

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

Report: April 2019

THE
RACING
FOUNDATION



THE
THOROUGHBRED
BREEDERS'
ASSOCIATION



Research
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Community Engagement
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Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2019

Executive Summary

Introduction and aims of the research

1. The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA), commissioned Public Perspectives Ltd, an independent research organisation, to conduct a survey of studs about recruitment, skills and retention in the racing industry. Similar surveys have been conducted with racing trainers and racing staff. This was to follow-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.

Approach to the research

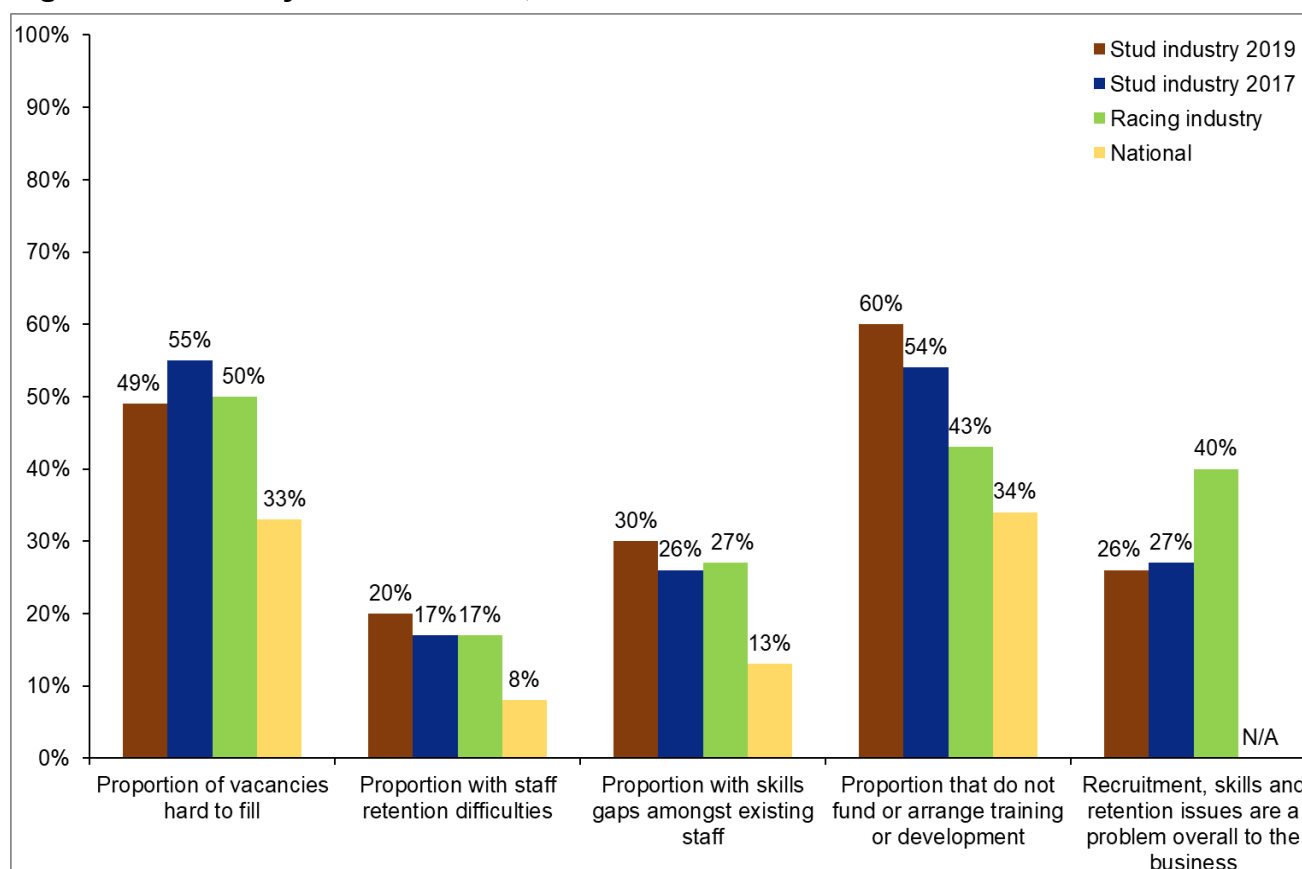
2. The research with studs adopted the same questionnaire used for racehorse trainers to provide for comparison, albeit with relevant wording tweaks to reflect the nature of studs. The survey was conducted from mid-January through to the end of March 2019.
3. At the time of the research there were approximately 321 studs that, according to TBA records, employed staff. The survey was administered via post (with an option to respond on-line), with e-mail reminders sent to non-respondents with a link to an on-line version of the questionnaire (a postal reminder was sent to non-respondents where an e-mail was not available). In total, 161 studs responded to the survey, which represents a 50% response rate (49% in 2017).

Key findings

4. The recruitment, skills and retention issues of studs are summarised below and compared over time and against racing yards and national data (from the UK Employer Skills Survey 2017):
 - By way of context, 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.
 - 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.

- 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%. 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). 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.
- 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.
- Overall, 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.

Figure 1: Summary of recruitment, skills and retention issues



Concluding points

5. 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 metrics, broadly comparable to those in racing yards. This suggests industry activity to promote recruitment, retention and skills development continues to be relevant and important.
6. 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 existing staff and there is scope to increase the awareness and exposure of staff to training and development opportunities.

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

Main Report

Section 1: Introduction

Introduction and aims of the research

1.1. The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA), commissioned Public Perspectives Ltd, an independent research organisation, to conduct a survey of studs about recruitment, skills and retention in the racing industry. Similar surveys have been conducted with racing trainers and racing staff. This was to follow-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 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 with studs adopted the same questionnaire used for racehorse trainers to provide for comparison, albeit with relevant wording tweaks to reflect the nature of studs.¹ The survey was conducted from mid-January through to the end of March 2019.
- 1.3. At the time of the research there were approximately 321 studs that, according to TBA records, employed staff.² The survey was administered via post (with an option to respond on-line)³, with e-mail reminders sent to non-respondents with a link to an on-line version of the questionnaire (a postal reminder was sent to non-respondents where an e-mail was not available). In total, 161 studs responded to the survey, which represents a 50% response rate (49% in 2017).
- 1.4. With this number of respondents, the survey provides for robust data. The confidence interval or accuracy of the survey result is no worse than +/- 5.5% at a 95% confidence level and for some results is as low as +/- 2%.⁴ This means that we can be 95% confident that the 'real' result for any given question would be within 5.5% of those stated within the

¹ The racehorse trainer survey was conducted via telephone. Theoretically, using two different methods – telephone and postal – can mean that results are not directly comparable. However, given that the questionnaires are almost identical and that the industries are so closely related, this research has not identified any concerns with directly comparing results.

² Due to the nature of studs, the research did not engage with studs that do not employ staff, with these studs either being very small operations and/or boarding their horses at other studs. Initially a list of 328 studs was provided by the TBA. However, 7 studs replied to say they do not employ staff.

³ A postal/e-mail survey method was used because the TBA have traditionally engaged and surveyed members in this way and it felt that this was the most appropriate mechanism to engage with its members. Response rate is lower than that for the racehorse trainer survey (nearly 80% response) because a telephone survey method can elicit a higher response rate. However, a response rate of 50% is still good and above average for postal surveys.

⁴ Sampling error exists because even when surveying as robustly as has been the case with this survey, only a proportion of the population has responded. Sampling error, therefore, is the measure of accuracy between the survey results and those that would have been obtained if all studs had responded, i.e. had a census been conducted.

survey findings. This provides for robust data when analysed at a headline level and when different questions are cross-referenced against each other.

- 1.5. 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.

Reporting

- 1.6. The following report summarises the key findings from the survey. Each relevant question has been analysed to identify any relevant patterns, trends, similarities or differences by different types of studs. Commentary is only provided where significant or meaningful findings are identified.
- 1.7. Comparison is provided against the racehorse trainer results, where appropriate and against the past survey results in 2017.
- 1.8. 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.
- 1.9. 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'.
- 1.10. 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 development
 - Section 6: Concluding points

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

Introduction

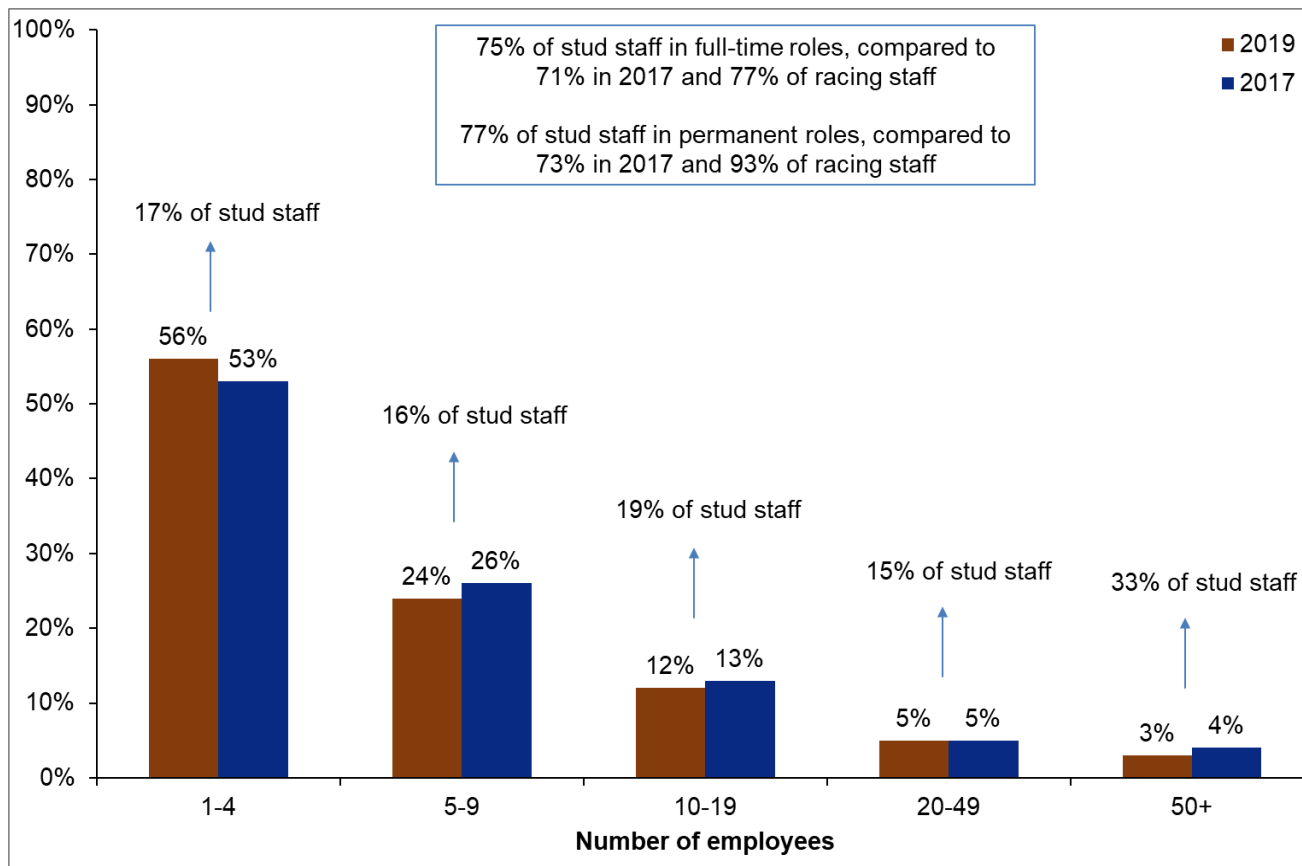
2.1. This section presents findings about the number of staff employed by studs, business performance and workforce demand.

Labour force statistics

Four-fifths of studs have 1-9 staff amounting to a third of all stud staff, while a tenth have 20+ staff but account for half of all staff

- 2.2. 56% of studs that employ staff have 1-4 staff, accounting for 17% of stud staff and 24% have 5-9 staff, accounting for 16% of stud staff. This compares to 69% of racing trainers that have 1-9 staff, accounting for 23% of racing staff.
- 2.3. 12% of studs have 10-19 staff, accounting for 19% of stud staff and 5% have 20-49 staff, accounting for 15% of stud staff. This compares to 28% of racing trainers that have 10-49 staff, accounting for 53% of racing staff.
- 2.4. 3% of studs have 50 or more staff, accounting for 33% of all stud staff. This compares to 3% of trainers that have 50+ staff, accounting for 24% of racing staff.
- 2.5. 75% of stud staff are in full-time roles, compared to 77% of racing staff.
- 2.6. 77% of stud staff are in permanent roles, with the remainder in temporary, seasonal or casual roles. This compares to 93% of racing staff in permanent roles.
- 2.7. Results are consistent over time, with no statistically significant differences.

Figure 2.1: Business size by number of employees



Number of respondents: 161 studs.

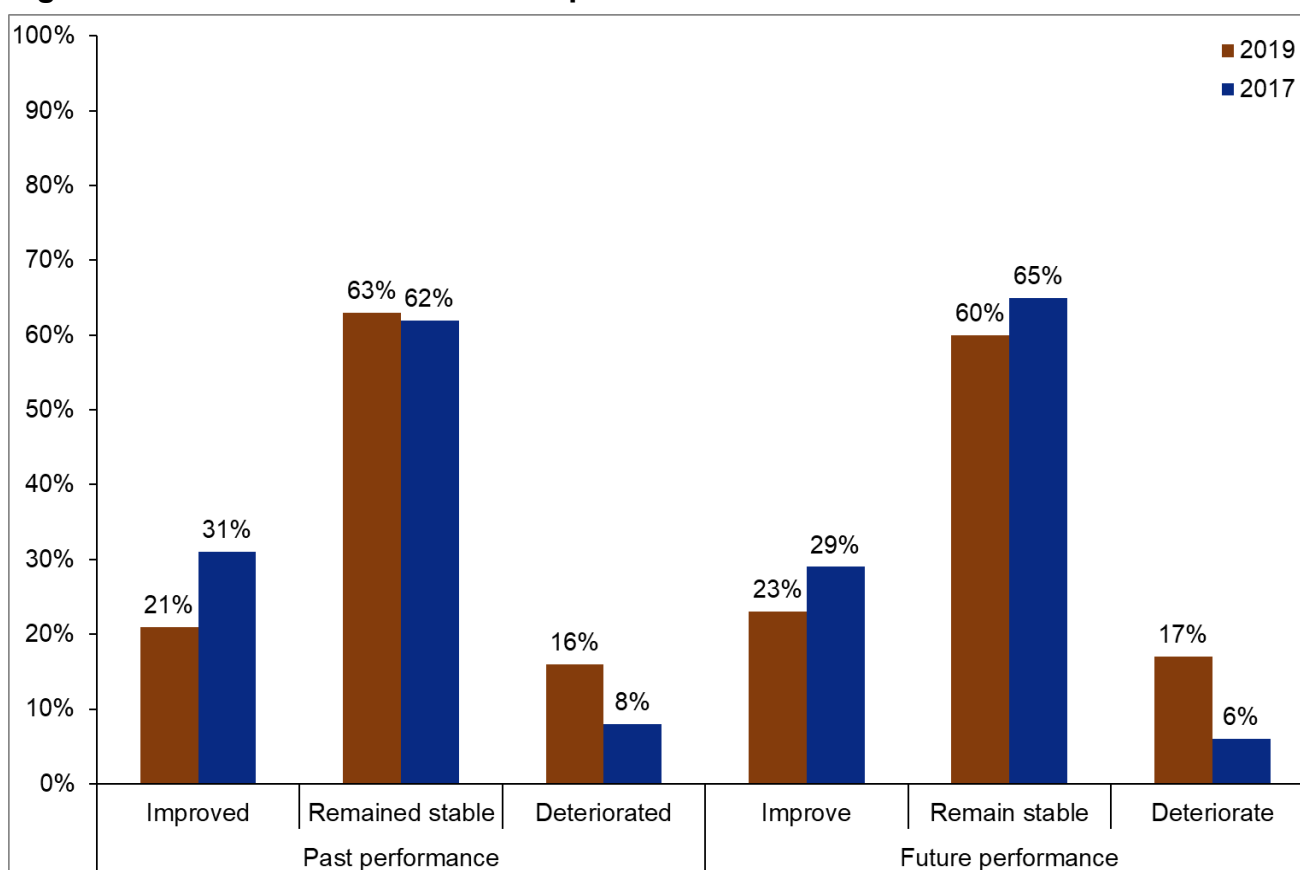
Question asked: Including you and any working proprietors/owners, how many people are employed by your business during your peak season? / How many are employed on a full-time basis (that is working 40 or more hours a week), and how many on a part-time basis (that is working fewer than 40 hours a week) during peak season? / And roughly, how many are permanent, temporary, seasonal and casual during peak season?

Business performance

A fifth of studs reported improved business performance and a similar proportion expect performance to improve in the future, a decrease compared to 2017

- 2.8. 21% of studs said their business performance improved over the past 12 months, compared to 31% in 2017 (a statistically significant decrease) and 36% of racing trainers. 63% said it remained stable and 16% said it deteriorated, compared to 8% in 2017 and 16% of racing trainers.
- 2.9. 23% of studs expect performance will improve over the next 12 months, compared to 29% in 2017 and 46% of racing trainers. 65% said it will remain stable and 17% said it will deteriorate, compared to 6% in 2017 and 8% of racing trainers.
- 2.10. Similar to 2017, smaller studs reported less positive performance and are also less optimistic. For example, 19% of studs with under 20 staff reported improved performance in the past compared to 50% of larger studs. Similarly, 21% of studs with under 20 staff expect performance to improve in the future, compared to 50% of larger studs.

Figure 2.2: Past and future business performance



Number of respondents: 161 studs.

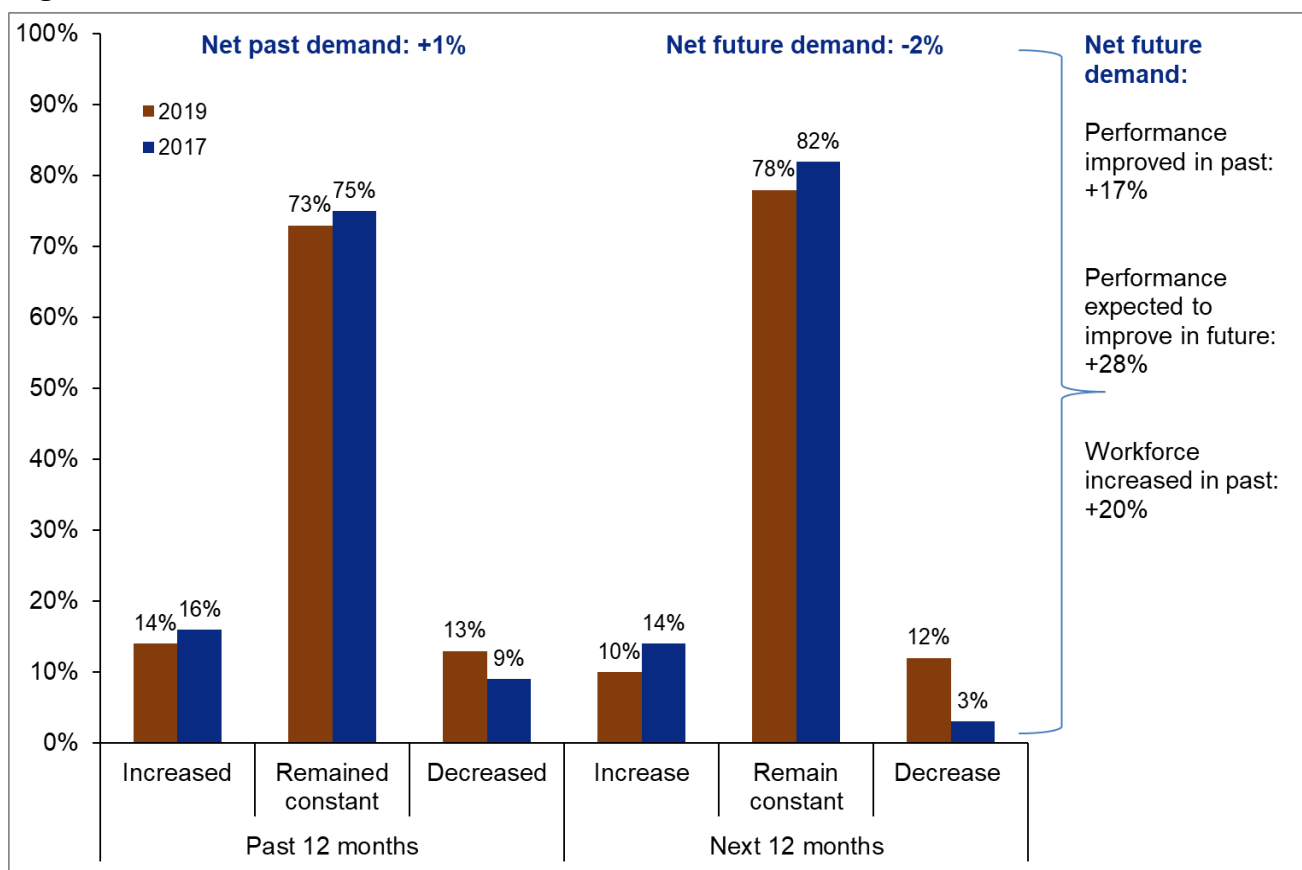
Questions asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? / Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?

Workforce demand

Three quarters of studs said their workforce remained constant over the last 12 months and about four-fifths expect it to remain constant in the next 12 months

- 2.11. 14% of studs said that their workforce increased over the past 12 months (compared to 16% in 2017), while 13% reported it decreased (9% in 2017). This results in net past demand (i.e. the difference between the increase and decrease in workforce) of +1% (compared to +7% in 2017 and +10% for racing trainers).
- 2.12. 10% of studs expect their workforce to increase in the next 12 months (14% in 2017), while 12% expect it to decrease (3% in 2017 – a statistically significant decrease), resulting in a net future demand of -2% (compared to +11% in 2017 and +23% of racing trainers).
- 2.13. As in 2017, net future demand is greatest amongst studs that reported improved performance in the past (+17%), studs that expect improved performance in the future (+28%) and studs that increased their workforce in the past (+20%).

Figure 2.3: Workforce demand



Number of respondents: 161 studs.

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 vacancy rates, hard-to-fill vacancies, types of studs / occupations affected, and reasons for recruitment difficulties.

Vacancy rates

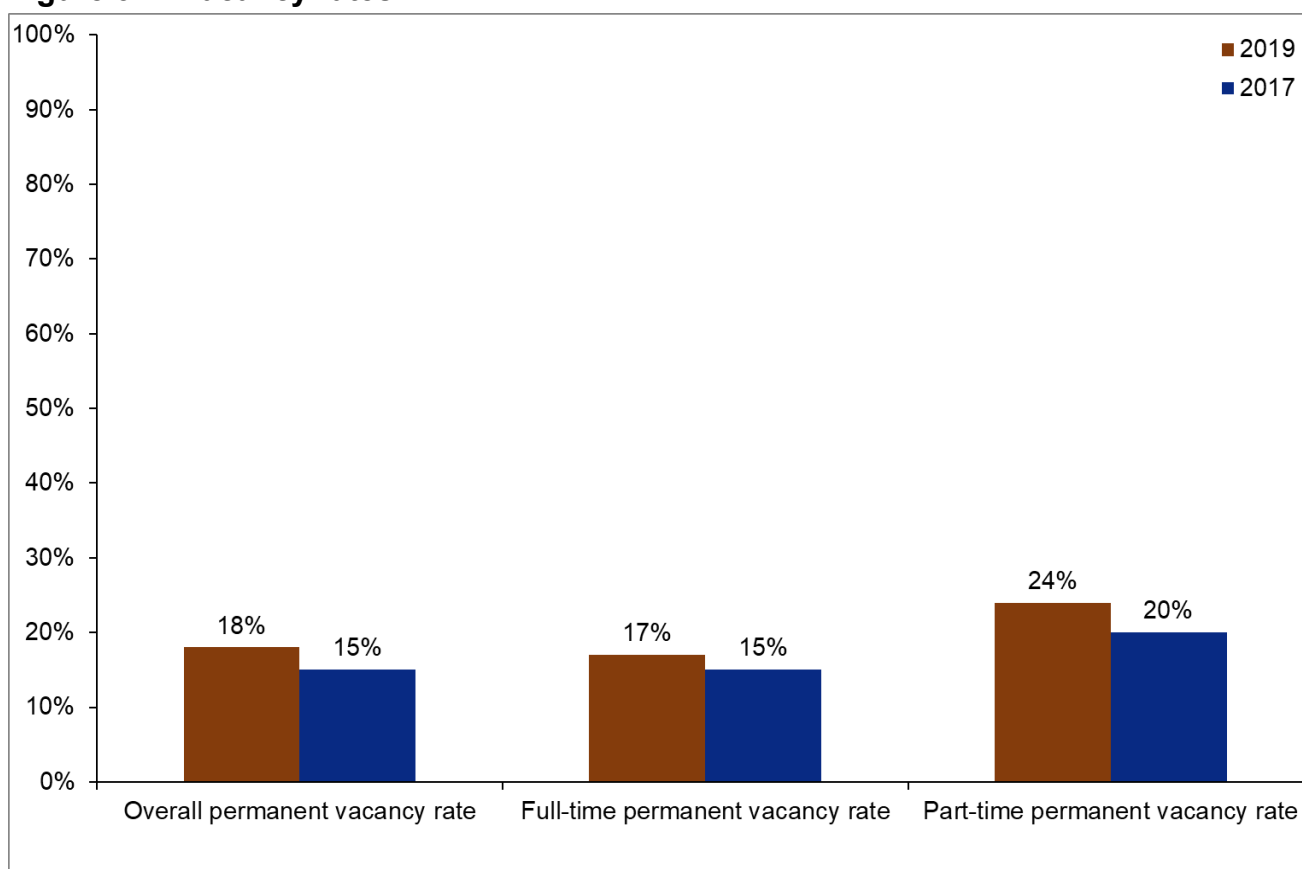
Under one in five permanent jobs are vacant annually, which is less than in racing yards

3.2. There is an estimated annual vacancy rate of 18% of all permanent stud jobs (15% in 2017) (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 studs 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.

3.3. This compares to a vacancy rate of 21% of permanent racing yard jobs.

3.4. The UK Government's Labour Force Survey (LFS) calculates a vacancy rate quarterly, based on asking businesses how many vacancies they currently have. 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 stud vacancy rate is at the middle to lower end of this range.

Figure 3.1: Vacancy rates



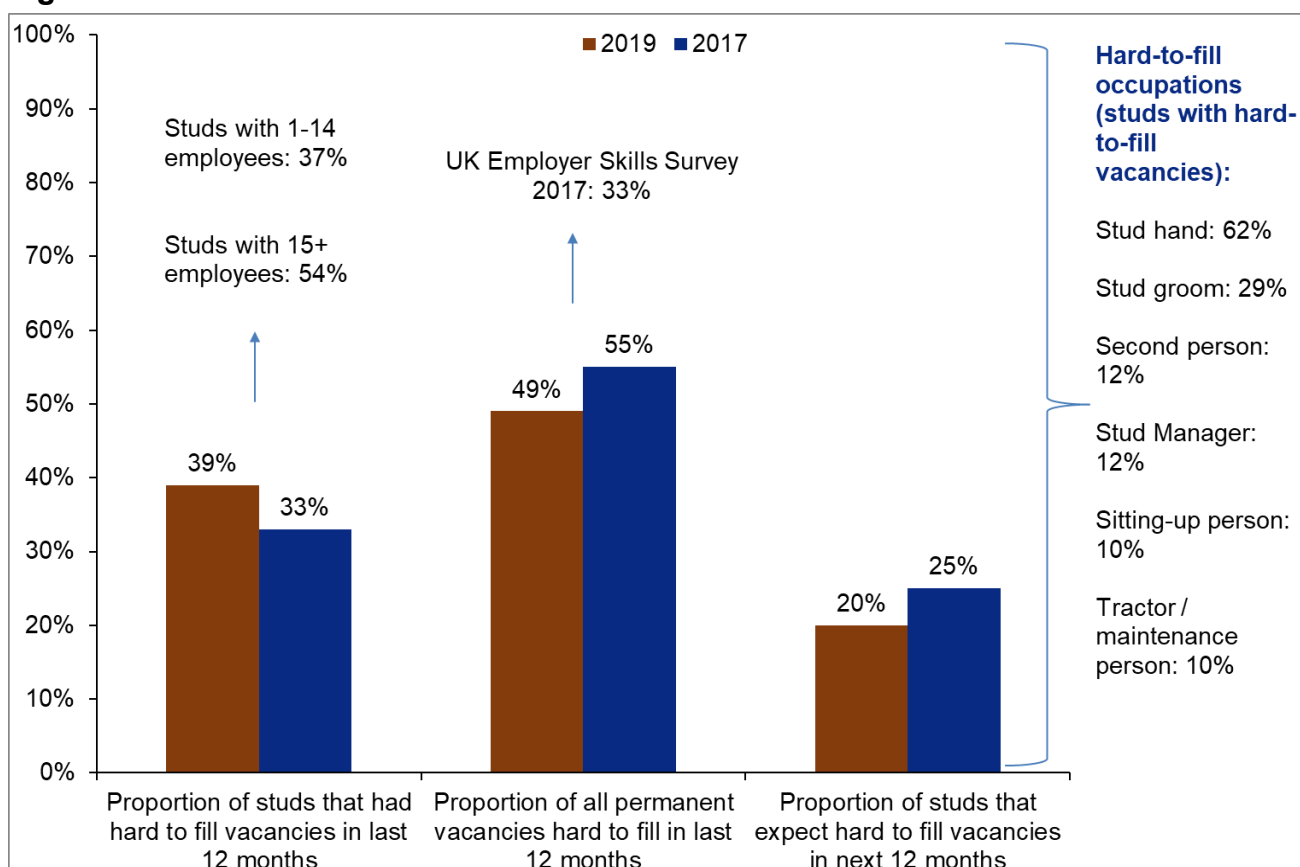
Number of respondents: 161 studs. Questions asked: Overall, how many full-time and part-time vacancies have you had in the last 12 months? / And roughly, in the last 12 months, how many vacancies have been permanent, temporary, seasonal and casual?

Hard-to-fill vacancies

Over a third of studs have hard-to-fill vacancies and nearly half of all permanent vacancies are hard-to-fill, with larger studs most affected

- 3.5. 39% of studs (compared to 33% in 2017 and 43% of racing yards) said they had hard-to-fill vacancies in the last 12 months. 34% said they did not have hard-to-fill vacancies and 27% said they did not have any vacancies.
- 3.6. An estimated 49% of permanent vacancies are hard-to-fill⁵, compared to 55% in 2017 and 50% of permanent racing yard vacancies. The national figure, based on the UK Employer Skills Survey, is 33%.
- 3.7. Similar to 2017, larger studs are more likely to say they had hard-to-fill vacancies. For example, 37% of studs with 1-14 employees said they had hard-to-fill vacancies, compared with 54% with 15+ employees.
- 3.8. 20% of studs expect to have hard-to-fill vacancies in the next 12 months, compared to 25% in 2017 and 42% of racing yards. 48% of studs that had hard-to-fill vacancies in the past also expect to have hard-to-fill vacancies in the future (56% in 2017).
- 3.9. The occupations which were most commonly cited as being hard-to-fill are similar to those in 2017 - stud hands (cited by 62% of studs that said they had hard-to-fill vacancies) and stud groom (29%).

Figure 3.2: Hard-to-fill vacancies



Number of respondents: 161 studs. 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?

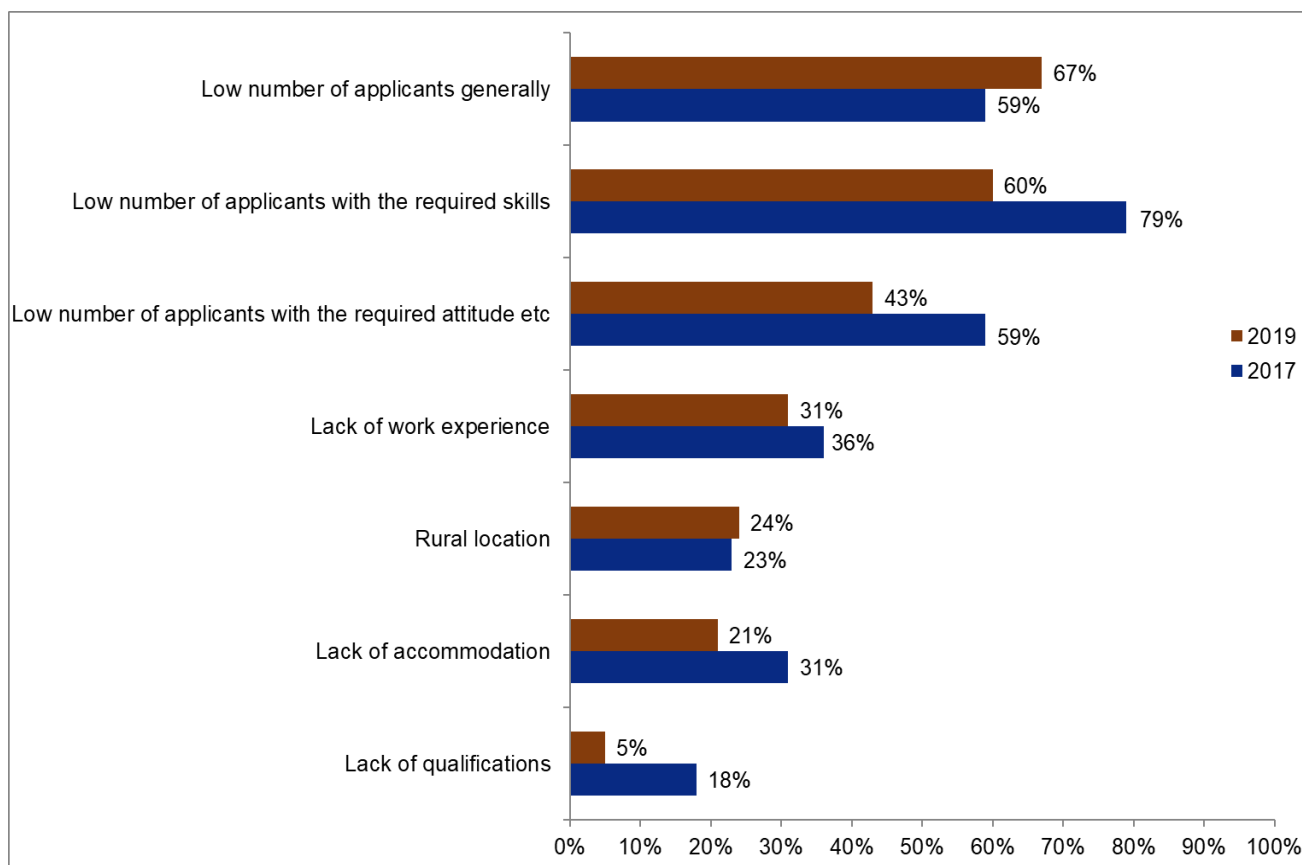
⁵ The reason why the proportion of vacancies that are hard-to-fill has reduced, despite the proportion of studs with hard-to-fill vacancies increasing is because a smaller proportion of hard-to-fill vacancies exist spread across more studs.

Reasons for hard-to-fill vacancies

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

3.10. The low number of applicants generally (67% in 2019 and 59% in 2017) and the low number of applicants with the required skills (60% in 2019 and 79% in 2017 – a statistically significant change) continue to be the top cited reasons for recruitment difficulties. In addition, other factors, such as low number of applicants with the required attitude (43% in 2019 and 59% in 2017 – a statistically significant change), lack of experience (31%), rural location (24%) and lack of accommodation (21%) should not be ignored.

Figure 3.3: Reasons for hard-to-fill vacancies



Number of respondents: 62 studs (studs 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, including information about retention rates, retention difficulties, the types of studs and occupations most affected, and the reasons for retention difficulties.

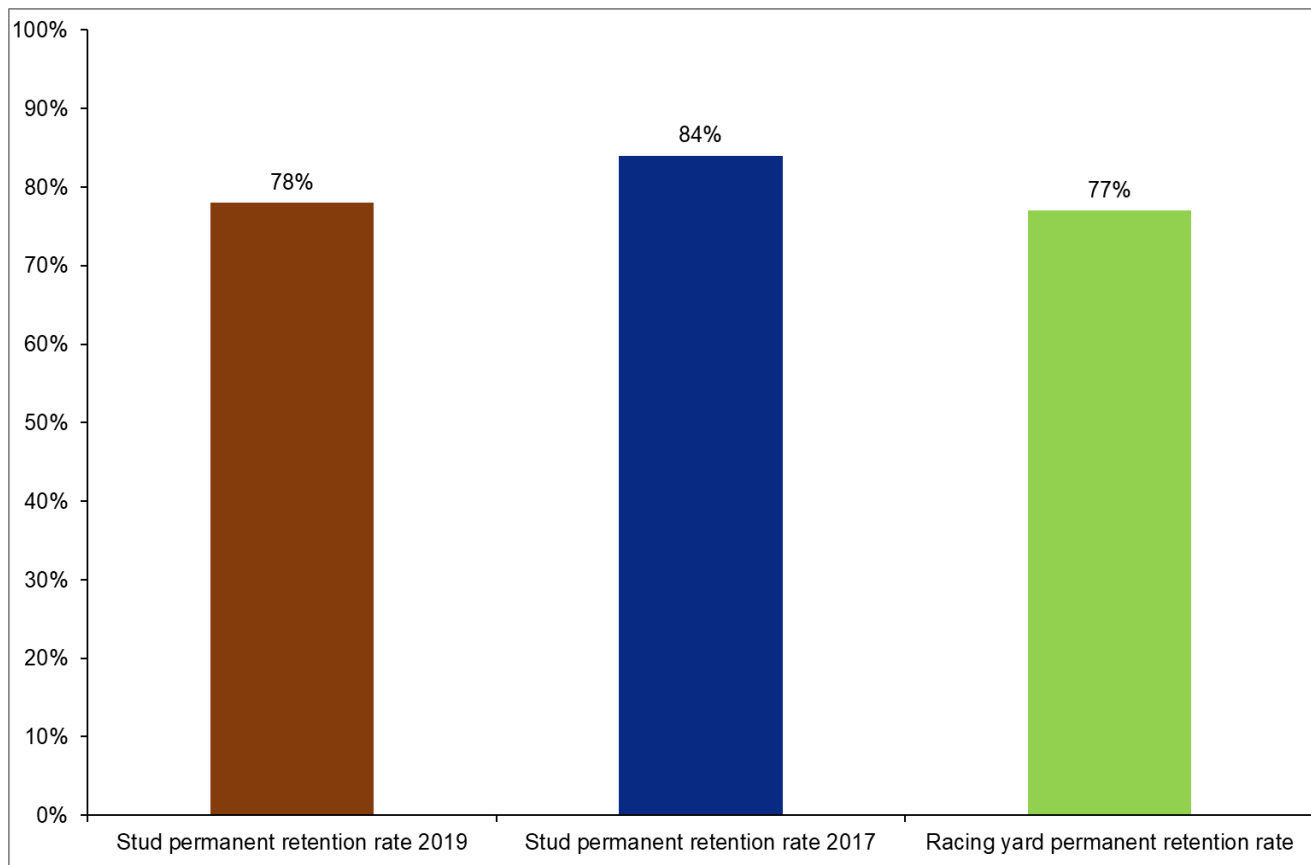
Retention rates

About a fifth of staff leave their job roles each year

4.2. Overall, there is an estimated retention rate of 78% of all permanent stud staff in their job roles per annum (84% in 2017). In other words, some 22% of stud staff leave their jobs each year (some of these may change jobs within the same organisation). This compares to a retention rate of 77% in racing yards.

4.3. The retention rate is similar for both full-time and part-time roles.

Figure 4.1: Retention rates



Number of respondents: 161 studs.

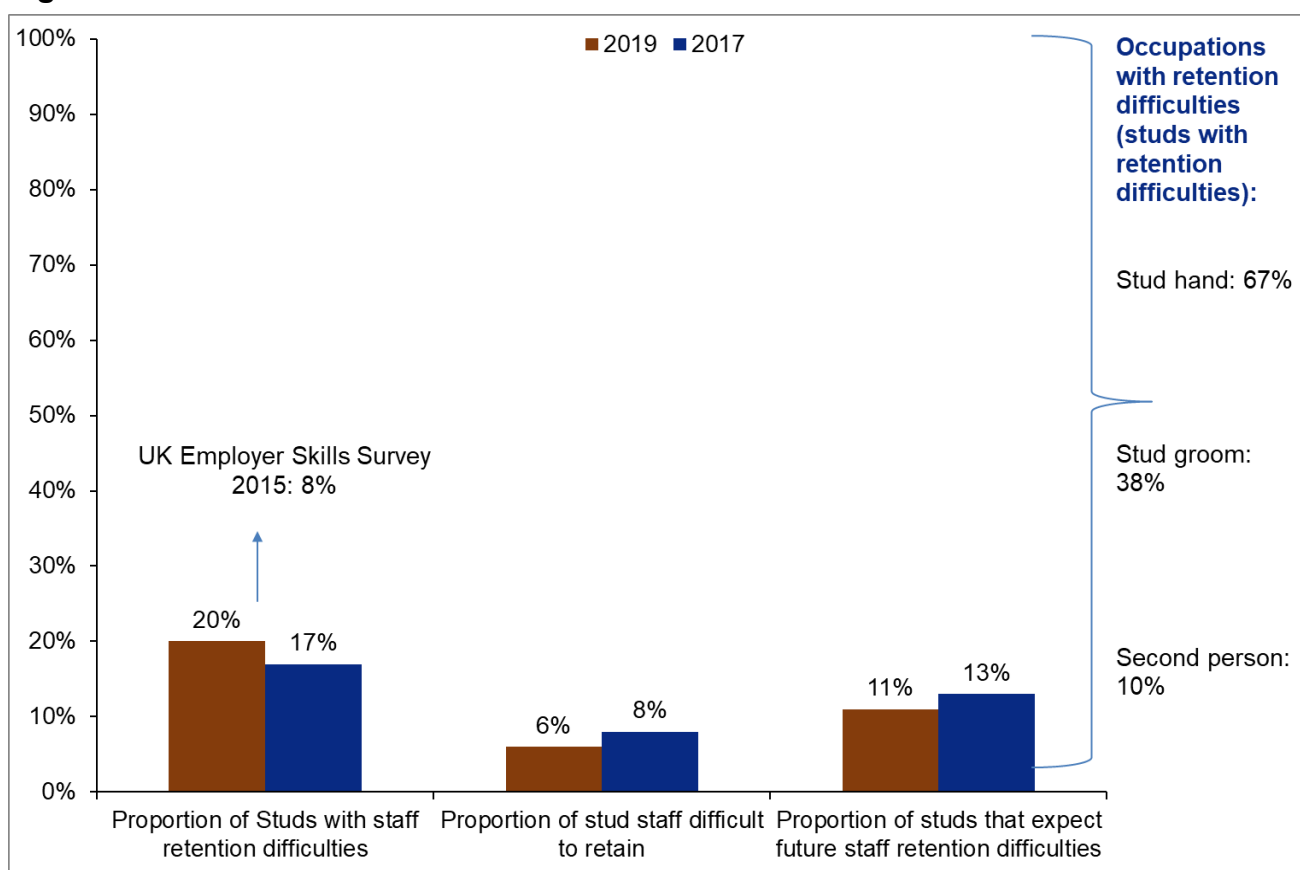
Question asked: Overall, how many permanent full-time and part-time staff have left their roles in the last 12 months?

Retention difficulties

A fifth of studs said they have retention difficulties, similar to the previous survey

- 4.4. 20% of studs (17% in 2017) said they had difficulties retaining permanent staff in the last 12 months. This compares to 17% of racing yards. The national figure, based on the UK Employer Skills Survey, is 8%.⁶
- 4.5. This translates into an estimated 6% of all stud staff that are difficult to retain, compared to 8% in 2017 and 13% of racing staff.
- 4.6. 18% of studs face a double problem of hard-to-fill vacancies and retention difficulties.
- 4.7. 11% of studs expect to have retention difficulties in the next 12 months, compared to 13% in 2017 and 17% of racing yards. 27% of studs that had retention difficulties in the past also expect to have difficulties in the future.
- 4.8. Similar to 2017, the occupations which were most commonly cited as being difficult to retain are stud hand (cited by 67% of studs that said they have retention difficulties), stud groom (38%) and second person (10%).

Figure 4.2: Retention difficulties



Number of respondents: 161 studs.

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?

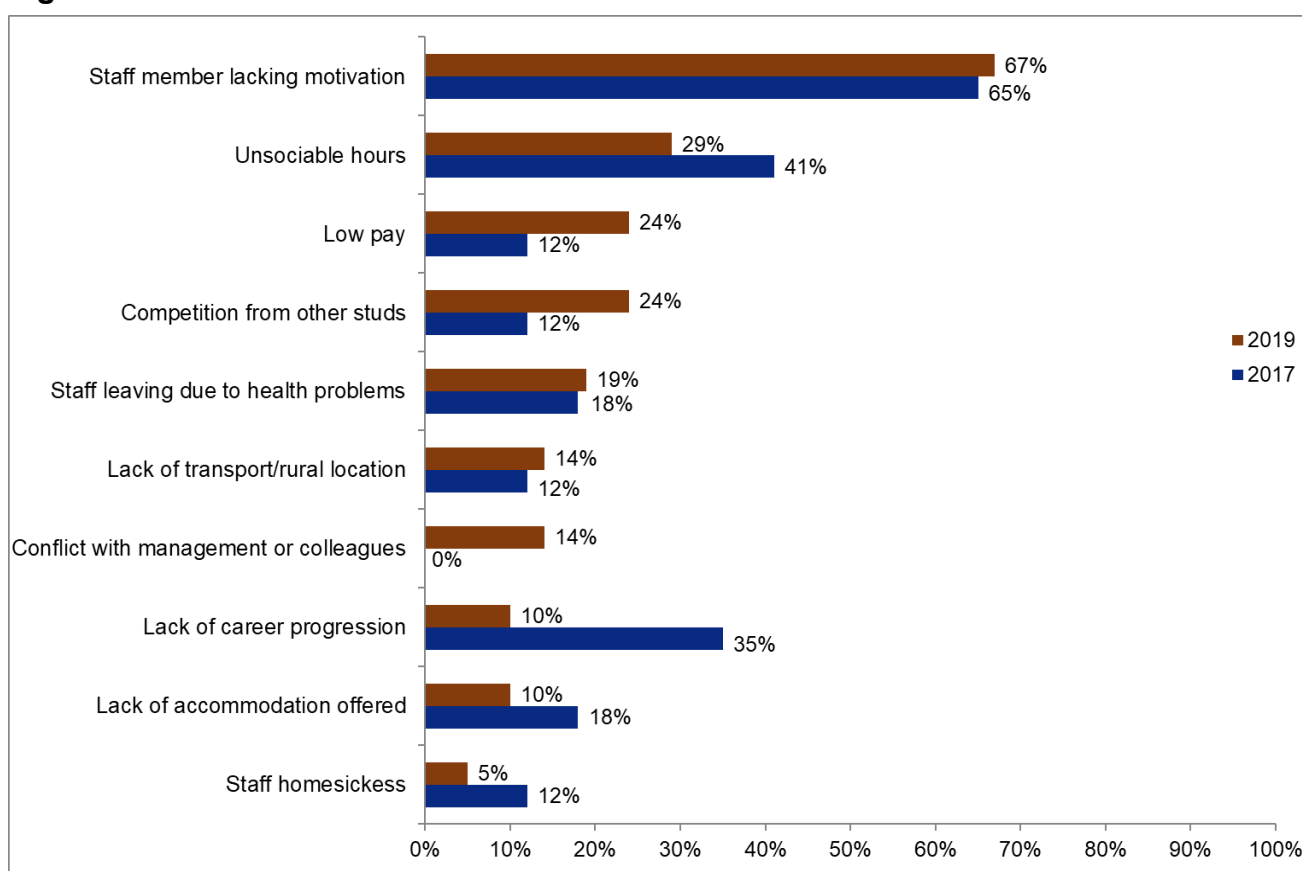
⁶ This is the figure for 2015. This question was not asked in the most recent survey in 2017.

Reasons for retention difficulties

Staff lacking motivation remains the main reason for leaving

- 4.9. Staff lacking motivation (cited by 67% of studs with staff retention difficulties) continues to be the top cited reason for staff leaving. Unsociable hours (29%), low pay (24%) and competition from other studs (24%) are also cited.
- 4.10. There are some variations in results over time, but the number of respondents is too small to know if these are reliable differences. However, the top cited reasons for retention issues remain consistent over time.
- 4.11. Lack of career progression has dropped notably from being cited by 35% of studs with retention issues in 2017 to 10% in 2019. However, this may be due to the small number of responses.

Figure 4.3: Reasons for retention difficulties



Number of respondents: 32 studs (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?

Section 5: Skills, training and development

Introduction

5.1. This section presents findings about skills gaps, training and development, and awareness and use of industry recruitment, training and retention initiatives and support.

Skills gaps

Just under a third of studs have skills gaps within their existing workforce

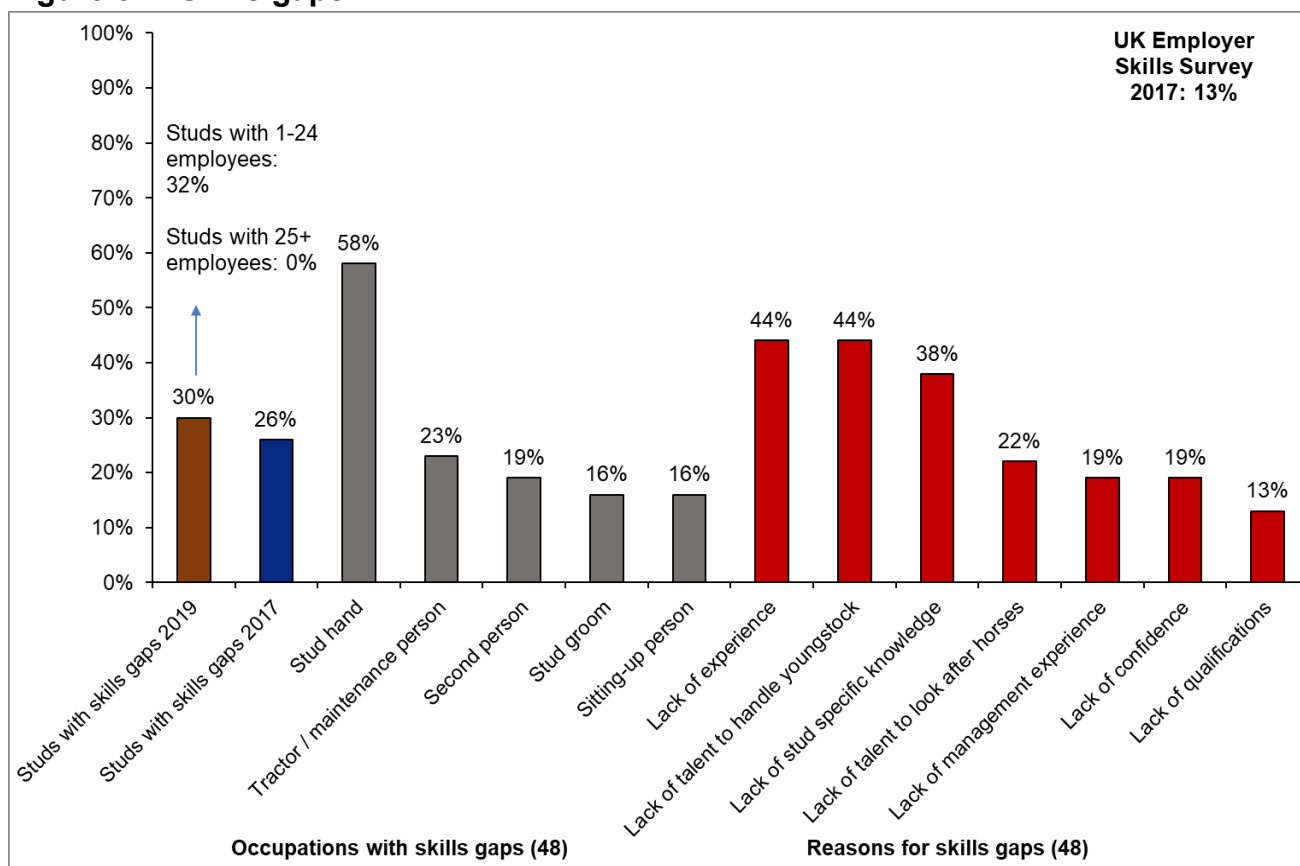
5.2. 30% of studs said there are gaps in the skills or capabilities of their existing workforce. This compares to 26% in 2017, 27% of racing yards and a national figure of 13%. Smaller studs are more likely to have skills gaps – for example 32% of studs with 1-24 employees have skills gaps, whereas none of the larger studs had skills gaps.

5.3. 9% of studs have a combination of skills gaps, hard-to-fill vacancies and retention difficulties.

5.4. Similar to 2017, the occupations most likely to have skills gaps are stud hand (cited by 58% of studs that have skills gaps), second person (19%) and stud groom (16%). In addition, in 2019, 23% of studs that have skills gaps cited tractor/maintenance person.

5.5. Similar to 2017, the main reasons for skills gaps are a lack of experience (cited by 44% of studs with skills gaps), lack of talent/capability to handle yearlings/youngstock (44%) and lack of stud specific experience (38%). Other skills gaps cited include lack of talent/capability to look after horses (22%), lack of management experience and lack of confidence (both 19%), and lack of qualifications (13%).

Figure 5.1: Skills gaps



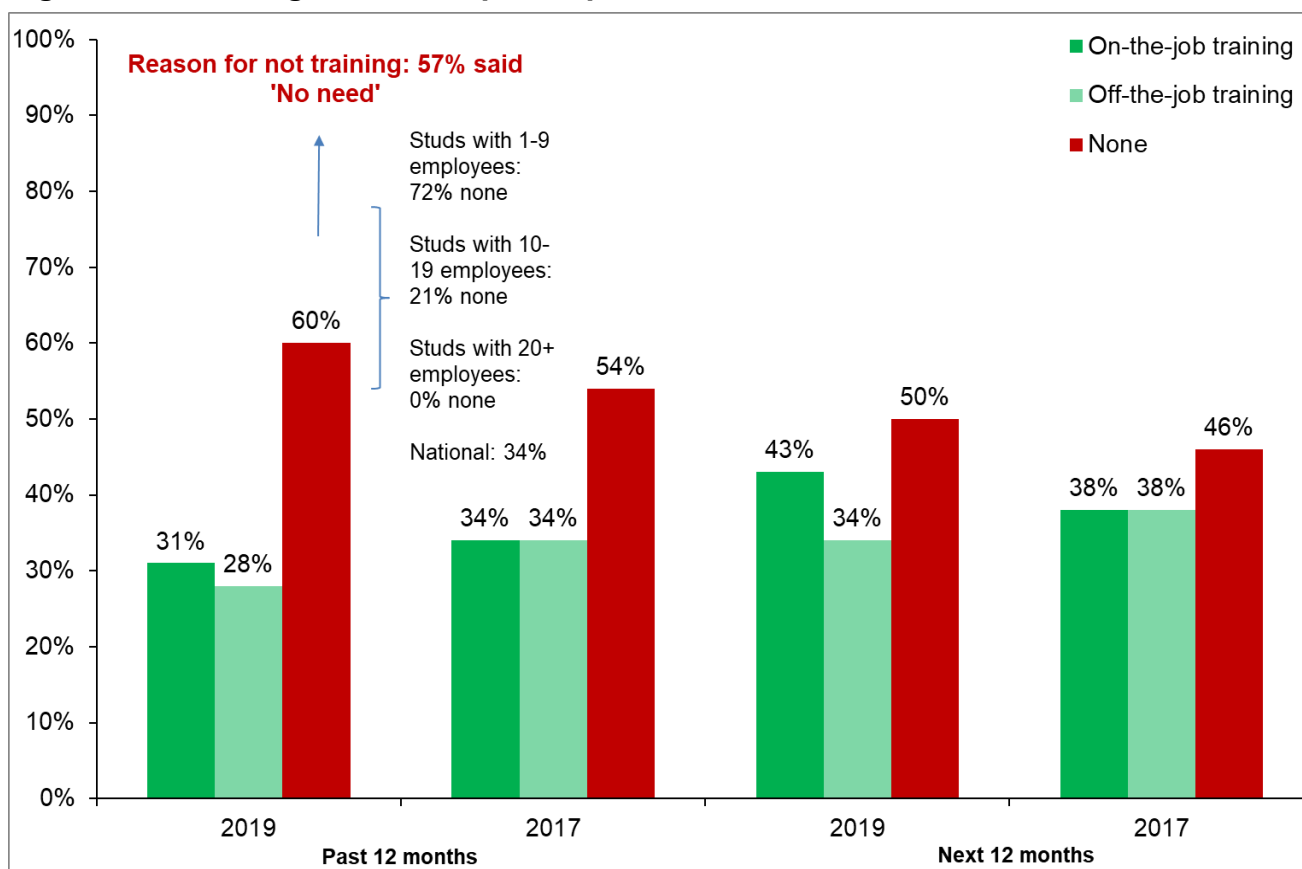
Number of respondents: 161 studs / numbers in brackets are the number of respondents to follow-up questions asked only to studs with skills gaps. Questions asked: Are there any gaps in the skills or capabilities of your existing workforce i.e. areas where existing staff lack the skills or capabilities to do their jobs as well as possible? / Which specific occupations have skills gaps? / What skills gaps exist?

Training and development prevalence

Two-fifths of studs trained their staff in the last 12 months, with prevalence less in smaller yards

- 5.6. 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 (53% provide on-the-job training and 48% off-the-job training) (based on the UK Employer Skills Survey 2017).
- 5.7. 53% of studs that said they have skills gaps do not provide training.
- 5.8. As in 2017, smaller studs are less likely to train their staff, with 72% of studs with 1-9 staff not having provided training or development in the past 12 months, compared with 21% with 10-19 staff and 0% of studs with 20 or more employees.
- 5.9. Similar to 2017, the main reason cited by employers that do not provide training is that there is 'no need' – cited by 57% of studs that did not provide training or development in the past 12 months. In addition, 20% said there is a lack of appropriate training locally, 16% cited a lack of time and 16% cited a lack of funds.
- 5.10. 50% of studs said they do not expect to fund or arrange training or development in the next 12 months, compared to 46% in 2017 and 47% of racing yards. 80% of employers that did not provide training in the past 12 months said this. This means that overall 45% of studs will not provide training/development either in the past 12 months or next 12 months.

Figure 5.2: Training and development prevalence



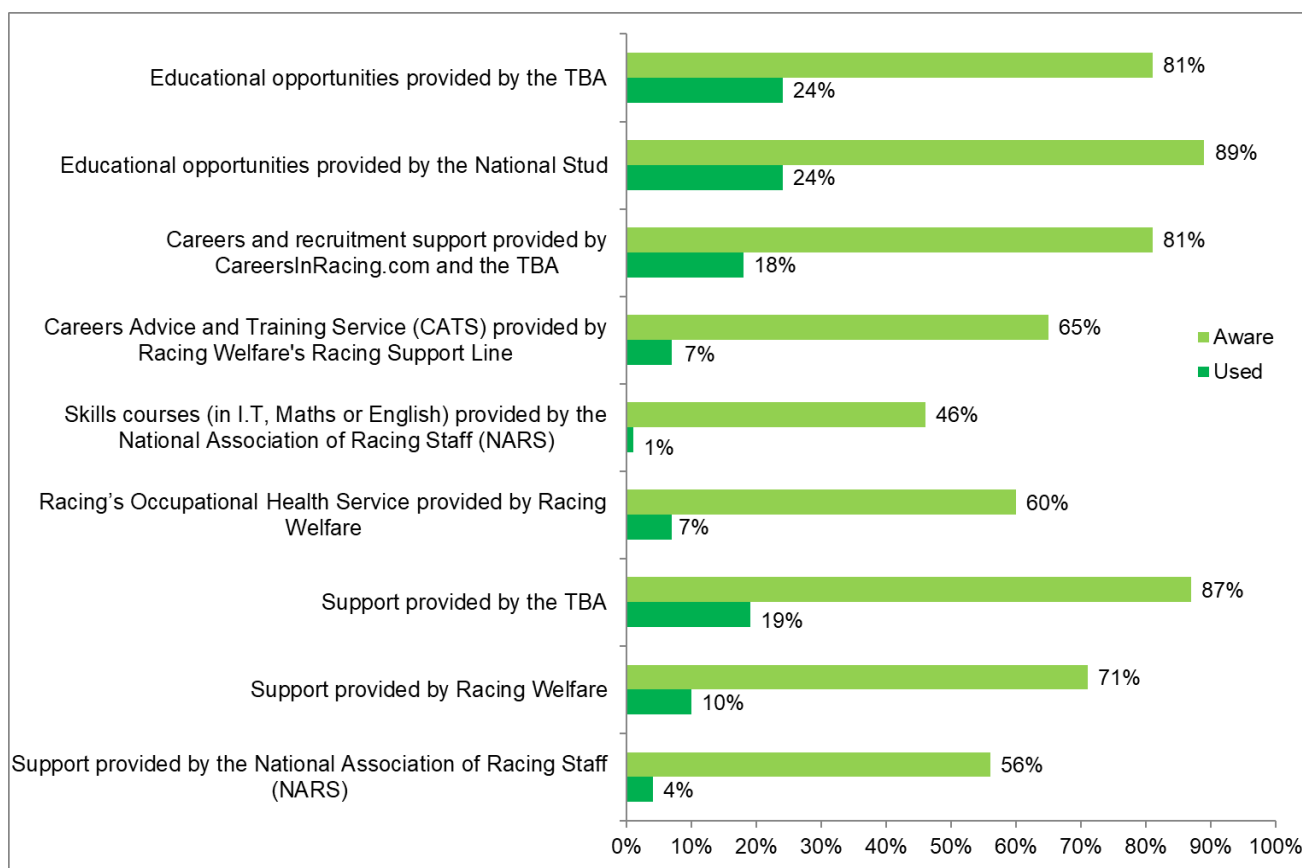
Number of respondents: 161 studs. Note: Respondents could select both on-the-job and off-the-job training response options. Questions asked: Over the past 12 months have you funded or arranged any off-the-job training or development or on-the-job or informal training or development for your staff? / Why have you not funded or arranged any training or development for staff? / In the next 12 months do you expect to fund or arrange any off or on the job training or development?

Awareness and use of training and development initiatives

The majority are aware of the training and development initiatives in the industry, but only a small minority have used them

- 5.11. 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).
- 5.12. A small 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.
- 5.13. Awareness and use tend to be greatest amongst larger studs. For example, on average, 70% of studs with 1 to 19 employees are aware of the initiatives and 9% have used them, compared with 86% of studs with 20+ employees aware and 55% that have used them.
- 5.14. There is greatest awareness and use of the educational opportunities and support delivered by the TBA and National Stud, while there is perhaps scope to increase awareness and use of two key industry initiatives - CATS and Occupational Health.

Figure 5.3: Awareness and use of training and development initiatives



Number of respondents: 161 studs.

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

Perceptions and attitudes about training and development

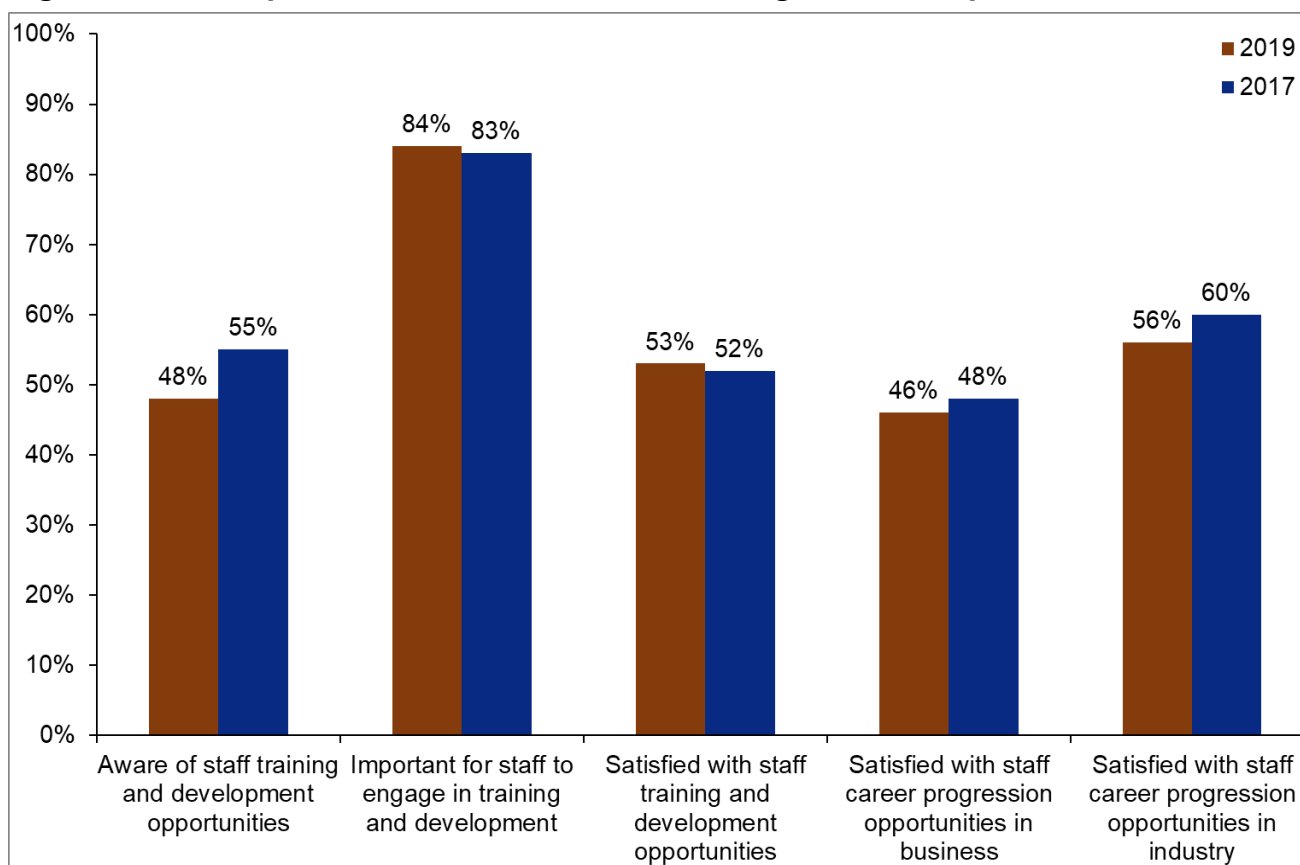
The majority of studs have positive perceptions and attitudes about training and development opportunities, broadly consistent with 2017, although there is scope for improvement

5.15. Studs hold the following perceptions and attitudes about training and development:

- 48% are aware of staff training and development opportunities, compared to 55% in 2017 and 73% of racing trainers.
- 84% agree it is important for staff to engage in training and development, compared to 83% in 2017 and 96% of racing trainers.
- 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.
- 56% are satisfied with staff career progression opportunities in the industry, compared to 60% in 2017 (question not asked of trainers).

5.16. Perceptions and attitudes are broadly similar amongst different sizes of studs, as in 2017.

Figure 5.4: Perceptions and attitudes about training and development



Number of respondents: 161 studs.

Question asked: Do you agree or disagree with the following statements about personal and professional development opportunities for staff?

Section 6: Concluding points

Introduction

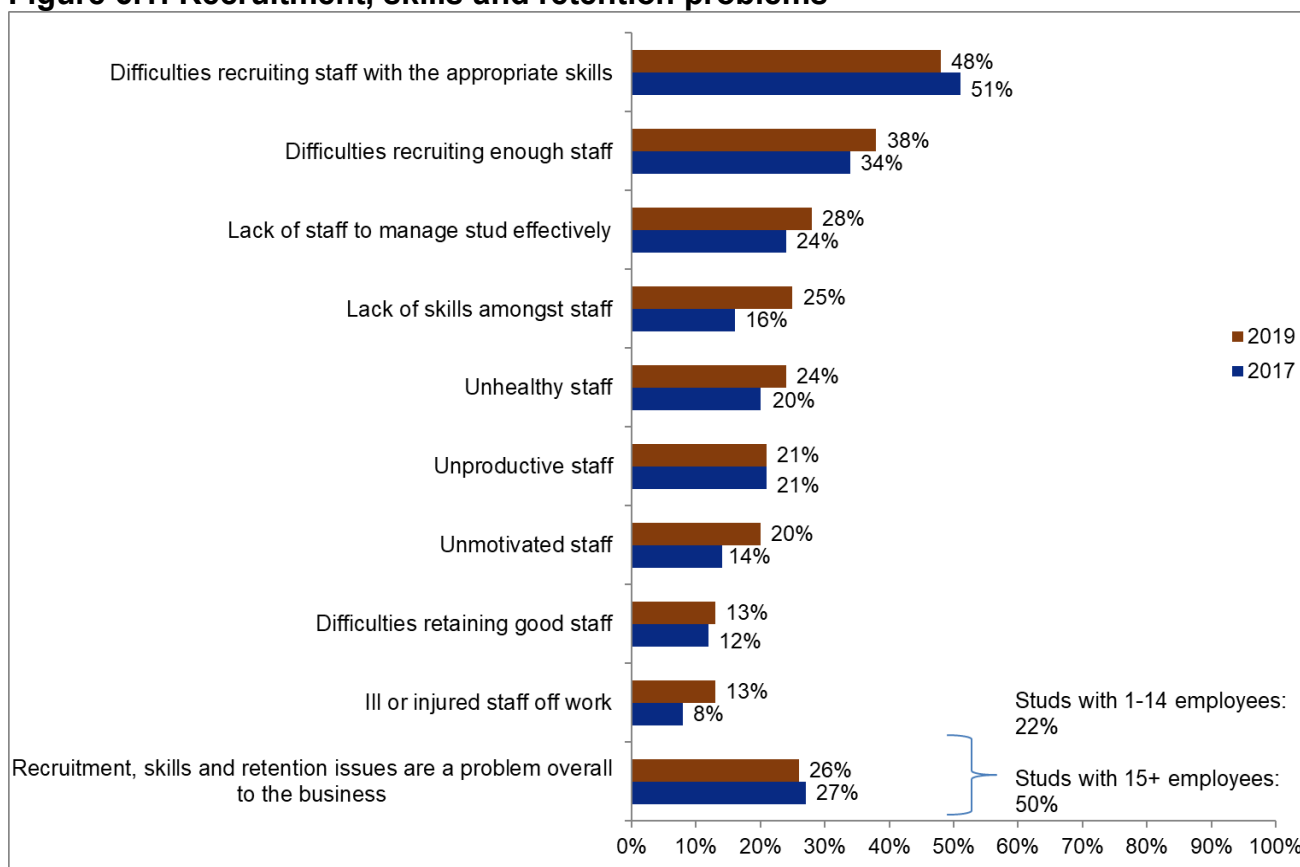
6.1. By way of conclusion, this section presents findings about the overall perceptions and size of recruitment, skills and retention problems. In addition, it presents whether studs perceive there to be improvements in recruitment, training and retention within the industry since 2017.

Perceptions about key recruitment, skills and retention issues

Recruitment, skills and retention issues are a problem to the businesses of over a quarter of studs, with recruitment issues cited as the biggest problem and larger studs most affected, as in 2017

- 6.2. The two most cited recruitment, skills and retention problems are difficulties recruiting staff with the appropriate skills (48% of studs said this is a problem in 2019 and 51% in 2017) and difficulties recruiting enough staff (38% said this is a problem in 2019 and 34% in 2017). These were also the two most cited issues in the racehorse trainer survey.
- 6.3. These issues are having an adverse impact on some studs, with 28% of studs stating that a lack of staff to manage the stud effectively is a problem (24% in 2017).
- 6.4. Overall, 26% of studs said that recruitment, skills and retention issues are a problem to their business (essentially when placed in the context of other issues), compared to 27% in 2017 and 40% of racing trainers. These issues are a bigger problem to larger studs. For example, 22% of studs with 1-14 staff said recruitment, skills and retention issues are a problem, compared to 50% of studs with 15 or more staff.

Figure 6.1: Recruitment, skills and retention problems



Number of respondents: 161 studs. 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

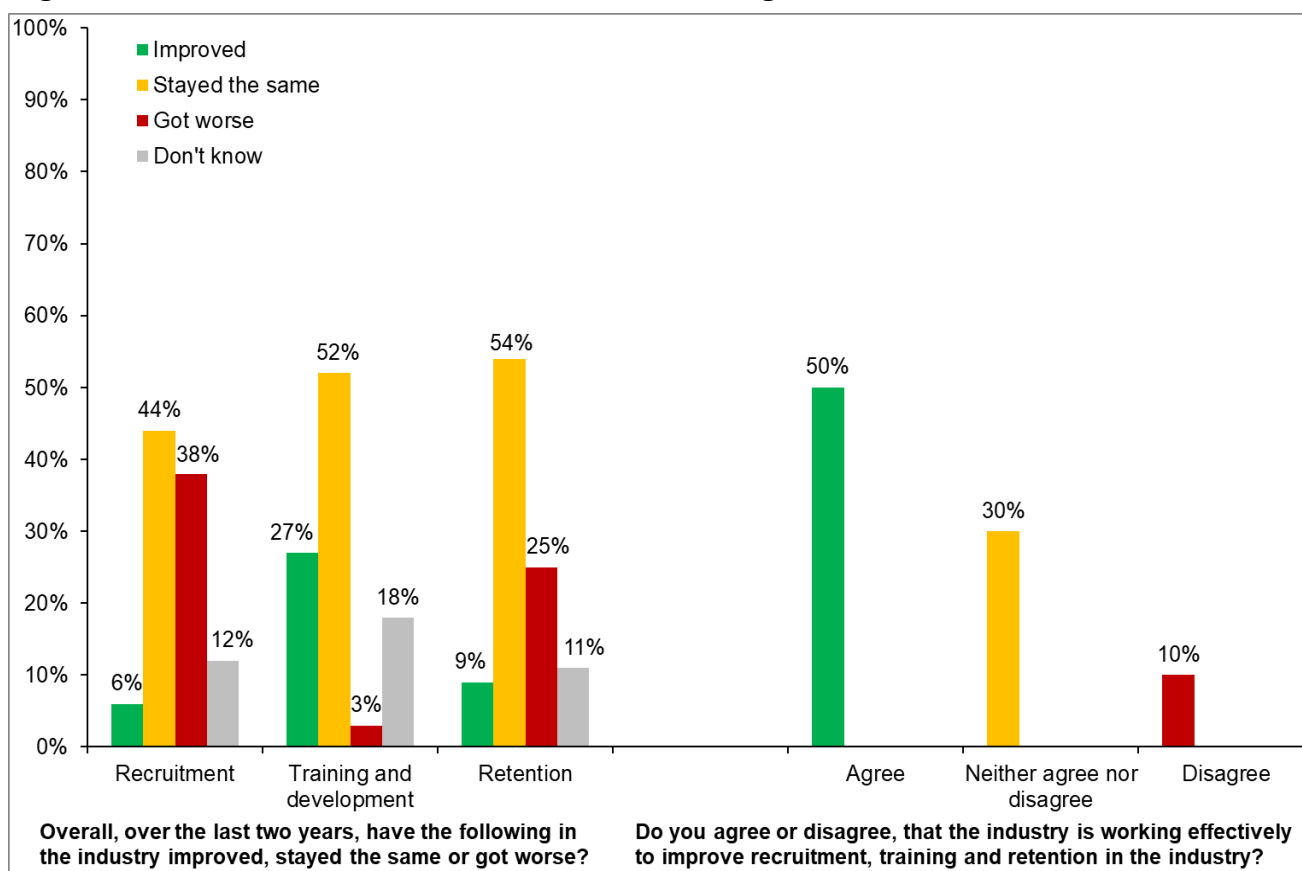
The majority of studs said that training and development for staff has improved or stayed the same in the last two years, but that recruitment and retention has worsened or stayed the same, although half agree that the industry is working effectively to address these issues

6.5. Studs said the following about change over time:

- 38% said recruitment has got worse, 44% said it has stayed the same and 6% said it had improved (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 (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 (this compares with 42% of racing trainers that said retention has got worse, 42% stayed the same and 11% improved).

6.6. 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.

Figure 6.2: Recruitment, skills and retention changes over time



Number of respondents: 161 studs.

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