

Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2022

Report: April 2022



Research
Evaluation
Community Engagement
Strategy Development

www.publicperspectives.co.uk

Contents

| | |
|--|-----------|
| Executive Summary | 1 |
| Main Report | 5 |
| Section 1: Introduction | 5 |
| Introduction and aims of the research | 5 |
| Approach to the research | 5 |
| Reporting | 6 |
| Section 2: Labour force statistics, business performance and workforce demand | 7 |
| Introduction | 7 |
| Labour force statistics | 7 |
| Business performance | 9 |
| Workforce demand | 10 |
| Section 3: Recruitment | 11 |
| Introduction | 11 |
| Vacancy rates | 11 |
| Hard-to-fill vacancies | 12 |
| Reasons for hard-to-fill vacancies | 12 |
| Section 4: Retention | 14 |
| Introduction | 14 |
| Retention rates | 14 |
| Retention difficulties | 15 |
| Reasons for retention difficulties | 16 |
| Section 5: Skills, training and development | 16 |
| Introduction | 17 |
| Skills gaps | 17 |
| Training and development prevalence | 17 |
| Awareness and use of training and development initiatives | 19 |
| Perceptions and attitudes about training and development | 20 |
| Section 6: Concluding points | 21 |
| Introduction | 21 |
| Perceptions about key recruitment, skills and retention issues | 21 |
| Perceptions of change over time | 22 |

Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2022

Executive Summary

Introduction and aims of the research

1. The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA), commissioned Public Perspectives, an independent research and evaluation organisation, to conduct a survey of studs about recruitment, skills and retention in the racing industry. Similar surveys have been conducted with racing trainers and racing staff. This was the third survey in a series, with the second in 2019, which followed-up on a baseline survey conducted in 2017 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 other relevant 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 with studs adopted the same questionnaire used for racehorse trainers to provide for comparison, albeit with relevant wording tweaks to reflect the nature of studs. The survey was conducted from the end of February through to late April 2022.
4. At the time of the research there were approximately 421 studs that, according to TBA records, employed staff. The survey was administered initially via e-mail/on-line and then via post. In total, 209 studs responded to the survey, which represents a 50% response rate (49% in 2017 and 50% in 2019).

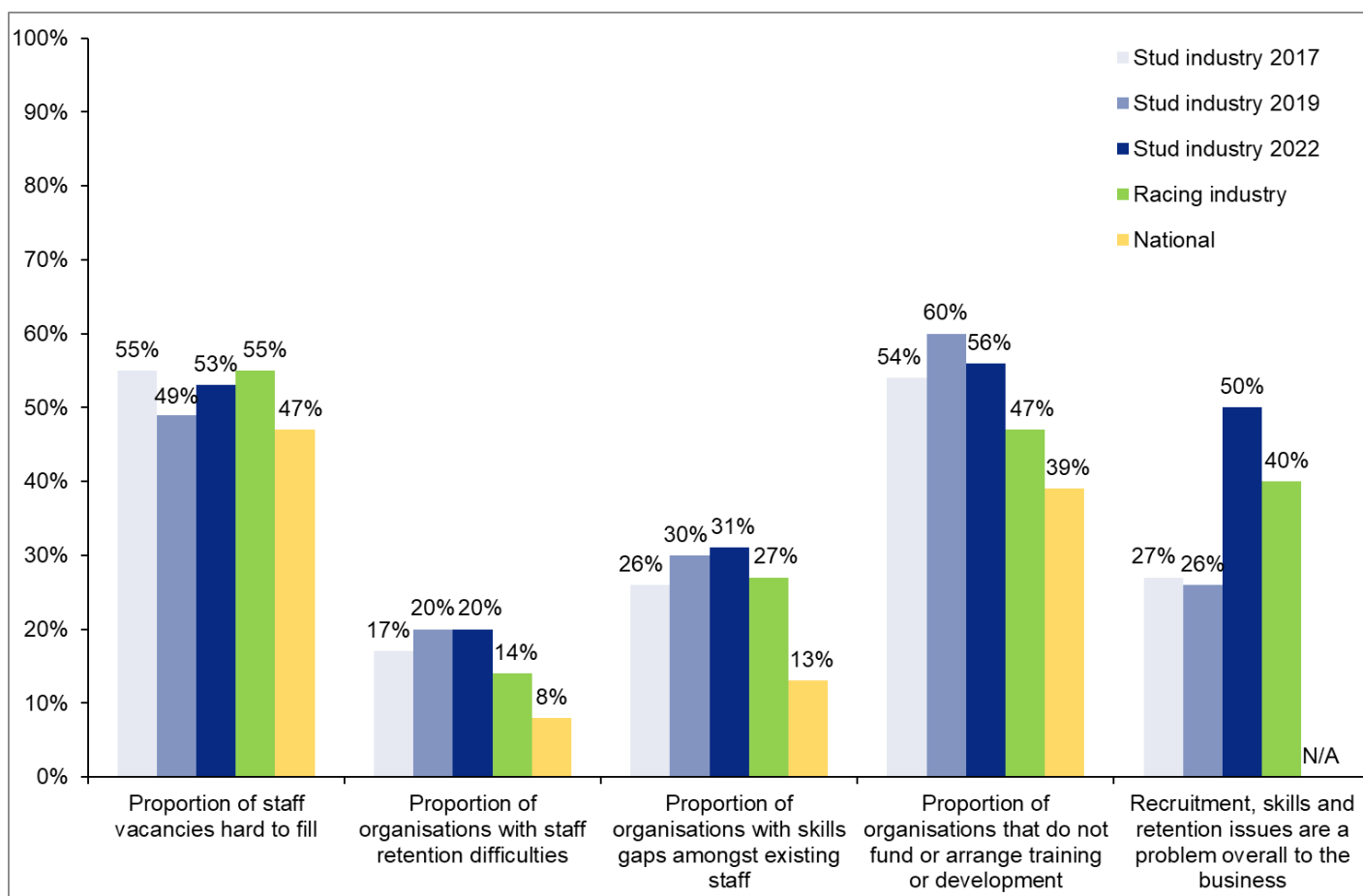
Key findings

5. The recruitment, skills and retention issues of studs are summarised below and compared over time and against racing yards and national data (from the UK Employer Skills Survey 2019):
 - There is an estimated **annual vacancy rate of 15% of all permanent stud jobs** (15% in 2017 and 18% in 2019) (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs – this is essentially a measure of recruitment demand and is not a measure of staff shortages). These are permanent posts in studs that require recruitment activity annually, due to staff moving jobs within a yard, moving to another yard, leaving the industry and/or business growth creating new roles. This compares to a vacancy rate of 25% of permanent racing yard jobs and an estimated national annual vacancy rate of between 15% and 35%.
 - An estimated **53% of permanent vacancies are hard-to-fill**, compared to 55% in 2017, 49% in 2019 and 55% of permanent racing yard vacancies (up from 50% in the previous

survey). The national figure, based on the UK Employer Skills Survey, is 47% (increased from 33% in 2017).

- Whilst there has only been a small change in the proportion of vacancies that are hard-to-fill, **the proportion of studs that said they had a hard-to-fill vacancy has increased notably from 33% in 2017 and 39% in 2019 to 49% in 2022.**
- Similar to racehorse trainers, studs said the **two main reasons for recruitment difficulties continue to be a lack of staff in general and a lack of sufficiently skilled staff, especially stud hands and stud grooms.** Brexit and other immigration changes appear to be exacerbating the issue, while the Covid-19 pandemic is only cited by a small number of studs as a reason for hard-fill-vacancies.
- **20% of studs have retention difficulties**, the same as in 2019 and compared to 17% in 2017, 14% of racehorse trainers and 8% of businesses nationally. The main difficulty, as in the past, is in the retention of stud hands. **Working pattern/hours is cited as the main reason for staff retention difficulties**, followed by staff leaving to change career. The impact of Brexit and other immigration changes appear to be exacerbating retention issues, although the pandemic has only had a minor impact.
- **31% of studs said there are gaps in the skills or capabilities of their existing workforce.** This compares to 26% in 2017, 30% in 2019, 27% of racing yards and a national figure of 13%. The main skills gaps continue to be amongst stud hands, with the main reasons for skills gaps a lack of experience, especially lack of stud specific knowledge and lack of talent/capability to handle yearlings/youngstock.
- **The majority of studs are aware of the training and development initiatives in the industry.** For example, on average across all initiatives, 68% of studs are aware of the training and development initiatives. This compares to 78% in 2017, 71% in 2019 and 80% of racing yards (although some of the initiatives have changed since 2017 and are different to those in racing yards and so the results are not directly comparable).
- **A minority of studs have used the training and development initiatives.** For example, on average across all initiatives, 14% of studs have used the training and development initiatives (and 13% of all respondents found them helpful, which equates to 93% of those that used the training and development initiatives). This compares to 13% in 2017 and 2019, and 26% of racing yards (22% found them helpful or rather 85% of those that used them).
- **56% of studs have not funded or arranged any training or development in the past 12 months**, compared with 54% in 2017, 60% in 2019 and 47% of racing yards. This compares with 39% of businesses nationally that do not fund or arrange training. The main reason cited for not providing training or development is that there is not a need, despite many of these studs citing skills gaps amongst their workforce.
- **Overall, a notable 50% of studs said that recruitment, skills and retention issues are a problem to their business**, compared to 27% in 2017, 26% in 2019 and 40% of racing trainers (same as in the previous survey).
- **Larger studs are more likely to experience hard-to-fill vacancies and state that recruitment, skills and retention issues are a problem to their business**, although they are also more likely to provide training and development to their staff.

Figure 1: Summary of recruitment, skills and retention issues



Concluding points

6. Recruitment, skills and retention issues continue to impact on the Thoroughbred breeding industry. At best indicators remain static and at worst the proportion of studs with hard-to-fill vacancies and that consider recruitment, skills and retention to be an issue has notably increased. Whilst there has also been a worsening staffing situation nationally, the issues appear more significant than the situation in the wider economy and, with most metrics, broadly comparable to those in racing yards.
7. Recruitment of sufficient staff and adequately skilled staff stands out as key issues, with the stud hand and, to a lesser extent, stud groom roles continuing to be the most problematic. In addition, a notable proportion of studs continue to experience retention difficulties, and therefore reducing the proportion of staff that leave their jobs and the industry should help reduce recruitment pressures. Some skills gaps also exist amongst current staff and there is scope to increase the awareness and exposure of staff to training and development opportunities in the industry.
8. The issues around recruitment, skills and retention are long-standing, although it is worth noting the context of similar challenges in the wider racing industry and national economy, and difficulties exacerbated by Brexit and other immigration changes. These are not presented as excuses, but rather as on-going challenges that need addressing alongside underlying issues.

Thoroughbred Breeders' Association (TBA) response to the research findings

The 2022 Recruitment, Skills and Retention survey carried out by Public Perspectives and funded by the Racing Foundation confirmed that the Thoroughbred breeding industry faces considerable workforce and skills shortages which are having an impact on how studs operate. Since the previous survey carried out in 2019, the number of studs indicating that these issues are causing a serious problem to their business increased sharply, and a third of studs reported a lack sufficient employees to manage their business effectively. The most common recruitment, skills and retention problems described were difficulties in recruiting enough staff and difficulties in recruiting staff with the right skills, and skill gaps within existing employees were also reported. Studs were also experiencing retention difficulties, with working patterns and hours and lack of career progression/change of career cited as the most common reasons for employees leaving.

These worrying findings have been reflected in other industry research carried out over the past two years, including the most recent Economic Impact Study of Britain's Thoroughbred Breeding Industry (PwC, 2023), which identified the shortage of skilled employees as a blocker to industry growth.

The TBA has a role to play in supporting employers and co-ordinating a collective approach to address the breeding industry's recruitment, skills and retention challenges. A recruitment and retention working group has been formed and has commenced a project to consult with employers and employees to dig deeper into the statistics and encourage participation in finding solutions. Joe Grimwade has been appointed to manage the project and is meeting with employers to share the results of the 2022 survey and gain deeper insight into the key issues emerging from it. Areas for discussion include identifying training needs and exploring how employee development and career progression can be facilitated, and raising awareness of the many existing recruitment, wellbeing, and support initiatives that employers and employees can take advantage of. The TBA would also like to encourage the sharing of good practice amongst employers and to explore the potential for introduction of flexible working patterns and other workplace benefits and practices that might appeal to new recruits and encourage retention of existing employees. There is also potential for employers to participate in collective careers promotion and recruitment initiatives and to broaden the appeal of working in the breeding industry to a more diverse audience.

The TBA is extremely grateful to the Racing Foundation who funded this research and the previous surveys in 2017 and 2019, which together have provided tangible data on which to base future action. The survey and subsequent consultation will also enable the breeding industry to contribute meaningfully to the future industry people strategy as the newly formed People Board starts to develop and implement an overarching approach to industry workforce issues.

Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2022

Main Report

Section 1: Introduction

Introduction and aims of the research

- 1.1. The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA), commissioned Public Perspectives, an independent research and evaluation organisation, to conduct a survey of studs about recruitment, skills and retention in the racing industry. Similar surveys have been conducted with racing trainers and racing staff. This was the third survey in a series, with the second in 2019, which followed-up on a baseline survey conducted in 2017 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 other relevant initiatives.
- 1.2. 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

- 1.3. The research with studs adopted the same questionnaire used for racehorse trainers to provide for comparison, albeit with relevant wording tweaks to reflect the nature of studs.¹ The survey was conducted from the end of February through to late April 2022.
- 1.4. At the time of the research there were approximately 421 studs that, according to TBA records, employed staff.² The survey was administered initially via e-mail/on-line to all but 75 who did not have an e-mail address. Non-respondents and those that did not have an e-mail address were then sent a postal questionnaire (with an option to respond on-line)³, with a final round of 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, 209 studs responded to the survey, which represents a 50% response rate (49% in 2017 and 50% in 2019).

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

² Due to the nature of studs, the research did not engage with studs that do not employ staff, with these studs either being very small operations and/or boarding their horses at other studs. Initially a list of 445 studs was provided by the TBA. However, 24 studs replied to say they do not employ staff or are no longer in operation.

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

- 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 +/- 4.8% at a 95% confidence level and for some results is as low as +/- 2%.⁴ This means that we can be 95% confident that the 'real' result for any given question would be within 4.8 percentage points 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.
- 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 (in broad terms a difference of no more than 10 percentage points or more is required between years to be statistically significant).

Reporting

- 1.7. The following report summarises the key findings from the survey. Each relevant question has been analysed to identify any important patterns, trends, similarities or differences by different types of studs. Commentary is only provided where significant or meaningful findings are identified.
- 1.8. Comparison is provided against the racehorse trainer results, where appropriate and against the past survey results in 2017 and 2019.
- 1.9. 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).
- 1.10. 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'.
- 1.11. 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

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

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

Introduction

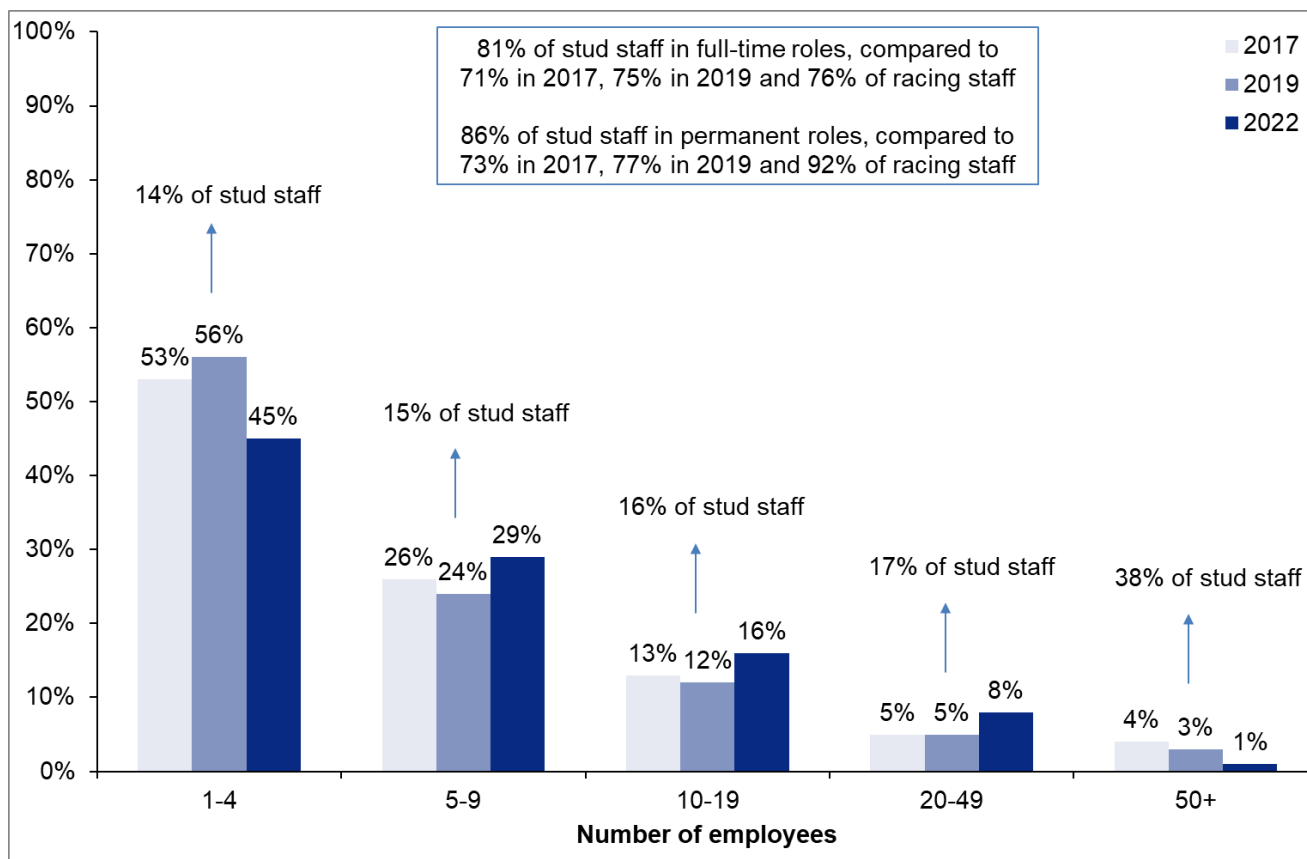
2.1. This section presents findings about the number of staff employed by studs, business performance and workforce demand.

Labour force statistics

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, in addition there is a shift over time towards full-time permanent staffing

- 2.2. 45% of studs that employ staff have 1-4 staff, accounting for 14% of stud staff and 29% have 5-9 staff, accounting for 15% of stud staff. This compares to 59% of racing trainers that have 1-9 staff, accounting for 20% of racing staff.
- 2.3. 16% of studs have 10-19 staff, accounting for 16% of stud staff and 8% have 20-49 staff, accounting for 17% of stud staff. This compares to 37% of racing trainers that have 10-49 staff, accounting for 56% of racing staff.
- 2.4. 1% of studs have 50 or more staff, accounting for 38% of all stud staff. This compares to 5% of trainers that have 50+ staff, accounting for 23% of racing staff.
- 2.5. 81% of stud staff are in full-time roles, compared to 76% of racing staff.
- 2.6. 86% of stud staff are in permanent roles, with the remainder in temporary, seasonal or casual roles. This compares to 92% of racing staff in permanent roles.
- 2.7. Over time, there appears a statistically significant shift in the structure of employment with a push towards larger studs, with more full-time, permanent roles, which may reflect a wider trend in the sector towards the consolidation of studs into larger organisations, helping increase resilience against economic challenges.
- 2.8. New for the 2022 survey, studs were asked to indicate the proportion of their staff by gender, age and nationality (rounded to nearest 5% as based on estimates):
 - Male: 40% (50% in racing)
 - Female: 60% (50% in racing)
 - Aged 16-24: 15% (22% in racing)
 - Aged 25-34: 25% (24% in racing)
 - Aged 35-44: 20% (18% in racing)
 - Aged 45-54: 15% (15% in racing)
 - Aged 55+: 25% (21% in racing)
 - UK Citizen: 90%
 - Non-UK Citizen: 10%

Figure 2.1: Business size by number of employees



Number of respondents: 209 studs.

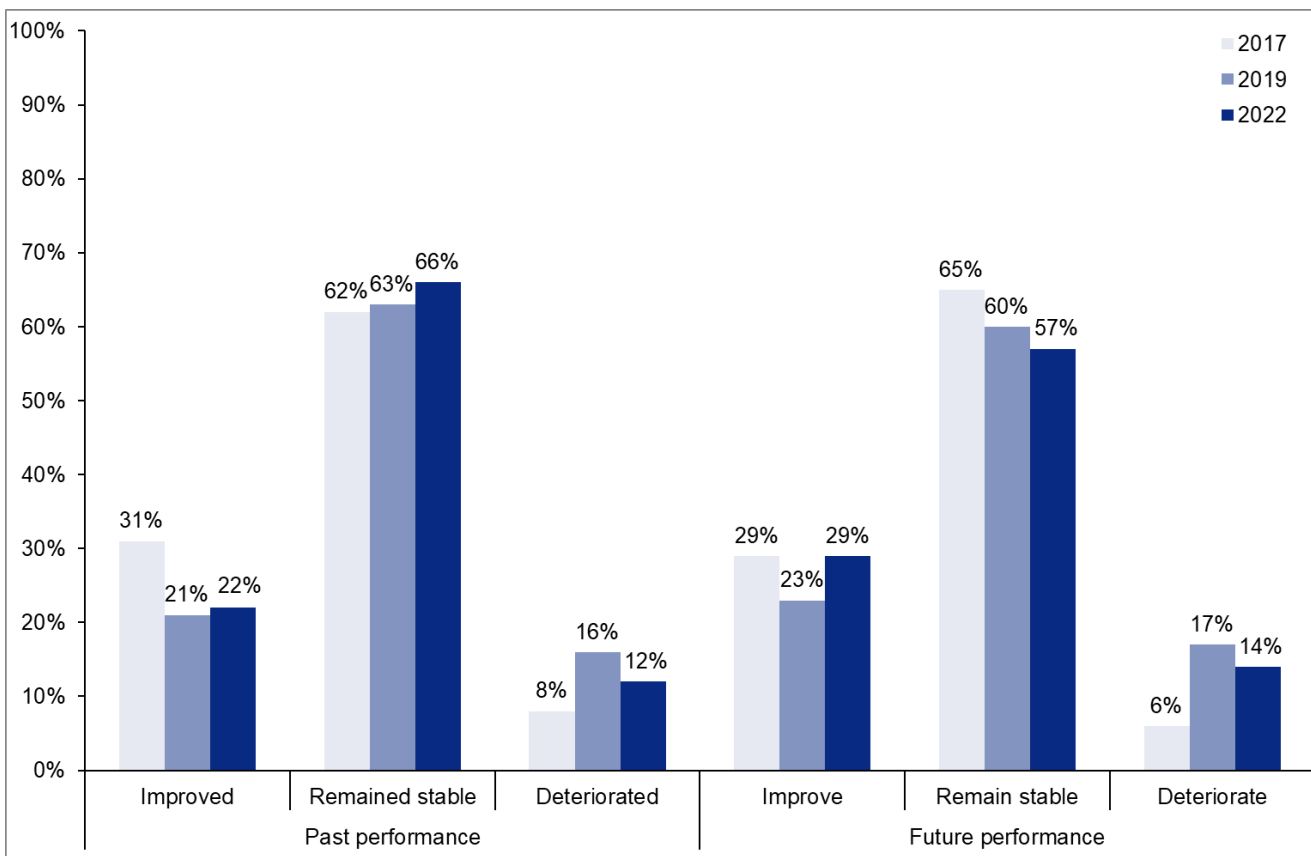
Question asked: Including you and any working proprietors/owners, how many people are employed by your business during your peak season? / How many are employed on a full-time basis (that is working 40 or more hours a week), and how many on a part-time basis (that is working fewer than 40 hours a week)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

Business performance

A fifth of studs reported improved business performance, similar to 2019, and just under a third expect performance to improve in the future, similar to 2017

- 2.9. Similar to 2019, 22% of studs said their business performance improved over the past 12 months, compared to 31% in 2017, 21% in 2019 and 32% of racing trainers. 66% said it remained stable and 12% said it deteriorated, compared to 8% in 2017, 16% in 2019 and 21% of racing trainers.
- 2.10. 29% of studs expect performance will improve over the next 12 months, the same figure as in 2017 and compared to 23% in 2019 and 46% of racing trainers. 57% said it will remain stable and 14% said it will deteriorate, compared to 6% in 2017, 17% in 2019 and 8% of racing trainers.
- 2.11. Similar to 2017 and 2019, smaller studs reported less positive performance. For example, 19% of studs with under 10 staff reported improved performance in the past compared to 32% of larger studs. Smaller studs are as optimistic as larger studs about future performance.
- 2.12. Studs were also asked about their business performance compared with prior to the pandemic, 16% said their performance has improved, 64% said it has remained the same, and 20% said it has deteriorated. Results are broadly consistent by different sizes of organisation.

Figure 2.2: Past and future business performance



Number of respondents: 209 studs.

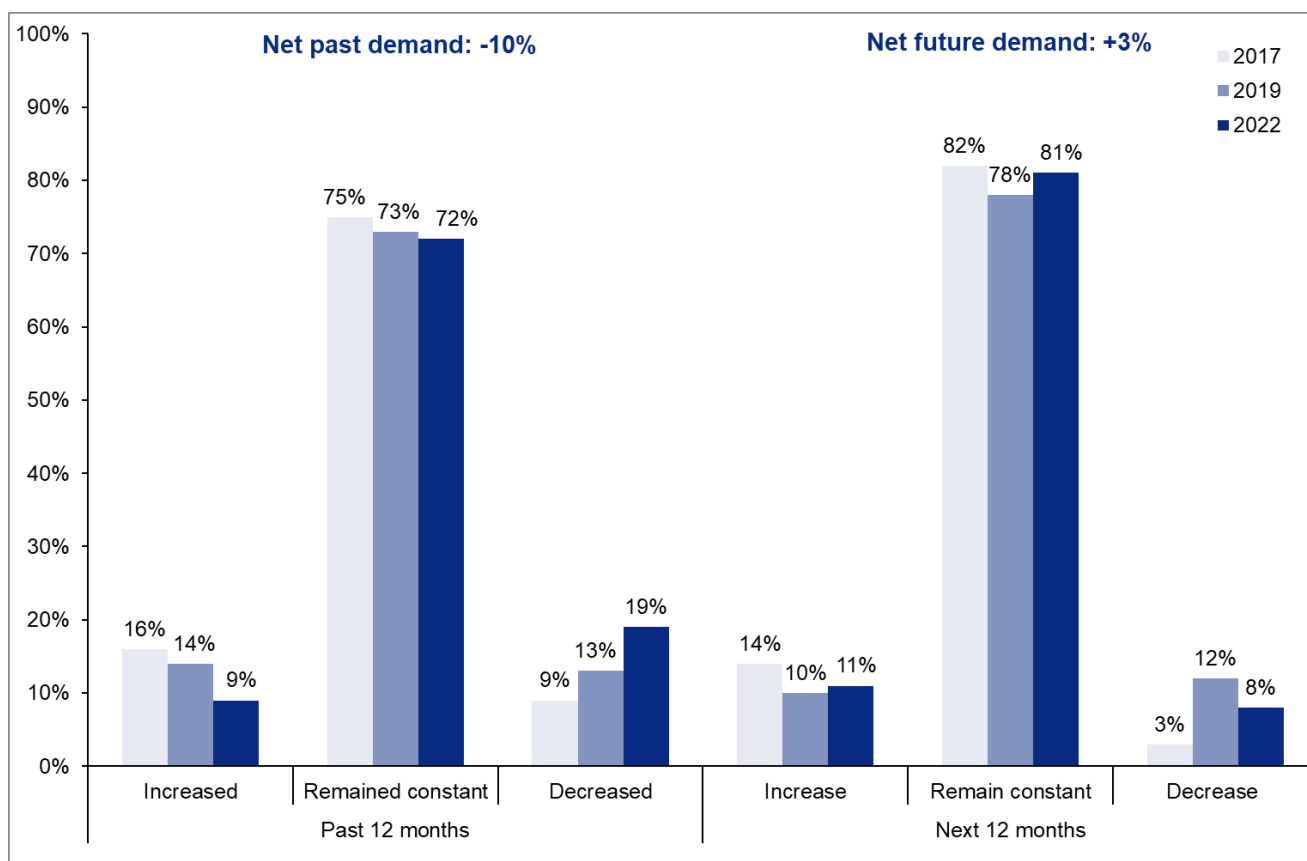
Questions asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? / Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?

Workforce demand

Most studs said their workforce remained constant over the last 12 months and expect it to remain constant in the next 12 months, with demand for staff contracting over the past year

- 2.13. 9% of studs said that their workforce increased over the past 12 months (compared to 16% in 2017 and 14% in 2019), while 19% reported it decreased (9% in 2017 and 13% in 2019). This results in net past demand (i.e. the difference between the increase and decrease in workforce) of -10% (compared to +7% in 2017, +1% in 2019 and -1% for racing trainers).
- 2.14. 11% of studs expect their workforce to increase in the next 12 months (14% in 2017 and 10% in 2019), while 8% expect it to decrease (3% in 2017 and 12% in 2019), resulting in a net future demand of +3% (compared to +11% in 2017, -2% in 2019 and +18% for racing trainers).
- 2.15. Compared to prior the pandemic, 10% said their workforce has increased, 81% said it remained constant, and 8% said it has decreased.

Figure 2.3: Workforce demand



Number of respondents: 209 studs.

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

Section 3: Recruitment

Introduction

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

Vacancy rates

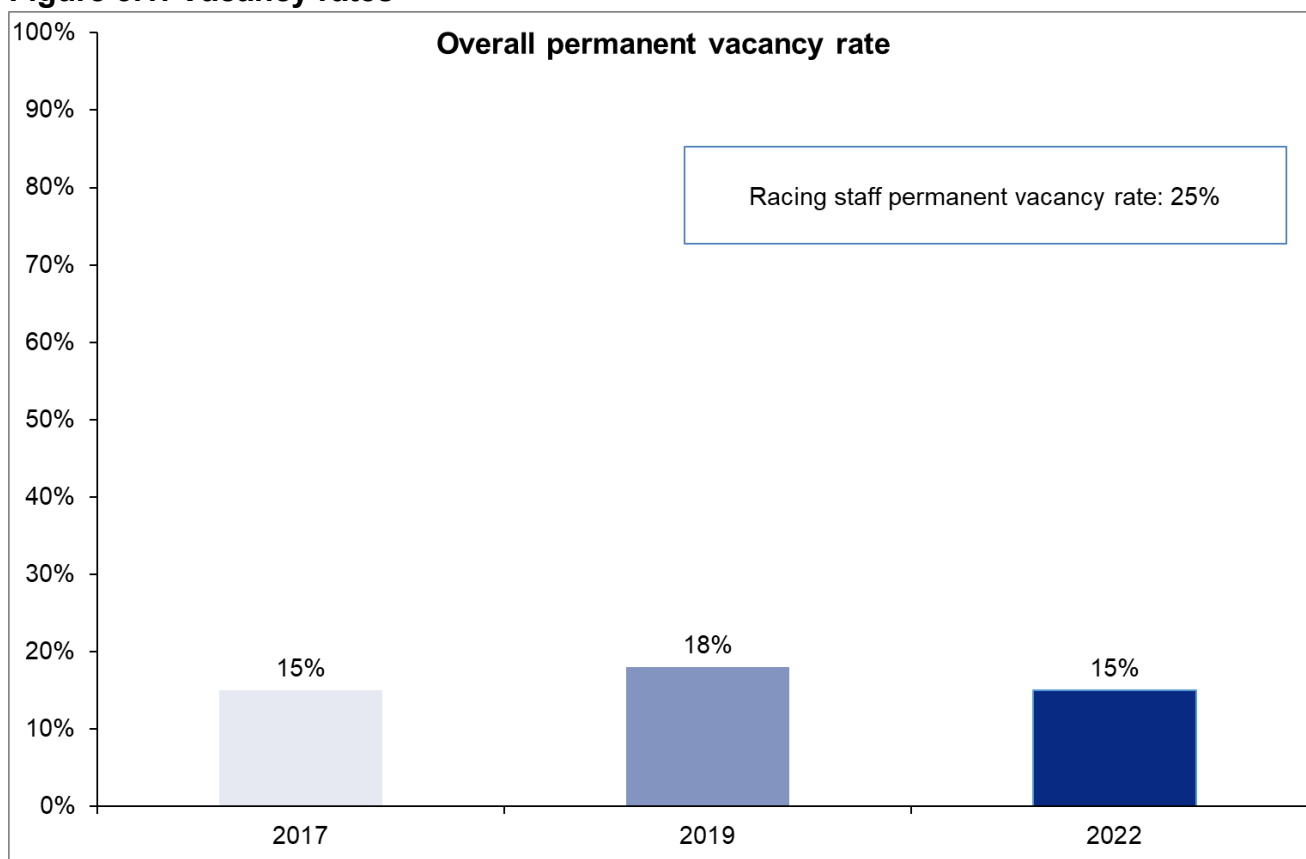
Under one in six permanent jobs are vacant annually, which is less than in racing yards and nationally

3.2. There is an estimated annual vacancy rate of 15% of all permanent stud jobs (15% in 2017 and 18% in 2019) (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs – this is essentially a measure of recruitment demand and is not a measure of staff shortages). These are permanent posts in studs that require recruitment activity annually, due to staff moving jobs within a yard, moving to another yard, leaving the industry and/or business growth creating new roles.

3.3. This compares to a vacancy rate of 25% of permanent racing yard jobs.

3.4. The UK Office for National Statistics calculates a vacancy rate quarterly, based on asking businesses how many vacancies they currently have. 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 4.1% (January 2022). 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 stud vacancy rate is at the lower end of this range.

Figure 3.1: Vacancy rates



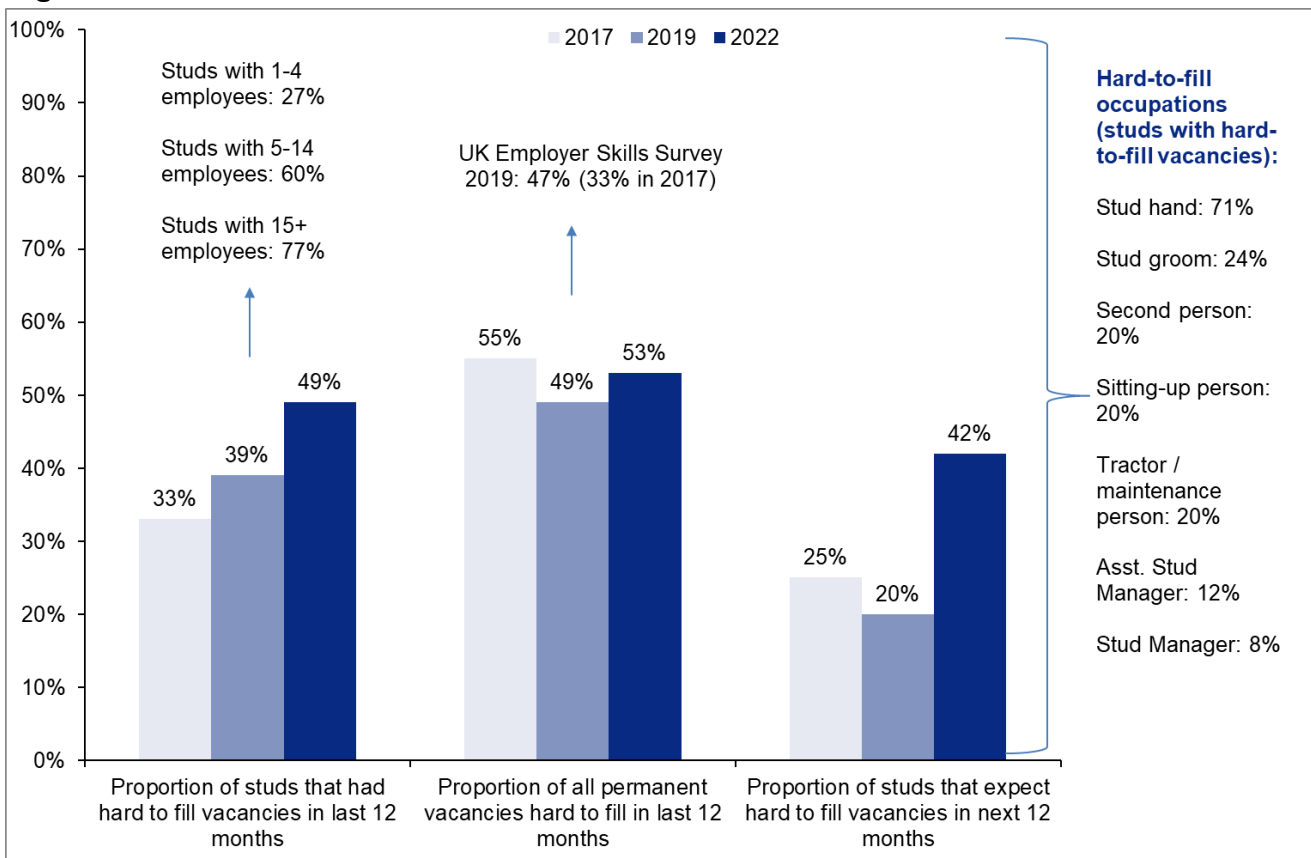
Number of respondents: 209 studs. Questions asked: Overall, how many full-time and part-time vacancies have you had in the last 12 months? / And roughly, in the last 12 months, how many vacancies have been permanent, temporary, seasonal and casual?

Hard-to-fill vacancies

Nearly half of studs have hard-to-fill vacancies, continuing the increase over time, and over half of all permanent vacancies are hard-to-fill, with larger studs most affected

- 3.5. 49% of studs (compared to 33% in 2017, 39% in 2018 and 50% of racing yards) said they had hard-to-fill vacancies in the last 12 months – this is a statistically significant increase, continuing the trend over time. 35% said they did not have hard-to-fill vacancies and 17% said they did not have any vacancies.
- 3.6. An estimated 53% of permanent vacancies are hard-to-fill, compared to 55% in 2017, 49% in 2019 and 55% of permanent racing yard vacancies. The national figure, based on the UK Employer Skills Survey, is 47%, an increase from 33% in 2017.
- 3.7. Similar to previous surveys, larger studs are more likely to say they had hard-to-fill vacancies. For example, 27% of studs with 1-4 employees said they had hard-to-fill vacancies, compared with 60% with 5-15 employees and 77% with 15+ employees.
- 3.8. 42% of studs expect to have hard-to-fill vacancies in the next 12 months, compared to 25% in 2017, 20% in 2019 and 48% of racing yards – again this is a statistically significant increase over time. 67% of studs that had hard-to-fill vacancies in the past also expect to have hard-to-fill vacancies in the future (56% in 2017 and 48% in 2019), highlighting this is an enduring problem for some studs.
- 3.9. The occupations which were most commonly cited as being hard-to-fill are similar to those in 2017 and 2019 - stud hands (cited by 71% of studs that said they had hard-to-fill vacancies), stud grooms (24%), second person (20%), sitting-up person (20%), and tractor/maintenance person (20%).

Figure 3.2: Hard-to-fill vacancies



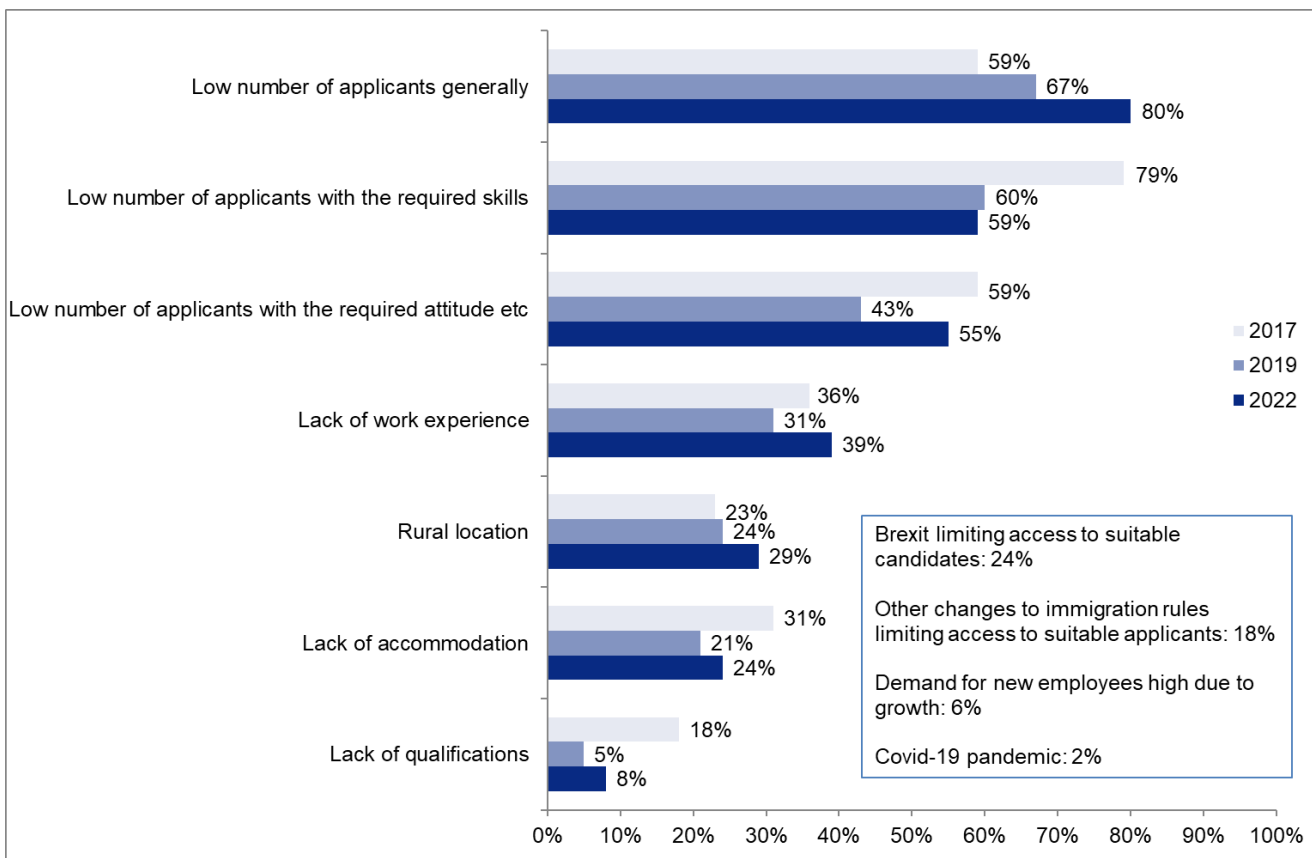
Number of respondents: 209 studs. Questions asked: Have you had any vacancies in the last 12 months that you have found hard to fill? / Roughly, what proportion of your vacancies have been hard to fill? / Which specific occupations have you found hard to fill? / Do you expect to have any vacancies that will be hard to fill in the next 12 months?

Reasons for hard-to-fill vacancies

The number of applicants in general and with the required skills continue to be cited as the main reasons for hard-to-fill vacancies, albeit with Brexit and immigration changes exacerbating the issue

- 3.10. The low number of applicants generally (80% in 2022, 67% in 2019 and 59% in 2017 – a statistically significant change) and the low number of applicants with the required skills (59% in 2022, 60% in 2019 and 79% in 2017) continue to be the top cited reasons for recruitment difficulties. In addition, other factors, such as low number of applicants with the required attitude (55% in 2022, 43% in 2019 and 59% in 2017 – a statistically significant change), lack of experience (39%), rural location (29%) and lack of accommodation (24%) should not be ignored, while lack of qualifications (8%) continues to remain a lesser issue.
- 3.11. Brexit (cited by 24% of studs with hard-to-fill vacancies) and other immigration changes (18%) appear to be exacerbating the issue, while the Covid-19 pandemic is only cited by 2% of studs as a reason for hard-fill-vacancies.

Figure 3.3: Reasons for hard-to-fill vacancies



Number of respondents: 101 studs (studs that said they had hard-to-fill vacancies).

Note: Respondents could select more than one answer.

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

Section 4: Retention

Introduction

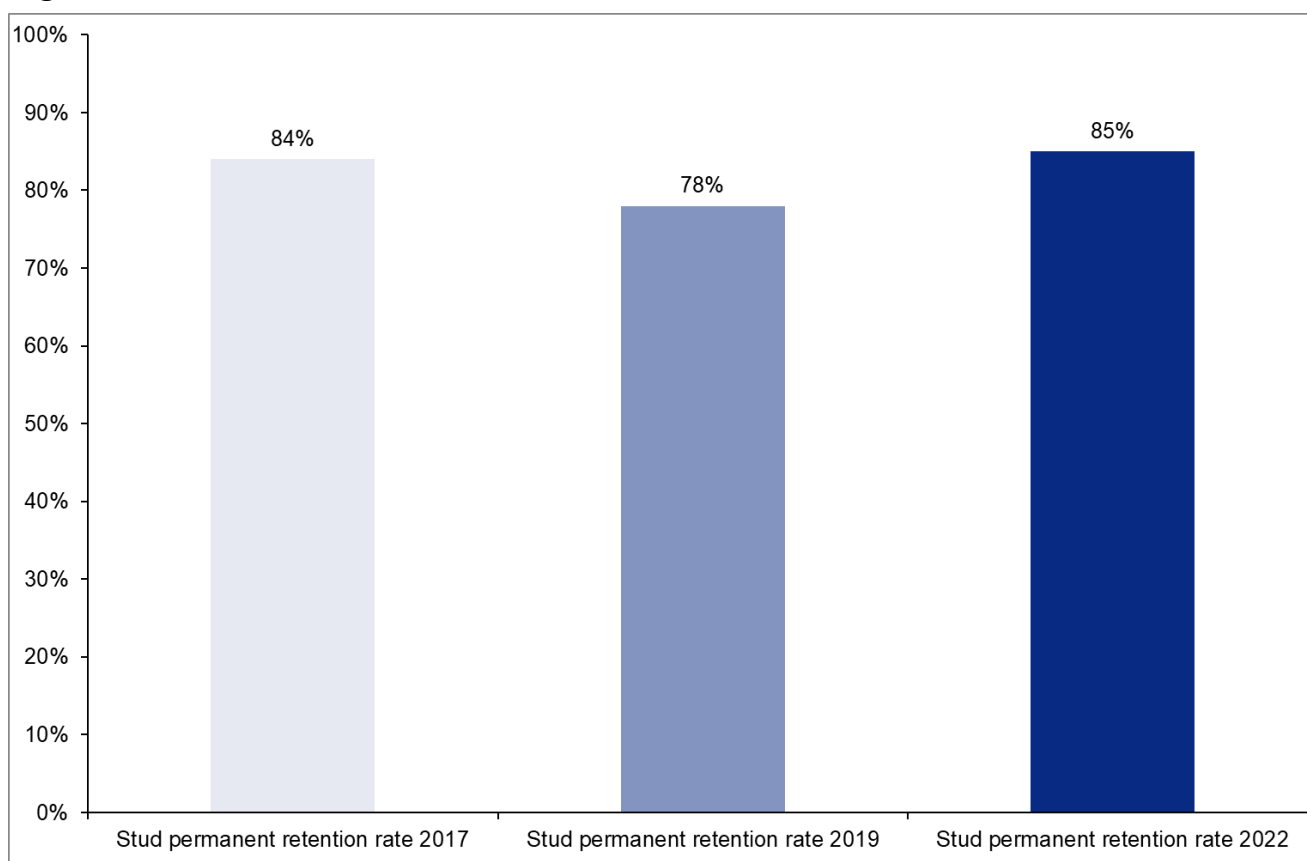
4.1. This section presents findings about staff retention, including information about retention rates, retention difficulties, the types of studs and occupations most affected, and the reasons for retention difficulties.

Retention rates

Less than 1 in 6 staff leave their job roles each year, bringing the retention rate back into line with the 2017 results

4.2. Overall, there is an estimated retention rate of 85% of all permanent stud staff in their job roles per annum (84% in 2017 and 78% in 2019). In other words, some 15% of stud staff leave their jobs each year (some of these may change jobs within the same organisation or move to another organisation within the industry). This compares to a retention rate of 76% in racing yards.

Figure 4.1: Retention rates



Number of respondents: 209 studs.

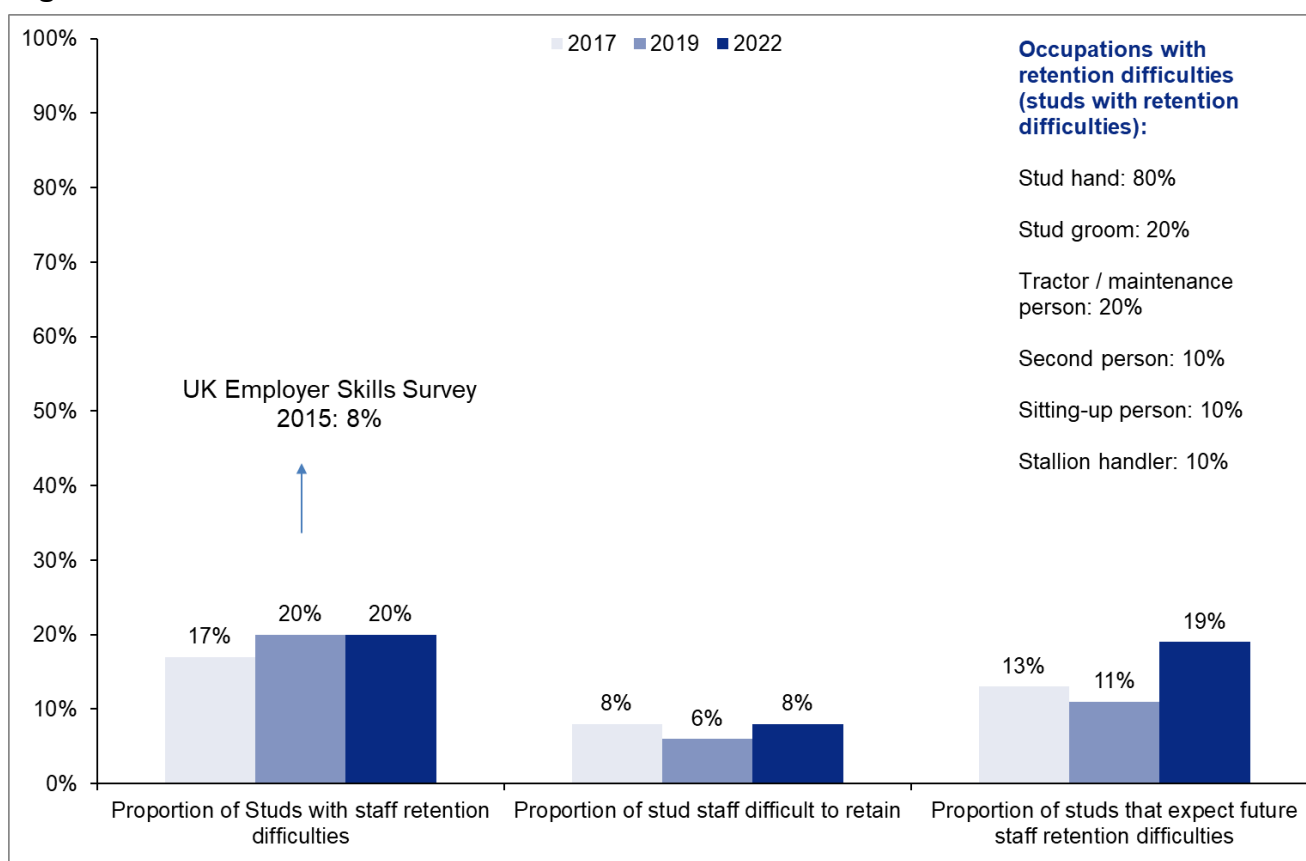
Question asked: Overall, how many permanent full-time and part-time staff have left their roles in the last 12 months?

Retention difficulties

A fifth of studs said they have retention difficulties, the same as in 2019

- 4.3. 20% of studs (17% in 2017 and also 20% in 2019) said they had difficulties retaining permanent staff in the last 12 months. This compares to 14% of racing yards. The national figure, based on the UK Employer Skills Survey, is 8%.⁵
- 4.4. This translates into an estimated 8% of all stud staff that are difficult to retain, compared to 8% in 2017, 6% in 2019 and 7% of racing staff.
- 4.5. 19% of studs face a double problem of hard-to-fill vacancies and retention difficulties (18% in 2019).
- 4.6. 19% of studs expect to have retention difficulties in the next 12 months, compared to 13% in 2017, 11% in 2019 and 19% of racing yards. 68% of studs that had retention difficulties in the past also expect to have difficulties in the future, highlighting this is a long-term issue for some studs.
- 4.7. Similar to 2017 and 2019, the occupations which were most commonly cited as being difficult to retain are stud hand (cited by 80% of studs that said they have retention difficulties), stud groom (20%) and tractor/maintenance person (20%).

Figure 4.2: Retention difficulties



Number of respondents: 209 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?

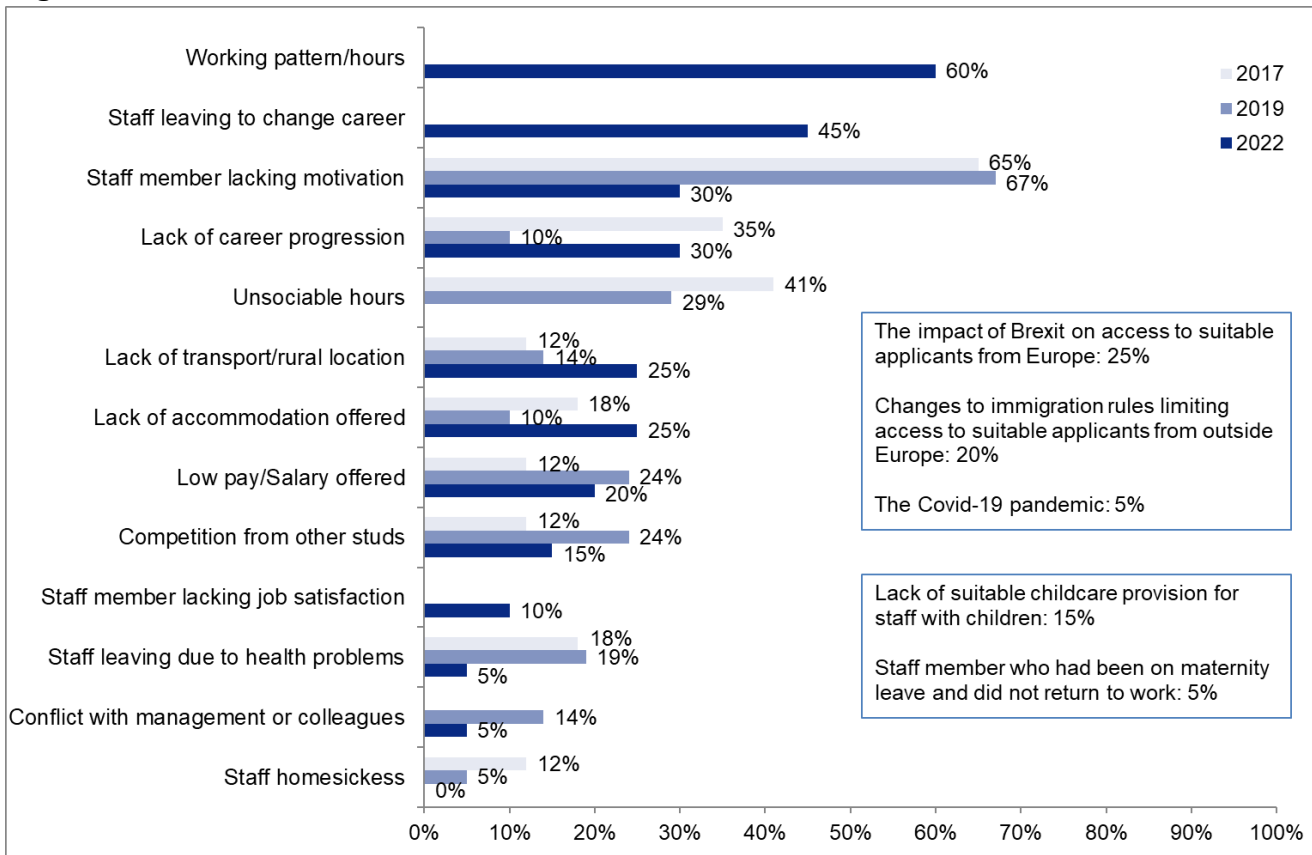
⁵ This is the figure for 2015. This question was not asked in the most recent surveys.

Reasons for retention difficulties

Working patterns, career change, motivation and lack of career progression are the main issues cited for retention difficulties, exacerbated by Brexit and other immigration changes

- 4.8. Working pattern/hours is cited as the main reason for staff retention difficulties (cited by 60% of studs with retention difficulties). This response option was new for 2022, but its closest comparator in 2019 is 'unsociable hours' cited by 29% of studs in 2019.
- 4.9. Staff leaving to change career is also a new response option in 2022 and was cited by 45% of studs as a reason for staff retention difficulties.
- 4.10. Staff lacking motivation was cited by 30% in 2022, compared with 67% in 2019 and 65% in 2017.
- 4.11. Lack of career progression returns to close to 2017 levels (30% in 2022 and 35% in 2017, up from 10% in 2019). The variation may be due to low sample sizes.
- 4.12. Factors such as lack of transport/rural location (25%), lack of accommodation (25%), low pay/salary offered (20%), competition from other studs (15%) and staff member lacking job satisfaction (10%) continue to be important factors.
- 4.13. Staff leaving due to health issues (5%) or conflict with management or colleagues (5%) are of lesser importance.
- 4.14. The impact of Brexit (25%) and other immigration changes (20%) appear to be exacerbating retention issues, although the pandemic has only had a minor impact (5%).
- 4.15. Lack of suitable childcare was mentioned by 15% of studs with retention difficulties and 5% mentioned that the staff member did not return to work following maternity leave.

Figure 4.3: Reasons for retention difficulties



Number of respondents: 42 studs (only respondents that said they had retention difficulties).

Note: Respondents could select more than one answer.

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

Section 5: Skills, training and development

Introduction

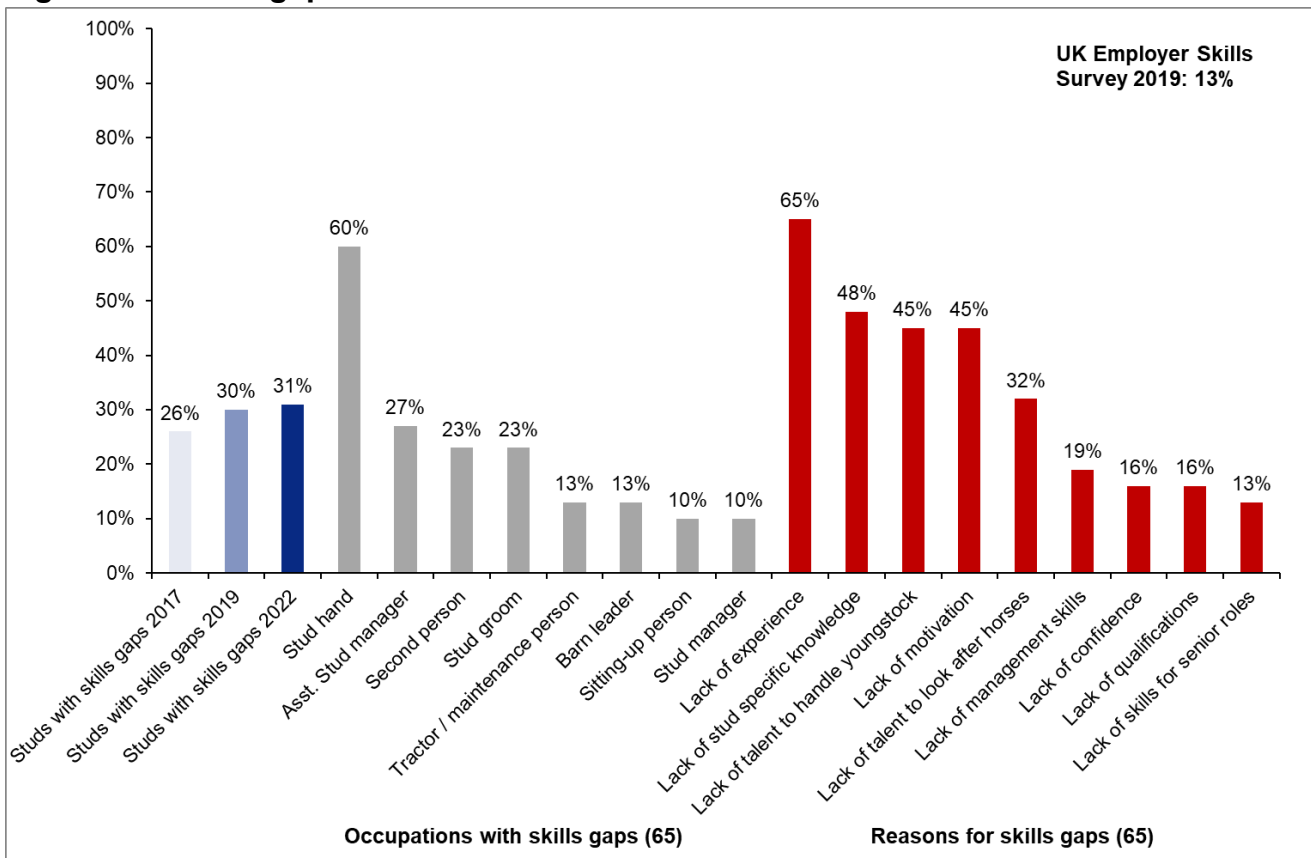
5.1. This section presents findings about skills gaps, training and development, and awareness and use of industry recruitment, training and retention initiatives and support.

Skills gaps

Just under a third of studs have skills gaps within their existing workforce, similar to 2019

- 5.2. 31% of studs said there are gaps in the skills or capabilities of their existing workforce. This compares to 26% in 2017, 30% in 2019, 27% of racing yards (also 27% in 2019) and a national figure of 13% (also 13% in 2017).
- 5.3. 10% of studs have a combination of skills gaps, hard-to-fill vacancies and retention difficulties (9% in 2019).
- 5.4. Similar to previous surveys, the occupations most likely to have skills gaps are stud hand (cited by 60% of studs that have skills gaps), second person (23%) and stud groom (23%). In addition, in 2022, 27% of studs that have skills gaps cited Assistant Stud Manager.
- 5.5. Also, similar to previous surveys, the main reasons for skills gaps are a lack of experience (cited by 65% of studs with skills gaps), lack of stud specific knowledge (48%), lack of talent/capability to handle yearlings/youngstock (45%) and lack of motivation (45%). Other skills gaps cited include lack of talent/capability to look after horses (32%), lack of management skills (19%) and lack of confidence and lack of qualifications (both 16%).

Figure 5.1: Skills gaps



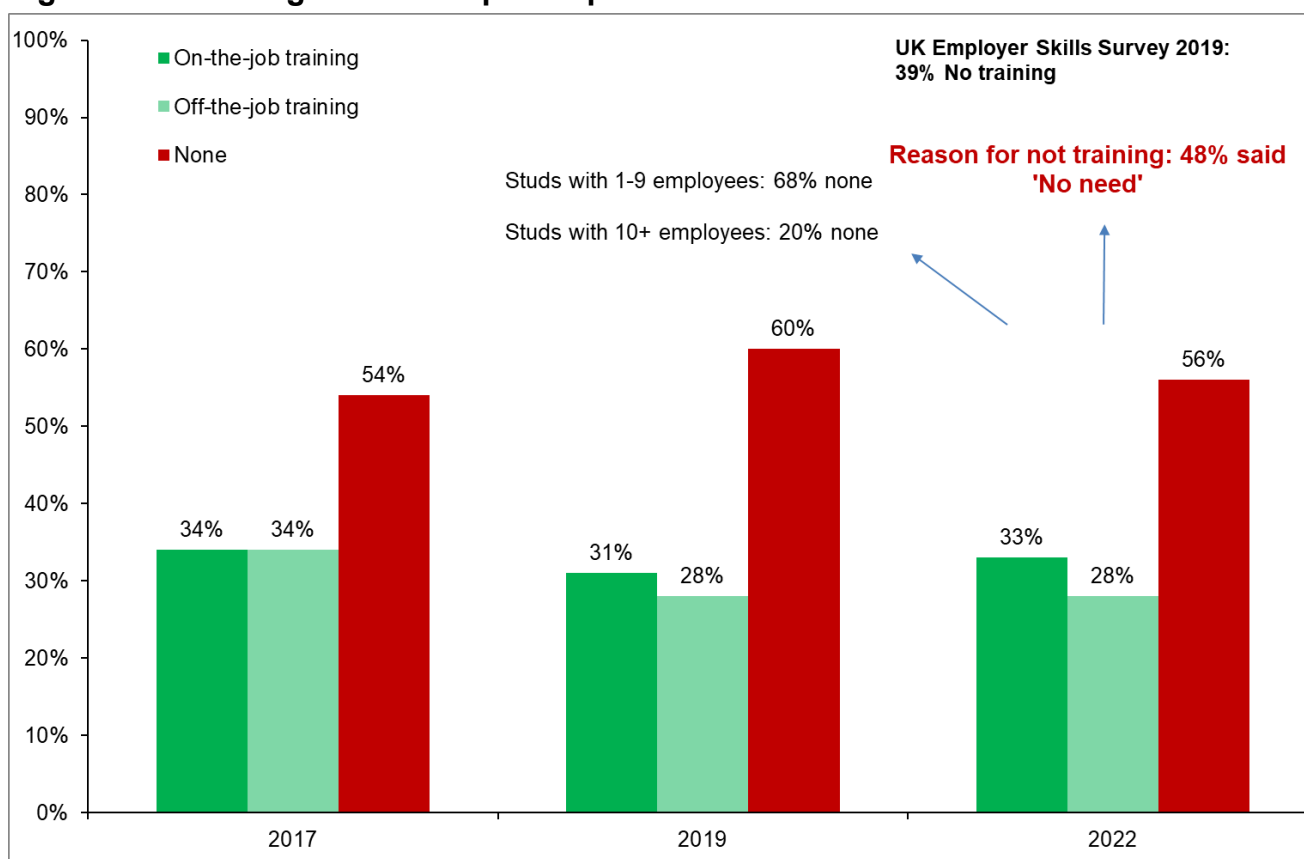
Number of respondents: 209 studs / numbers in brackets are the number of respondents to follow-up questions asked only to studs with skills gaps. Questions asked: Are there any gaps in the skills or capabilities of your existing workforce i.e. areas where existing staff lack the skills or capabilities 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. 56% of studs have not funded or arranged any training in the past 12 months, compared with 54% in 2017, 60% in 2019 and 47% of racing yards (43% in previous survey). This compares with 39% of businesses nationally that do not fund or arrange training (34% in 2017).
- 5.7. 55% of studs that said they have skills gaps do not provide training.
- 5.8. As in previous surveys, smaller studs are less likely to train their staff, with 68% of studs with 1-9 staff not providing training or development in the past 12 months, compared with 20% of larger studs
- 5.9. Similar to 2017, the main reason cited by employers that do not provide training is that there is 'no need' – cited by 48% of studs that did not provide training or development in the past 12 months (57% in 2019). In addition, 33% cited a lack of time, 17% said there is a lack of appropriate training locally, 6% cited a lack of funds/too expensive, and 25% said that the Covid-19 pandemic has restricted opportunities for training and development of staff.
- 5.10. 39% of studs said they do not expect to fund or arrange training or development in the next 12 months, compared to 46% in 2017, 50% in 2019 and 41% of racing yards. 63% of employers that did not provide training in the past 12 months said this. This means that overall, approximately 35% of studs will not provide training/development either in the past 12 months or next 12 months.

Figure 5.2: Training and development prevalence



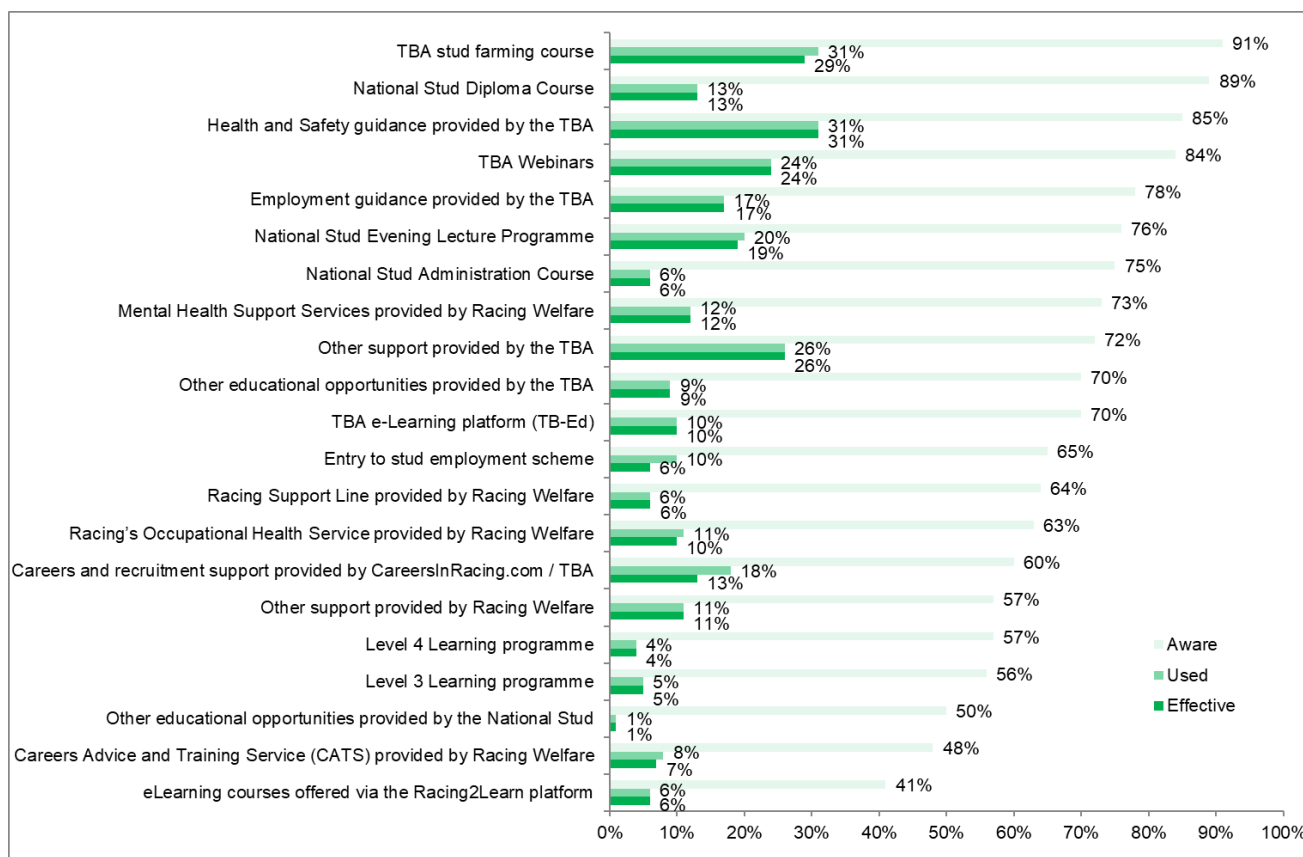
Number of respondents: 209 studs. Note: Respondents could select both on-the-job and off-the-job training response options. Questions asked: Over the past 12 months have you funded or arranged any off-the-job training or development or on-the-job or informal training or development for your staff? / Why have you not funded or arranged any training or development for staff? / In the next 12 months do you expect to fund or arrange any off or on the job training or development?

Awareness and use of training and development initiatives

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

- 5.11. The majority of studs are aware of the training and development initiatives in the industry. For example, on average across all initiatives, 68% of studs are aware of the training and development initiatives. This compares to 78% in 2017, 71% in 2019 and 80% of racing yards (although some of the initiatives have changed since 2017 and are different to those in racing yards and so the results are not directly comparable).
- 5.12. A small minority of studs have used the training and development initiatives. For example, on average across all initiatives, 14% of studs have used the training and development initiatives (and 13% of all respondents found them helpful, which equates to 93% of those that used the training and development initiatives). This compares to 13% in 2017 and 2019 and 26% of racing yards (22% found them helpful or rather 85% of those that used them).
- 5.13. As in previous surveys, awareness and use tend to be greatest amongst larger studs. For example, on average, 63% of studs with 1 to 4 employees are aware of the initiatives and 7% have used them, compared with 72% of larger studs aware and 19% that have used them.
- 5.14. There is greatest awareness and use of the educational opportunities and support delivered by the TBA and National Stud, while there is perhaps scope to increase awareness and use of two key industry-wide initiatives - CATS and Occupational Health.

Figure 5.3: Awareness and use of training and development initiatives



Number of respondents: 209 studs. Percentages are of all respondents.

Question 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 development initiatives?

Perceptions and attitudes about training and development

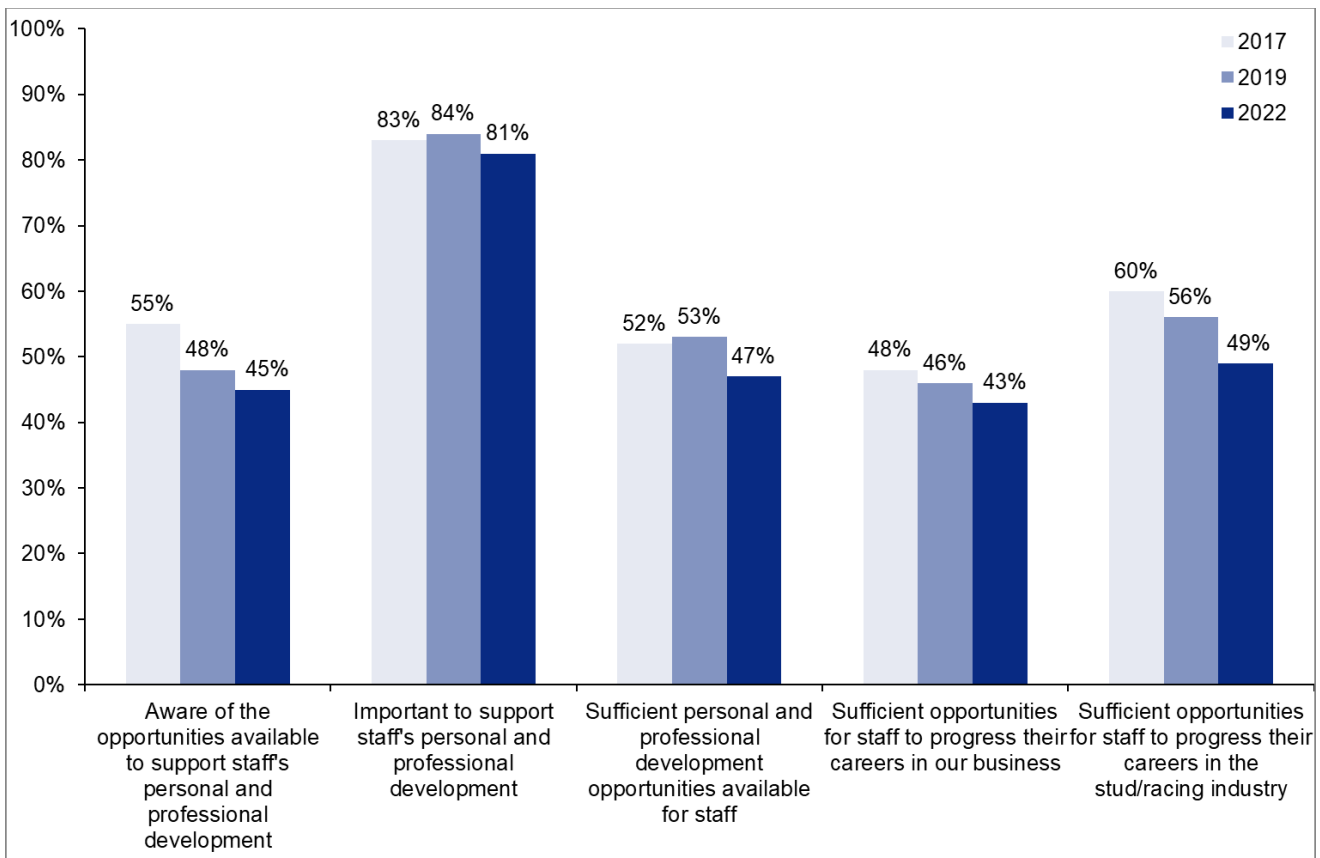
Across all indicators there are subtle decreases over time of perceptions and attitudes about training and development

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

- 45% are aware of staff training and development opportunities, compared to 55% in 2017, 48% in 2019 and 80% of racing trainers (73% in previous survey).
- 81% agree it is important to support staff to engage in training and development, compared to 83% in 2017, 84% in 2019 and 95% of racing trainers (96% in previous survey).
- 47% said there are sufficient staff training and development opportunities, compared to 52% in 2017, 53% in 2019 and 80% of racing trainers (74% in previous surveys).
- 43% said there are sufficient staff career progression opportunities in their business, compared to 48% in 2017, 46% in 2019 and 77% of racing trainers (74% in previous surveys).
- 49% said there are sufficient staff career progression opportunities in the industry, compared to 60% in 2017 and 56% in 2019 (question not asked of trainers).

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

Figure 5.4: Perceptions and attitudes about training and development



Number of respondents: 209 studs.

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

Section 6: Concluding points

Introduction

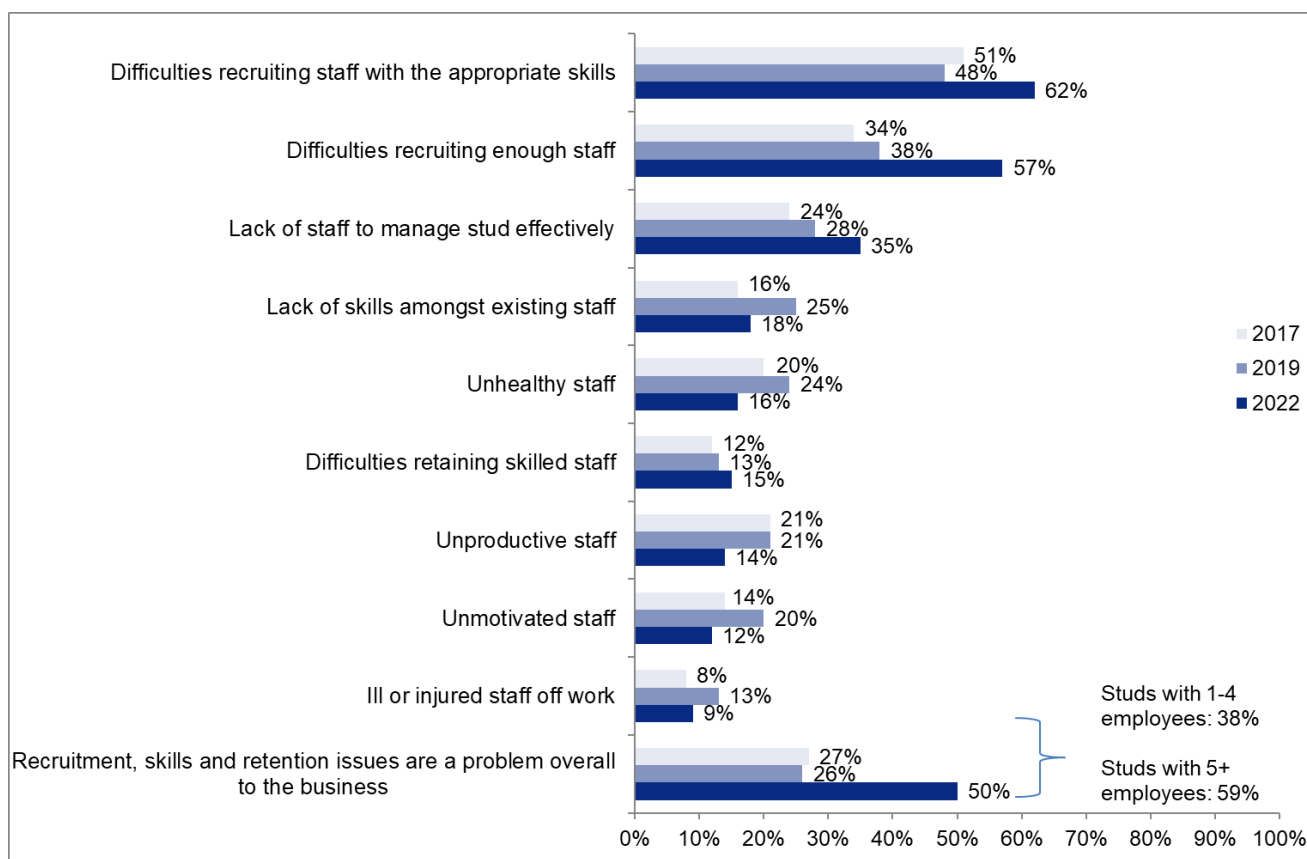
6.1. By way of conclusion, this section presents findings about the overall perceptions and size of recruitment, skills and retention problems. In addition, it presents whether studs perceive there to be improvements in recruitment, training and retention within the industry over recent years.

Perceptions about key recruitment, skills and retention issues

Recruitment, skills and retention issues are a much bigger problem than in the past, with half of studs stating they are a problem, especially recruitment issues cited as the biggest problem and larger studs most affected

- 6.2. The two most cited recruitment, skills and retention problems remain difficulties recruiting staff with the appropriate skills (62% of studs said this is a problem in 2022, compared with 51% in 2017 and 48% in 2019) and difficulties recruiting enough staff (57% said this is a problem in 2022, compared with 34% in 2017 and 38% in 2019). 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 35% of studs stating that a lack of staff to manage the stud effectively is a problem (24% in 2017 and 28% in 2019).
- 6.4. Overall, a statistically notable 50% of studs said that recruitment, skills and retention issues are a problem to their business (essentially when placed in the context of other issues), compared to 27% in 2017, 26% in 2019 and 40% of racing trainers (also 40% in the previous survey).
- 6.5. These issues are a bigger problem to larger studs. For example, 38% of studs with 1-4 staff said recruitment, skills and retention issues are a problem, compared to 59% of studs with 5 or more staff.
- 6.6. In addition, the following were asked in the 2022 survey:
- 16% said there is a problem with a lack of overseas staff to meet their requirements (compared with 39% of racing trainers).
 - 14% said they have problems retaining working mothers (29% said they do not know) (also 14% of racing trainers)
 - 12% said there are difficulties faced by female staff returning from maternity leave (32% said they do not know) (compared with 11% of racing trainers).

Figure 6.1: Recruitment, skills and retention problems



Number of respondents: 209 studs. Questions asked: Thinking about your business, in general how big a problem are the following issues for your business? / Overall, in general, how big a problem are recruitment, skills and retention issues to your business?

Perceptions of change over time

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

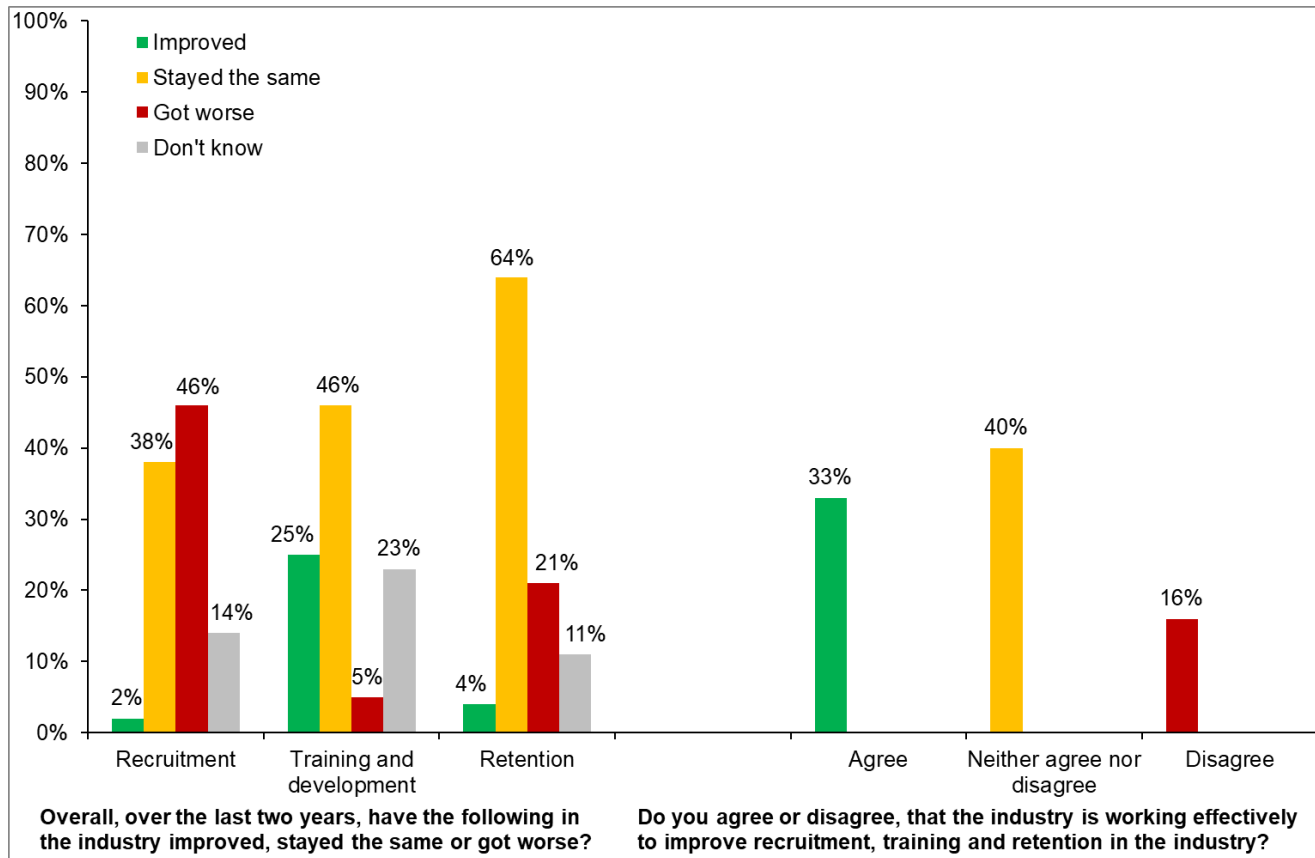
6.7. Studs said the following about change over time:

- 46% said recruitment has got worse (38% in 2019), 38% said it has stayed the same (44% in 2019) and 2% said it had improved (6% in 2019) (this compares with 63% of racing trainers that said recruitment has got worse, 28% said it has stayed the same and 4% said it had improved).
- 25% said that training and development has improved (27% in 2019), 46% stayed the same (52% in 2019) and 5% got worse (3% in 2019) (this compares with 57% of racing trainers that said that training and development has improved, 30% stayed the same and 5% got worse).
- 21% said retention has got worse (25% in 2019), 64% stayed the same (54% in 2019) and 4% improved (9% in 2019) (this compares with 42% of racing trainers that said retention has got worse, 43% stayed the same and 8% improved).

6.8. 33% of studs said that the industry is working together effectively to address recruitment, training and retention issues (50% in 2019), while 16% disagree with this (10% in 2019) (the remainder 'neither agree nor disagree' or 'don't know'). This compares with 52% of

rating trainers that said the industry is working together effectively to address recruitment, training and retention issues, while 25% disagree with this.

Figure 6.2: Recruitment, skills and retention changes over time



Number of respondents: 209 studs.

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

Tel: 01727 750175

E-mail: mark@publicperspectives.co.uk

Website: www.publicperspectives.co.uk

Registered in England and Wales Company No: 6769064

Research
Evaluation
Community Engagement
Strategy Development

