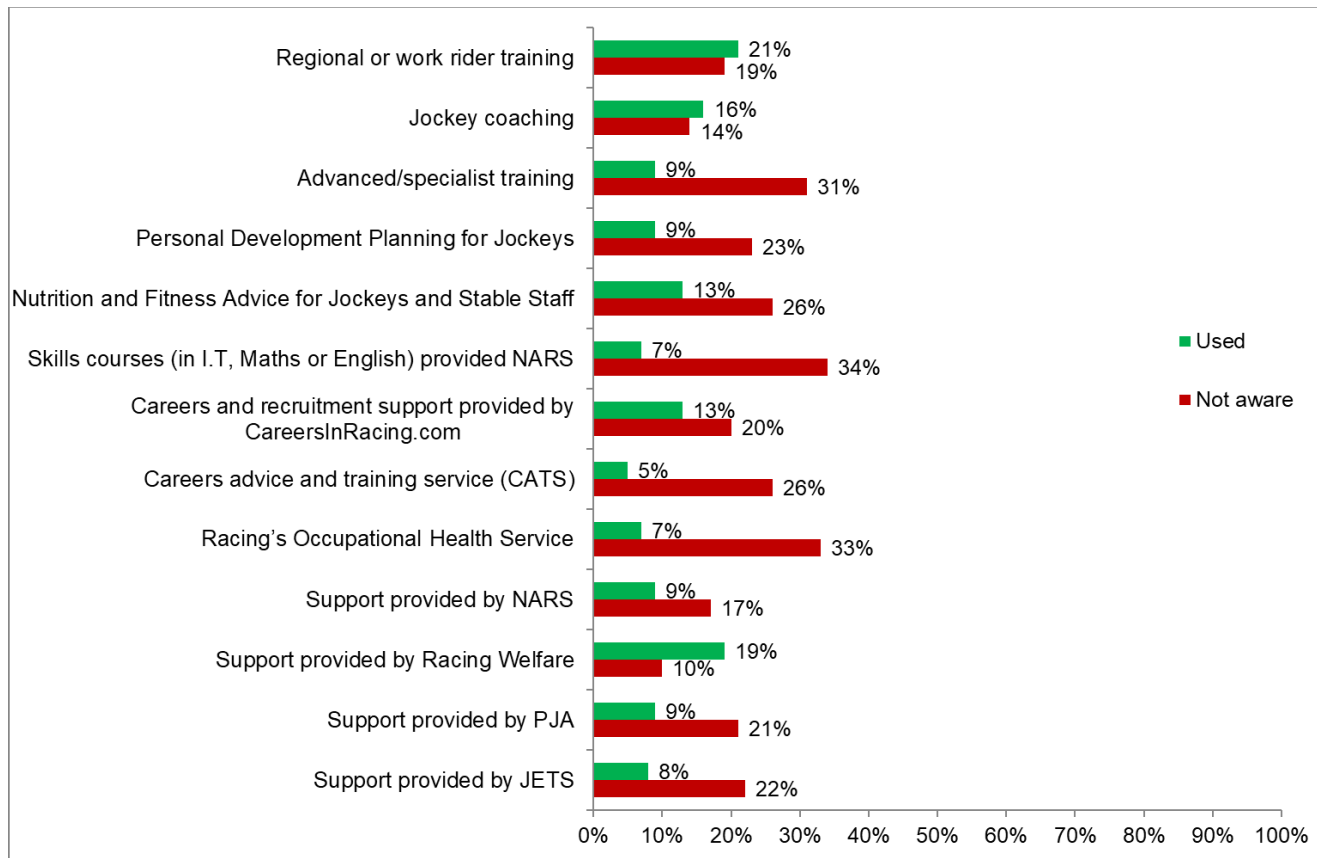
Questions asked: Are you aware or have you as an employer used or supported your staff to use any of the following industry recruitment, training and retention initiatives?

- 5.18. In terms of future initiatives, trainers were asked if they would use a support/advice service aimed at supporting trainers' well-being and providing assistance with topics such as mental health and physical health. Over three-quarters of trainers said it would be a useful service, broken down as follows: 48% said it would be useful and they would use it, 28% said it would be useful but they are not sure if they would use it, 15% said it would not be useful and 9% said they did not know.

The majority of staff are aware of the training and support initiatives in the industry, and an increasing number are using them

- 5.19. The majority of staff are aware of the training and support initiatives in the industry. For example, on average across all initiatives, 23% of staff are not aware of the training and support initiatives (26% in 2016) although the list of initiatives has been added to since then).
- 5.20. An increasing number of staff have used the training and support initiatives. For example, on average across all initiatives, 11% of staff have used the training and support initiatives. This has improved from 6% in 2016.

Figure 5.5: Awareness and use of training and support initiatives (staff)



Number of respondents: 1228 staff.

Questions asked: Are you aware or have you used any of the following training, development or career support services?

Perceptions and attitudes about training and development

An increasing majority of trainers and staff have positive perceptions and attitudes about training and development opportunities, although negative views are related to job satisfaction and staff retention issues

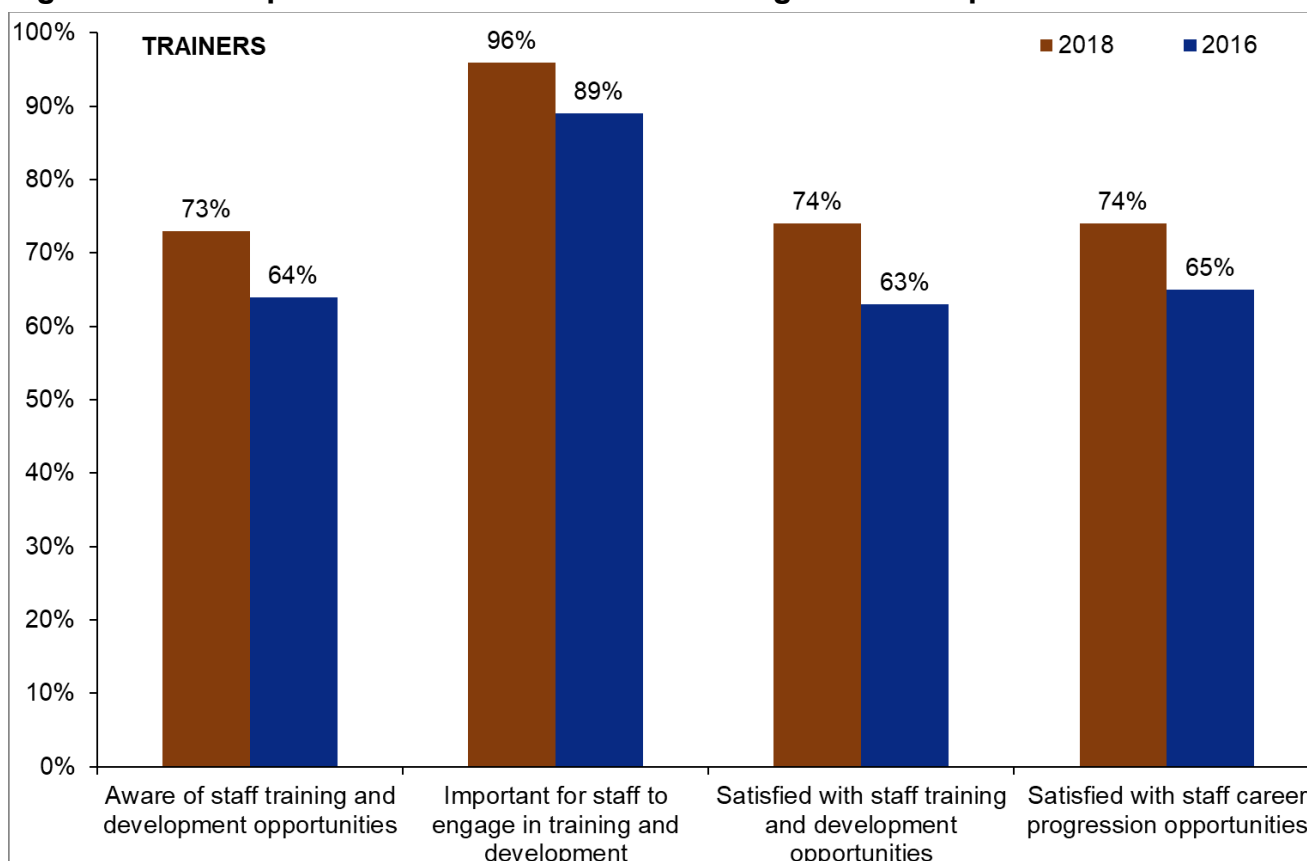
5.21. Trainers and staff hold the following perceptions and attitudes about training and development, which have all improved since 2016:

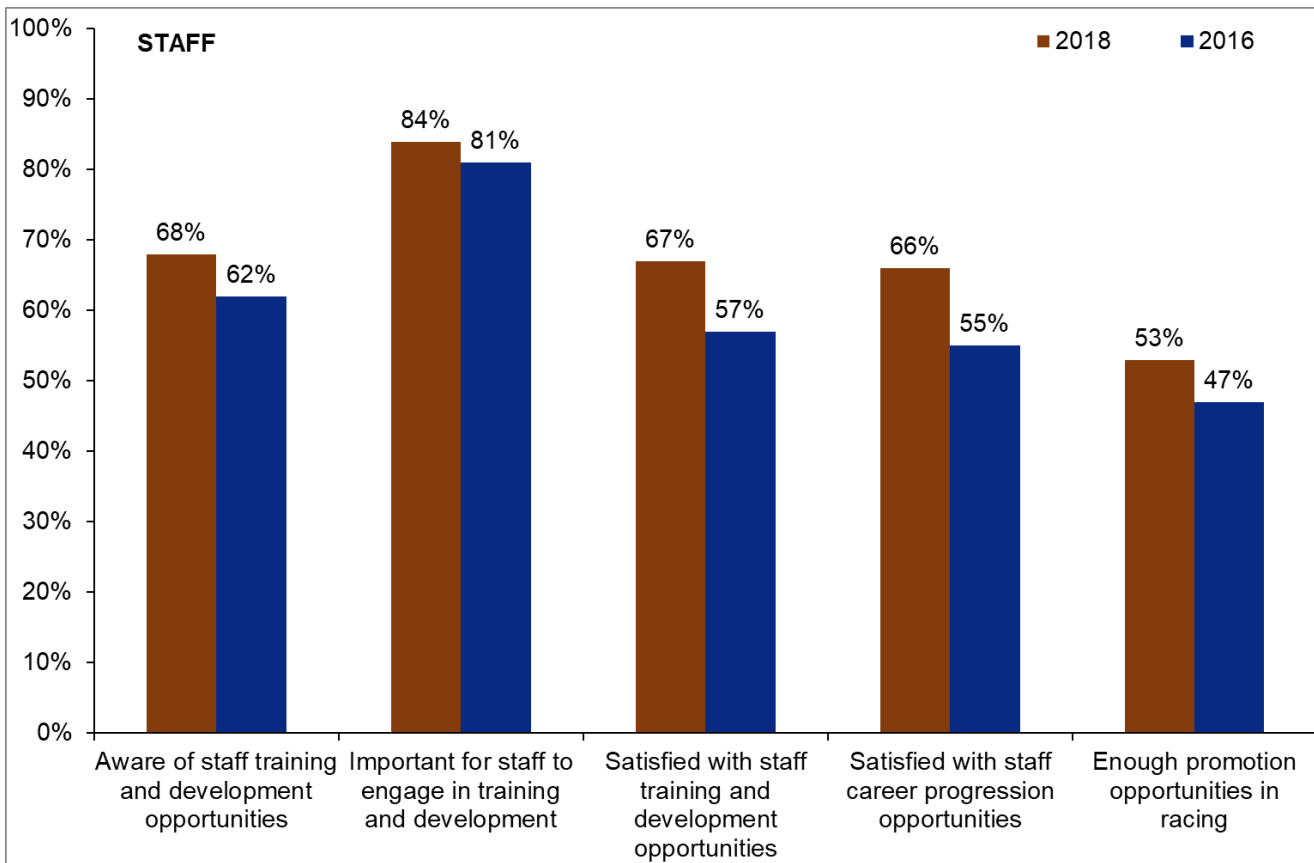
- 73% of trainers (64% in 2016) and 68% of staff (62% in 2016) are aware of staff training and development opportunities (statistically significant improvements).
- 96% of trainers (89% in 2016 – a statistically significant improvement) and 84% of staff (81% in 2016) agree it is important for staff to engage in training and development.
- 74% of trainers (63% in 2016) and 67% of staff (57% in 2016) are satisfied with staff training and development opportunities (statistically significant improvements).
- 74% of trainers (65% in 2016) and 66% of staff (55% in 2016) are satisfied with staff career progression opportunities (statistically significant improvements).
- 53% of staff agree there are enough promotion opportunities in racing (47% in 2016) (statistically significant improvement).

5.22. Perceptions and attitudes are similar amongst different types of trainers.

5.23. Staff that intend to leave the industry within the next two years (and also staff that are unsatisfied with their job) are less likely to be aware of training opportunities (50%), to be satisfied with staff training and development opportunities (50%) and career progression opportunities (39%) and less likely to agree there are enough promotion opportunities in racing (35%). This suggests perceptions around training and development impact on job satisfaction and staff retention and remain important issues for the industry, despite notable improvements in perceptions since 2016.

Figure 5.6: Perceptions and attitudes about training and development





Number of respondents: 459 trainers / 1228 staff. Questions asked: Do you agree or disagree with the following statements about personal and professional development opportunities for staff? / Thinking about training, development and career issues, do you agree or disagree with the following statements?

Section 6: Concluding points

Introduction

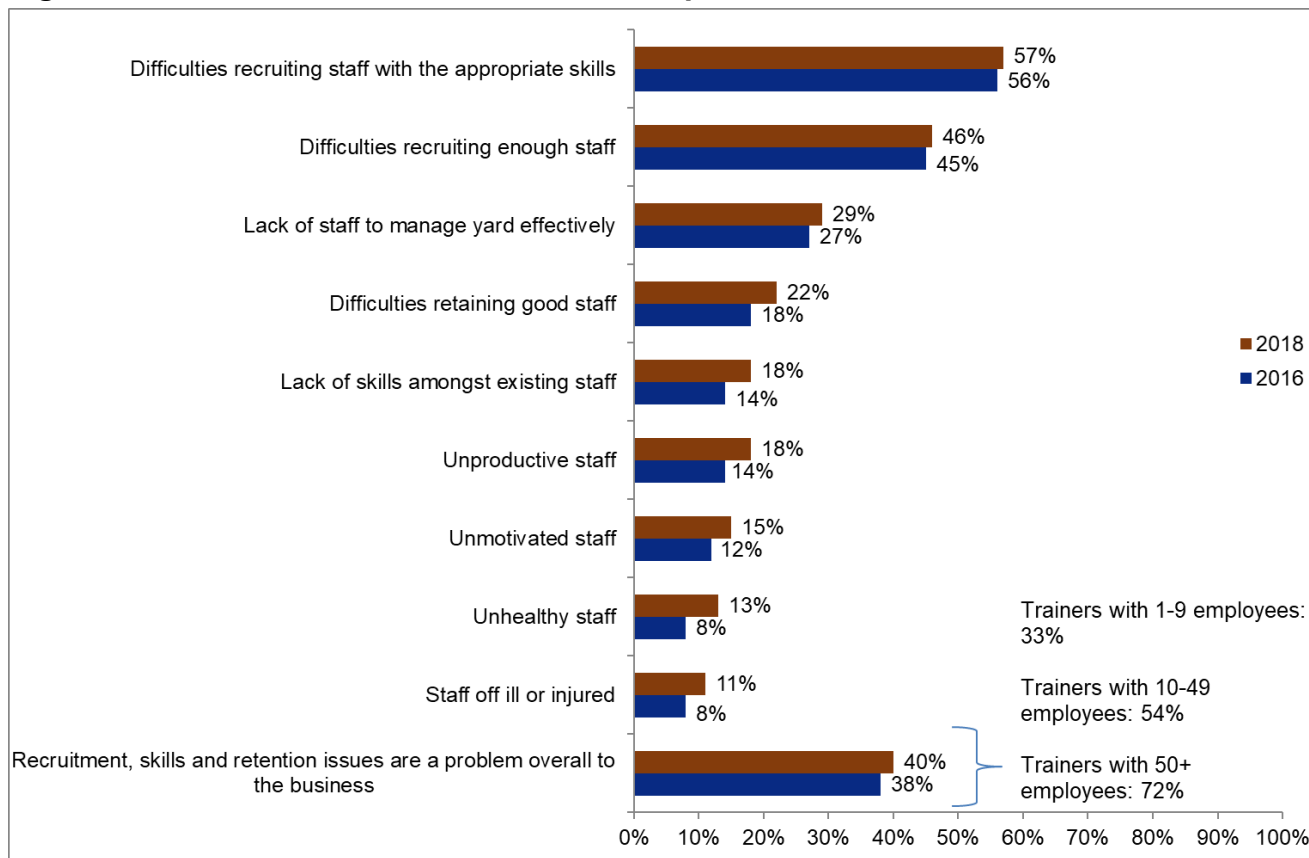
- 6.1. By way of conclusion, this section presents findings about the overall perceptions and size of recruitment, skills and retention problems as perceived by trainers.
- 6.2. In addition, it presents whether trainers and staff perceive there to be improvements in recruitment, training and retention within the industry since 2016.

Perceptions about key recruitment, skills and retention issues

Recruitment, skills and retention issues remain a problem to the businesses of two-fifths of trainers, with recruitment issues cited as the biggest problem and larger yards most affected

- 6.3. As in 2016, the two most cited recruitment, skills and retention problems are difficulties recruiting staff with the appropriate skills (57% of trainers said this is a problem (56% in 2016)) and difficulties recruiting enough staff (46% said this is a problem (45% in 2016)). In addition, 22% of trainers said difficulties retaining good staff are a problem, 18% said a lack of skills amongst existing staff (i.e. skills gaps) are a problem and 18% said productivity is an issue.
- 6.4. These issues are having an adverse impact on some yards, with 29% of trainers stating that a lack of staff to manage a yard effectively is a problem (27% in 2016).
- 6.5. Overall, 40% of trainers (38% in 2016) said that recruitment, skills and retention issues are a problem to their business (essentially when placed in the context of other issues). As has been the case throughout this research, these issues are a bigger problem for larger yards. For example, 33% of trainers with 1-9 staff said recruitment, skills and retention issues are a problem, compared with 54% of trainers with 10-49 staff and 72% with 50 or more staff.

Figure 6.1: Recruitment, skills and retention problems



Number of respondents: 459 trainers.

Questions asked: Thinking about your business, in general how big a problem are the following issues for your business? / Overall, in general, how big a problem are recruitment, skills and retention issues to your business?

Perceptions of 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

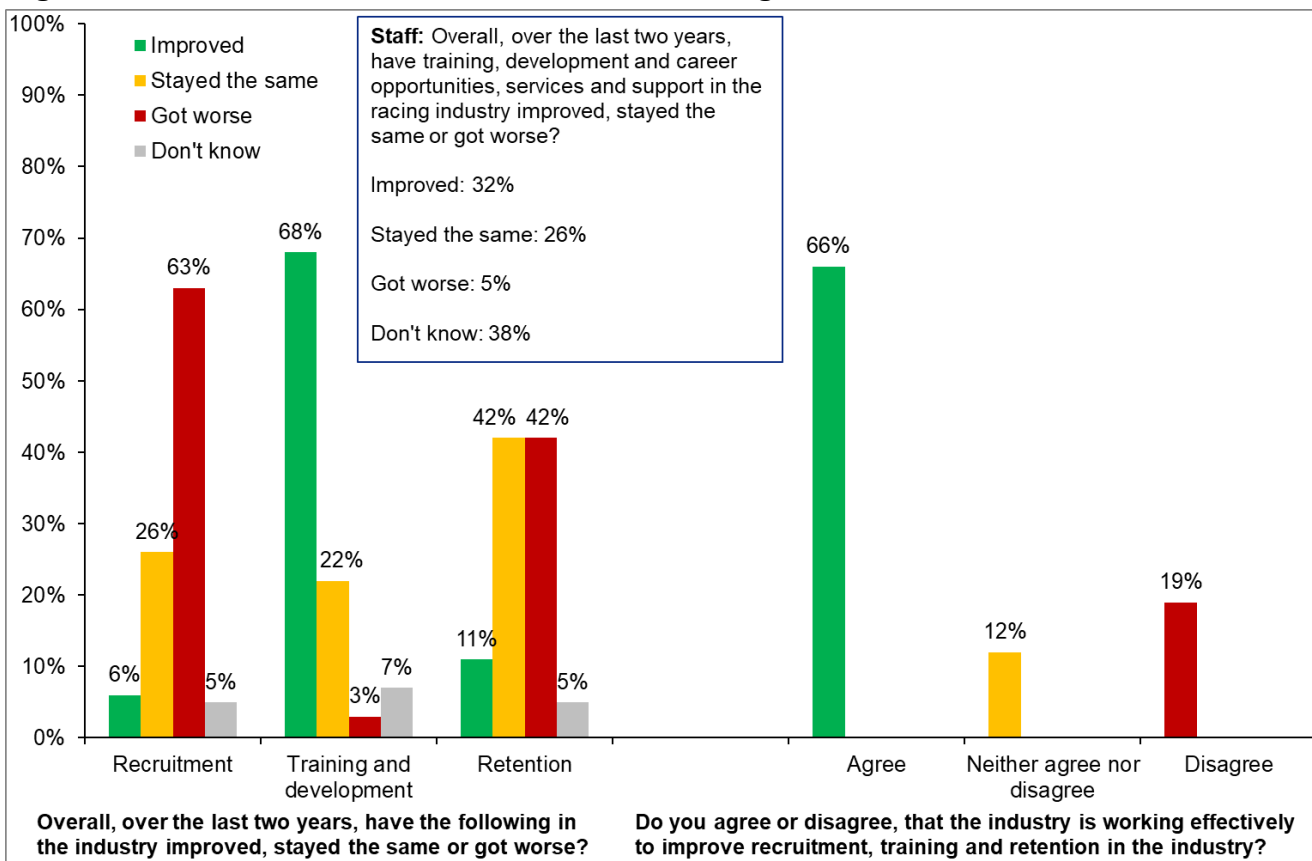
6.6. Trainers said the following about change over time:

- 63% 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.

6.7. 66% of trainers said that the industry is working together effectively to address recruitment, training and retention issues, while 19% disagree with this.

6.8. 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').

Figure 6.2: Recruitment, skills and retention changes over time



Number of respondents: 459 trainers / 1228 staff.

Public Perspectives Ltd
20 Camp View Road
St. Albans, AL1 5LL

Tel: 01727 750175

E-mail: mark@publicperspectives.co.uk

Website: www.publicperspectives.co.uk

Registered in England and Wales Company No: 6769064

Research
Evaluation
Community Engagement
Strategy Development

