

# Racing Industry Recruitment, Skills and Retention Research 2021

Report: May 2022



[www.publicperspectives.co.uk](http://www.publicperspectives.co.uk)

# Contents

<b>Executive Summary</b> .....	<b>1</b>
Introduction and aims of the research .....	1
Approach to the research.....	1
Key findings .....	2
Concluding points .....	5
<b>Main Report</b> .....	<b>6</b>
<b>Section 1: Introduction</b> .....	<b>6</b>
Introduction and aims of the research .....	6
Approach to the research.....	6
Reporting .....	9
<b>Section 2:</b>	
<b>Labour force statistics, business performance and workforce demand</b> .....	<b>10</b>
Introduction .....	10
Labour force statistics .....	10
Business performance .....	11
Workforce demand .....	13
<b>Section 3: Recruitment</b> .....	<b>14</b>
Introduction .....	14
Vacancy rates .....	14
Hard-to-fill vacancies .....	16
Reasons for hard-to-fill vacancies .....	17
<b>Section 4: Retention</b> .....	<b>19</b>
Introduction .....	19
Retention rates .....	19
Retention difficulties.....	20
Reasons for retention difficulties .....	22
Staff and retention .....	22
<b>Section 5: Skills, training and support</b> .....	<b>25</b>
Introduction .....	26
Skills gaps .....	26
Staff and skills .....	27
Training and development prevalence .....	29
Awareness and use of training and support initiatives.....	31
Perceptions and attitudes about training and development .....	33
<b>Section 6: Concluding points</b> .....	<b>35</b>
Introduction .....	35
Perceptions about key recruitment, skills and retention issues.....	35
Perceptions of change over time.....	37

# Racing Industry Recruitment, Skills and Retention Survey 2021

## 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 a survey of racing trainers and racing staff about recruitment, skills and retention in the racing industry.<sup>1</sup> This was the third survey in a series, with the second in 2018, which followed-up on a baseline survey conducted in Autumn 2016 to help measure the impact of the Racing Foundation's initial 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 future industry initiatives.
2. The findings of this research should be considered in the context of Brexit and the Covid-19 pandemic, which have all taken place between the time of the last survey and this current one.

### Approach to the research

3. The research involved surveys of racing trainers and racing staff, with separate, but related, questionnaires developed for each audience.
4. **Racing trainers:** At the time of the research there were 581 licenced racing trainers. Between the end of October 2021 and mid-December 2021 (an approximately seven-week period) a telephone survey of racing trainers was conducted. In addition, an online version of the survey was e-mailed to non-respondents in late December 2021 and early January 2022 to help maximise the response. In total, 458 trainers responded to the survey, which represents a 79% response rate (the response rate was 79% in 2016 and 78% in 2018). As in previous years, this sample also covers some 80% of all racing staff and 80% of all horses in training.
5. **Racing staff:** At the time of the research there were approximately 7,961 racing staff, including licenced jockeys, on the BHA's register with valid contact details. Racing staff were sent an e-mail/on-line survey initially at the start of November 2021, followed by a postal survey (this questionnaire was also kindly promoted at the Racing Centre in Newmarket) to non-respondents with the option to complete the survey on-line or via hard-copy, with a return date of the 6<sup>th</sup> December 2021. In total, 1,616 racing staff and jockeys responded to the survey (including over 80% responding on-line/via e-mail - in 2018 over 30% responded this way), with a further 119 unable to respond due to an invalid email or postal address. This represents an adjusted response rate of 21% (the adjusted response rate was 17% in 2018 and 14% in 2016).<sup>2</sup>

---

<sup>1</sup> The research was conducted by independent research and evaluation organisation, Public Perspectives, who has over a decade of experience working with the horse racing industry and conducted the previous versions of this survey.

<sup>2</sup> Although this is a relatively low response rate, it is in line with expectations and exceeds past exercises with racing staff.

## Key findings

6. By way of context, the research estimates that 25% of all permanent posts in racing yards require recruitment activity annually, due to staff turnover or growth (21% in 2018 and 24% in 2016) (this vacancy rate is a measure of recruitment demand and not of staff shortages). This equates to an estimated 1,790 jobs per annum that require recruitment.<sup>3</sup> The research did not identify if these posts are successfully recruited or not, although there is evidence of hard-to-fill vacancies in the industry. The following graph (Figure 1) highlights the extent of recruitment, skills and retention issues from the perspective of trainers, compared over time and against national data in the wider economy (from the UK Employer Skills Survey 2019, reported in November 2020):
- 55% of permanent vacancies in the racing industry are hard-to-fill, compared with 50% in 2018, 48% in 2016 and 47% nationally in the wider economy (the national figure has witnessed a worsening trend over time, with hard-to-fill vacancies of 33% in 2015, 40% in 2017 and now 47%). 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/groom and yard staff.
  - 14% of trainers said they have retention difficulties, compared with 17% in 2018, 19% in 2016 and 8% of businesses nationally in the wider economy (this is based on the 2017 UK Employer Skills Survey, because the question was not included in the 2019 version). This equates to an estimated 24% of permanent racing staff jobs that are vacated by staff per annum (23% in 2018 and 28% in 2016). This retention rate is a measure of staff churn, some of these may change jobs within the same organisation and also not necessarily be leaving the industry, but instead moving to another trainer or organisation. The main retention challenges are with the work rider, rider/groom and yard staff roles, due to unsociable hours, low pay and competition from other yards, which were mentioned by racing staff and trainers as the main retention issues.
  - 27% of trainers said there are skills gaps amongst their existing workforce, exactly the same as in 2018, and compared to 29% in 2016 and 13% of businesses nationally in the wider economy (a figure that has stayed steady over time). The main gaps are around capability to ride and experience, especially amongst work riders, rider/grooms and yard staff.
  - 53% of trainers funded, arranged training or development for their staff in the last 12 months, compared with 57% in 2018, 49% in 2016 and 61% of businesses nationally in the wider economy (this has decreased from an average of 65% in previous national surveys of the wider economy). Lack of need is mentioned by trainers as the main reason for not funding or organising training, even by some trainers that said they have skills gaps.
  - 40% of trainers said that recruitment, skills and retention issues are a problem for their business, same result as in 2018 and compared to 38% in 2016. Recruiting staff with the appropriate skills, and recruiting enough numbers of staff are cited as the main problems.
7. For the first time, trainers were asked about the number of staff they are short to be able to operate at optimum levels i.e. staffing shortages. Two-thirds of trainers that have hard-to-fill vacancies said they are short of staff, which equates to a third of all trainers. On average, of these trainers, they were approximately 10% to 20% short of staff to operate at optimum

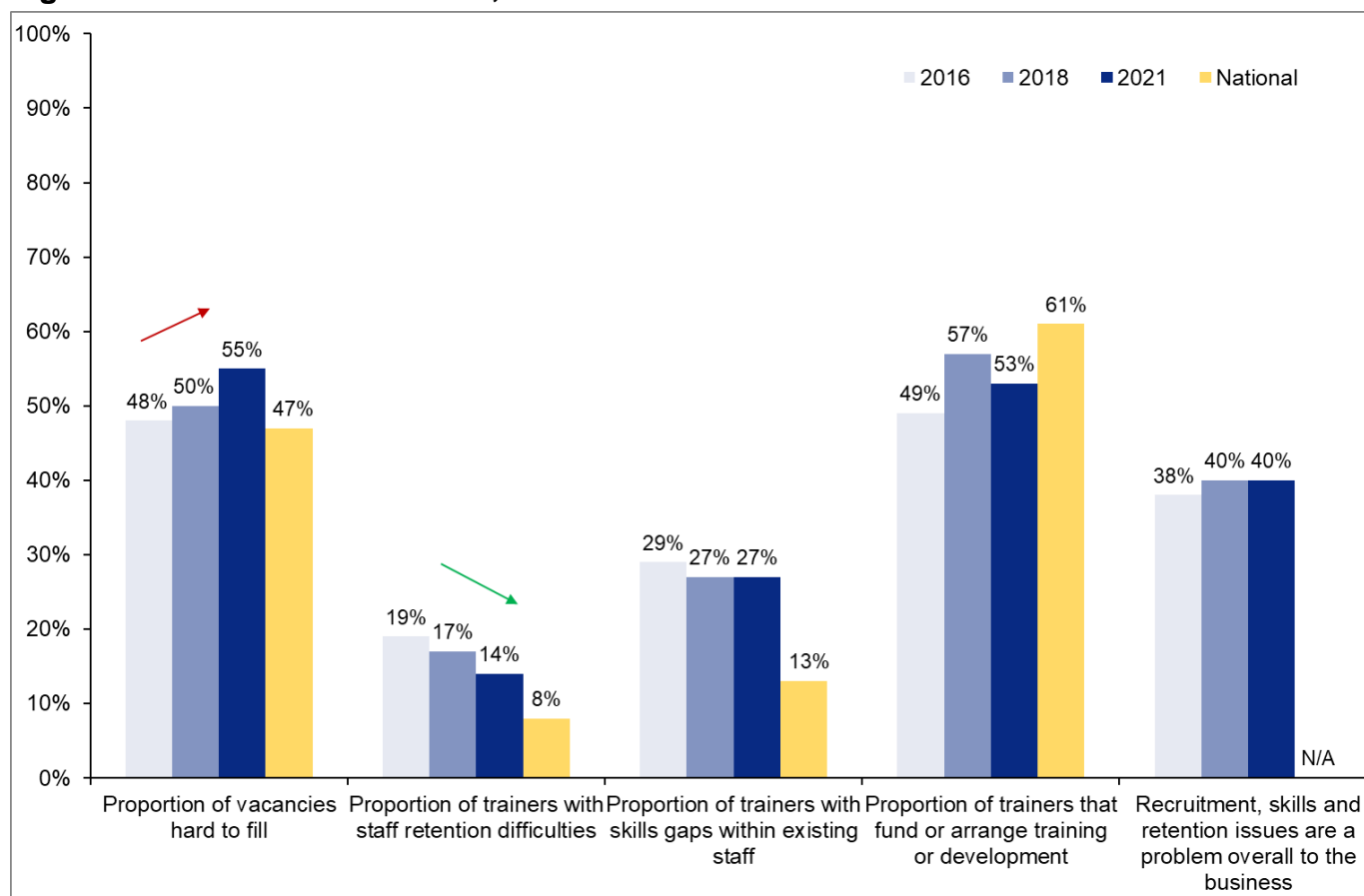
---

<sup>3</sup> Not all of these will be individual roles as it is possible that some roles will be vacant more than once per annum.

levels. This equates to a staffing shortage of between approximately 400 and 500 staff across racing yards.<sup>4</sup>

8. The size of yard matters. Larger yards (10+ staff) are more likely than smaller yards to experience hard-to-fill vacancies, retention difficulties, and skills gaps. Recruitment, skills and retention issues tend to be a greater problem for larger business. Smaller yards are less likely to fund, arrange or support training and development for their staff.

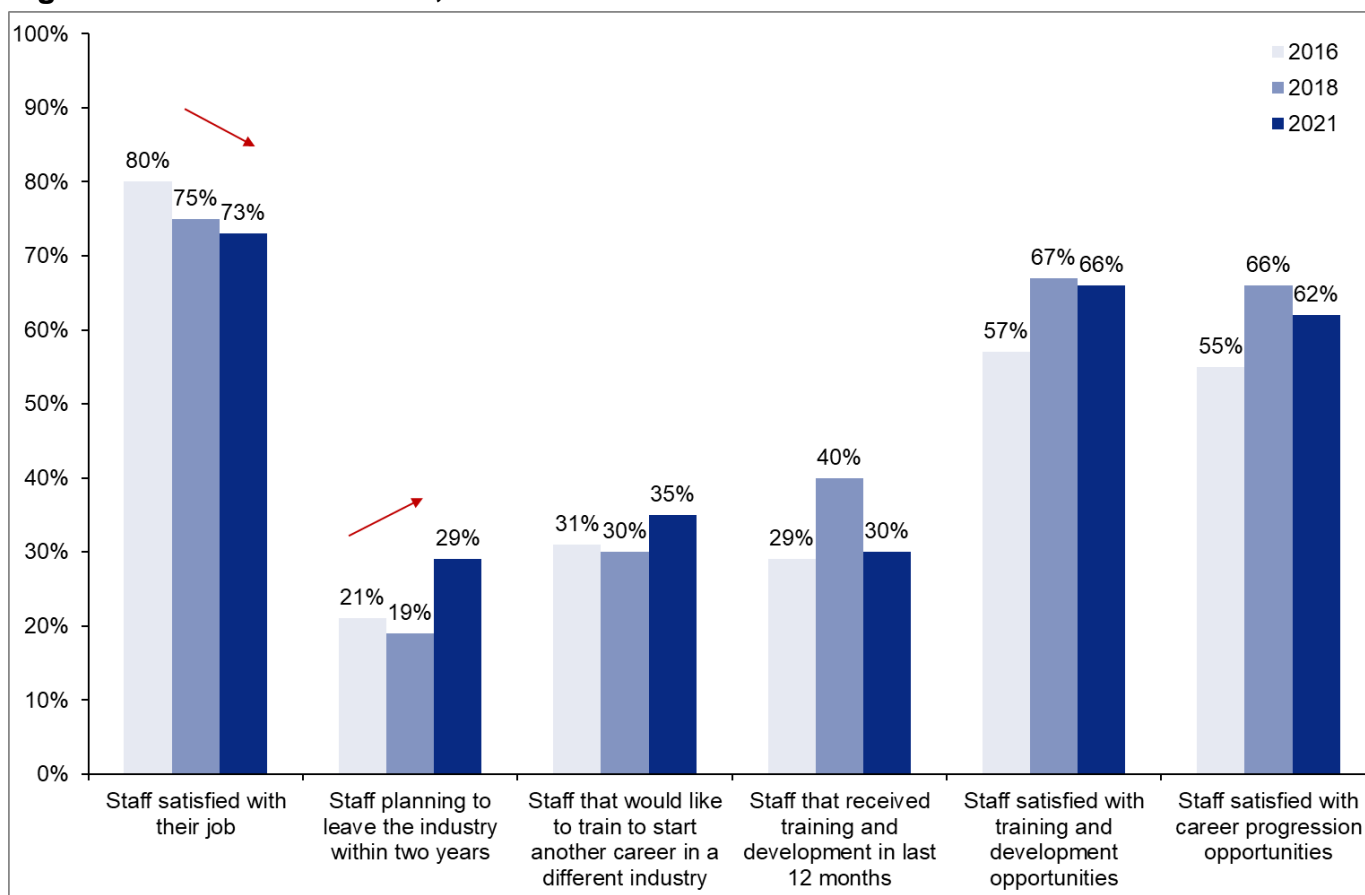
**Figure 1: Trainers – recruitment, skills and retention issues**



<sup>4</sup> Note: Whilst we are confident in the data and calculations behind this figure, it is based on modelling and estimated figures/approximations from respondents to the survey, which are then scaled-up to cover all racing yards.

9. The following graph highlights the extent of recruitment, skills and retention issues from the perspective of staff:
- 73% of staff are satisfied with their job (75% in 2018 and 80% in 2016).
  - 29% are planning to leave the industry within two years (this is up from 19% in 2018 and 21% in 2016). The reasons staff cited for planning to leave the industry and for lack of job satisfaction are similar to those cited in previous years – i.e. mainly working conditions and pay, with some mention of lack of career progression opportunities and perceived poor management.
  - These adverse movements are reflected in the 35% of staff who would now like to train to start another career in a different industry (30% in 2018 and 31% in 2016).
  - 30% of staff received training and development in the last 12 months (down from 40% in 2018, but in line with 29% in 2016).
  - 66% are satisfied with training and development opportunities (67% in 2018 and 57% in 2016).
  - 62% are satisfied with career progression opportunities (66% in 2018 and 55% in 2016).
10. 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 and reflections from the Racing Foundation

11. By way of conclusion, the Racing Foundation highlights the following key points:
- Recruitment, skills and retention issues are negatively impacting the industry. There remain notable difficulties around recruitment in the industry, with hard-to-fill vacancies increasing, including in key roles such as work riders and in larger yards (with 10+ staff). These recruitment challenges are caused by a lack of staff in general but particularly skilled staff. Similarly, whilst trainers report an improved staff retention picture, there is a decrease in job satisfaction amongst racing staff and an increase in the proportion of staff that are considering leaving the industry, often citing working conditions, unsociable hours, low pay and lack of career progression as issues. These issues persist despite significant investment in industry recruitment, skills and retention initiatives. The associated staff shortage has the potential to undermine the industry as the economy recovers from the pandemic and challenges associated with Brexit, while there is a looming threat of the industry losing skilled and experienced staff that would exacerbate staffing problems.
  - There are a number of organisations, services and initiatives that have supported the industry with the staffing challenges faced. However, the persistent nature of the challenges and the fundamental causes behind some of the difficulties suggest that the previous call for a people strategy should have been heeded. The industry must now make changes and act strategically if the levels of investment being made can be justifiably continued and are to have the required impact. The strategy should cover the full staffing life-cycle, from attracting new entrants to the industry, to initial training, on-going support and development. It must also consider issues such as working conditions, hours, pay, career progression, and organisational/industry culture with clear accountabilities in place for delivery of improvements to the figures reported here by the time of the next survey in November 2023.
  - The strategy should be evidenced based and recognise that cultural change is required. The low number of job applications recorded by trainers from individuals with the required attitude, motivation and personality may well be a trend that continues and without modernising employment practices the industry may not be able to address this. The decrease in the number of staff who feel they receive fair and equal treatment, and the fact that 42% of staff feel that bullying and harassment is an issue in racing further supports the potential requirement for regulatory support to drive improvement.

# Racing Industry Recruitment, Skills and Retention Survey 2021

## 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 a survey of racing trainers and racing staff about recruitment, skills and retention in the racing industry.<sup>5</sup> This was the third survey in a series, with the second in 2018, which followed-up on a baseline survey conducted in Autumn 2016 to help measure the impact of the Racing Foundation's initial 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 future industry 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 581 licenced racing trainers. Between the end of October 2021 and mid-December 2021 (an approximately seven-week period) a telephone survey of racing trainers was conducted. In addition, an online version of the survey was e-mailed to non-respondents in late December 2021 and early January 2022 to help maximise the response. In total, 458 trainers responded to the survey, which represents a 79% response rate (the response rate was 79% in 2016 and 78% in 2018). As in previous years, this sample also covers some 80% of all racing staff and 80% of all horses in training.
- 1.4. **Racing staff:** At the time of the research there were approximately 7,961 racing staff, including licenced jockeys, on the BHA's register with valid contact details. Racing staff were sent an e-mail/on-line survey initially at the start of November 2021, followed by a postal survey (this questionnaire was also kindly promoted at the Racing Centre in Newmarket) to non-respondents with an option to complete the survey on-line or via hard-copy, with a return date of the 6<sup>th</sup> December 2021. In total, 1,616 racing staff and jockeys responded to the survey (including over 80% responding on-line/via e-mail - in 2018 over 30% responded this way), with a further 119 unable to respond due to an invalid email or postal address. This represents an adjusted response rate of 21% (the adjusted response rate was 17% in 2018 and 14% in 2016).<sup>6</sup>
- 1.5. With this number of respondents, the surveys provide robust data. The accuracy of the survey result is no worse than +/- 2.1% at a 95% confidence level for the trainer survey, and

---

<sup>5</sup> The research was conducted by independent research and evaluation organisation, Public Perspectives, who has over a decade of experience working with the horse racing industry and conducted the previous versions of this survey.

<sup>6</sup> Although this is a relatively low response rate, it is in line with expectations and exceeds past exercises with racing staff.



+/- 2.2% at a 95% confidence level for staff.<sup>7</sup> This means that we can be 95% confident that the 'real' result for any given question would be within 2.1 percentage points and 2.2 percentage points 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, sub-population 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 both the previous surveys). For the staff survey, a higher proportion of women responded, as in 2016 and 2018. Similarly, there is a slight over-representation of full-time employed staff over part-time staff, which likely reflects the greater investment in the industry of the former, and therefore there was more motivation to respond to the survey. The survey results have been 're-weighted' to bring them 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 by key demographics, and compared against the wider trainer and staff populations:

---

<sup>7</sup> 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 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.

**Figure 1.1 Profile of respondents (prior to re-weighting)**

Profile	Percentage of respondents	Percentage of all trainers/staff
<b>Trainers</b>		
<b>No. of horses in training</b>		
1-9	30%	42%
10-19	25%	23%
20-39	21%	18%
40+	24%	18%
<b>Prize money</b>		
Under £20,000	29%	42%
£20,000-£49,999	16%	14%
£50,000-£99,999	16%	16%
£100,000-£249,999	17%	13%
£250,000 and over	22%	16%
<b>Geography</b>		
South East	21%	19%
South West	19%	20%
East Anglia	16%	13%
Midlands	11%	13%
North	25%	24%
Scotland	4%	4%
Wales	5%	5%
<b>Staff</b>		
<b>Gender</b>		
Female	65%	50%
Male	35%	50%
<b>Age</b>		
16-24	26%	22%
25-34	25%	24%
35-44	18%	18%
45-54	16%	15%
55-64	12%	14%
65+	4%	6%
<b>Employment status</b>		
Employed full-time	66%	53%
Employed part-time	18%	28%
Self-employed	16%	19%

## 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 2021 results with those in 2018 and 2016.

1.11. In addition, where data exists, questions are compared against national data, primarily the UK Employer Skills Survey 2019 (reported in November 2020) – a telephone survey of some 90,000 employers conducted nationally by the Department for Education (this survey has not been repeated since due to the pandemic).

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.

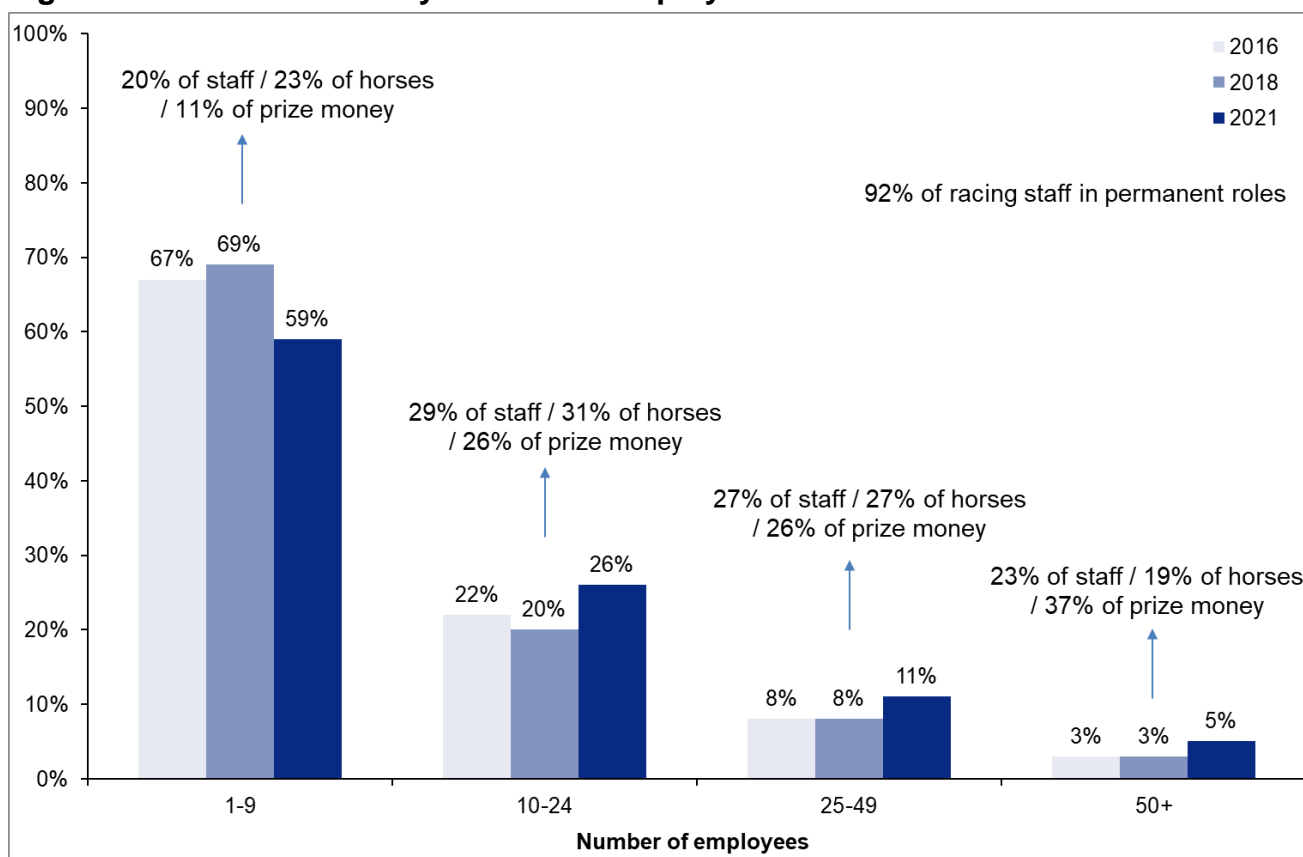
### Labour force statistics

**The structure of the labour force remains similar to the past, albeit with an increase in the proportion of trainers that have 10 or more staff – six-in-ten trainers have 1-9 staff, while just over 15% have 25+ staff but account for half of all racing staff**

2.2. 59% of trainers have 1-9 staff (down from 69% in 2018), accounting for 20% of racing staff, 23% of horses in training and 11% of prize money earned. 26% of trainers (20% in 2018) have 10-24 staff, accounting for 29% of racing staff, 31% of horses and 26% of prize money. The remaining 16% of trainers have 25+ staff, accounting for 50% of racing staff, 46% of horses and 63% of prize money.

2.3. Similar to previous surveys, 92% of racing staff are in permanent roles, with the remainder in temporary, seasonal or casual roles (93% in 2016 and 2018).

**Figure 2.1: Business size by number of employees**



Number of respondents: 458 trainers.

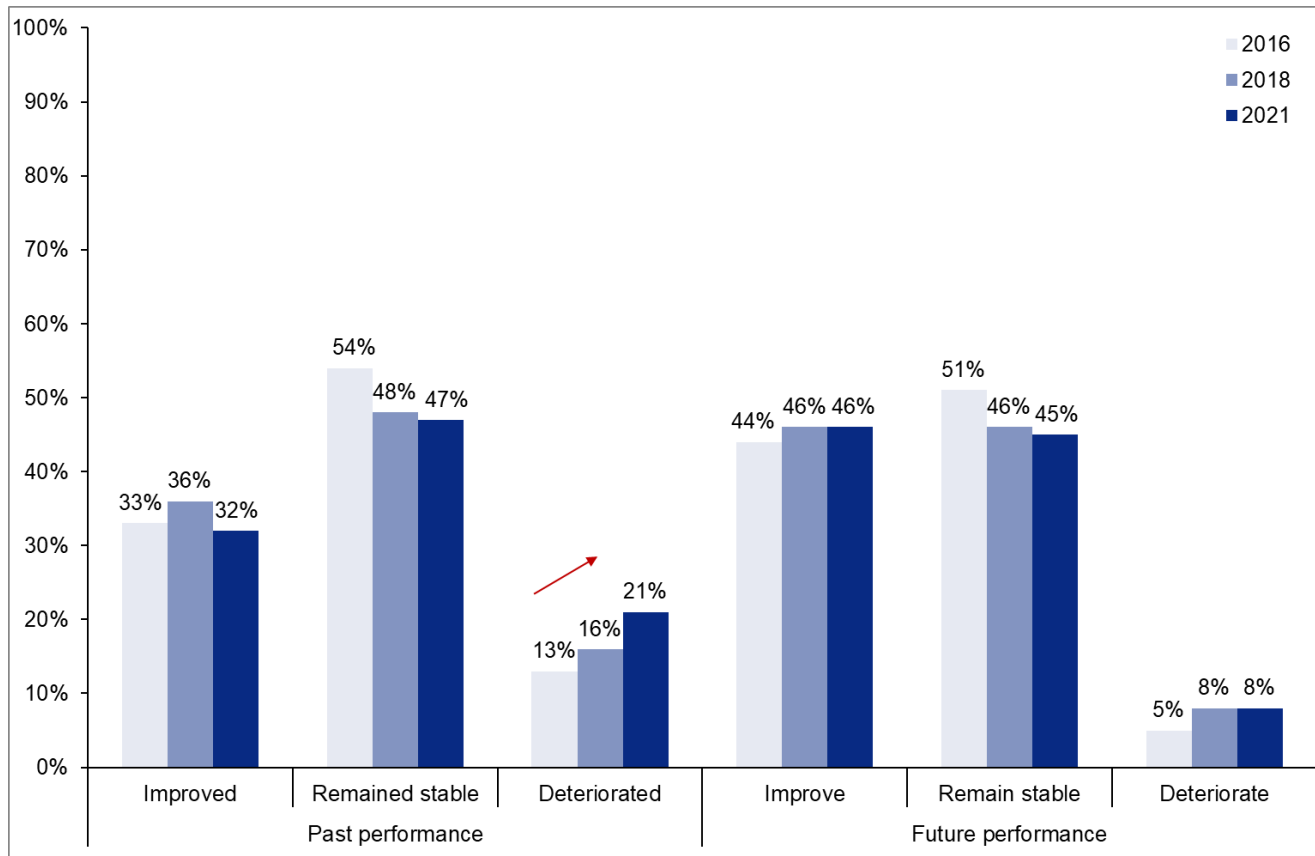
Question asked: Including you and any working proprietors/owners, how many people are employed by your business during your peak season?

## **Business performance**

**A third of trainers reported improved business performance and over two-fifths expect performance to improve in the future, similar to the past, although there has been an increase in the proportion that said performance has deteriorated over the past 12 months**

- 2.4. 32% of trainers said their business performance improved over the past 12 months, 47% said it remained stable and 21% said it deteriorated, which has increased from 13% in 2016. Of the 21% of trainers that said performance deteriorated, 37% expect it will improve, a further 39% expect it will remain stable and 24% expect it will deteriorate further in the next 12 months.
- 2.5. 46% of trainers expect performance will improve over the next 12 months, 45% said it will remain stable and 8% said it will deteriorate, almost identical to 2018.
- 2.6. As in the past, trainers with 1-9 staff are less likely than larger yards to state that business has improved (27%, compared with 39% of larger yards) and more likely to state it has deteriorated (28%, compared with 12% of larger yards). Trainers with 1-9 staff also tend to be slightly less optimistic about the future, with 11% expecting performance to deteriorate, compared with 5% of larger yards.
- 2.7. Trainers were asked how their business performance compared to prior to the pandemic, with 25% stating it had improved, 51% said it had remained stable, and 24% said it had deteriorated. Trainers with 1 to 9 staff were less likely than larger yards to state that performance had improved (21% compared with 30% of larger yards), and more likely to state it had deteriorated (28% compared with 19% of larger yards).
- 2.8. Whilst these figures are worse compared to performance in the last 12 months, they suggest that the pandemic has only had a marginally worse impact on performance compared with other economic conditions and that Government and industry business support initiatives may have mitigated against the worse of the pandemic. Similarly, with business optimism similar to 2018 levels, it suggests that the impact of the pandemic is in the past, from the perspective of racing trainers at least.

**Figure 2.2: Past and future business performance**



Number of respondents: 458 trainers.

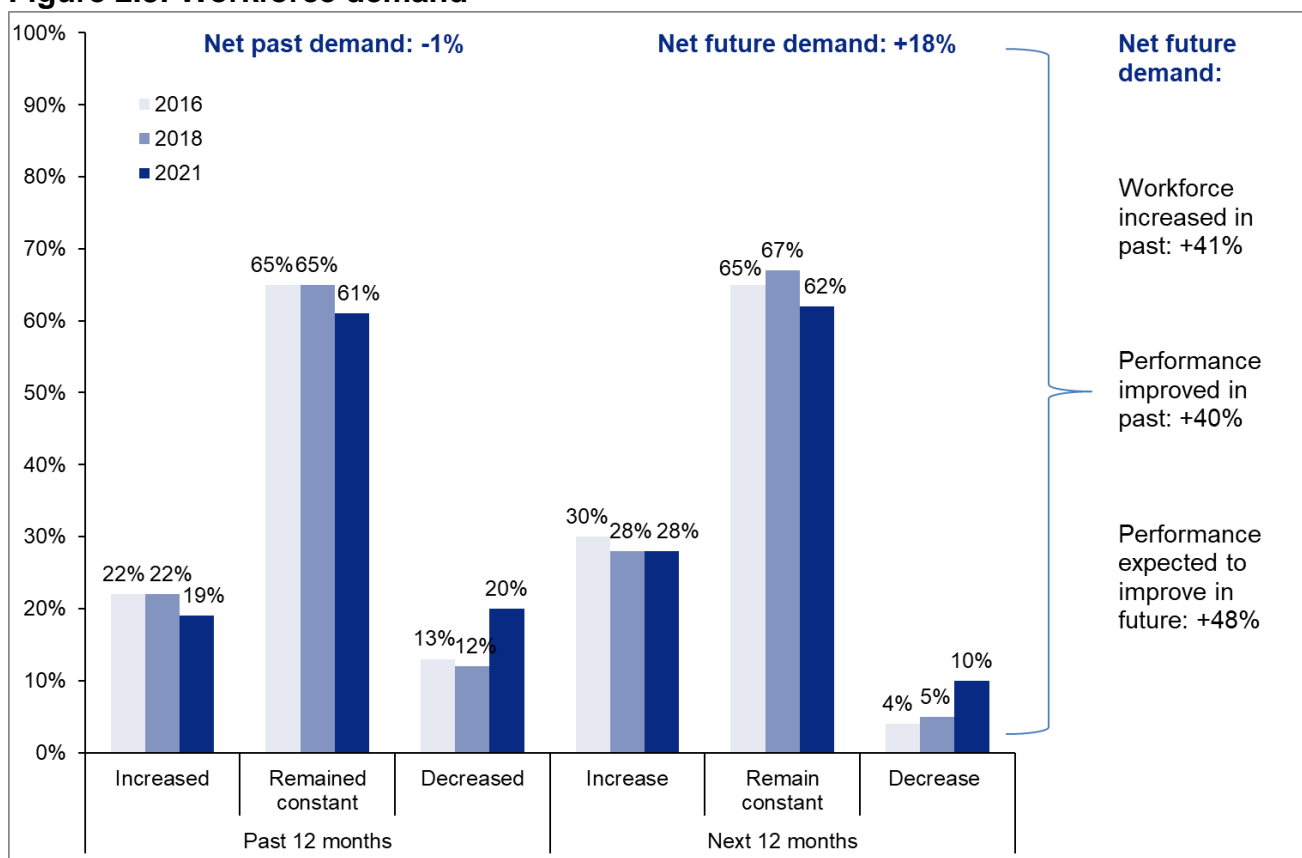
Questions asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? / Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?

## Workforce demand

Whilst two-thirds of trainers said their workforce remained the same in the past, more said it decreased than increased (this has not happened in previous surveys), although workforce demand is positive for the future

- 2.9. 19% of trainers said that their workforce increased over the past 12 months, while 20% reported it decreased. This results in net past workforce demand (i.e. the difference between the increase and decrease in workforce) of -1% (in 2018 it was +10%).
- 2.10. There is understandably a relationship between business performance and workforce demand. Trainers that said their performance had improved over the past 12 months had a higher net past workforce demand of +30%, compared with -15% of other trainers. Net demand is broadly similar across other trainer demographics, although larger yards were more likely to have a minus net past workforce demand.
- 2.11. 28% of trainers expect their workforce to increase in the next 12 months, while 10% expect it to decrease, resulting in a net future demand of +18%.
- 2.12. Net future demand is greatest amongst trainers that increased their workforce in the past 12 months (+41%), trainers that reported improved performance in the past (+40%) and trainers that expect improved performance in the future (+48%), which highlights the close relationship between business growth and continued demand for staffing. Larger businesses are more likely to have a higher future demand for staff – trainers with 1 to 9 staff have a net demand of +13%, compared with a net future workforce demand of +27% for larger yards.
- 2.13. Trainers were asked how their workforce had changed compared to before the pandemic, with 16% stating it had increased, 64% remained constant, and 21% said it had decreased, a net workforce demand of -5% (slightly higher than over the past 12 months). Larger yards appear to have experienced more of a decrease in staff numbers than smaller yards.

Figure 2.3: Workforce demand



Number of respondents: 458 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

### **A quarter of permanent racing staff jobs are vacant annually, which is fairly stable since 2016**

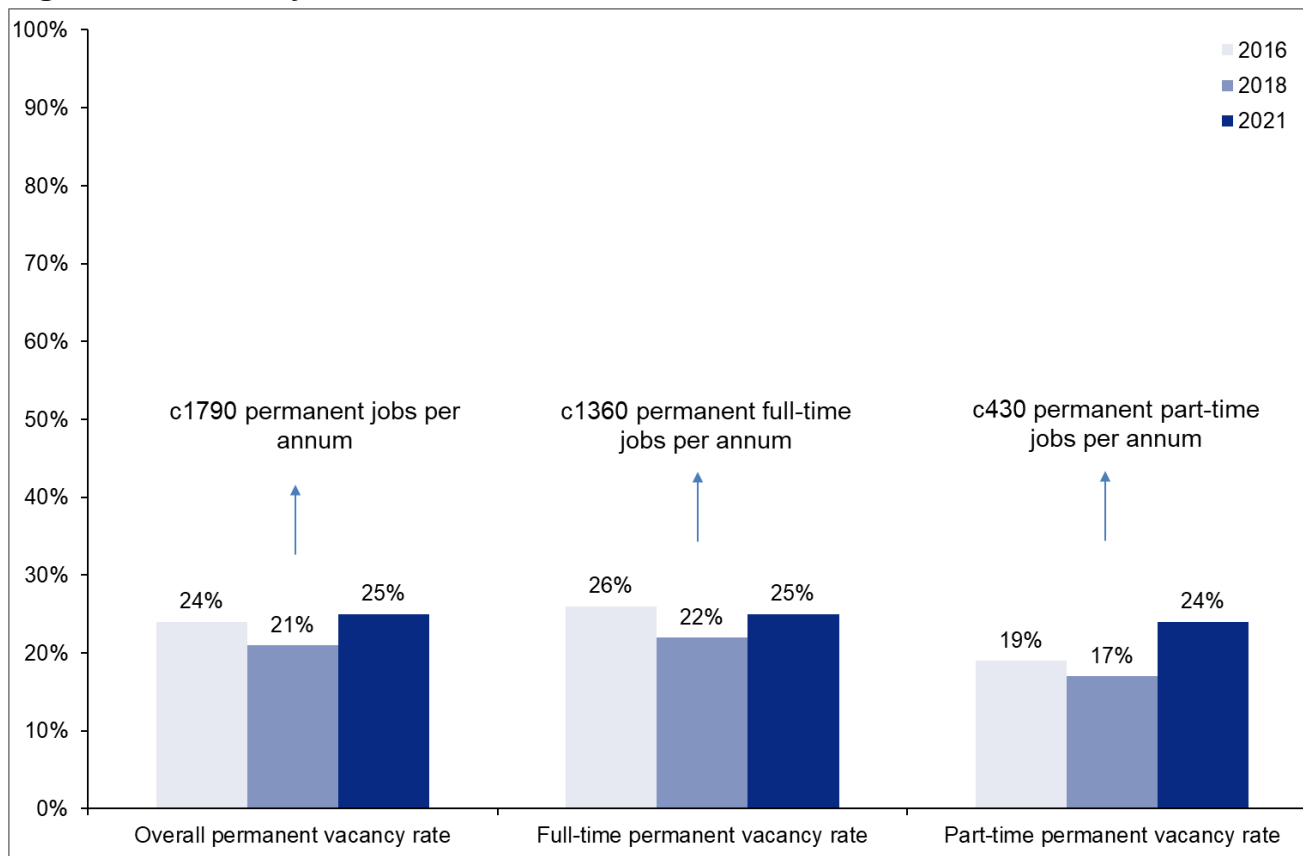
- 3.2. Overall, there is an estimated annual vacancy rate of 25% of all permanent racing staff jobs (21% in 2018 and 24% in 2016) (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs – this is essentially a measure of recruitment demand and is not a measure of 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 up slightly from the 21% in 2018 and similar to the 24% in 2016, although the differences are not statistically significant, so in essence the result is stable.
- 3.3. A vacancy rate of 25% equates to an estimated 1,790 jobs per annum that require recruitment, including some 1,360 that are full-time and 430 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.
- 3.4. The UK Office for National Statistics calculates a vacancy rate quarterly, based on asking businesses how many vacancies they currently have.<sup>8</sup> Prior to the pandemic, this figure fluctuated between 2%-2.6%. However, due to the recruitment pressures in the economy as a result of the pandemic and Brexit, this figure is currently at an all time high of 3.9% (November 2021). Based on an assumption that on average a post takes between two and three months to fill, the likely annual vacancy rate would be between approximately 15% and 35%. Therefore, the racing industry vacancy rate is roughly in the middle of this range.
- 3.5. 95% of businesses with 25 or more staff had vacancies requiring recruitment, 94% of businesses with 10 or more employees had vacancies and 68% of businesses with 1-9 employees had vacancies requiring recruitment at some point in the past year (similar results to previous surveys, although the proportion of small yards with vacancies has increased - in 2018 57% of yards with 1 to 9 staff had vacancies). Overall, 77% of trainers had vacancies that needed recruiting over the past 12 months.

---

<sup>8</sup> 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: 458 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 (in order of being cited): Word of mouth (especially smaller yards), social media, Careersinracing.com (especially larger yards), via the racing schools (especially larger yards), advertising in local press and shops (especially smaller yards), Racing Groom website and yardandgroom.com.

## Hard-to-fill vacancies

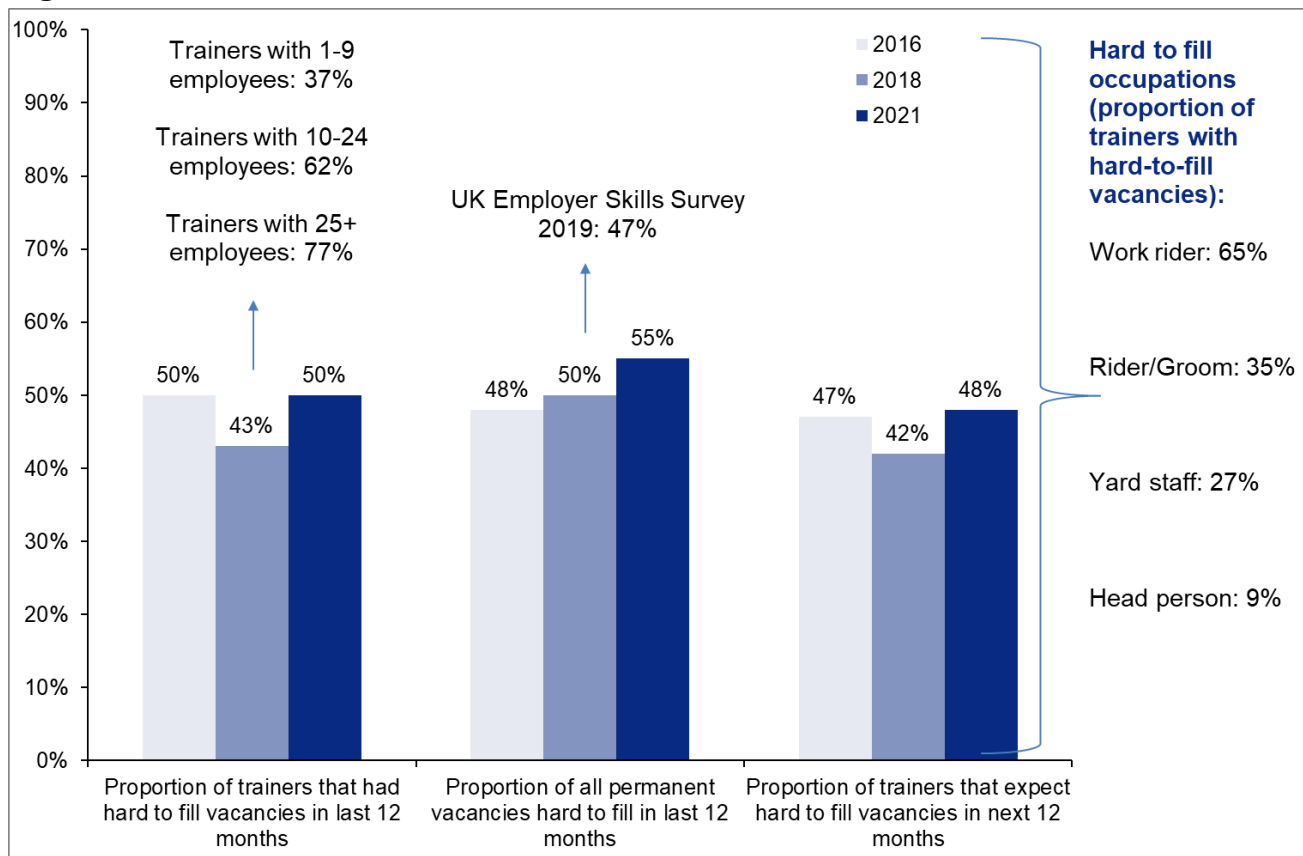
**The proportion of hard-to-fill vacancies has increased slightly over time resulting in an estimated staffing shortfall of up to 500 staff across racing yards, with larger yards most affected and work riders continue to be most difficult to find**

- 3.7. 50% of trainers (which account for some 68% of racing staff - 64% in 2018) said they had hard-to-fill vacancies in the last 12 months, and these trainers estimated on average that 77% of their vacancies are hard-to-fill (75% in 2018 and 78% in 2016). This translates into an estimated 55% of permanent vacancies that are hard-to-fill (50% in 2018 and 48% in 2016).
- 3.8. The national figure, based on the UK Employer Skills Survey 2019, is 47%. This national figure has increased over time from 33% in 2015 and 40% in 2017.
- 3.9. As in previous surveys, larger yards are more likely to say they had hard-to-fill vacancies. For example, 37% of trainers with 1-9 employees said they had hard-to-fill vacancies, compared with 62% 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.
- 3.10. 48% of trainers expect to have hard-to-fill vacancies in the next 12 months, compared with 42% in 2018 and 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 (same figure as in 2018), and 22% that did not have any hard-to-fill vacancies in the past expect to have them in the future (18% in 2018).
- 3.11. The occupations which were most commonly cited as being hard to fill are consistent with previous surveys and continue to be: work riders (cited by 65% of trainers that said they had hard-to-fill vacancies - 64% in 2018 and 47% in 2016), Rider/Groom (35% in 2021, compared with 25% in 2018 and 48% in 2016), yard staff (27% in 2021, compared with 34% in 2018 and 33% in 2016) and head person (9% in 2021, 10% in 2018 and 8% in 2016). These are also generally the expected roles that will be difficult to fill over the next 12 months.
- 3.12. For the first time, trainers were asked about the number of staff they are short to be able to operate at optimum levels i.e. staffing shortages. Two-thirds of trainers that have hard-to-fill vacancies said they are short of staff, which equates to a third of all trainers. On average, of these trainers, they were approximately 10% to 20% short of staff to operate at optimum levels. **This equates to a staffing shortage of between approximately 400 and 500 staff across racing yards.**<sup>9</sup>

---

<sup>9</sup> Note: Whilst the report writers are confident in the data and calculations behind this figure, it is based on modelling and estimated figures/approximations from respondents to the survey, which are then scaled up to cover all racing yards.

**Figure 3.2: Hard-to-fill vacancies**



Number of respondents: 458 trainers.

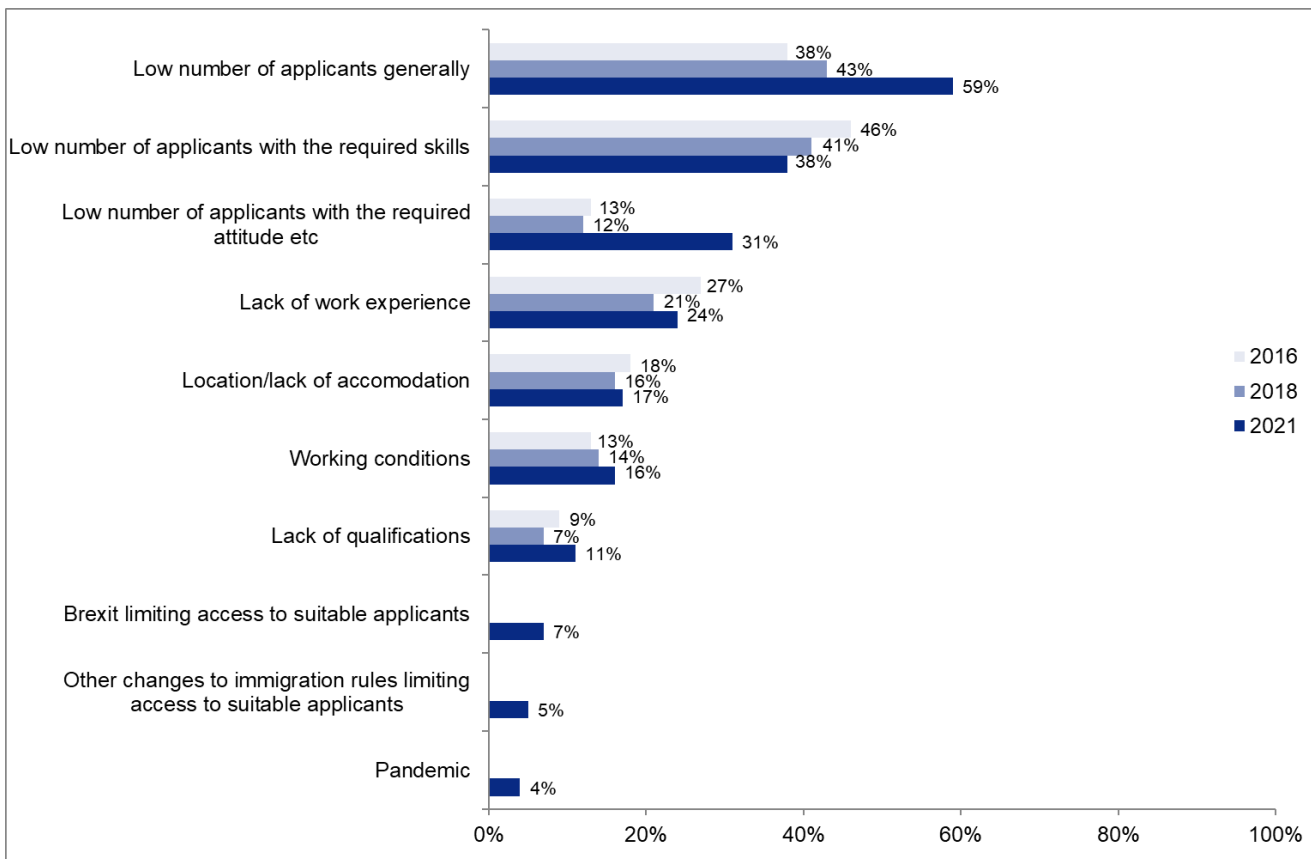
Questions asked: Have you had any vacancies in the last 12 months that you have found hard to fill? / Roughly, what proportion of your vacancies have been hard to fill? / Which specific occupations have you found hard to fill? / Do you expect to have any vacancies that will be hard to fill in the next 12 months? If hard to fill vacancies, how many staff, if at all, would you say you are short to be operating at optimum levels?

## Reasons for hard-to-fill vacancies

The number of applicants generally, and the number with the required skills, continue to be cited as the main reasons for hard-to-fill vacancies

- 3.13. The reasons for hard-to-fill vacancies remain broadly consistent over time, with the low number of applicants (cited by 59% of trainers with hard-to-fill vacancies, up from 43% in 2018) and the low number of applicants with the required skills (38% down from 41% in 2018 and 46% in 2016) the two most cited reasons.
- 3.14. The low number of applicants with the required attitude, motivation or personality has increased notably as a reason, cited by 31% of trainers with hard-to-fill vacancies, compared with 12% in 2018.
- 3.15. In addition, other factors, such as lack of experience (24%), location/lack of accommodation (17%), working conditions such as low pay and long working hours (16%), and lack of qualifications (11%) remain prevalent.
- 3.16. Brexit (7%) and other changes to immigration rules (5%) were cited as small, yet important reasons for hard-to-fill vacancies, as was the pandemic (cited by 4% of businesses with hard-to-fill vacancies).
- 3.17. The reasons cited are broadly consistent across different types of trainers/different demographics.

Figure 3.3: Reasons for hard-to-fill vacancies



Number of respondents: 229 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

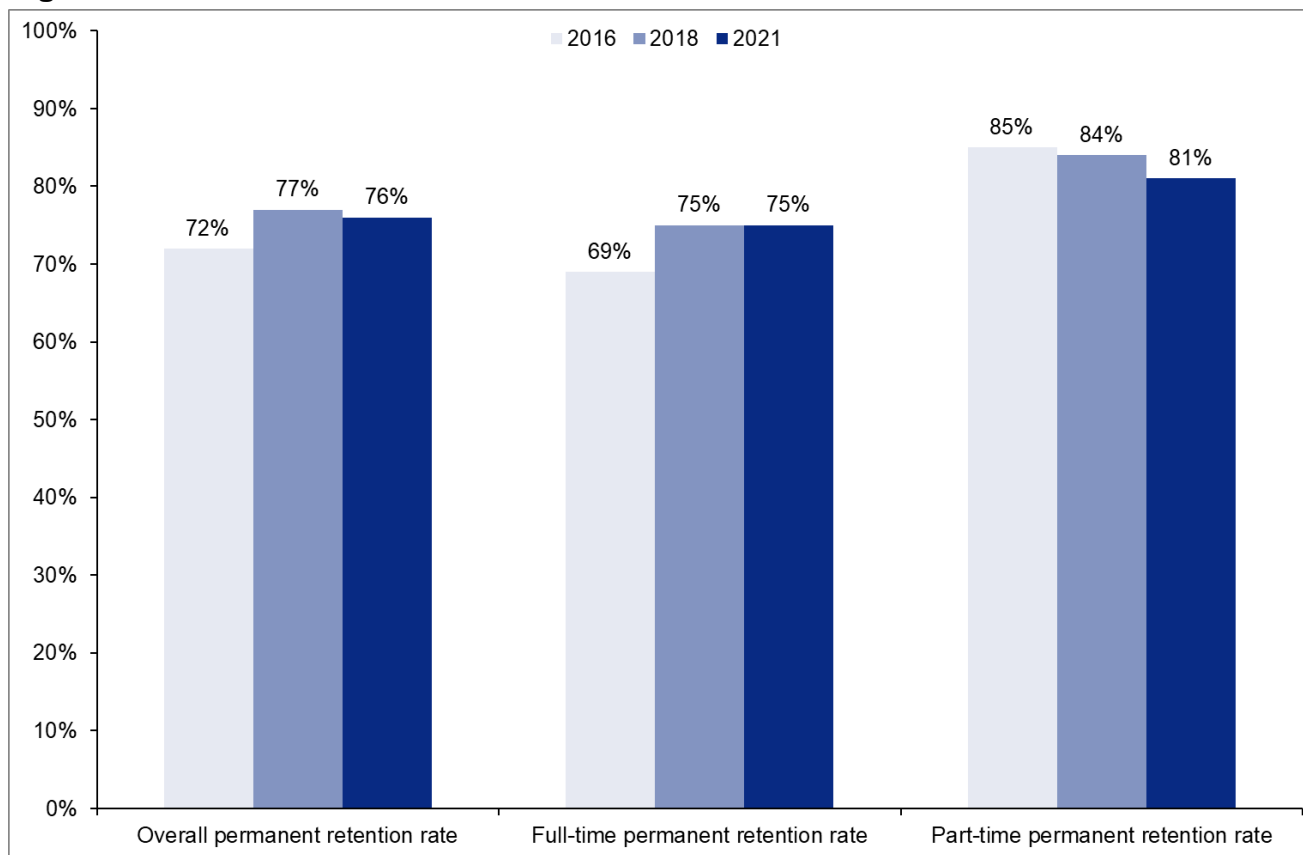
4.1. This section presents findings about staff retention from the perspective of trainers and staff, including information about retention rates, retention difficulties, the types of trainers and occupations most affected, and the reasons for retention difficulties.

### Retention rates

#### Under a quarter of staff leave their job roles per annum, broadly maintaining the slight improvement since 2016

- 4.2. Overall, there is an estimated retention rate of 76% of all permanent racing staff in their job roles per annum. In other words, some 24% 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 (81%). This so-called retention rate is a measure of staff churn.
- 4.3. The retention rate broadly maintains the slight improvement over time, from 72% in 2016 to 77% in 2018 and 76% in 2021 (this is statistically significant).
- 4.4. Smaller yards experience greater retention problems, with retention rates in yards of 1 to 9 staff of 67%, compared to 74% in yards of 10 to 24 staff, 76% in yards of 25 to 49 staff and 80% in yards of 50+ staff. This suggests that larger yards may have better policies, systems and cultures in place to support staff retention, as well as offer more job progression.

Figure 4.1: Retention rates



Number of respondents: 458 trainers.

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

## Retention difficulties

**The retention picture is broadly improving with less trainers experiencing retention difficulties, which in turn are affecting less roles, although difficulties still exist in key roles such as work riders**

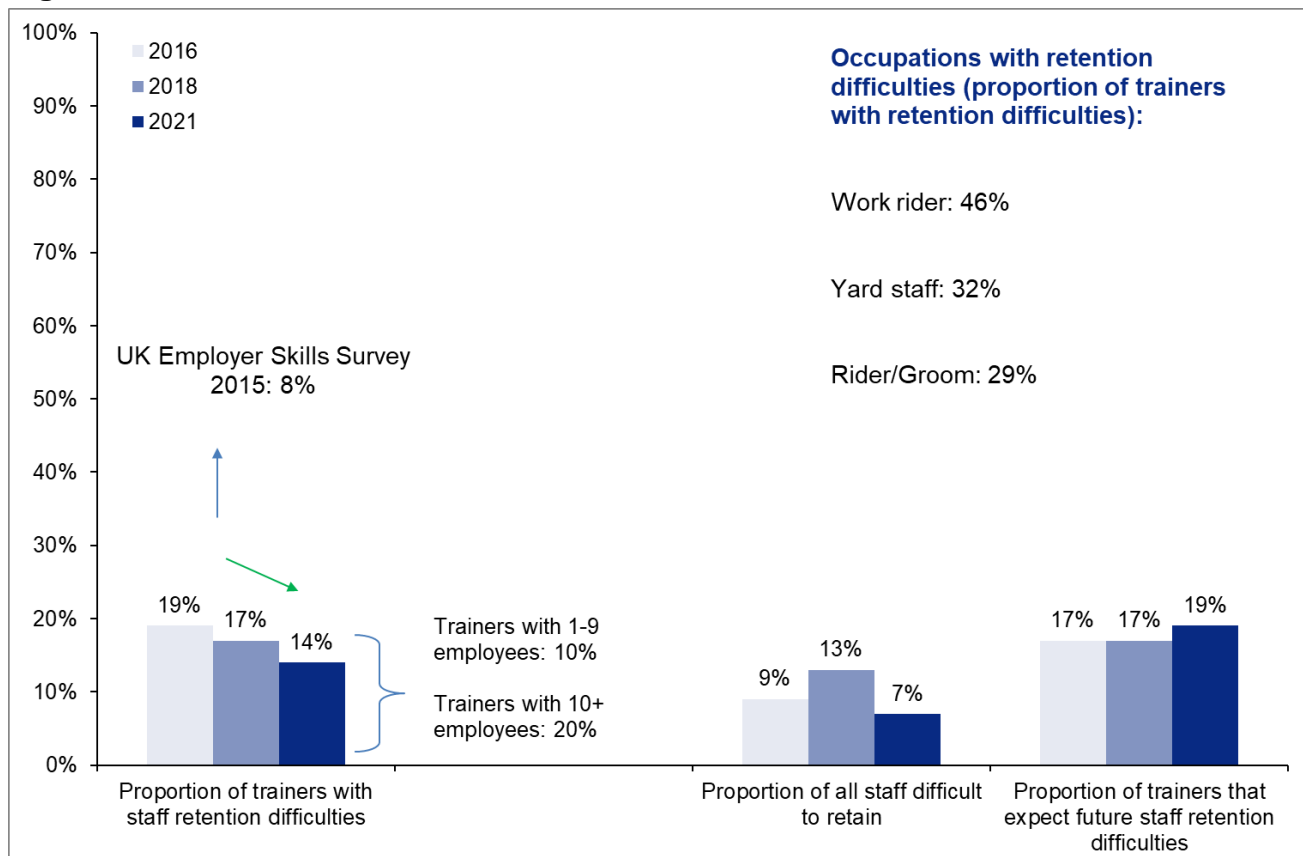
- 4.5. 14% of trainers (which account for some 19% of racing staff (21% in 2018)) said they had difficulties retaining staff in the last 12 months. This represents a steady improvement over time, with results of 17% in 2018 and 19% in 2016. The national figure, based on the UK Employer Skills Survey, is 8%.<sup>10</sup>
- 4.6. 11% of trainers face a double problem of hard-to-fill vacancies and retention difficulties (14% in 2018 and 17% in 2016).
- 4.7. Trainers with retention difficulties estimated, on average, that about 37% of their staff are difficult to retain (compared with 45% in 2018 and 41% in 2016). This translates into an estimated 7% of all staff that are difficult to retain, compared with 13% in 2018 and 9% in 2016.<sup>11</sup>
- 4.8. As in previous surveys, larger yards are more likely to say they have retention difficulties, which is essentially a product of having more staff and therefore more staff likely to change roles or move organisations. For example, 10% of trainers with 1-9 employees said they had retention difficulties, compared with 20% with 10+ employees. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 4.9. 19% of trainers expect to have retention difficulties in the next 12 months, compared with 17% in 2018 and 2016. Similar to previous surveys, 67% of trainers that had retention difficulties in the past also expect to have difficulties in the future, and 11% 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 continue to be work riders (cited by 46% of trainers with retention difficulties in 2021, down from 59% in 2018 and 40% in 2016), yard staff (32% in 2021 down from 43% in 2018 and 51% in 2016), and Rider/Groom (29% in 2021, down from 39% in 2018 and 54% in 2016). These are also the similar roles that trainers expect to have retention difficulties with in the future.

---

<sup>10</sup> This is the figure for 2015. This question was not asked in the most recent surveys in 2017 and 2019.

<sup>11</sup> This figure 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: 458 trainers.

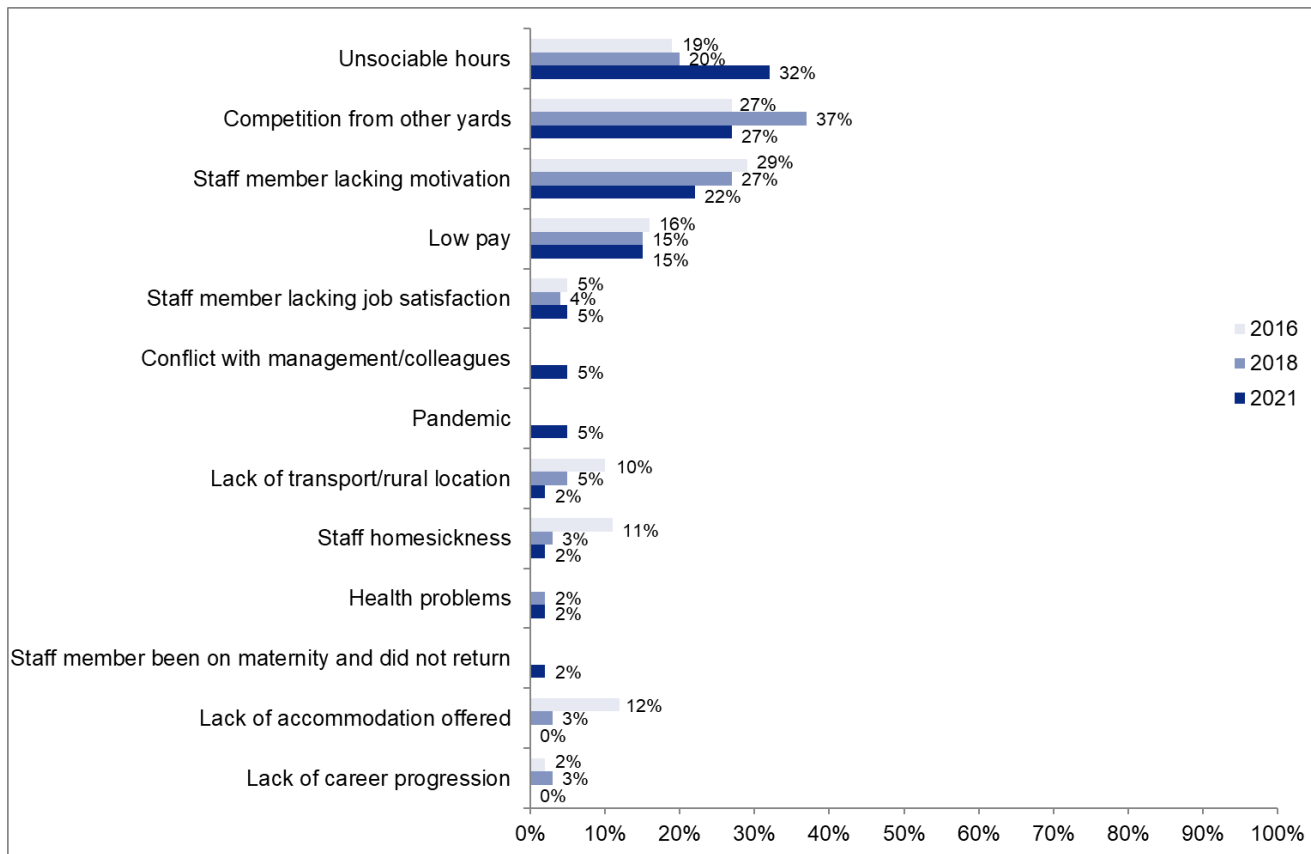
Questions asked: In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal, such as retirement or leaving a temporary role) / Roughly, what proportion of your staff have been difficult to retain? / Which specific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

### Working conditions (hours and pay), competition from other yards and staff lacking motivation/commitment to the job continued to be the most cited reasons for retention difficulties

- 4.11. Unsociable hours (cited by 32% of trainers with retention difficulties), competition from other yards (27%), staff member lacking motivation/commitment to the job (22%) and low pay (15%) remain the main reasons for retention difficulties.<sup>12</sup>
- 4.12. 5% stated the pandemic and 2% mentioned staff not returning from maternity leave.
- 4.13. There was not any mention of Brexit, other immigration challenges or lack of suitable childcare provision as issues leading to retention difficulties.

**Figure 4.3: Reasons for retention difficulties**



Number of respondents: 64 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?

<sup>12</sup> Although the percentages vary, the broad order of reasons for retention difficulties remains similar between 2016, 2018 and 2021. The percentage differences are minimal, once sampling accuracy is taken into account due to the low number of respondents to this question.



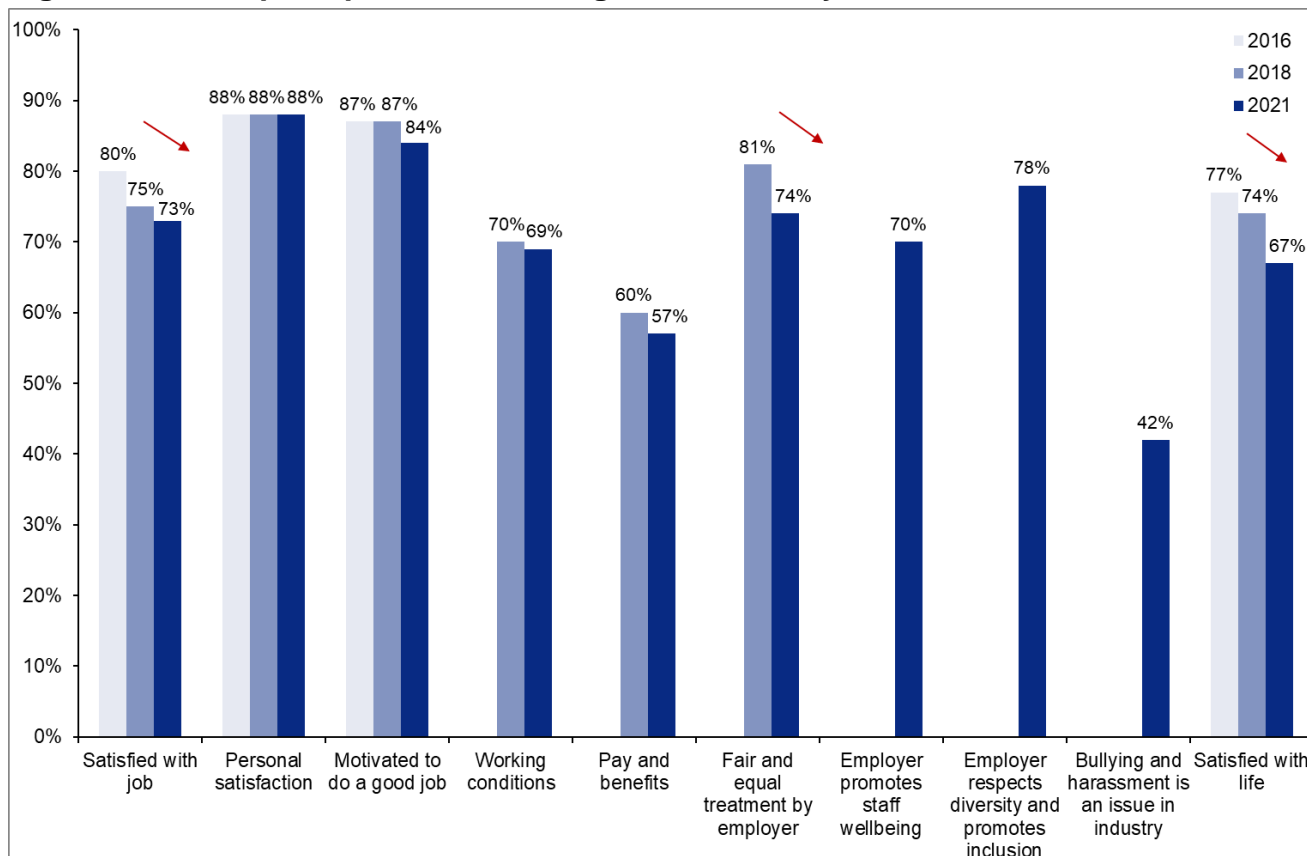
## Staff and retention

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

4.14. Staff said the following about job satisfaction:

- **Job satisfaction:** 73% of racing staff are satisfied (compared with 75% in 2018 and 80% in 2016, which represents a statistically significant, albeit small decrease since 2016). As in the past, the main reasons staff cited for being satisfied were a love of, or passion for, riding and working with horses, as well as the camaraderie of working in some yards. The same reasons behind lack of job satisfaction persist since 2016 – mainly long hours and low pay (exacerbated by the cost of living), the physical demands of the job that get harder with age, 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 2018 and 2016). As in previous surveys, staff that are not satisfied with their job are less likely to get personal satisfaction from their work (65% personal satisfaction).
- **Motivation:** 84% of racing staff are motivated to do a good job (87% in 2016 and 2018). Staff that are not satisfied with their job are less likely to be motivated (55% motivated).
- **Working conditions:** 69% of racing staff are satisfied with their working conditions (70% in 2018). Staff that are not satisfied with their job are less likely to be satisfied with working conditions (32% are satisfied with working conditions). In addition, 64% of staff agreed that working a maximum 40 hour working week would improve their experience of working in racing (67% in 2018). 19% disagreed (16% in 2018), with the remainder neutral.
- **Pay and benefits:** 57% of racing staff are satisfied with their pay and benefits (60% in 2018). Staff that are not satisfied with their job are less likely to be satisfied with pay (24% are satisfied with pay).
- **Fair and equal treatment:** 74% of racing staff said they receive fair and equal treatment from their employer (81% in 2018, which represents a statistically significant decrease). Staff that are not satisfied with their job are less likely to agree they receive fair and equal treatment (43% agree they receive fair and equal treatment).
- **Promoting staff wellbeing:** 70% of staff said their employer promotes wellbeing. Staff that are not satisfied with their job are less likely to say their employer promotes wellbeing (36% agree their employer promotes staff wellbeing).
- **Respecting diversity and promoting inclusion:** 78% of staff agree their employer respects diversity and promotes inclusion. Staff that are not satisfied with their job are less likely to say their employer respects diversity and promotes inclusion (51% agree their employer respects diversity and promotes inclusion).
- **Bullying and harassment:** 42% of staff said that bullying and harassment is an issue in the industry. Staff that are not satisfied with their job are more likely to say bullying and harassment are issues (53% said bullying and harassment are an issue in the industry).
- **Life satisfaction:** 67% of racing staff are satisfied with their lives (74% in 2018 and 77% in 2016, representing a statistically significant decrease). Staff that are unsatisfied with their job are less likely to be satisfied with life (32% satisfied with life).

**Figure 4.4: Staff perceptions of working in the industry**



Number of respondents: On average across all statements – 1599.

Questions asked: Overall, how satisfied are you with your job? / Do you agree or disagree with the following statements about your job in racing? / 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?

**Just under a third of staff plan to leave the industry within two years, which has increased since 2018 and is closely linked to job satisfaction, length of working in the industry, working conditions, pay and to a lesser extent lack of opportunities for career progression and perceived poor management**

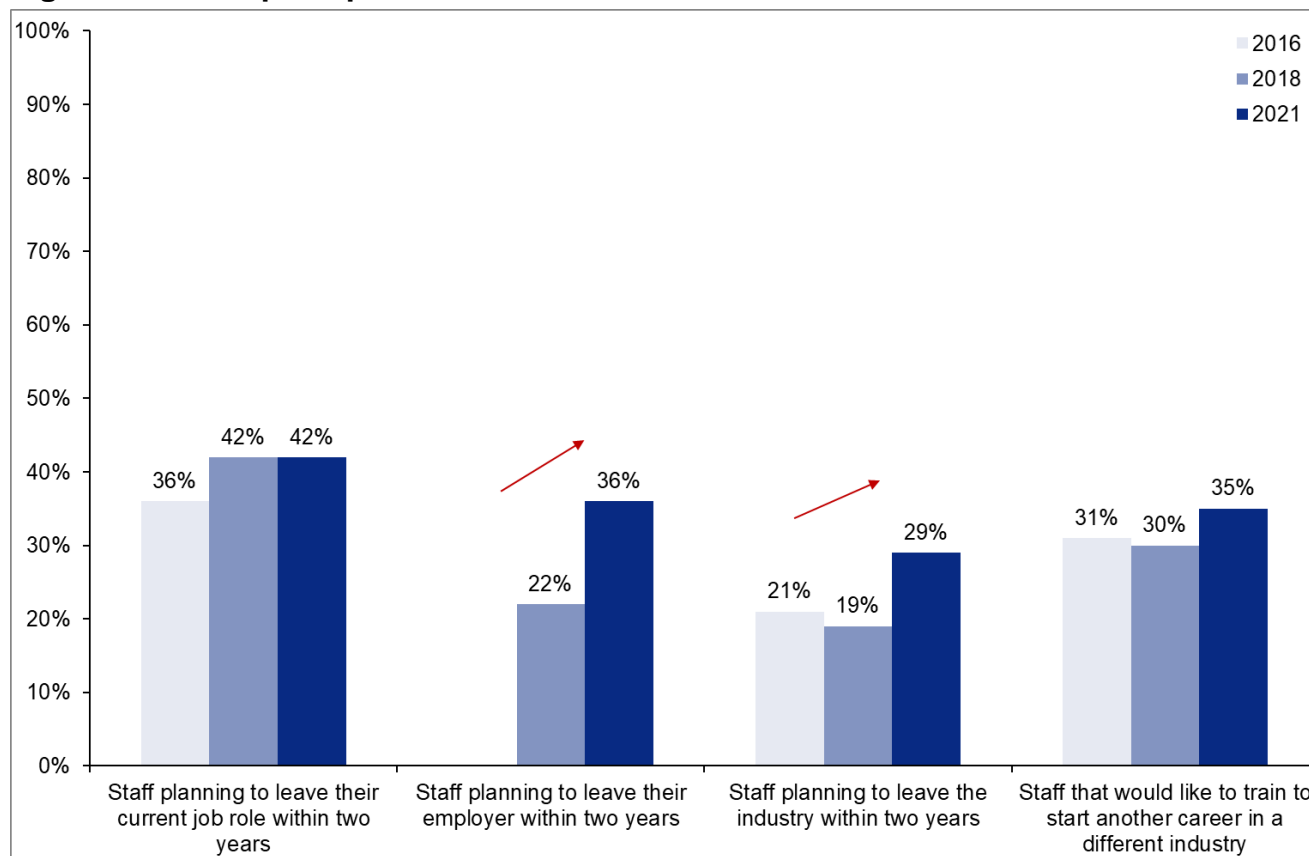
4.15. Staff said the following about retention:

- **Plan to leave current job within two years:** 42% of staff plan to leave their current job within two years (also 42% in 2018 and 36% in 2016). Two-thirds of these (65%) intend to leave the industry all together within two years. As in previous surveys, staff that have been working in the industry for 10 years or more (35%) are less likely than other staff to say they plan to leave their current job (50%).
- **Plan to leave employer within two years:** 36% of staff plan to leave their current employer within two years (22% in 2018, a statistically significant increase). 70% of these plan to leave the industry all together within two years. Staff that have been working in the industry for 10 years or more (31%) are less likely than other staff to say they plan to leave their current employer (42%).
- **Plan to leave industry within two years:** 29% of staff plan to leave the industry within two years (up from 19% in 2018 and 21% in 2016, a statistically significant increase). Staff that are unsatisfied with their job (55% plan to leave industry) are more likely than satisfied staff (19% plan to leave industry) to plan to leave the industry within two years. Staff that have been in the industry for 3 to 10 years are more likely (31%) than new staff (21%) to plan to leave the industry within two years. The reasons staff cited for planning to leave the industry are similar to those cited since 2016 and for lack of job satisfaction – i.e. mainly working conditions and low pay, which means it can be difficult

to find affordable housing and pay household bills, especially with the current cost of living. There was also some mention of lack of career progression opportunities and perceived poor management.<sup>13</sup> In addition, a small number of staff cited illness/injury, which has worsened with age making it difficult to do a physical job. There was also some mention of the demanding nature of the job (long and unsociable hours) 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:** 35% of staff would like to start a career in a different industry (30% in 2018 and 31% in 2016). This is more common amongst staff that have worked in the industry for three years or more (38% compared with 25% of newer staff) and staff unsatisfied with their job (56% would like to join another industry).

**Figure 4.5: Staff perceptions and retention**



Number of respondents: On average across all statements – 1597.

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? Thinking about training, development and career issues, do you agree or disagree with the following statements?

<sup>13</sup> 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**

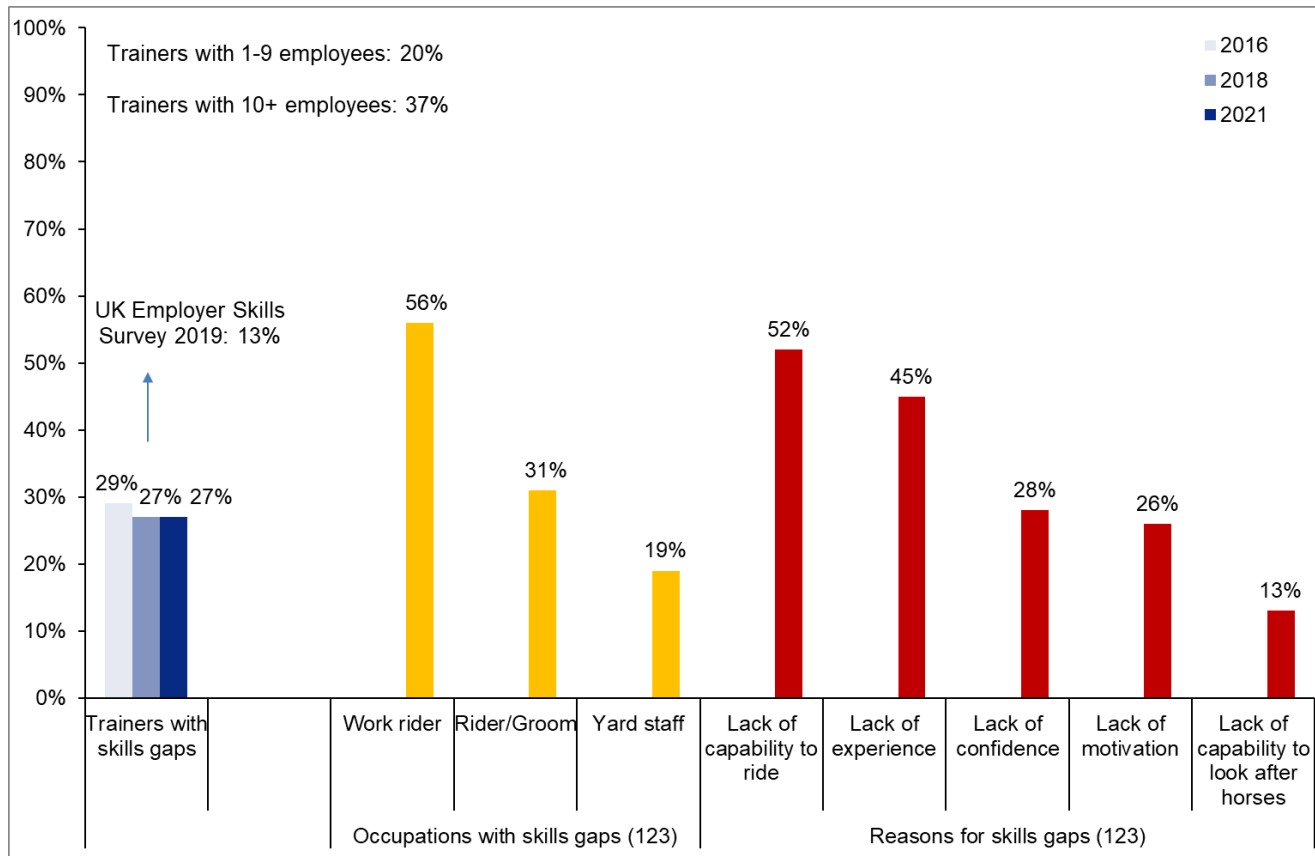
5.1. This section presents findings about skills gaps, training and support from the perspective of trainers and staff.

### **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 (also 27% in 2018 and 29% in 2016). This compares to a national figure of 13%, which has remained consistent since 2015 (14% in 2015 and 13% in 2017).
- 5.3. 11% of trainers have a combination of skills gaps, hard-to-fill vacancies and retention difficulties (also 9% in 2018 and 2016).
- 5.4. Larger yards with 10 or more staff (37%) are more likely than smaller yards (20%) to state they have skills gaps, as was also the case in previous surveys. 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 56% of trainers with skills gaps in 2021, compared with 76% in 2018 and 49% in 2016), rider/groom (31% in 2021, 24% in 2018 and 40% in 2016) and yard staff (19% in 2021 and 2018 and 26% in 2016).
- 5.6. The main reasons for skills gaps are a lack of capability to ride (cited by 52% in 2021, 71% in 2018 and 49% of trainers with skills gaps in 2016) and lack of experience (45% in 2021, 36% in 2018 and 42% in 2016). Other skills gaps cited include lack of confidence (28%), lack of motivation (26%), and lack of capability to look after horses (13%).

**Figure 5.1: Skills gaps**



Number of respondents: 458 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?

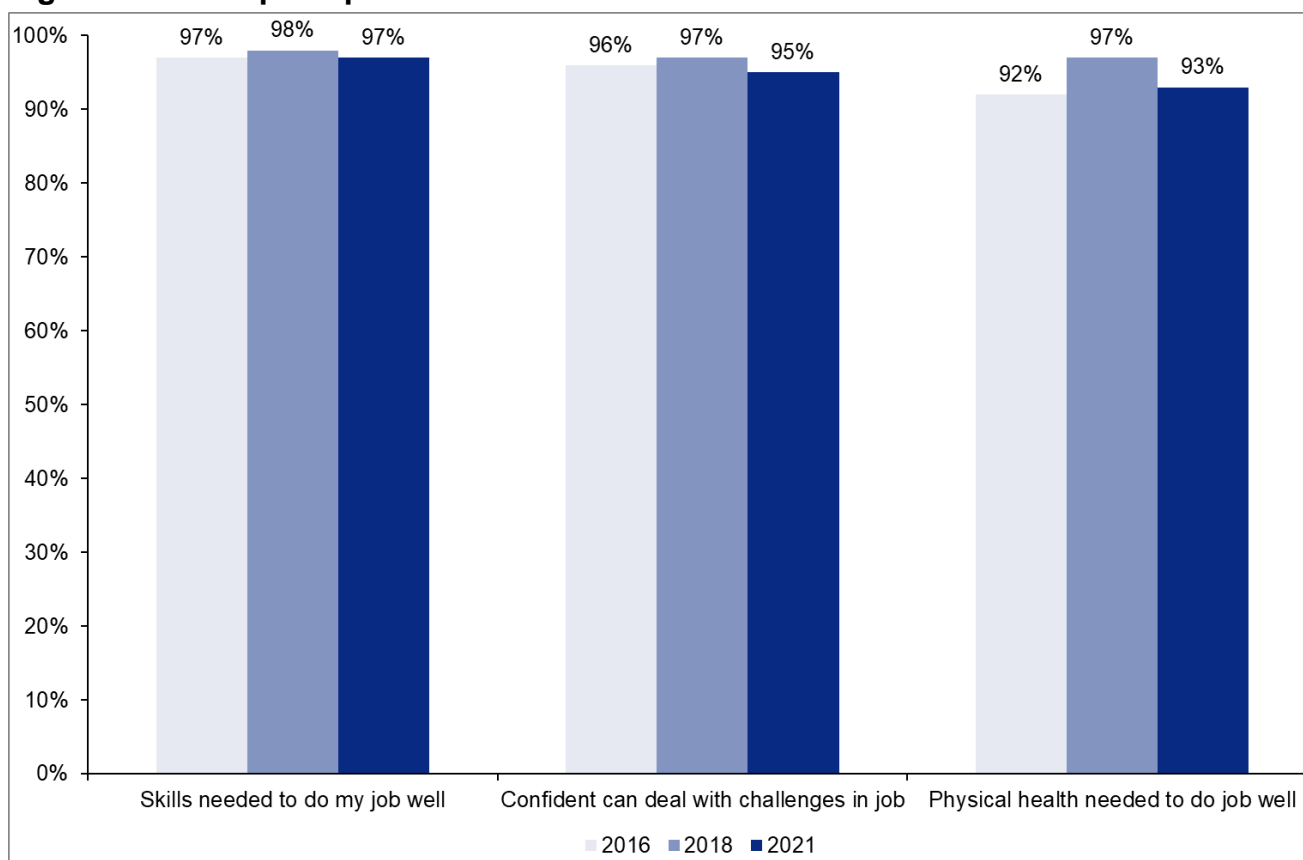
## Staff and skills

### Most staff said they have the skills, confidence and physical health to do their jobs well, consistent with the previous surveys

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

- 97% said they have the skills they need to do their job well (98% in 2018 and 97% in 2016).
- 95% said they are confident they can deal with challenges in their job (97% in 2018 and 96% in 2016).
- 93% said they have the physical health they need to do their job well (97% in 2018 and 92% in 2016).

**Figure 5.2: Staff perceptions about skills**



Number of respondents: On average across all statements – 1594.

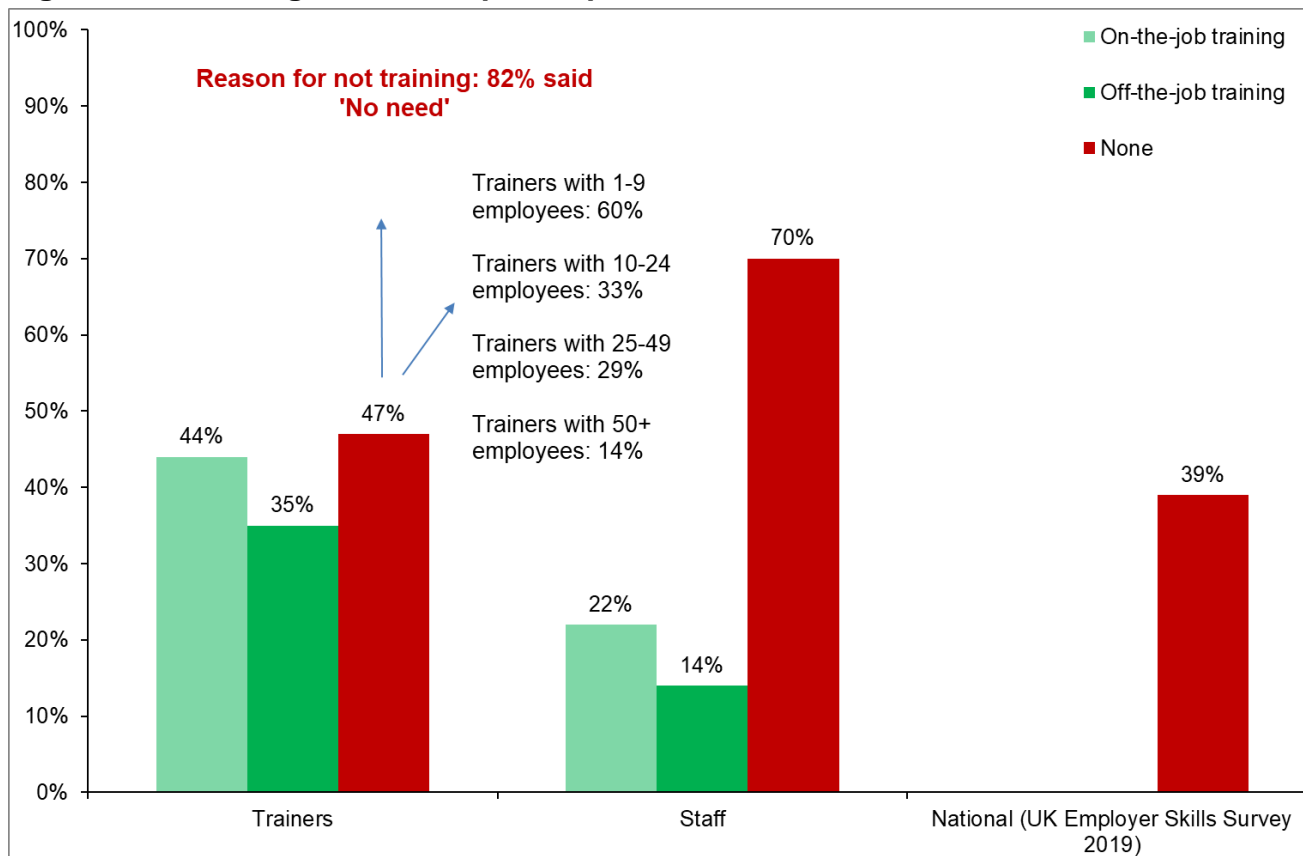
Question asked: Do you agree or disagree with the following statements about your job in racing?

## Training and development prevalence

### **Just under half of trainers and over two-thirds of staff do not engage in training and development activities, with prevalence less in smaller yards, and levels have returned close to those in 2016**

- 5.8. 47% of trainers have not funded or arranged any training in the past 12 months (43% in 2018 and 51% in 2016) and 70% of staff have not taken part in any training or development in the past 12 months (60% in 2018 and 71% in 2016 – a statistically significant decrease from 2018, but in line with 2016 results) (this is consistent across different demographic groups, although, as in 2018, part-time staff are less likely to receive training – 75% did not receive training compared with 66% of full-time staff). These results compare with 39% of businesses nationally that did not fund or arrange training (based on the UK Employer Skills Survey 2019, which has worsened from 34% in 2017).
- 5.9. 36% of trainers that said they have skills gaps do not provide training (27% in 2018 and 33% in 2016).
- 5.10. As in previous surveys, smaller yards are less likely to train their staff, with 60% of trainers with 1-9 staff not providing training or development in the past 12 months, compared with 33% of trainers with 10-24 staff, 29% with 25-49 staff and 14% with 50+ staff. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 5.11. In addition, as in previous surveys, trainers that report improved business performance are more likely to train their staff - 64% train their staff compared with 53% of other trainers.
- 5.12. As in previous surveys, the main reason cited by employers that do not provide training is that there is 'no need' – cited by 82% of trainers that did not provide training or development in the past 12 months (cited by 88% in 2018). In addition, 7% cited a lack of time, 5% the pandemic restricting opportunities, 2% a lack of funds and 1% cited a lack of appropriate training and courses locally.
- 5.13. The main reasons staff cited for not taking part in training are similar to the past - a lack of support or encouragement from their employers and a lack of time (including not being able to attend external training during working hours). In addition, some said they have a lack of interest or need. In the past a lack of awareness of training opportunities was also commonly cited, but this was cited less commonly in 2021.
- 5.14. 41% of trainers said they do not expect to fund or arrange training or development in the next 12 months (44% in 2018 and 47% in 2016). 70% of employers that did not provide training in the past 12 months said this (84% in 2018 and 83% in 2016). This means that overall 32% of trainers have not provided training/development in the past 12 months or will not provide training in the next 12 months (37% in 2018). The reasons for not providing training in the next 12 months are almost identical to the reasons for not having provided it in the past, with 88% citing 'no need' and 7% a lack of time.
- 5.15. Staff were asked about the type of training and development they would like in the future. Similar to the past, 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 a HGV licence. Just over a tenth said they wanted jockey or rider 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. Lastly, new for 2021, about a tenth mentioned training around more human orientated aspects, such as mental wellbeing/first aider training, being mentored themselves or training to become a mentor of staff, or training around managing staff effectively.

**Figure 5.3: Training and development prevalence**



Number of respondents: 458 trainers / 1616 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?

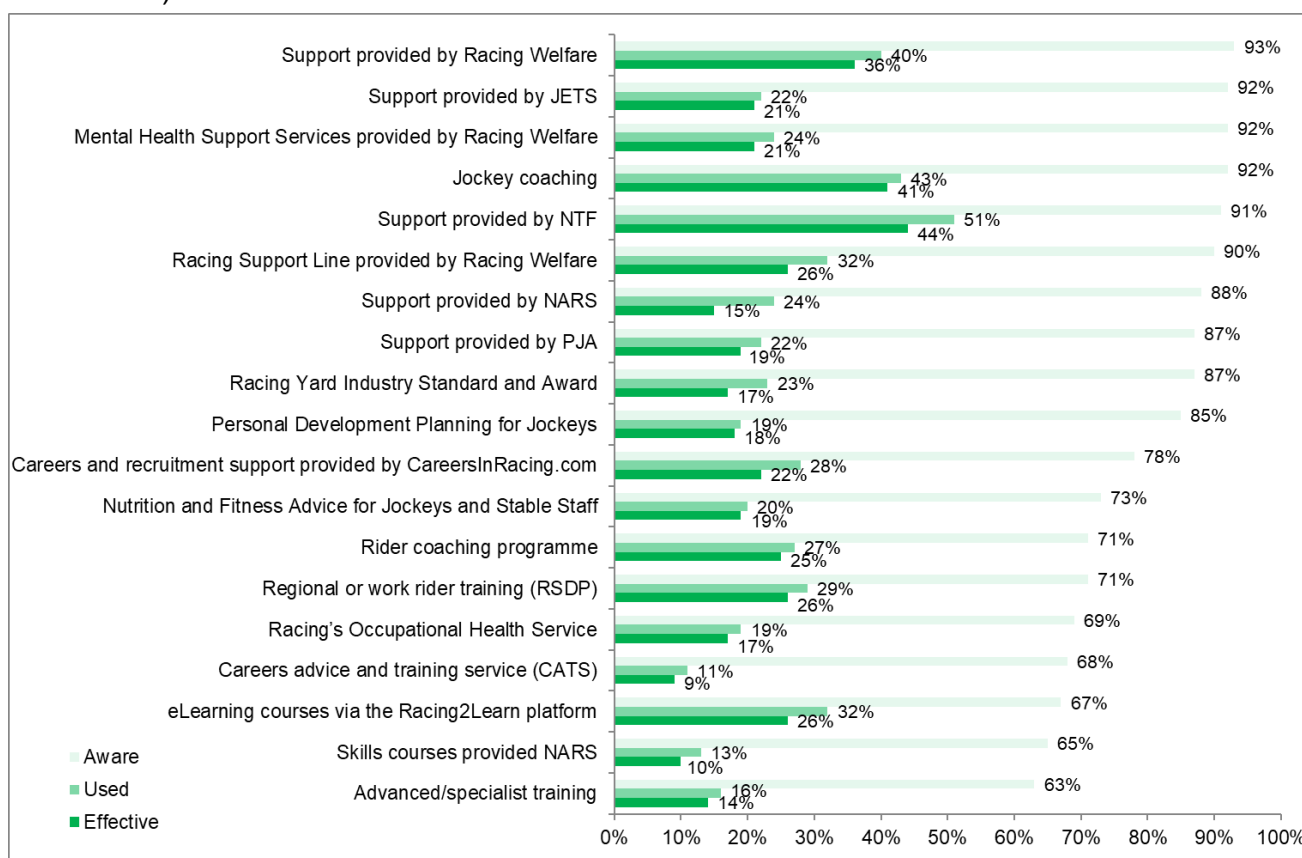


## Awareness and use of training and support initiatives

### Most trainers remain aware of the training and development initiatives in the industry, and notable numbers are finding them helpful

- 5.16. Most 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 is the same as in 2018 and maintains the improvement from 32% that were not aware in 2016 (although the list of initiatives has been added to/amended each time).
- 5.17. On average, over a quarter (26%) have used the training and support initiatives (30% in 2018 and 15% in 2016). And 22% on average have found the initiatives helpful.
- 5.18. As in previous surveys, 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, 78% of trainers with 1-9 employees were aware of the initiatives and 18% have used the initiatives compared with 84% of trainers with 10+ employees that are aware of the initiatives and 37% that have used them.
- 5.19. All Scottish-based trainers in this survey were aware of the Scottish Racing Academy, and 77% had used the organisation with 69% finding them helpful.

**Figure 5.4: Awareness and use of training and support initiatives (trainers)** (ordered by awareness)



Number of respondents: 458. Percentages are of all respondents.

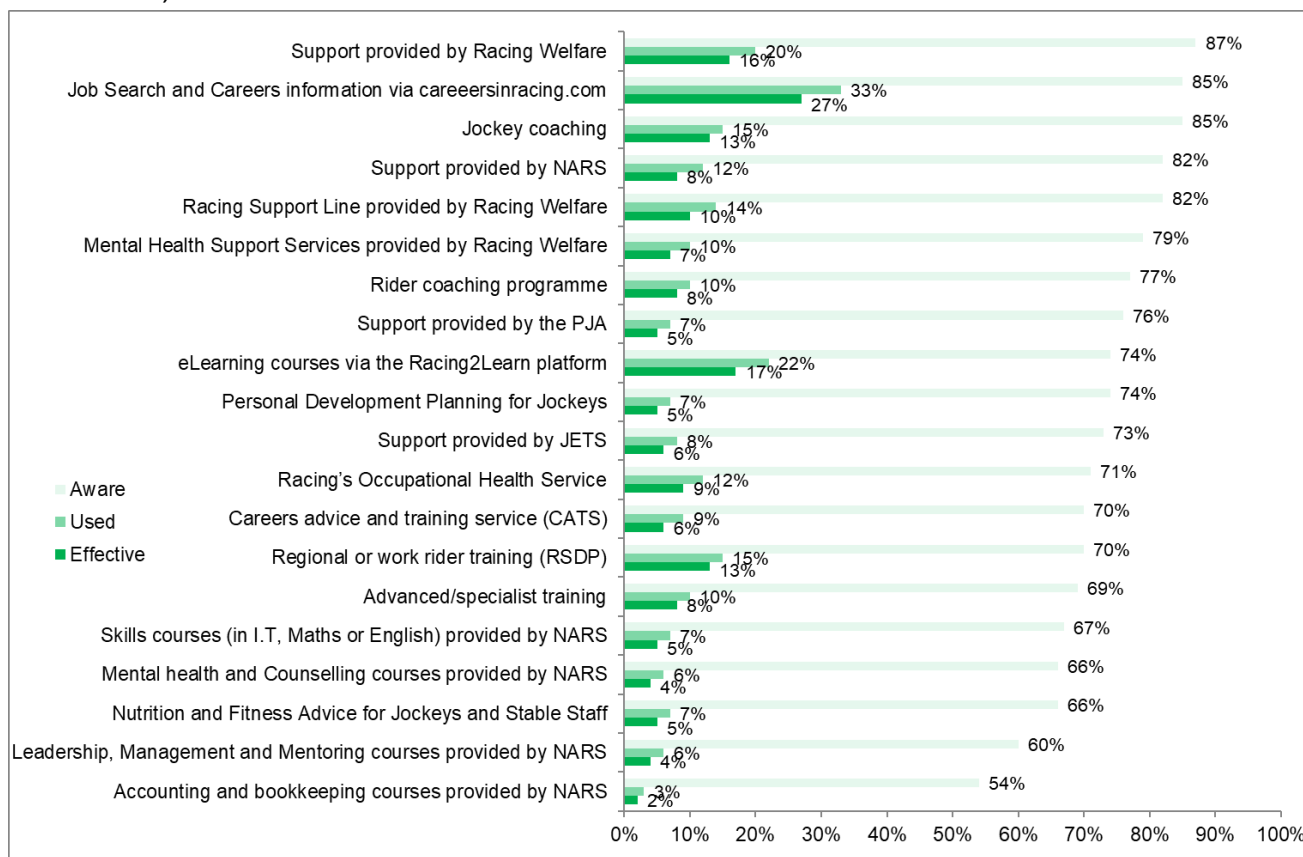
Questions asked: Are you aware or have you as an employer used or supported your staff to use any of the following industry recruitment, training and retention initiatives?

## Most staff continue to be aware of the training and support initiatives in the industry, although only a minority are using them

5.20. The majority of staff are aware of the training and support initiatives in the industry. For example, on average across all initiatives, 27% of staff are not aware of the training and support initiatives (23% in 2018 and 26% in 2016) (although the list of initiatives has been added to/amended over time).

5.21. An increasing number of staff have used the training and support initiatives. For example, on average across all initiatives, 12% of staff have used the training and support initiatives (11% in 2018 and 6% in 2016), with 9% of all staff on average stating they were helpful.

**Figure 5.5: Awareness and use of training and support initiatives (staff) (ordered by awareness)**



Number of respondents: On average across all statements – 1594. Percentages are of all respondents.

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

Note:

82% of Scottish based racing staff are aware of the Scottish Racing Academy, 18% of all Scottish based staff have engaged with the Scottish Racing Academy and 16% of all Scottish based staff said it is helpful.

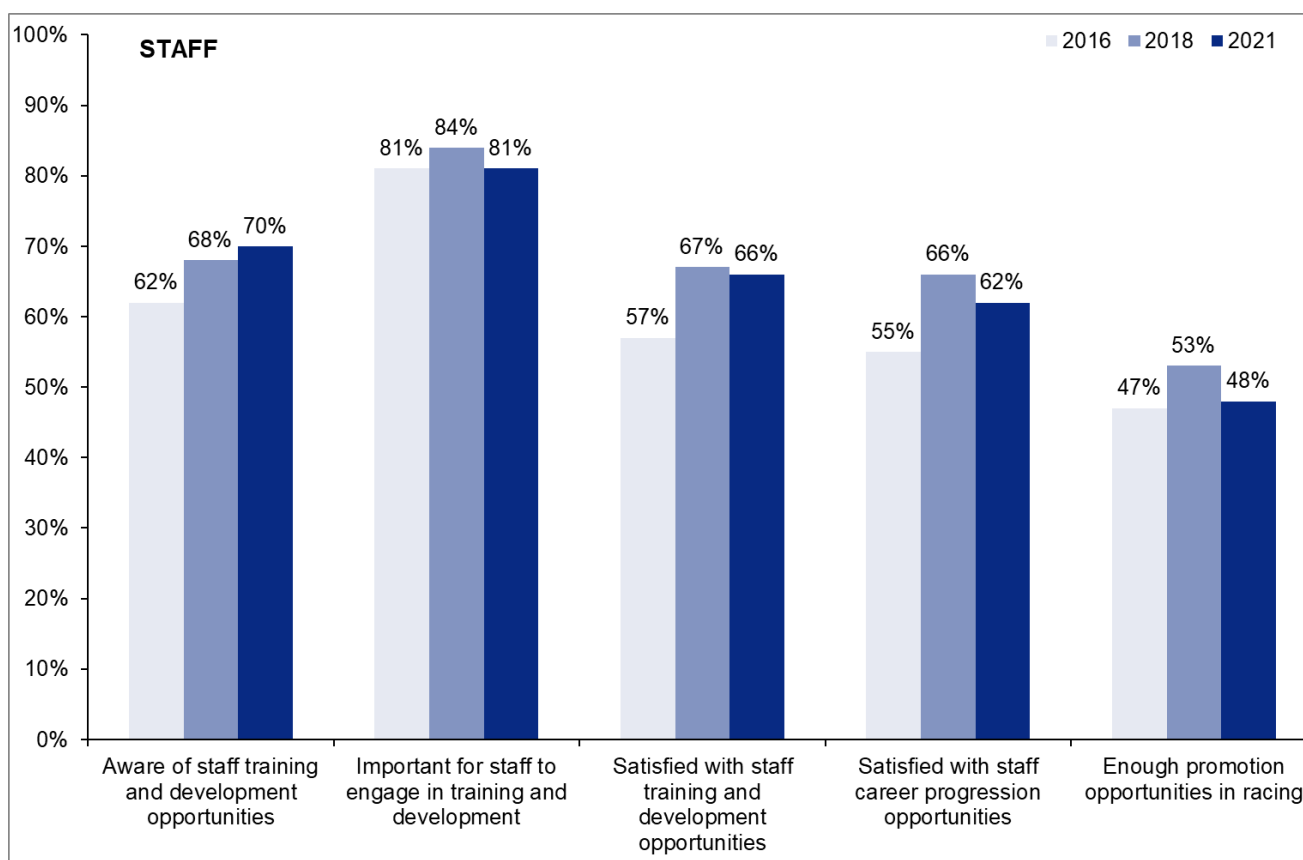
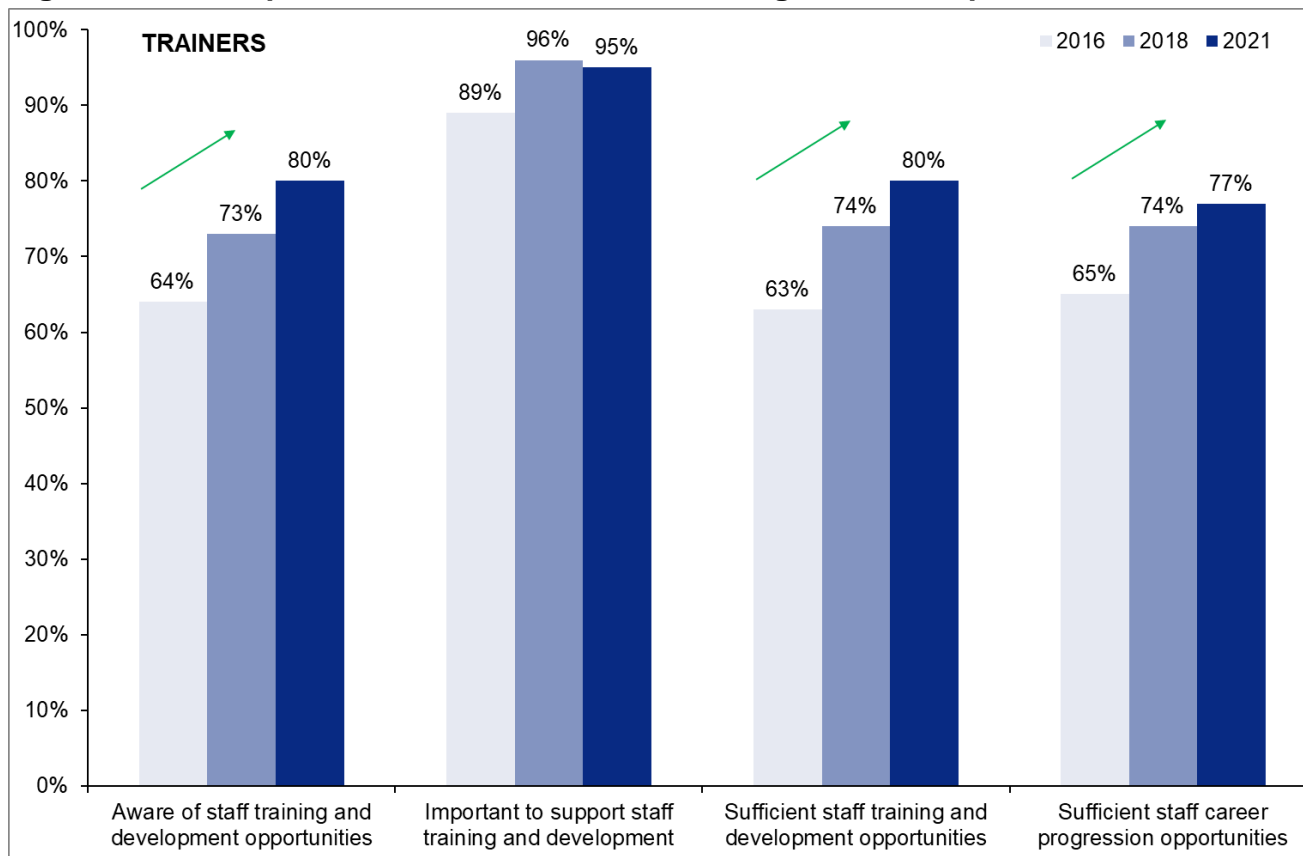
90% of jockeys are aware of the PJA, 38% have engaged with the PJA and 32% said it is helpful.

## **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**

- 5.22. Trainers and staff hold the following perceptions and attitudes about training and development, which generally maintain the improvement since 2016 and in some cases increases it further:
- 80% of trainers (73% in 2018 and 64% in 2016) and 70% of staff (68% in 2018 and 62% in 2016) are aware of staff training and development opportunities.
  - 95% of trainers (96% in 2018 and 89% in 2016) and 81% of staff (84% in 2018 and 81% in 2016) agree it is important for staff to engage in training and development.
  - 80% of trainers (74% in 2018 and 63% in 2016) and 66% of staff (67% in 2018 and 57% in 2016) are satisfied with staff training and development opportunities.
  - 77% of trainers (74% in 2018 and 65% in 2016) and 62% of staff (66% in 2018 and 55% in 2016) are satisfied with staff career progression opportunities.
  - 48% of staff agree there are enough promotion opportunities in racing (53% in 2018 and 47% in 2016).
- 5.23. Smaller yards tend to have slightly less positive perceptions, with on average across all these indicators, 79% of trainers with 1 to 9 staff are in agreement, compared with 84% of larger yards.
- 5.24. 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, to be satisfied with staff training and development opportunities as well as career progression opportunities and are less likely to agree there are enough promotion opportunities in racing. 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: 458 trainers / 1616 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**

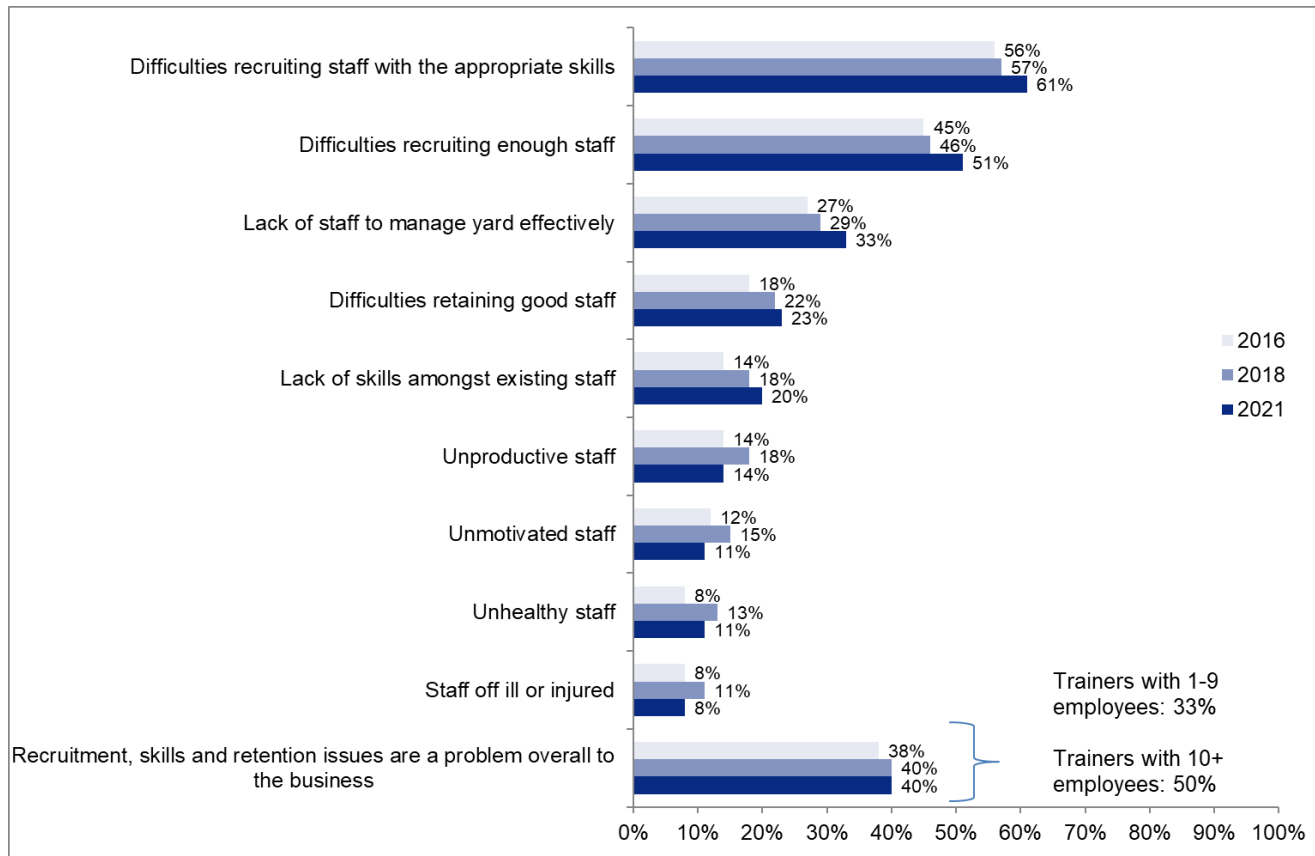
- 6.1. By way of conclusion, this section presents findings about the overall perceptions and size of recruitment, skills and retention problems as perceived by trainers.
- 6.2. In addition, it presents whether trainers and staff perceive there to be improvements in recruitment, training and retention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

### **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 continuing to be cited as the biggest problem and larger yards most affected**

- 6.3. As in previous surveys, the two most cited recruitment, skills and retention problems are difficulties recruiting staff with the appropriate skills (61% of trainers said this is a problem in 2021, 57% in 2018 and 56% in 2016) and difficulties recruiting enough staff (51% said this is a problem in 2021 46% in 2018 and 45% in 2016). In addition, 23% of trainers said difficulties retaining good staff are a problem, 20% said a lack of skills amongst existing staff (i.e. skills gaps) are a problem and 14% said productivity is an issue.
- 6.4. These issues are having an adverse impact on some yards, with 33% of trainers stating that a lack of staff to manage a yard effectively is a problem (29% in 2018 and 27% in 2016).
- 6.5. Overall, 40% of trainers (also 40% in 2018 and 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 (and in previous surveys), 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 50% of trainers with 10+ employees.
- 6.6. In addition:
  - 14% said they have problems retaining working mothers (26% said they do not know).
  - 11% said there are difficulties faced by female staff returning from maternity leave (30% said they do not know).
  - 41% said there is a problem with a lack of UK workers to meet their requirements.
  - 39% said there is a problem with a lack of overseas staff to meet their requirements.

**Figure 6.1: Recruitment, skills and retention problems**



Number of respondents: 458 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

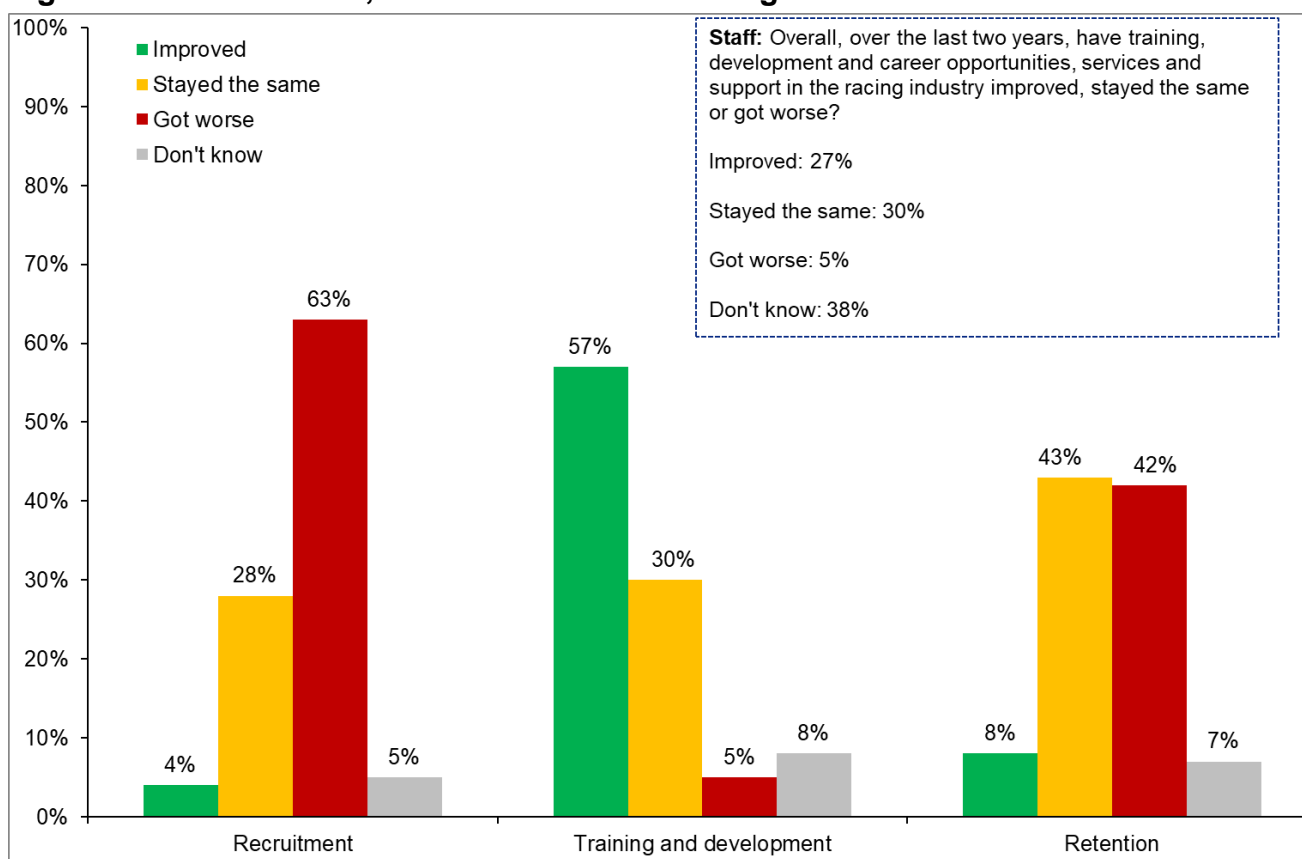
The majority of trainers said that training and development for staff has improved in the last two years, but that recruitment and retention has worsened or stayed the same

6.7. Trainers said the following about change over time:

- 63% said recruitment has got worse (same as in 2018), 28% said it has stayed the same (26% in 2018) and 4% said it had improved (6% in 2018).
- 57% said that training and development has improved (68% in 2018), 30% stayed the same (22% in 2018) and 5% got worse (3% in 2018).
- 42% said retention has got worse (also 42% in 2018), 43% stayed the same (42% in 2018) and 8% improved (11% in 2018).

6.8. In addition, 27% of racing staff said that training, development and career opportunities, services and support have improved (32% in 2018), 30% stayed the same (26% in 2018) and 5% got worse (also 5% in 2018). The remainder (38%) said 'don't know', which reflects perhaps lack of awareness and engagement in training and development opportunities.

**Figure 6.2: Recruitment, skills and retention changes over time**



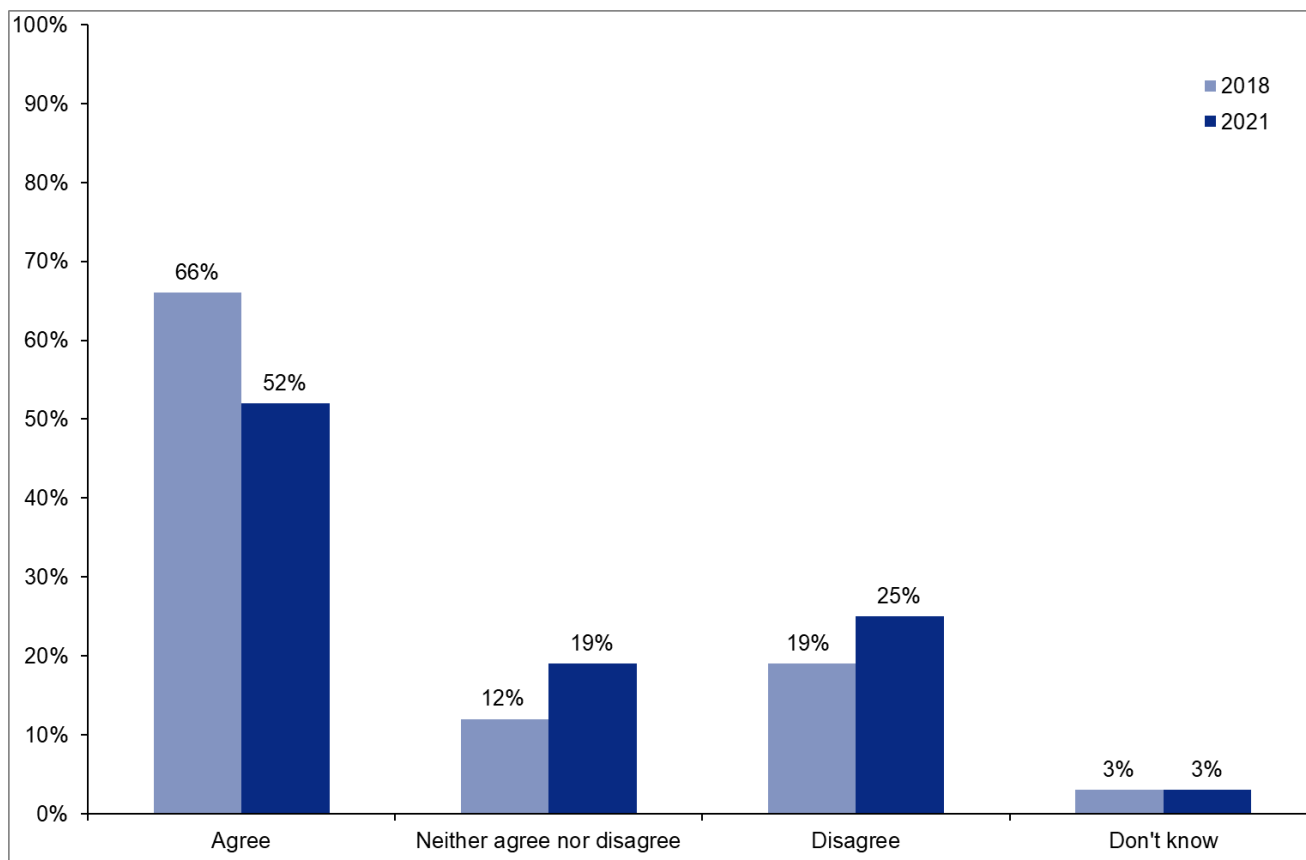
Number of respondents: 458 trainers / 1615 staff.

Questions asked: Overall, over the last two years, have the following in the industry improved, stayed the same or got worse?

## Half of trainers agree the industry is working effectively together to address staffing issues, while a quarter disagree

6.9. 52% of trainers said that the industry is working together effectively to address recruitment, training and retention issues (66% in 2018), while 25% disagree with this (19% in 2018).

**Figure 6.3: Industry working effectively together to improve recruitment, training and retention**



Number of respondents: 458 trainers.

Question asked: Do you agree or disagree, that the industry is working effectively to improve recruitment, training and retention in the industry?



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

Tel: 01727 750175

E-mail: [mark@publicperspectives.co.uk](mailto:mark@publicperspectives.co.uk)

Website: [www.publicperspectives.co.uk](http://www.publicperspectives.co.uk)

Registered in England and Wales Company No: 6769064

Research  
Evaluation  
Community Engagement  
Strategy Development

