

# Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2016-17

Report: April 2017

THE  
**RACING**  
FOUNDATION



THE  
THOROUGHBRED  
BREEDERS'  
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# Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2016-17

## Executive Summary

### Introduction and aims of the research

1. Since the end of 2015/start of 2016 the Racing Foundation has funded a three-year £1 million proactive grant in the area of recruitment, skills and retention in the racing and thoroughbred breeding industries. This programme is being independently evaluated by Public Perspectives Ltd.
2. In order to effectively assess the impact of the programme, as well as provide up to date and comprehensive information, the Racing Foundation has funded surveys of racehorse trainers, racehorse staff and studs. This report presents the findings of the survey of studs, which has been conducted in partnership with the Thoroughbred Breeders' Association (TBA).

### Approach to the research

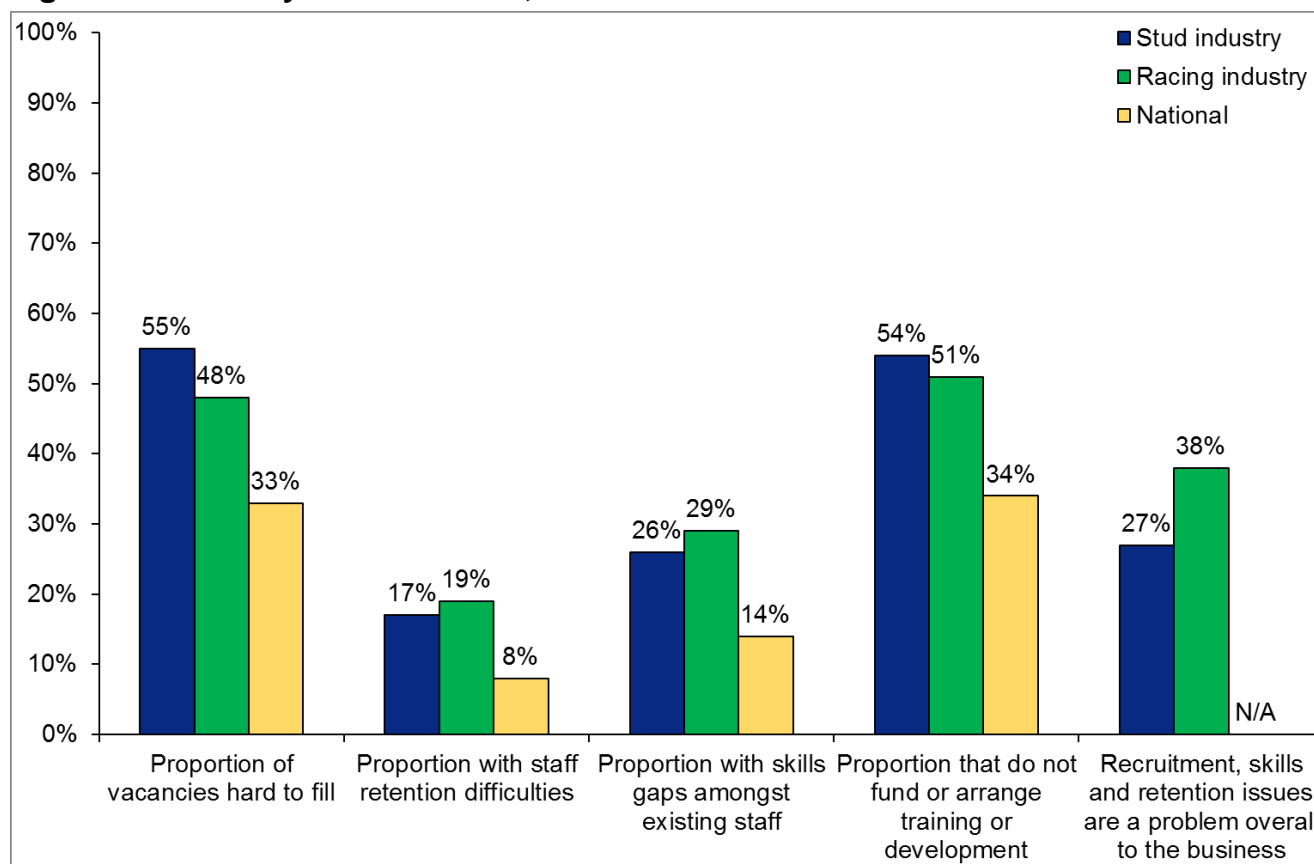
3. The same questionnaire used for racehorse trainers was used for the survey of studs to provide for comparison, albeit with relevant wording tweaks to reflect the nature of studs. The survey was conducted from mid-January through to the end of February 2017.
4. At the time of the research there were approximately 285 studs that, according to TBA records, employed staff. The survey was administered via post, 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, 139 studs responded to the survey, which represents a healthy 49% response rate.

### Key findings

5. The recruitment, skills and retention issues of studs are summarised below and compared against racing yards and national data (from the UK Employer Skills Survey 2015):
  - By way of context, there is an estimated annual vacancy rate of 15% of all permanent stud staff jobs (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs). This compares to a rate of 24% in the racing industry.
  - Although there tend to be less vacancies in studs compared to the racing yards, 55% of permanent vacancies in studs are hard to fill, compared to 48% in racing yards and 33% nationally.
  - 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, stud grooms and second persons.
  - 17% of studs have retention difficulties, compared to 19% of racehorse trainers and 8% of businesses nationally.
  - 26% of studs have skills gaps, compared to 29% of racehorse trainers and 14% of businesses nationally. On average, 21% of studs are not aware of industry training and development initiatives and only 13% of studs have made use of these initiatives.
  - 54% of studs did not fund or arrange training or development for their staff in the last 12 months, compared to 51% of racehorse trainers and 34% of businesses nationally.

- 27% of studs said that recruitment, skills and retention issues are a problem for their business, compared to 38% of racehorse trainers.
- The size of stud matters. Larger studs are more likely than smaller studs to state recruitment, skills and retention issues are a problem to their business.

**Figure 1: Summary of recruitment, skills and retention issues**



## Concluding points

6. Recruitment, skills and retention issues are impacting on the Thoroughbred breeding industry and appear more significant than the situation nationally. This suggests the Racing Foundation’s programme to promote recruitment, retention and skills development is relevant and important, along with other industry initiatives,
7. Recruitment of sufficient staff and adequately skilled staff stands out as a key issue, with the stud hand role tending to be the most problematic. In addition, a notable proportion of studs 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. Consequently, initiatives should seek to increase the supply of skilled staff to the industry, whilst reducing retention difficulties and providing training and development opportunities to improve the skills of existing staff.

# Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2016-17

## Main Report

### Section 1: Introduction

#### Introduction and aims of the research

- 1.1. Recruitment, skills and retention are fundamental to an effective and successful industry. Since the end of 2015/start of 2016 the Racing Foundation has funded a three-year £1 million proactive grant in the area of recruitment, skills and retention in the racing and thoroughbred breeding industries.<sup>1</sup> This programme is being independently evaluated by Public Perspectives Ltd.
- 1.2. In order to effectively assess the impact of the programme, as well as provide up to date and comprehensive information, the Racing Foundation has funded surveys of racehorse trainers, racehorse staff and studs. This report presents the findings of the survey of studs, which has been conducted in partnership with the Thoroughbred Breeders' Association (TBA).

#### Approach to the research

- 1.3. The same questionnaire used for racehorse trainers was used for the survey of studs to provide for comparison, albeit with relevant wording tweaks to reflect the nature of studs.<sup>2</sup> The questionnaire is included in the appendices. The survey was conducted from mid-January through to the end of February 2017.
- 1.4. At the time of the research there were approximately 285 studs that, according to TBA records, employed staff.<sup>3</sup> The survey was administered via post<sup>4</sup>, 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, 139 studs responded to the survey, which represents a 49% response rate.
- 1.5. With this number of respondents, the survey provides for robust data. The confidence interval or accuracy of the survey result is no worse than +/- 6% at a 95% confidence level and for some results is as low as +/- 2%.<sup>5</sup> This means that we can be 95% confident that

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<sup>1</sup> More detail about The Racing Foundation's 'Providing a co-ordinated career development and learning programme for racing's people' can be found at: <http://www.racingfoundation.co.uk/pro-active-funding-initiatives>.

<sup>2</sup> 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.

<sup>3</sup> 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 297 studs was provided by the TBA. However, 12 studs replied to say they do not employ staff.

<sup>4</sup> 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%) because a telephone survey method can elicit a higher response rate. However, a response rate of nearly 50% is still good and above average for past surveys conducted by the TBA.

<sup>5</sup> 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 staff had responded, i.e. had a census been conducted.

the 'real' result for any given question would be within 6% of those stated within the survey findings. This provides for robust data when analysed at a headline level and when different questions are cross-referenced against each other.

## Reporting

- 1.9. 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.
- 1.10. Comparison is provided against the racehorse trainer results, where appropriate.
- 1.11. In addition, where data exists, questions are compared against national data, primarily the UK Employer Skills Survey 2015 – a telephone survey of 91,000 employers conducted nationally by the UK Commission for Employment and Skills (UKCES).
- 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 development
  - Section 6: Concluding points

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

### Introduction

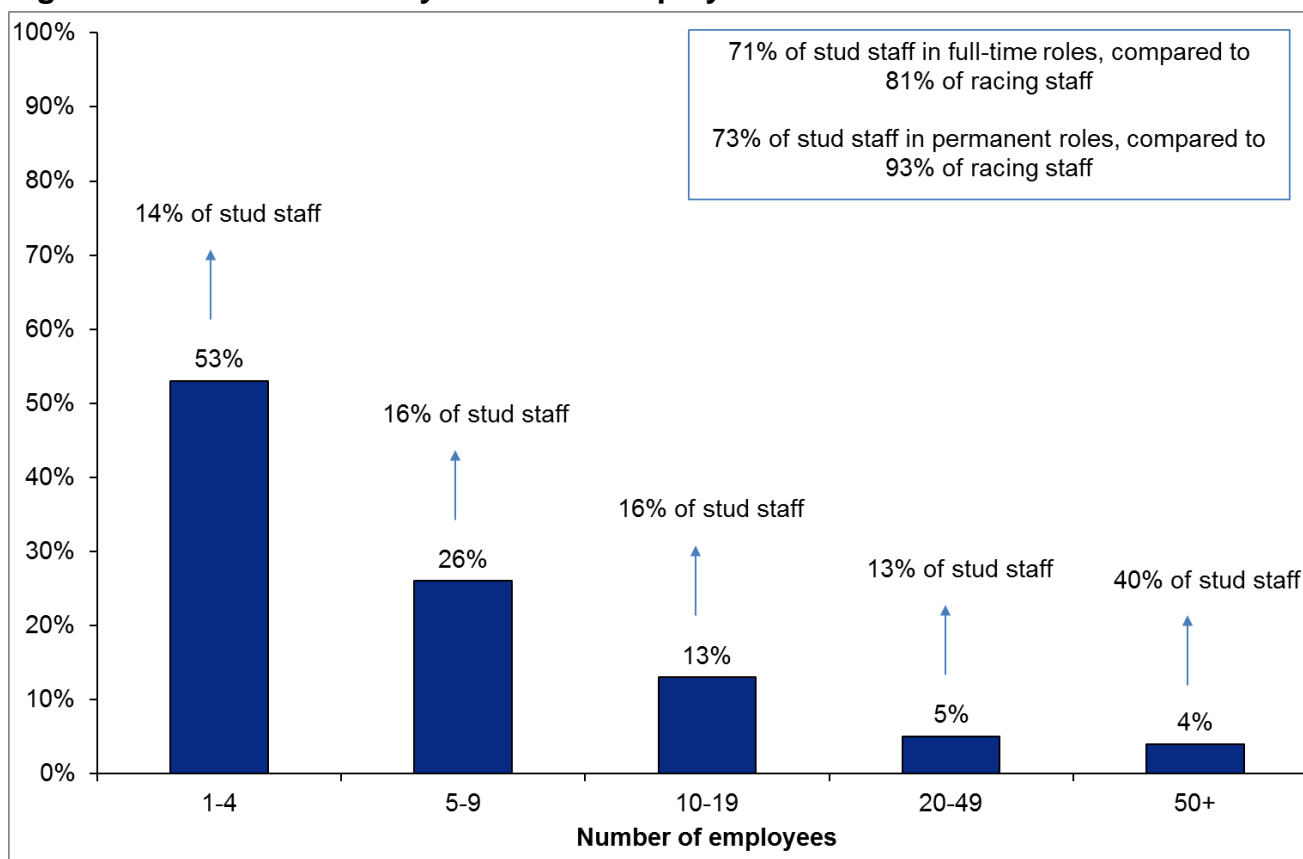
2.1. By way of context, this section presents findings about the number of staff employed by studs, business performance and workforce demand.

### Labour force statistics

**Three quarters of studs have 1-9 staff amounting to under a third of all stud staff, while a tenth have 20+ staff but account for over half of all staff**

- 2.2. 53% of studs that employ staff have 1-4 staff, accounting for 14% of stud staff and 26% have 5-9 staff, accounting for 16% of stud staff. This compares to 67% of trainers that have 1-9 staff, accounting for 22% of staff.
- 2.3. 13% of studs have 10-19 staff, accounting for 16% of stud staff and 5% have 20-49 staff, accounting for 13% of stud staff. This compares to 30% of trainers that have 10-49 staff, accounting for 49% of staff.
- 2.4. 4% of studs have 50 or more staff, accounting for 40% of all stud staff. This compares to 3% of trainers that have 50+ staff, accounting for 30% of staff.
- 2.5. 71% of stud staff are in full-time roles, compared to 81% of racing staff.
- 2.6. 73% 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.

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



Number of respondents: 139 studs.

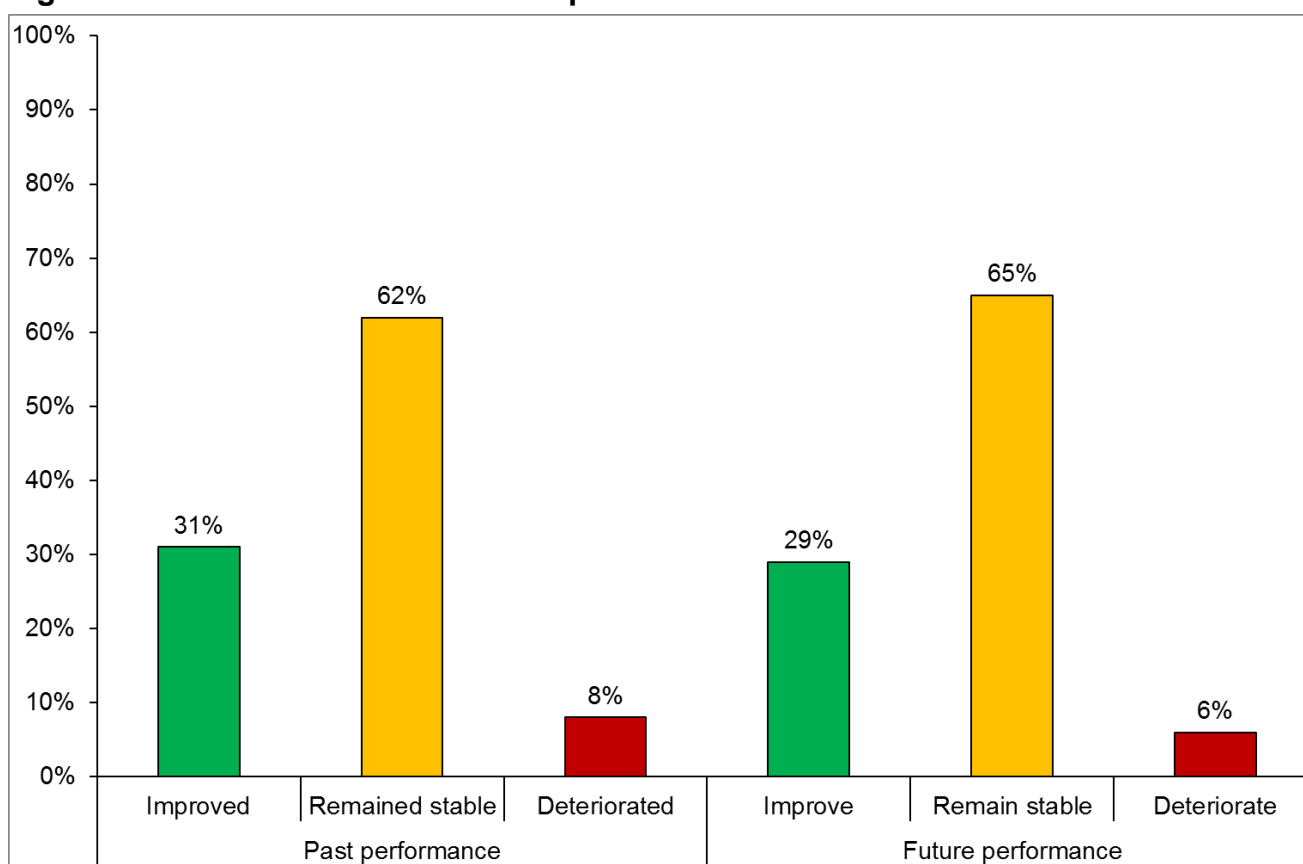
Question asked: Including you and any working proprietors/owners, how many people are employed by your business during your peak season?

## Business performance

### **A third of studs reported improved business performance and a similar proportion expect performance to improve in the future, with larger studs most positive**

- 2.7. 31% of studs said their business performance improved over the past 12 months, compared to 33% of racing trainers. 62% said it remained stable and 8% said it deteriorated.
- 2.8. 29% of studs expect performance will improve over the next 12 months, compared to 44% of trainers. 65% said it will remain stable and 6% said it will deteriorate.
- 2.9. Smaller studs reported less positive performance and are also less optimistic. For example, 30% of studs with under 20 staff reported improved performance in the past compared to 44% of larger studs. Similarly, 28% of studs with under 20 staff do not expect performance to improve in the future, compared to 44% of larger studs.

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



Number of respondents: 139 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?

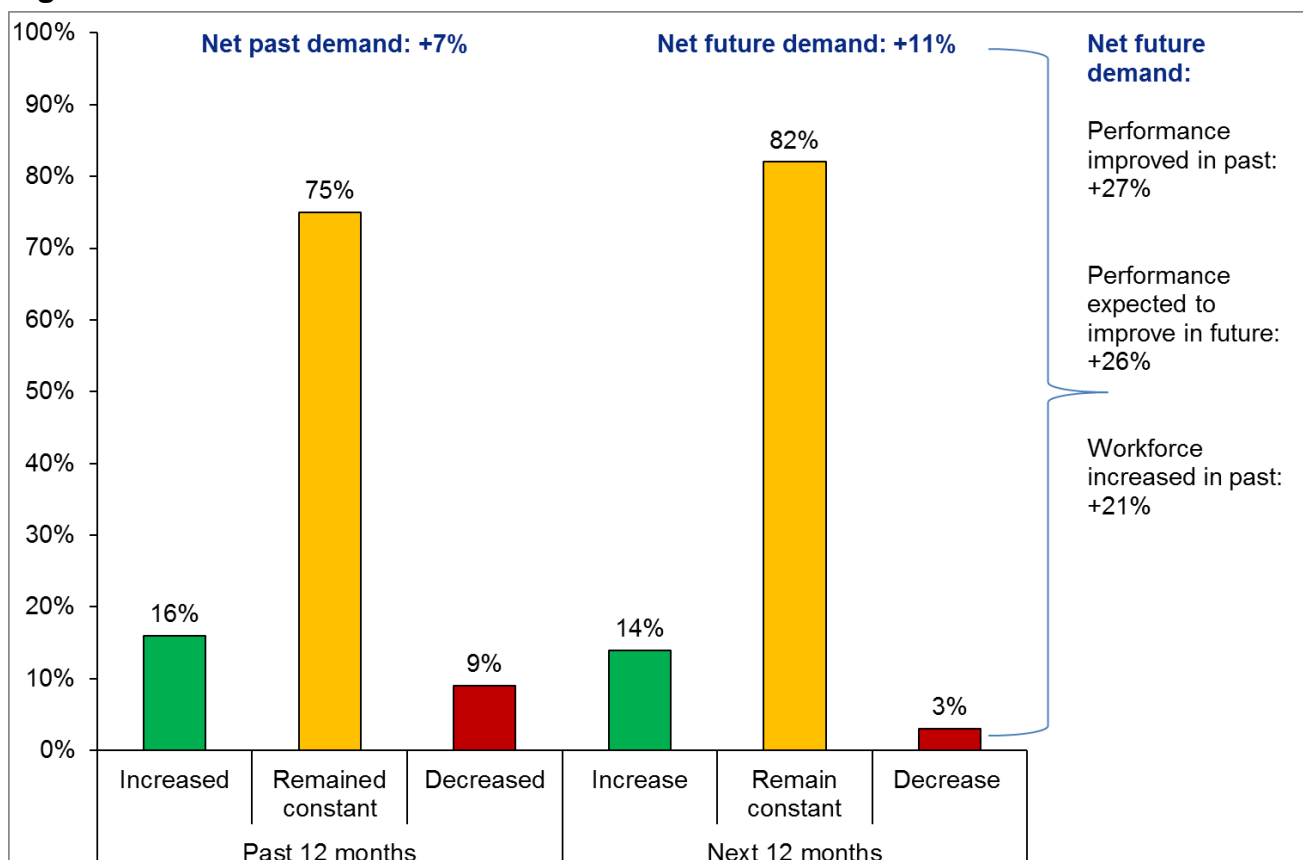


## Workforce demand

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

- 2.10. 16% of studs said that their workforce increased over the past 12 months, while 9% reported it decreased. This results in net past demand (i.e. the difference between the increase and decrease in workforce) of +7% (compared to +9% for trainers).
- 2.11. 14% of studs expect their workforce to increase in the next 12 months, while 3% expect it to decrease, resulting in a net future demand of +11% (compared to +26% of trainers). Net future demand is greatest amongst studs that reported improved performance in the past (+27%), studs that expect improved performance in the future (+26%) and studs that increased their workforce in the past 12 months (+21%).

**Figure 2.3: Workforce demand**



Number of respondents: 139 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

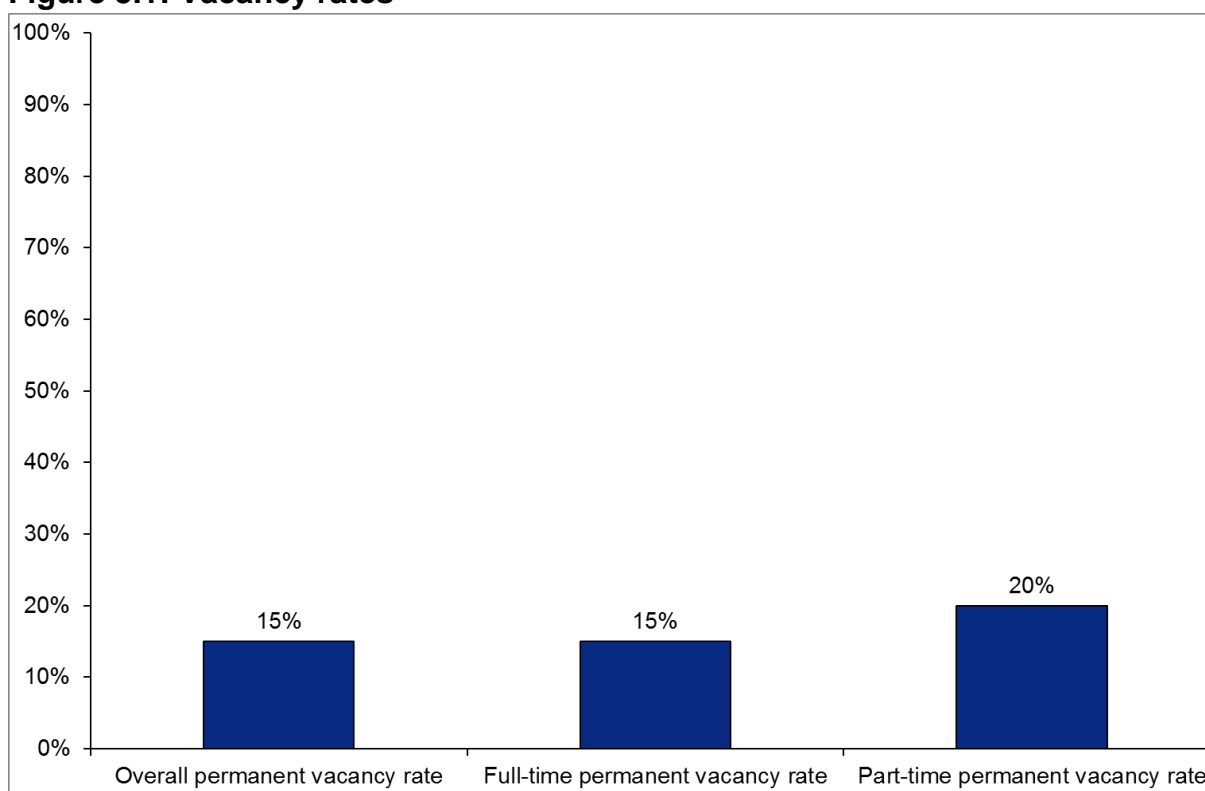
3.1. This section presents findings about recruitment, including vacancy rates, hard-to-fill vacancies, types of studs / occupations affected, and reasons for recruitment difficulties.

### Vacancy rates

#### **Some one in six permanent jobs are vacant annually, which is less than in racing yards**

- 3.2. By way of context, there is an estimated annual vacancy rate of 15% of all permanent stud jobs, which is a measure of staff turnover (i.e. the number of vacancies per annum that require recruitment as a proportion of the total number of permanent jobs). An estimated 65% of these vacancies are full-time, with the remainder part-time, which equates to some 15% of full-time permanent job vacancies and 20% part-time job vacancies. Not all of these will be individual roles as it is possible that some roles will be vacant more than once per annum. The vacancies will be created due to staff moving jobs within a stud, moving to another stud, leaving the industry and/or business growth creating new roles.
- 3.3. This compares to a vacancy rate of 24% of permanent racing yard jobs, indicating that staff turnover is greater in racing yards than studs.
- 3.4. Regarding comparison with national data, the UK Government's Labour Force Survey (LFS) calculates a vacancy rate quarterly, based on asking businesses how many vacancies they currently have.<sup>6</sup> This figure fluctuates between 2%-2.5% and is currently at 2.5%. 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 Thoroughbred breeding industry vacancy rate is at the lower end of this range.

**Figure 3.1: Vacancy rates**



Number of respondents: 139 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?

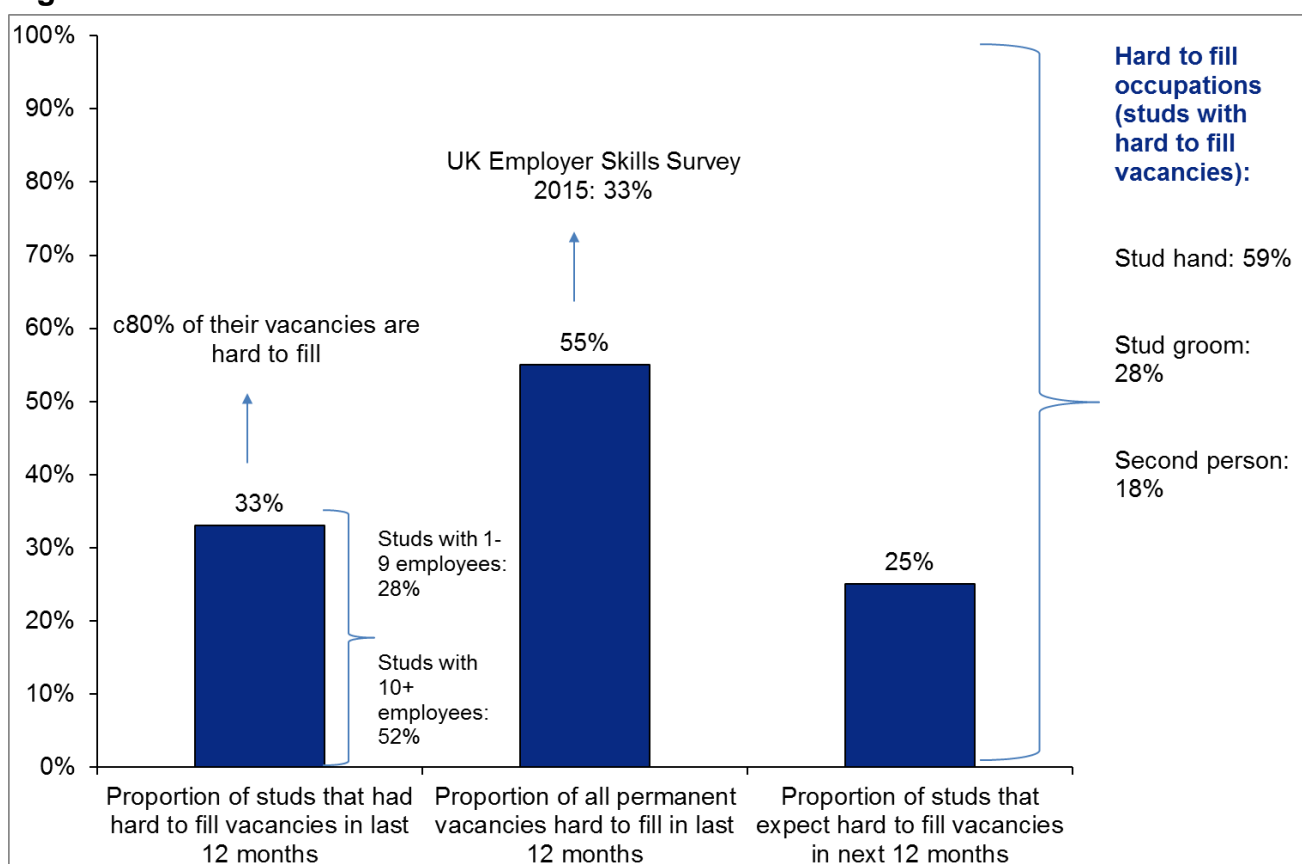
<sup>6</sup> The vacancy rate in this survey was calculated annually given the seasonal nature of the industry, which meant asking it at a given point in time would be problematic.

## Hard-to-fill vacancies

### Although only a third of studs have hard-to-fill vacancies, over half of all permanent vacancies are hard-to-fill, with larger studs most affected

- 3.5. 33% of studs (compared to 50% of racing yards), representing 42% of stud staff, said they had hard-to-fill vacancies in the last 12 months. 40% said they did not have hard-to-fill vacancies and 27% said they did not have any vacancies.
- 3.6. The studs that had hard-to-fill vacancies on average estimated that 80% of their vacancies are hard-to-fill. This translates into an estimated 55% of permanent vacancies that are hard-to-fill, compared to 48% of permanent racing yard vacancies. The national figure, based on the UK Employer Skills Survey, is 33%.
- 3.7. Larger studs are more likely to say they had hard-to-fill vacancies. For example, 28% of studs with 1-9 employees said they had hard-to-fill vacancies, compared with 52% with 10+ employees.
- 3.8. 25% of studs expect to have hard-to-fill vacancies in the next 12 months, compared to 47% of racing yards. 56% of studs that had hard-to-fill vacancies in the past also expect to have hard-to-fill vacancies in the future.
- 3.9. The occupations which were most commonly cited as being hard-to-fill are stud hands (cited by 59% of studs that said they had hard-to-fill vacancies), stud groom (28%) and second person (18%).

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



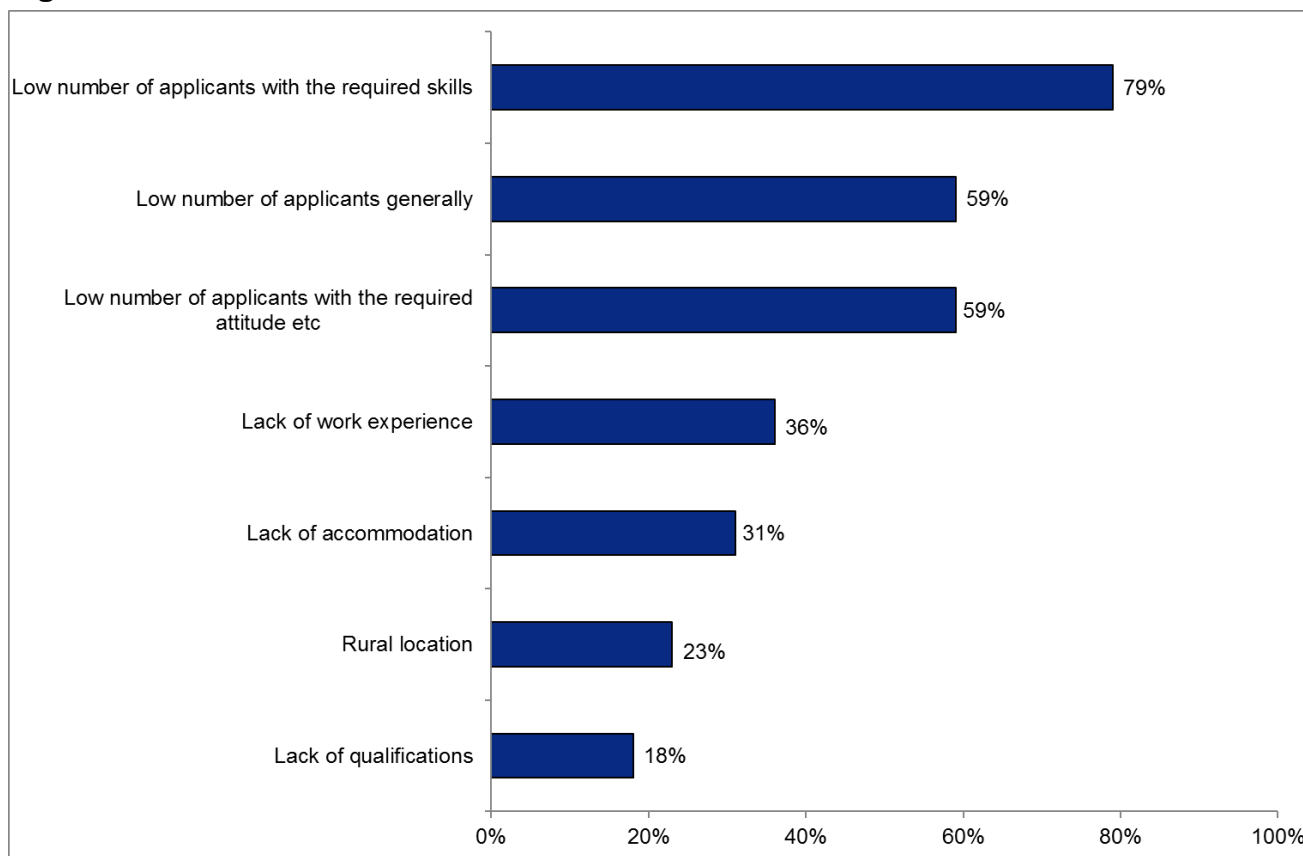
Number of respondents: 139 studs. Questions asked: Have you had any vacancies in the last 12 months that you have found hard to fill? / Roughly, what proportion of your vacancies have been hard to fill? / Which specific occupations have you found hard to fill? / Do you expect to have any vacancies that will be hard to fill in the next 12 months?

## Reasons for hard-to-fill vacancies

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

3.10. The low number of applicants with the required skills (cited by 79% of studs with hard-to-fill vacancies), the low number of applicants generally and the low number with the required attitude (both cited by 59%) are the main reasons for hard-to-fill vacancies. In addition, other factors, such as lack of experience (36%), lack of accommodation (31%), rural location (23%) and lack of qualifications (18%), should not be ignored.

**Figure 3.3: Reasons for hard-to-fill vacancies**



Number of respondents: 45 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 trainers and occupations most affected, and the reasons for retention difficulties.

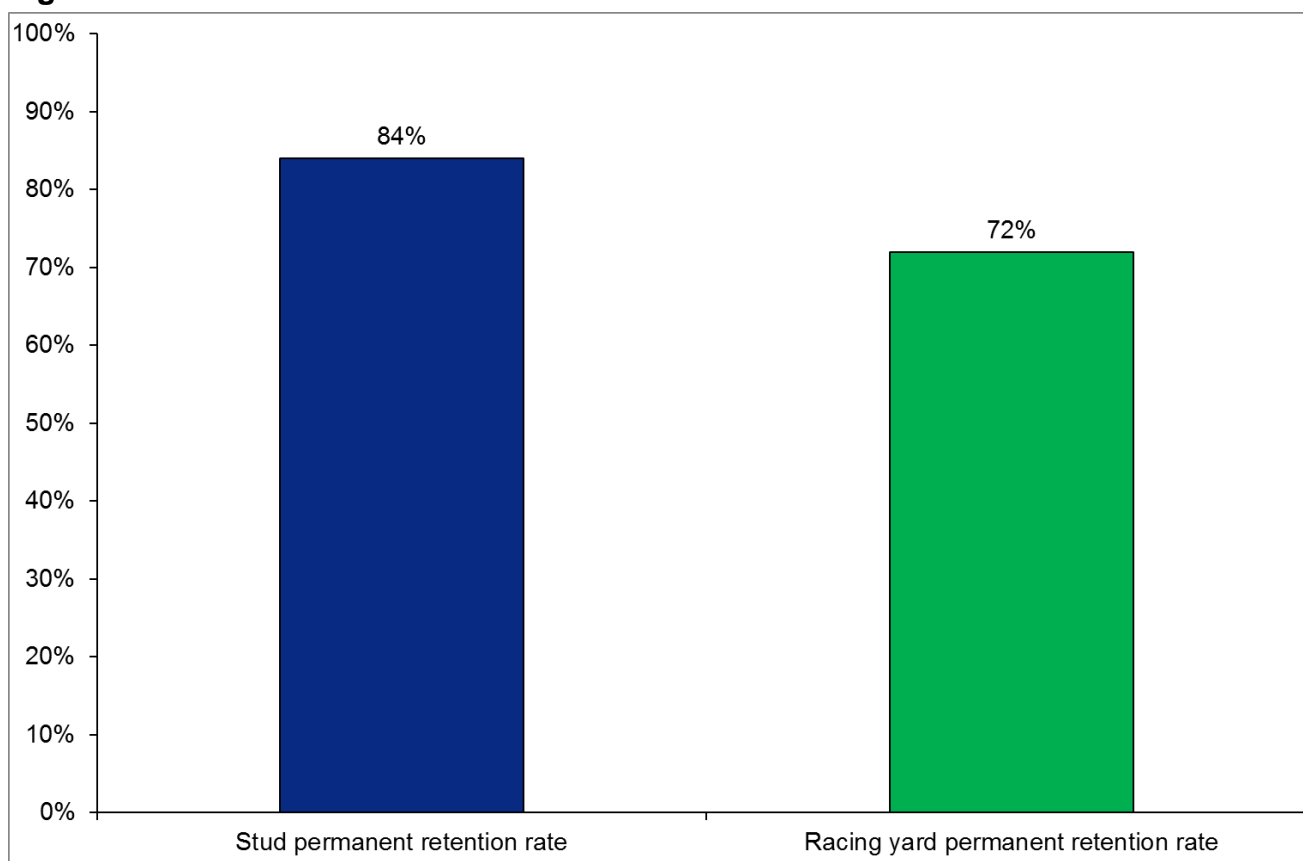
### Retention rates

#### **Under a fifth of staff leave their job roles each year, which is less than in racing yards**

4.2. Overall, there is an estimated retention rate of 84% of all permanent stud staff in their job roles per annum. In other words, some 16% 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 72% in racing yards.

4.3. The retention rate is the same for both full-time and part-time roles i.e. 84%.

**Figure 4.1: Retention rates**



Number of respondents: 139 studs.

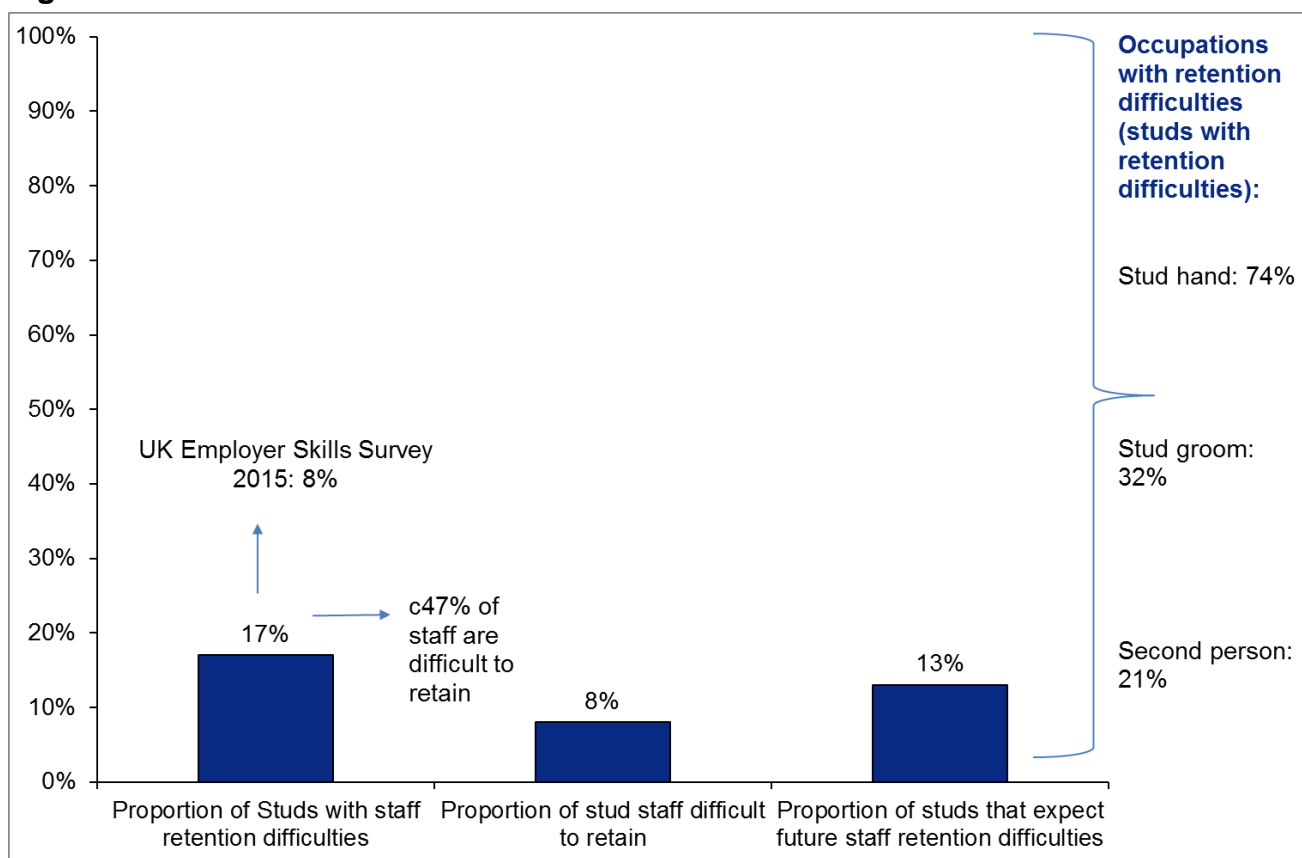
Question asked: Overall, how many permanent full-time and part-time staff have left their roles in the last 12 months?

## Retention difficulties

### Under a fifth of studs said they have retention difficulties

- 4.4. 17% of studs, which account for some 17% of stud staff, said they had difficulties retaining permanent staff in the last 12 months. This compares to 19% of racing yards. The national figure, based on the UK Employer Skills Survey, is 8%.
- 4.5. 15% of studs face a double problem of hard-to-fill vacancies and retention difficulties.
- 4.6. Studs with retention difficulties estimated, on average, that 47% of their staff are difficult to retain, compared to 41% of racing yards. This translates into an estimated 8% of all stud staff that are difficult to retain, compared to 9% of permanent racing staff.
- 4.7. 13% of studs expect to have retention difficulties in the next 12 months, compared to 17% of racing yards. 53% of studs that had retention difficulties in the past also expect to have difficulties in the future.
- 4.8. The occupations which were most commonly cited as being difficult to retain are stud hand (cited by 74% of studs that said they have retention difficulties), stud groom (32%) and second person (21%).

**Figure 4.2: Retention difficulties**



Number of respondents: 139 studs.

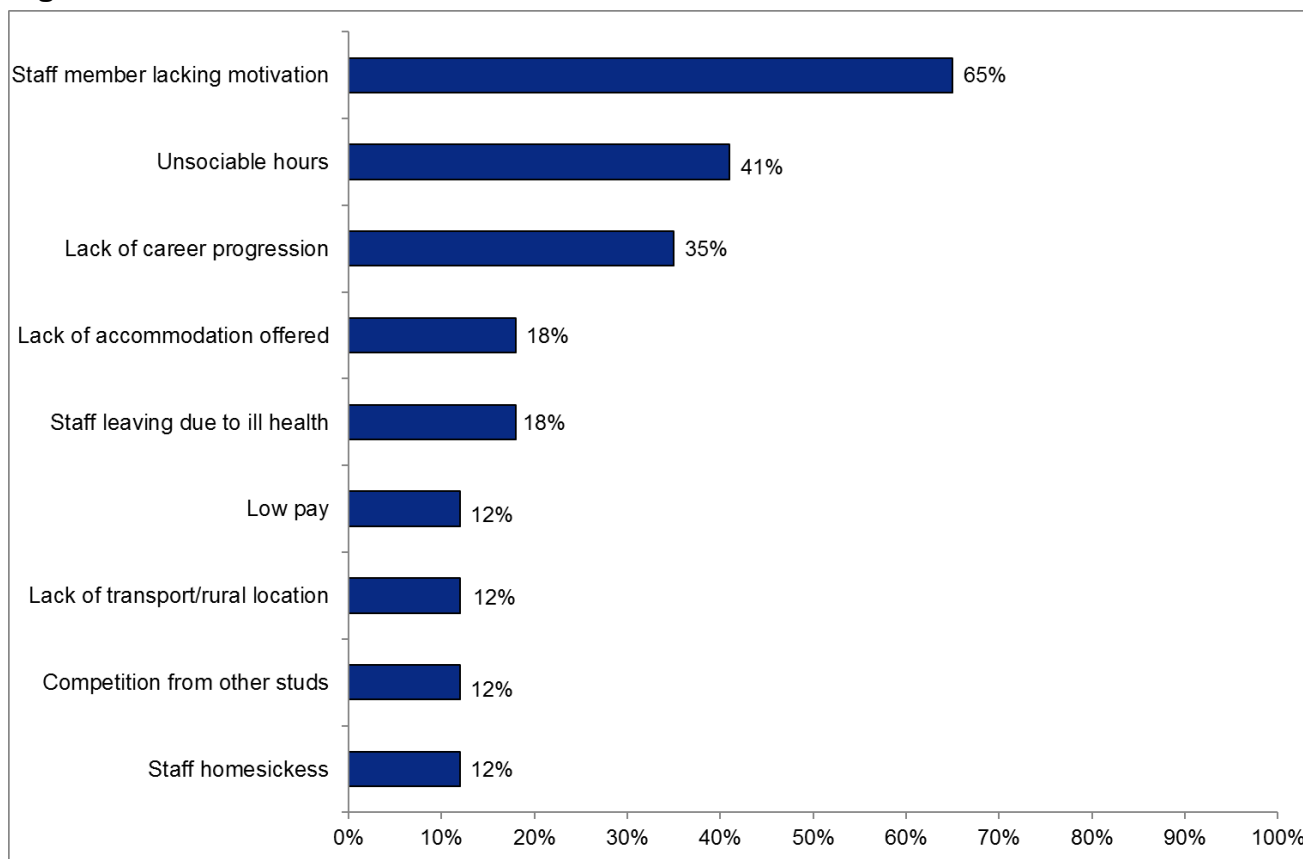
Questions asked: In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal, such as retirement or leaving a temporary role) / Roughly, what proportion of your staff have been difficult to retain? / Which specific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

## Reasons for retention difficulties

### **Staff lacking motivation, unsociable hours and lack of career progression are the most cited reasons for retention difficulties**

4.9. Staff lacking motivation (cited by 65% of studs with staff retention difficulties), unsociable hours (41%) and lack of career progression (35%) are the main reasons for retention difficulties.

**Figure 4.3: Reasons for retention difficulties**



Number of respondents: 24 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

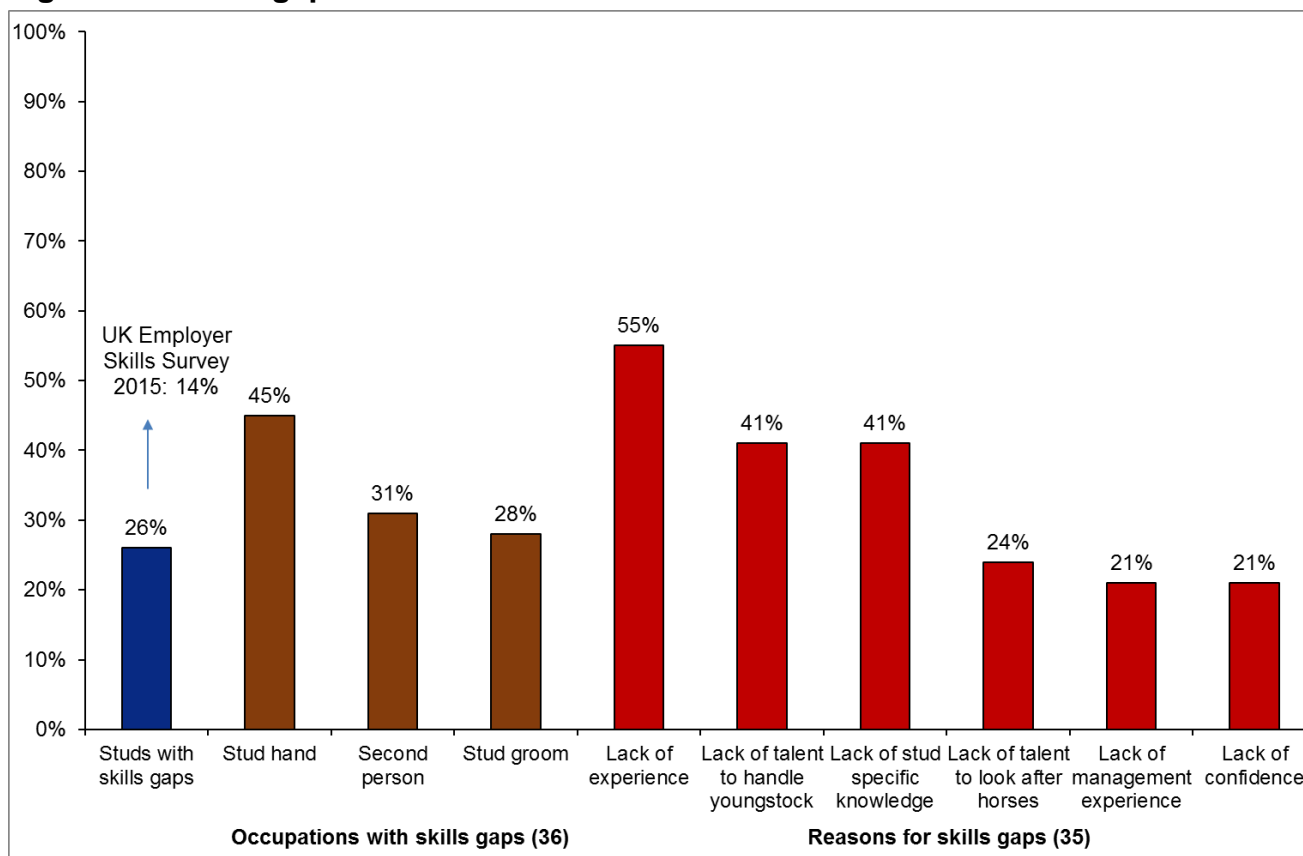
5.1. This section presents findings about skills gaps, training and development.

## Skills gaps

### Over a quarter of studs have skills gaps within their existing workforce

- 5.2. 26% of studs said there are gaps in the skills or capabilities of their existing workforce. This compares to 29% of racing yards and a national figure of 14%.
- 5.3. 6% of studs have a combination of skills gaps, hard-to-fill vacancies and retention difficulties.
- 5.4. The occupations most likely to have skills gaps are stud hand (cited by 45% of studs that have skills gaps), second person (31%) and stud groom (28%).
- 5.5. The main reasons for skills gaps are a lack of experience (cited by 55% of studs with skills gaps), lack of talent/capability to handle yearlings/youngstock (41%) and lack of stud specific experience (41%). Other skills gaps cited include lack of talent/capability to look after horses (24%), lack of management skills and lack of confidence (both 21%).

**Figure 5.1: Skills gaps**



Number of respondents: 139 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?

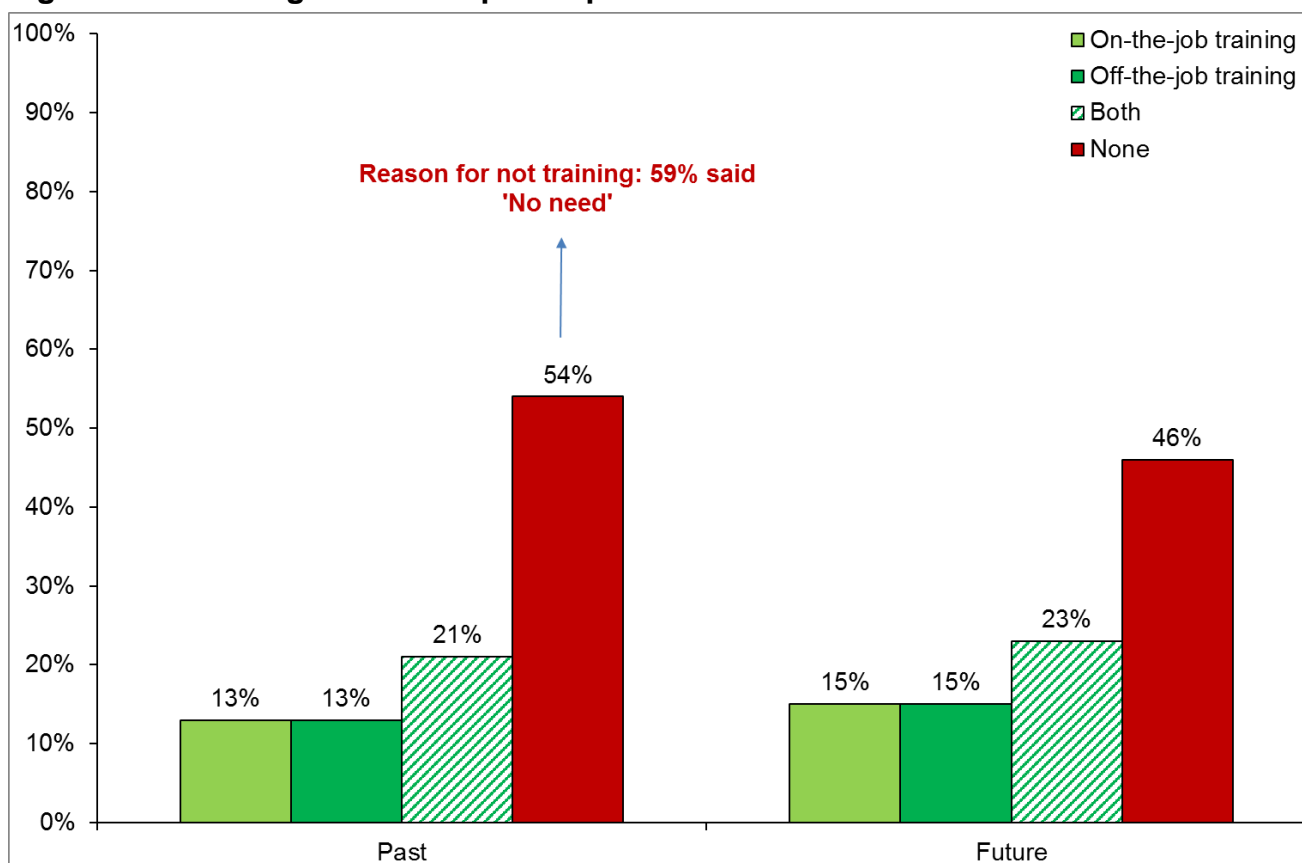


## Training and development prevalence

### Under half of studs trained their staff in the last 12 months, with prevalence less in smaller yards

- 5.6. 54% of studs have not funded or arranged any training in the past 12 months, compared with 51% of racing yards. This compares with 34% of businesses nationally (based on the UK Employer Skills Survey 2015).
- 5.7. 48% of studs that said they have skills gaps do not provide training.
- 5.8. Smaller studs are less likely to train their staff, with 59% of studs with 1-19 staff not having provided training or development in the past 12 months, compared with 0% of studs with 20 or more employees.
- 5.9. The main reason cited by employers that do not provide training is that there is 'no need' – cited by 59% of studs that did not provide training or development in the past 12 months. In addition, 26% said there is a lack of appropriate training locally, 15% cited a lack of time and 11% cited a lack of funds.
- 5.10. 46% of studs said they do not expect to fund or arrange training or development in the next 12 months, compared to 47% of racing yards. 73% of employers that did not provide training in the past 12 months said this. This means that overall 39% 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: 139 studs.

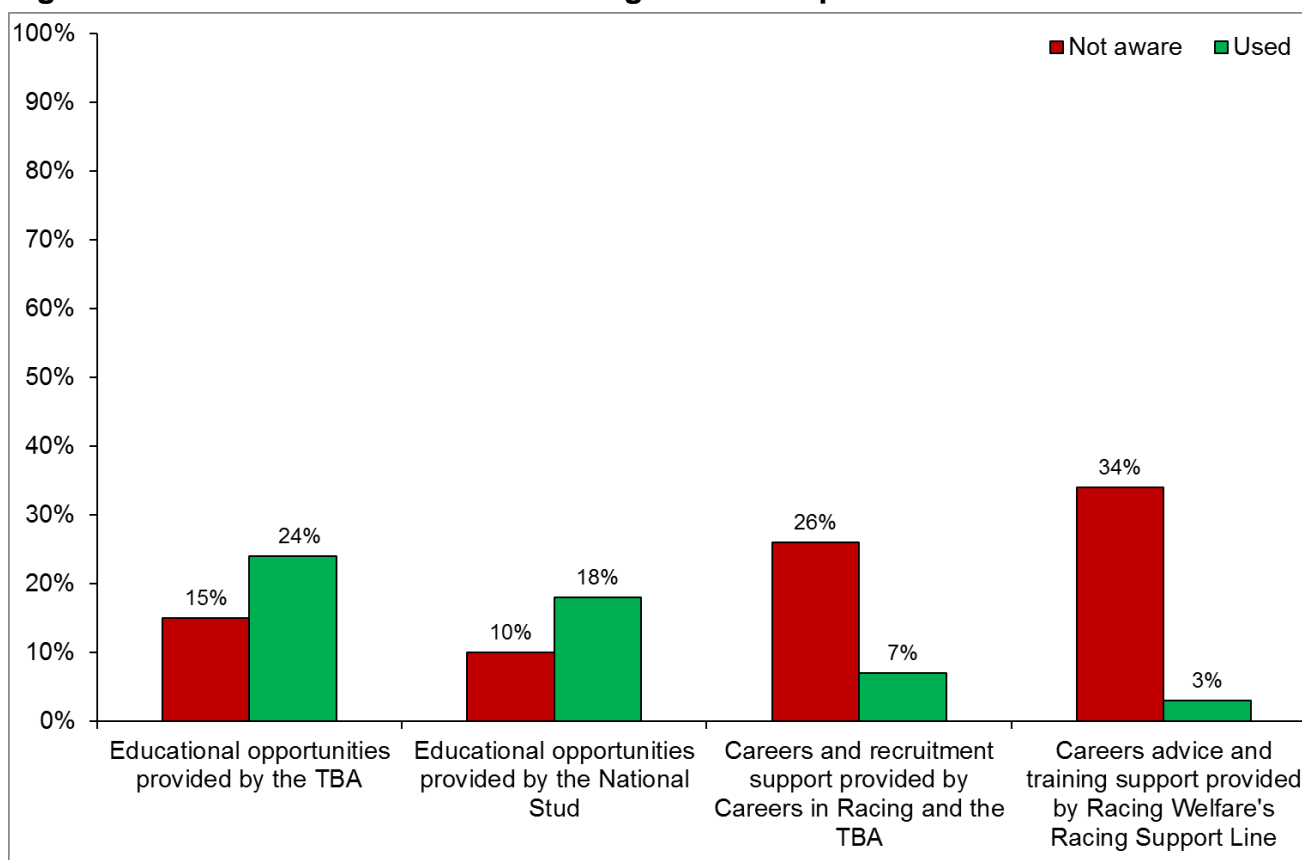
Questions asked: Over the past 12 months have you funded or arranged any off-the-job training or development or on-the-job or informal training or development for your staff? / Why have you not funded or arranged any training or development for staff? / In the next 12 months do you expect to fund or 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, 21% of studs are not aware of the training and development initiatives. This compares to 32% of racing yards (although some of the initiatives are different).
- 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 15% of racing yards.
- 5.13. There is greatest awareness and use of the educational opportunities delivered by the TBA and National Stud.

**Figure 5.3: Awareness and use of training and development initiatives**



Number of respondents: 139 studs.

Questions 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

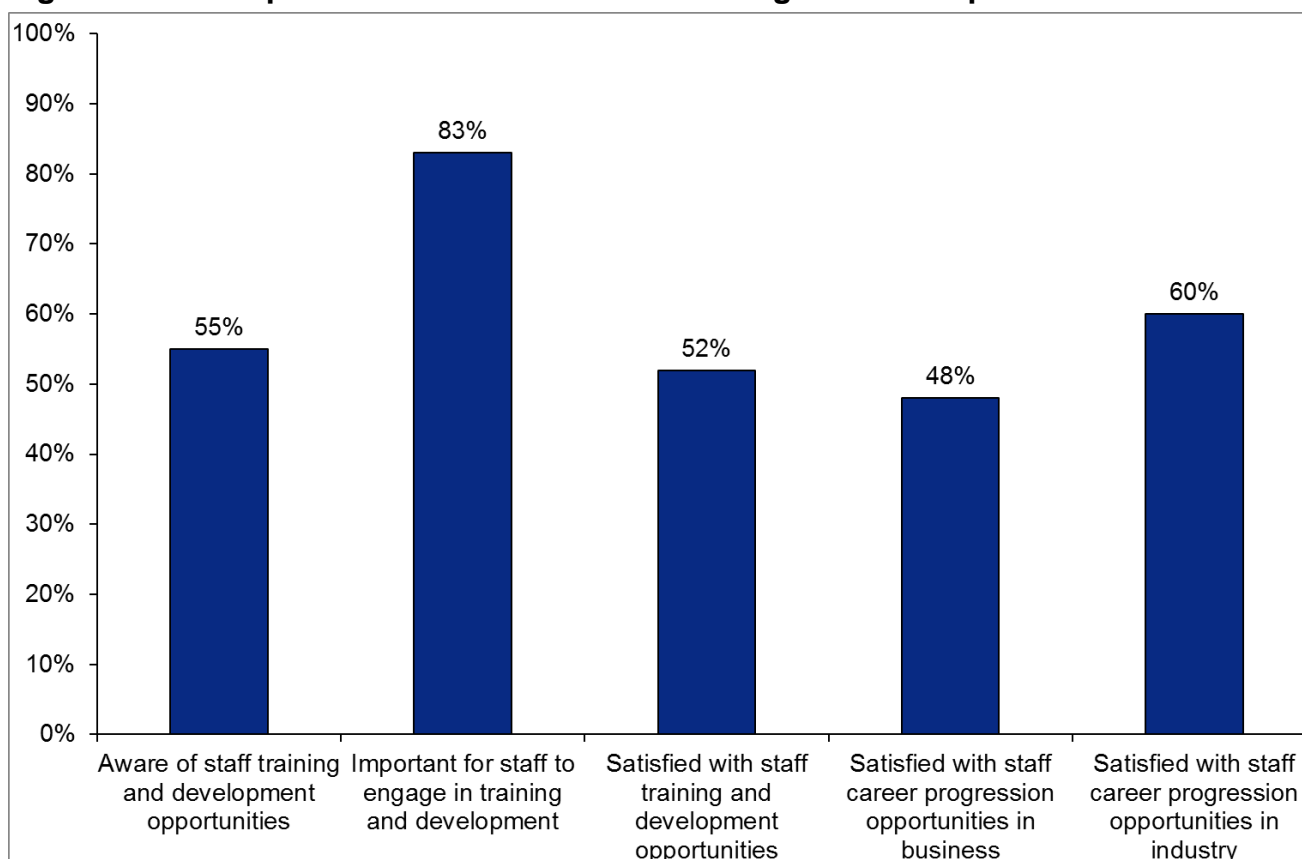
### The majority of studs have positive perceptions and attitudes about training and development opportunities, although there is scope for improvement

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

- 55% are aware of staff training and development opportunities, compared to 64% of trainers.
- 83% agree it is important for staff to engage in training and development, compared to 89% of trainers.
- 52% are satisfied with staff training and development opportunities, compared to 63% of trainers.
- 48% are satisfied with staff career progression opportunities in their business, compared to 65% of trainers.
- 60% are satisfied with staff career progression opportunities in the industry (question not asked of trainers).

5.15. Perceptions and attitudes are similar amongst different sizes of studs.

**Figure 5.4: Perceptions and attitudes about training and development**



Number of respondents: 139 studs. Questions 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.

### **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**

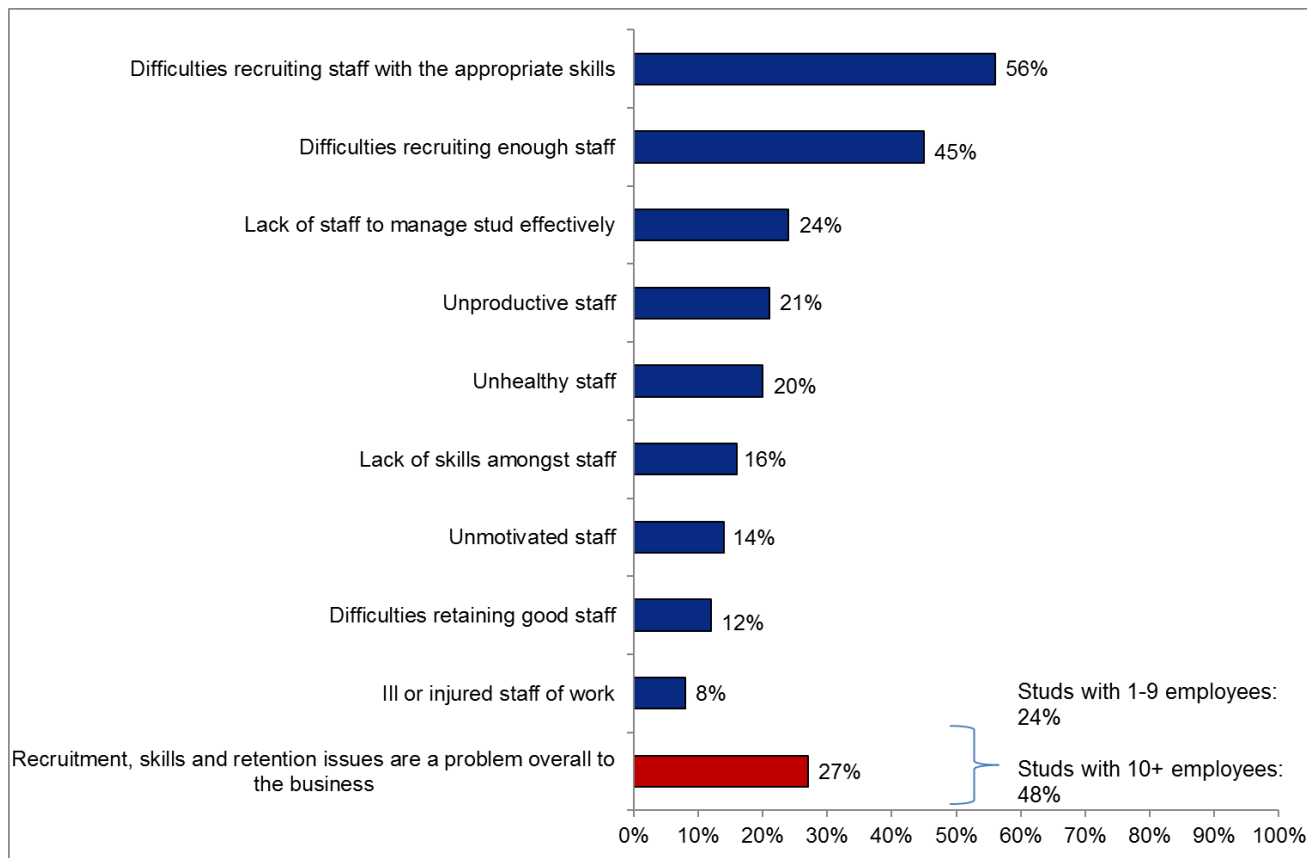
- 6.2. The two most cited recruitment, skills and retention problems are difficulties recruiting staff with the appropriate skills (56% of studs said this is a problem) and difficulties recruiting enough staff (45% said this is a problem). These were also the two most cited issues in the racehorse trainer survey.
- 6.3. These issues are having an adverse impact on some studs, with 24% of studs stating that a lack of staff to manage the stud effectively is a problem.
- 6.4. As has tended to be the case in this report, recruitment, skills and retention issues are most keenly experienced by larger studs. For example, 45% of studs with 1-9 employees said difficulties recruiting staff with the appropriate skills are a problem, compared to 72% of studs with 10 or more staff. Similarly, 28% of studs with 1-9 staff said difficulties recruiting enough staff are a problem, compared to 56% of studs with 10 or more staff. And 21% of studs with 1-9 staff said a lack of staff to manage the stud effectively is a problem, compared to 38% of studs with 10 or more staff. These differences are likely to be in part because larger yards need more staff and are thus more likely to face staffing pressures, and simply in part because larger yards are naturally exposed to more staff and associated staffing issues.
- 6.5. Overall, 27% 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 38% of trainers. As above, these issues are a bigger problem to larger studs. For example, 24% of studs with 1-9 staff said recruitment, skills and retention issues are a problem, compared to 48% of studs with 10 or more staff. The following comments from respondents, help sum up the issues:

“We’re fairly small and we tend to keep hold of our staff for a long time, but now and then we need to recruit someone. We recently advertised and I was shocked by the small number of applicants and worse still some not even bothering to turn up for interview or if they did they lacked any enthusiasm.”

“We’re constantly disappointed by the lack of good quality staff, especially young staff. They come from the colleges but lack any work ethic. They don’t want to do all the hard work that comes with being on a stud, but they want as much money as they can get.”

“We’ve had some new recruits who simply don’t know much about horses. One recently didn’t even know the right side to lead a horse. Some of these can be trained up, but we’d prefer to have a higher calibre of recruit from the start.”

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



Number of respondents: 457 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?

## Appendix - Questionnaire

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

## Section A: Business details

**Q1. Including you and any working proprietors/owners, how many people are employed by your business during your peak season? Please select one answer only.**

- 1-4
- 5-9
- 10-14
- 15-19
- 20-24
- 25-34
- 35-49
- 50-99
- 100+

**Q2. 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? Estimates will do. Please write in as a number e.g. 5.**

Full-time: \_\_\_\_\_

Part-time: \_\_\_\_\_

**Q3. And roughly, how many are permanent, temporary, seasonal and casual during peak season? Estimates will do. Please write in as a number e.g. 5.**

Permanent: \_\_\_\_\_

Temporary: \_\_\_\_\_

Seasonal: \_\_\_\_\_

Casual: \_\_\_\_\_

**Q4. Overall, how many full-time and part-time vacancies have you had in the last 12 months?**

Estimates will do. Please write in as a number e.g. 5.

Full-time: \_\_\_\_\_

Part-time: \_\_\_\_\_

**Q5. And roughly, in the last 12 months, how many vacancies have been permanent, temporary, seasonal and casual? Estimates will do. Please write in as a number e.g. 5.**

Permanent: \_\_\_\_\_

Temporary: \_\_\_\_\_

Seasonal: \_\_\_\_\_

Casual: \_\_\_\_\_

**Q6. Overall, how many permanent full-time and part-time staff have left their roles in the last 12 months? Estimates will do. Please write in as a number e.g. 5.**

Full-time: \_\_\_\_\_

Part-time: \_\_\_\_\_

## Section B: Business Performance and Growth

- Q7. Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated?** Please select one answer only.
- Improved                                       Remained stable                                       Deteriorated
- Q8. Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?** Please select one answer only.
- Improve                                       Remain stable                                       Deteriorate
- Q9. On average, over the past 12 months, has your workforce increased, remained constant or decreased?** Please select one answer only.
- Increased                                       Remained constant                                       Decreased
- Q10. And over the next 12 months, on average, do you expect your workforce to increase, remain constant or decrease?** Please select one answer only.
- Increase                                       Remain constant                                       Decrease

## Section C: Employment, Skills and Training

- Q11. Have you had any vacancies in the last 12 months that you have found hard to fill?** Please select one answer only.
- Yes                                       No                                       Not applicable - not had any vacancies

If you answered 'Yes' to Q11, please continue. If you answered 'No' or 'Not applicable', please go to Q16.

- Q12. Roughly, what proportion of your vacancies have been hard to fill?** Please write in the number as a percentage. For example: 50%. Estimates will do.

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- Q13. Have the hard to fill vacancies mainly been for full-time staff, part-time staff or both?** Please select one answer only.
- Full-time                                       Part-time                                       Both

- Q14. Which specific occupations have you found hard to fill?** Please select all relevant answers.

- |   |   |
|---|---|
| <input type="checkbox"/> Stud Manager           | <input type="checkbox"/> Stud hand                  |
| <input type="checkbox"/> Assistant Stud Manager | <input type="checkbox"/> Sitting-up person          |
| <input type="checkbox"/> Stud groom             | <input type="checkbox"/> Tractor/maintenance person |
| <input type="checkbox"/> Second person          | <input type="checkbox"/> Stud secretary             |
| <input type="checkbox"/> Barn leader            | <input type="checkbox"/> Other                      |
| <input type="checkbox"/> Stallion handler       |   |

If "Other", please specify:

---

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**Q15. What have been the main causes of having hard to fill vacancies?** Please select all relevant answers.

- |   |  |
|---|--|
| <input type="checkbox"/> Low number of applicants generally   | <input type="checkbox"/> Our demand for new employees has been high due to business growth |
| <input type="checkbox"/> Low number of applicants with the required skills                              | <input type="checkbox"/> Rural location of stud/business                                   |
| <input type="checkbox"/> Lack of qualifications   | <input type="checkbox"/> Lack of accommodation offered to staff                            |
| <input type="checkbox"/> Lack of work experience  | <input type="checkbox"/> Other   |
| <input type="checkbox"/> Low number of applicants with the required attitude, motivation or personality | <input type="checkbox"/> Don't know  |

If "Other", please specify:

---

**Q16. Do you expect to have any vacancies that will be hard to fill in the next 12 months?** Please select one answer only.

- Yes  No  Don't know

**Q17. 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)** Please select one answer only.

- Yes  No

**If you answered 'Yes' to Q17, please continue. If you answered 'No', please go to Q22.**

**Q18. Roughly, what proportion of your staff have been difficult to retain?** Please write in the number as a percentage. For example: 50%. Estimates will do.

---

**Q19. Have the difficulties retaining staff mainly been for full-time staff, part-time staff or both?** Please select one answer only.

- Full-time  Part-time  Both

**Q20. Which specific occupations have you had difficulties retaining staff?** Please select all relevant answers.

- |   |   |
|---|---|
| <input type="checkbox"/> Stud Manager           | <input type="checkbox"/> Stud hand                  |
| <input type="checkbox"/> Assistant Stud Manager | <input type="checkbox"/> Sitting-up person          |
| <input type="checkbox"/> Stud groom             | <input type="checkbox"/> Tractor/maintenance person |
| <input type="checkbox"/> Second person          | <input type="checkbox"/> Stud secretary             |
| <input type="checkbox"/> Barn leader            | <input type="checkbox"/> Other                      |
| <input type="checkbox"/> Stallion handler       |   |

If "Other", please specify:

---



**Q21. What have been the main reasons why you have found it difficult to retain staff?** Please select all relevant answers.

- |  |   |
|--|---|
| <input type="checkbox"/> Low pay   | <input type="checkbox"/> Competition from other studs     |
| <input type="checkbox"/> Unsociable hours                                      | <input type="checkbox"/> Staff homesickness               |
| <input type="checkbox"/> Lack of career progression                            | <input type="checkbox"/> Lack of transport/rural location |
| <input type="checkbox"/> Staff member lacking job satisfaction                 | <input type="checkbox"/> Lack of accommodation offered    |
| <input type="checkbox"/> Staff member lacking motivation/commitment to the job | <input type="checkbox"/> Other                            |
| <input type="checkbox"/> Staff leaving due to health problems                  | <input type="checkbox"/> Don't know                       |

If "Other", please specify:

---

**Q22. Do you expect to have any staff retention problems in the next 12 months?** Please select one answer only.

- Yes  No  Don't know

**Q23. 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?** Please select one answer only.

- Yes  No

If you answered 'Yes' to Q23, please continue. If you answered 'No', please go to Q26.

**Q24. Which specific occupations have skills gaps?** Please select all relevant answers.

- |   |   |
|---|---|
| <input type="checkbox"/> Stud Manager           | <input type="checkbox"/> Stud hand                  |
| <input type="checkbox"/> Assistant Stud Manager | <input type="checkbox"/> Sitting-up person          |
| <input type="checkbox"/> Stud groom             | <input type="checkbox"/> Tractor/maintenance person |
| <input type="checkbox"/> Second person          | <input type="checkbox"/> Stud secretary             |
| <input type="checkbox"/> Barn leader            | <input type="checkbox"/> Other                      |
| <input type="checkbox"/> Stallion handler       |   |

If "Other", please specify:

---

**Q25. What skills gaps exist?** Please select all relevant answers.

- |  |   |
|--|---|
| <input type="checkbox"/> Lack of management skills | <input type="checkbox"/> Lack of talent/capability to look after horses           |
| <input type="checkbox"/> Lack of experience        | <input type="checkbox"/> Lack of talent/capability to handle yearlings/youngstock |
| <input type="checkbox"/> Lack of qualifications    | <input type="checkbox"/> Lack of stud specific knowledge                          |
| <input type="checkbox"/> Lack of confidence        | <input type="checkbox"/> Other  |
| <input type="checkbox"/> Lack of motivation        |   |

If "Other", please specify:

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- Q26. Over the past 12 months have you funded or arranged any off-the-job training or development or on-the-job/informal training or development for your staff?** (By off-the-job training we mean training away from the individual's immediate work position, whether on your premises or elsewhere / By on-the-job training we mean activities that would be recognised as training by the staff, and not the sort of learning by experience which could take place all the time) Please select one answer only.
- Yes, off-the job       Yes, on-the job       Yes, both       No

If you answered 'No' to Q26, please continue. If you answered 'Yes', please go to Q28.

- Q27. Why have you not funded or arranged any training or development for staff?** Please select all relevant answers.

- No need  
 Too expensive/do not have the funds  
 Lack of appropriate training/courses available locally  
 Lack of time  
 Other

If "Other", please specify:

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- Q28. In the next 12 months do you expect to fund or arrange any off or on the job training or development?** Please select one answer only.

- Yes, off-the job       Yes, on-the job       Yes, both       No

- Q29. 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?** Please select one answer for each initiative.

	Not aware	Yes, aware but do not know much about it	Yes, know about, but have not used	Yes, used
Educational opportunities provided by the TBA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational opportunities provided by the National Stud	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Careers and recruitment support provided by Careers in Racing and the TBA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Careers advice and training support provided by Racing Welfare's Racing Support Line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q30. Do you agree or disagree with the following statements about personal and professional development opportunities for staff? Please indicate on a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree. Please select one answer for each statement.**

	1 - Strongly disagree	2	3	4	5	6	7	8	9	10 - Strongly agree	Don't know
I am aware of the opportunities available to support our staff's personal and professional development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important to support our staff's personal and professional development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are sufficient personal and professional development opportunities available for my staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are sufficient opportunities for staff to progress their careers in our business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are sufficient opportunities for staff to progress their careers in the stud/racing industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q31. Thinking about your business, in general how big a problem are the following issues for your business? Please indicate on a scale of 1 to 10, where 1 is not a problem at all and 10 is a very big problem Please select one option for each statement.**

	1 - Not a problem at all	2	3	4	5	6	7	8	9	10 - A very big problem	Don't know
Difficulties recruiting enough staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulties recruiting staff with the appropriate skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A lack of staff to manage our Stud/number of horses effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A lack of appropriate skills amongst existing staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff that are not as healthy and physically able to do their job as they should be	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too many staff that are off work ill or injured	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff that are not as productive as they should be i.e. staff that are not as efficient and effective at doing their jobs as they should be	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff that are not motivated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulties retaining good staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q32. Overall, in general, how big a problem are recruitment, skills and retention issues to your business? Please indicate on a scale of 1 to 10, where 1 is not a problem at all and 10 is a very big problem** Please select one answer only.

- |                                |                          |                          |                          |                          |                          |                          |                          |                          |                               |                          |
|--------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------|--------------------------|
| <input type="checkbox"/>       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| 1 - Not a<br>problem at<br>all | 2                        | 3                        | 4                        | 5                        | 6                        | 7                        | 8                        | 9                        | 10 - A<br>very big<br>problem | Don't<br>know            |

**Q33. Finally, do you have any other comments you would like to make about the issues raised in this survey?**

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**Thank you for completing the survey. Your views are important to us and will help inform the way that services are provided to people working in racing and the Thoroughbred breeding industry.**

Please post your questionnaire by **Tuesday 28th February 2017** using the pre-paid freepost envelope provided, or alternatively send by freepost to (No stamp required):

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Research  
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