

RACING INDUSTRY
RECRUITMENT, SKILLS
AND RETENTION
RESEARCH 2021



RACING
FOUNDATION

PROJECT IN PARTNERSHIP WITH



INTRODUCTION & BACKGROUND

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

Conducted in late 2021, this was the third in a series of surveys. A baseline survey was conducted in Autumn 2016 and the second in 2018. The surveys are a tool to measure of the effectiveness of industry intervention in the areas 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 decision making.

In total 458 trainers participated via telephone and online, representing 79% of all trainers and over 80% of all horses in training. In addition, 1,616 racing staff participated via a postal survey and online, representing 21% of all racing staff.

KEY FINDINGS

Trainers

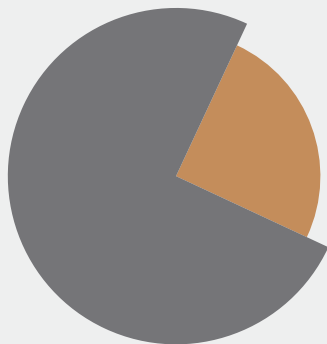
The research estimates that 25% of all permanent posts in racing yards require recruitment activity annually due to staff turnover or growth (24% in 2016 and 21% in 2018). This vacancy rate is a measure of recruitment demand and not of staff shortages.

This equates to an estimated 1,790 jobs per annum that require recruitment. There is evidence of hard-to-fill vacancies and issues with the retention of staff within their existing yards and the industry as a whole.

Of the survey respondents, 40% of trainers indicated that recruitment, skills and retention issues are problematic for their businesses (38% in 2016 and also 40% in 2018).

25%

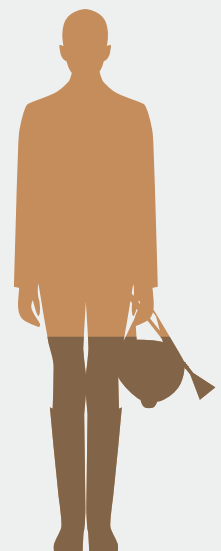
Estimated proportion of permanent posts that require recruitment activity annually



40%

Trainers with employment issues

- 38% in 2016
- 40% in 2018



55% of permanent vacancies in the racing industry are hard-to-fill, compared with 48% in 2016, 50% in 2018 and 47% nationally. Trainers reported that the two main reasons for recruitment difficulties are a lack of available staff and a lack of available sufficiently skilled staff, especially amongst work riders, rider/grooms and yard staff.

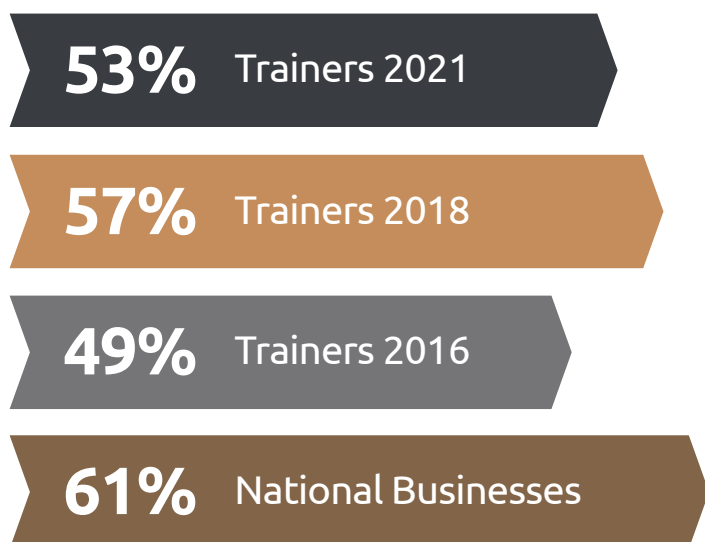
14% of trainers said they have retention difficulties, compared with 19% in 2016, 17% in 2018 and 8% of businesses nationally. This reflects an estimated 24% of permanent racing staff jobs that are vacated by staff per annum (28% in 2016 and 23% in 2018).

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.

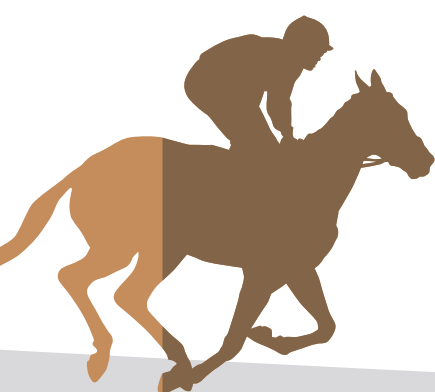
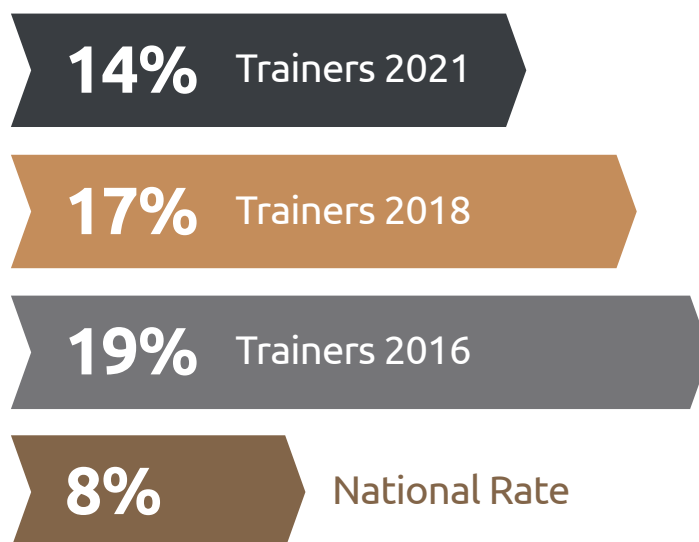
53% of trainers funded arranged training or development for their staff in the last 12 months, compared with 57% in 2018, 49% in 2016 and 61% of businesses nationally in the wider economy.

'Lack of need' is mentioned by trainers as the main reason for not funding or organising training, even by some trainers that reported skills gaps among staff.

Training arranged or funded



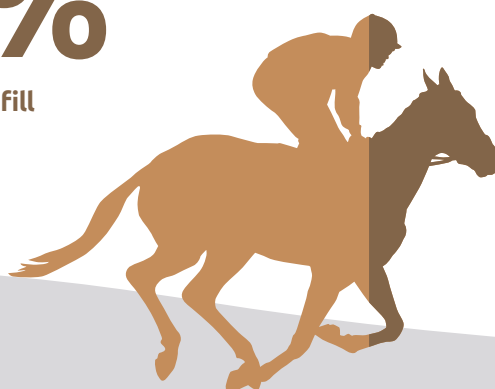
Retention Difficulties



55%

Racing Hard-to-fill positions

- 48% in 2016
- 50% in 2018



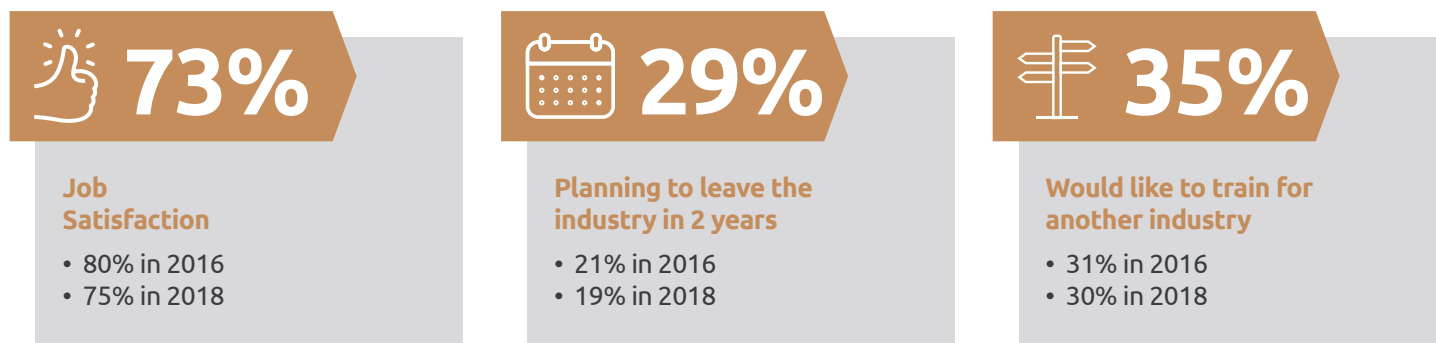
27%

Racing Skill-gaps

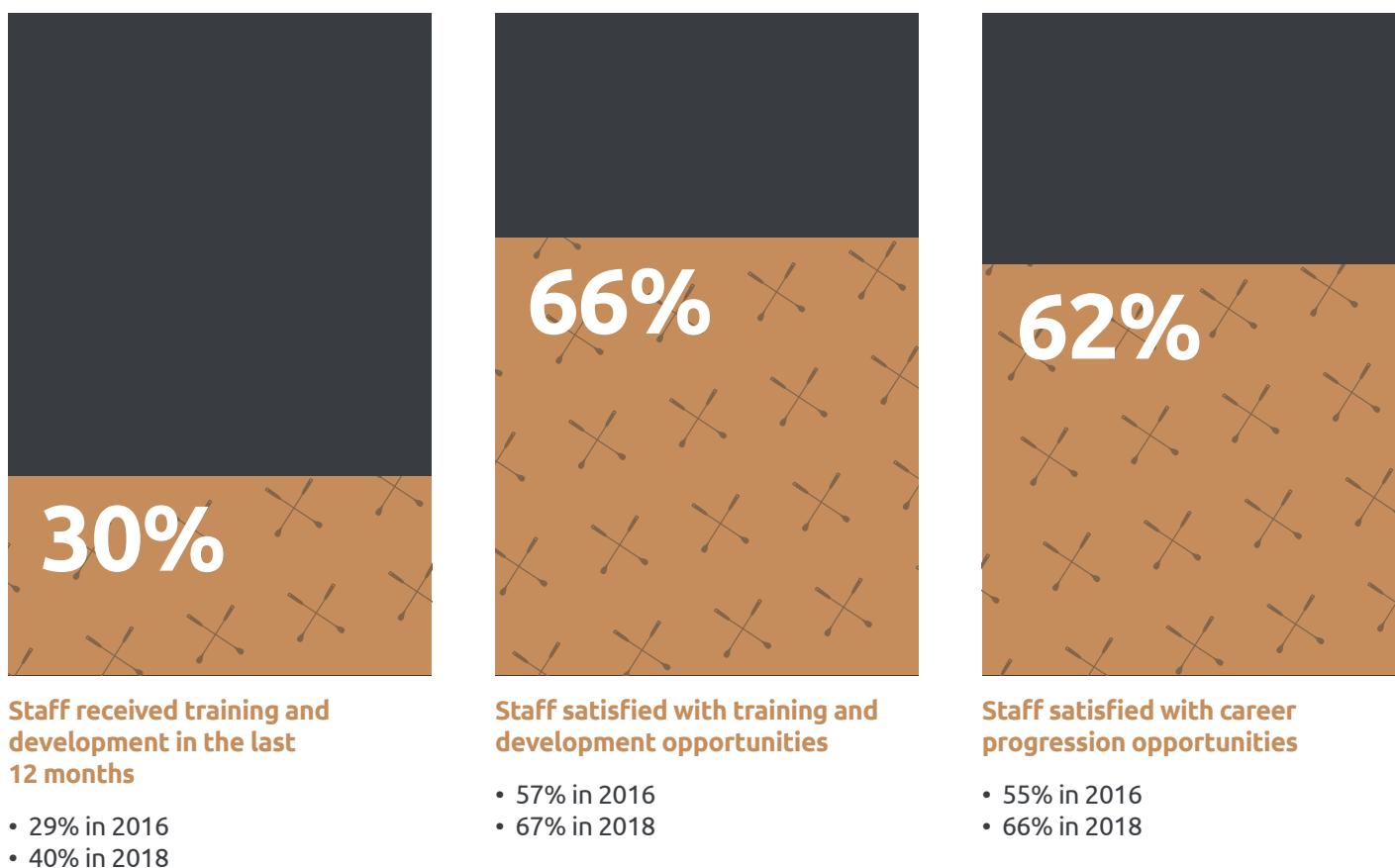
- 29% in 2016
- 27% in 2018

Staff

73% of staff said they are satisfied with their job (80% in 2016 and 75% in 2018). 29% are planning to leave the industry within two years (21% in 2016 and 19% in 2018). The reasons staff cited for planning to leave the industry are similar to those cited in 2016, and are the same reasons staff report lack of job satisfaction: working conditions, pay, lack of career progression opportunities and perceived poor management. 35% would like to train to start another career in a different industry (31% in 2016 and 30% in 2018).



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 (57% in 2016 and 67% in 2018). 62% are satisfied with career progression opportunities (55% in 2016 and 66% in 2018).



Industry recruitment, training and retention initiatives

Trainers (95%) and staff (81%) agree it is important for staff to engage in training and development. The majority of trainers and staff are increasingly more satisfied with training and development and career progression opportunities.

The majority of trainers (80% in 2021 and 73% in 2018) and staff (70% in 2021 and 68% in 2018) are now aware of the training and support initiatives being offered by the industry.

Lack of riding capability continues to be a growing concern with work riders being the key group reported by trainers as having skill gaps (cited by 76% of trainers that experience staff skills gaps compared with 49% in 2016).

It is important to engage in training and development

95% Trainers Agree

81% Staff Agree

Aware of training and support initiatives being offered by the industry

80% Trainers Aware

70% Staff Aware

Change over time

63% of trainers said recruitment has got worse, 28% said it has stayed the same and 4% said it had improved. 57% said that training and development has improved, 30% stayed the same and 5% got worse. 42% said retention has got worse, 43% stayed the same and 8% improved.

27% of racing staff said that training, development and career opportunities, services and support have improved, 30% stayed the same and 5% got worse (also 5% in 2021), the remainder said 'don't know'.



Trainers said recruitment has got worse

63%

• The same as in 2018



Trainers said training and development has improved

57%



Trainers said retention has got worse

42%

• The same as in 2018

Training, development and career opportunities, services and support

30%

Same

27%

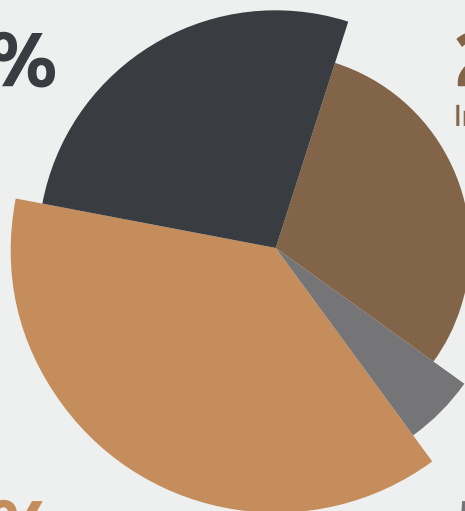
Improved

38%

Don't Know

5%

Worse



IMPLICATIONS

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

Key business indicators such as vacancy rate (a measure of recruitment demand), retention rate (a measure of staff churn), and hard-to-fill vacancies, alongside trainer perceptions of retention difficulties and skills gaps, all indicate the scale of the challenge.

Staff feedback is concerning. Reduced levels of staff are receiving training, reduced levels of staff are satisfied with the training and development opportunities presented to them, more staff plan to leave within two years and more staff want to train for another industry. Overall job satisfaction has fallen over the course of the three surveys. From 80% in 2016, to 75% in 2018, and 73% in 2021.

We must conclude that the current arrangements for industry support are not delivering improvement. Indeed, they are generally delivering decline.

THE FUTURE

The Horserace Betting Levy Board and the Racing Foundation, alongside the British Horseracing Authority, have commissioned Portas to examine how the industry can best deal with the challenges faced with recruitment, training and retention. At the same time the National Trainers Federation, supported by the National Association of Racing Staff, have led a staff working group examining the day-to-day challenges being faced in racing yards.

We are convinced that the best chance of dealing with staffing issues is to fully implement the Portas recommendations; creating an independent and skills-based People Board and team that effectively engages with the staff working group and other industry participants. This will enable a strategic approach across the whole people journey; one that prioritises interventions which have the greatest impact.

Our hope is that the industry recruits experts in HR management who are provided with the right structures, support and funding. They should be made fully accountable for improvements in the indicators reported here. This will result in racing having expert knowledge whilst removing racing politics from the decision-making process.

The 2021 survey illustrates that despite significant investment, there has been a lack of any meaningful progress since 2016. By 2023 we hope to have seen a change in the approach, resulting in improved survey results, which are indicative of a more sustainable people journey within the industry.

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

The research was conducted by independent research organisation, Public Perspectives Ltd.