

# Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2024: Employees

Report: May 2024



RACING  
FOUNDATION



THE  
THOROUGHBRED  
BREEDERS'  
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# Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2024: Employee survey

## Executive Summary

### Introduction and aims of the research

1. The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA) and Horseracing Industry People Board (HIPB), commissioned Public Perspectives, an independent research and evaluation organisation, to conduct a survey of employees working on Thoroughbred Studs about recruitment, skills and retention in the breeding industry. Similar surveys have been conducted with Thoroughbred Stud employers, as well as racing trainers and racing staff. Whilst the aforementioned have been subject to four surveys since 2016/2017, this is the first attempt at surveying employees working in studs.

### Approach to the research

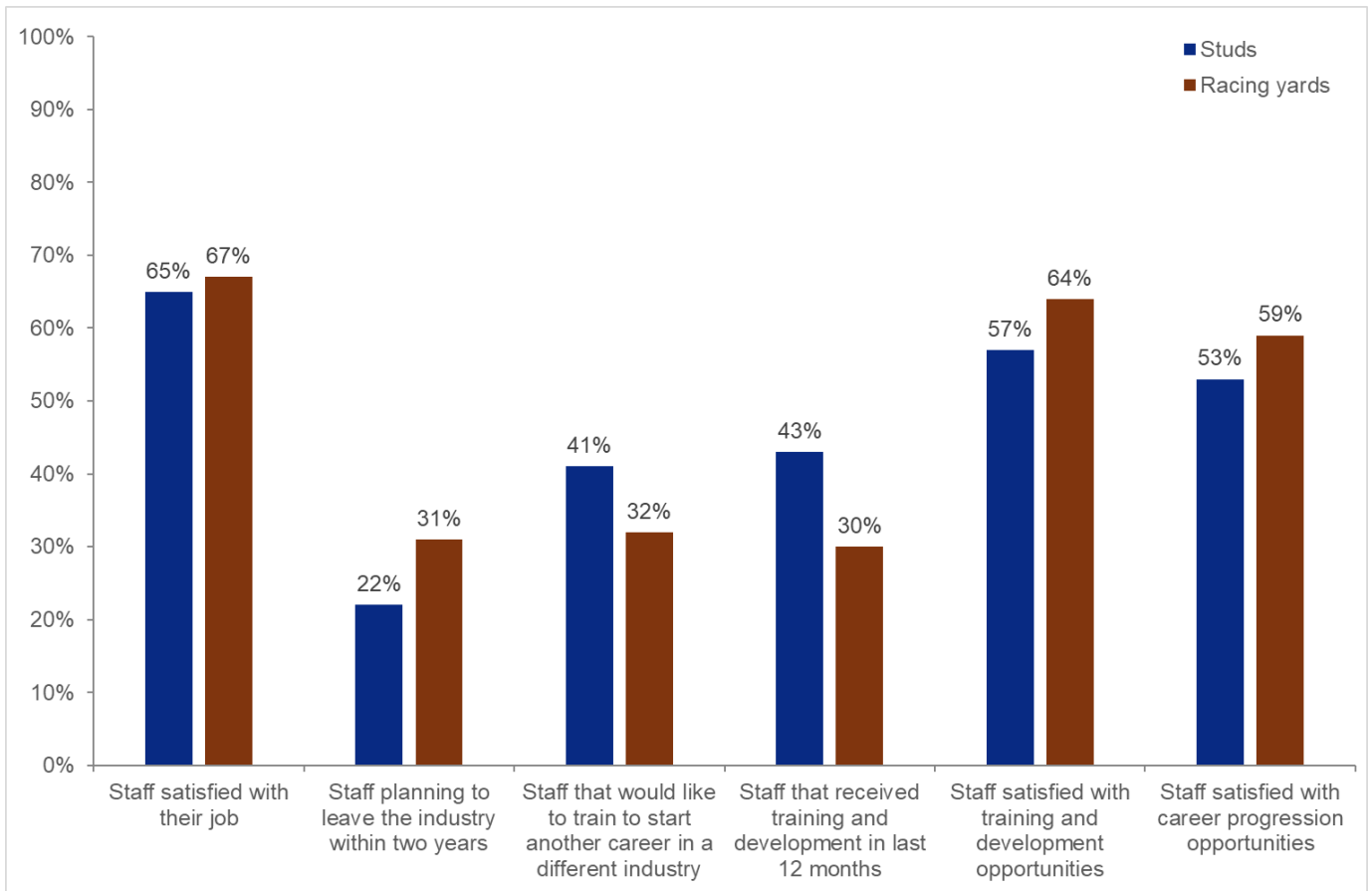
2. The research with stud employees adopted a similar questionnaire as that used for staff working in racing yards, utilising tried and tested questions and providing for comparison, albeit with relevant wording tweaks to reflect the nature of studs.
3. Unlike racing staff, racing employers and stud employers, there is not a database of stud employees nor an established representative organisation. This has meant data collection is more challenging, requiring widespread promotion of the survey. The survey was conducted online and promoted through a combination of social media and other communication channels, as well as using the networks of key stakeholders in the industry.
4. The survey was conducted from the end of March 2024 through to the start of May 2024 – approximately a seven-week period, designed to allow the promotion of the survey to gain momentum.
5. Overall, there were 284 respondents to the survey that currently work (250, including 28 that stated they work in both the racing and thoroughbred breeding industries) or previously worked (34) in the Thoroughbred breeding industry. Approximate estimates suggest this represents about 10% of the workforce. Given that this survey was conducted for the first time and the related challenges in reaching stud employees, this number of responses is a reasonable start. The hope is that it provides the foundation to increase response rate in future iterations of the survey.
6. With this number of respondents, the survey provides for robust data. The confidence interval or accuracy of the survey result is no higher than +/- 5.5% at a 95% confidence level and for some results is as low as +/- 2.5%. This means that we can be 95% confident that the 'real' result for any given question would be within 5.5 percentage points of those stated within the survey findings. This provides for robust data when analysed at a headline level and to a lesser degree when different questions are cross-referenced against each other.
7. The above figures about sample accuracy are important because they help determine whether differences in results over time (for future surveys) and between racing and stud

staff are statistically significant, once sample accuracy is taken into account - in broad terms a difference of approximately 8 percentage points or more is required between racing staff and Thoroughbred breeding staff to be statistically significant.

## Key findings

8. The following graph summarises the key findings:
  - 65% of stud staff are satisfied with their job compared with 67% of racing staff. Similar to racing staff, the main reasons stud staff cited for being satisfied were a love of, or passion for, working with horses. The reasons for lack of satisfaction include work-life balance, working conditions and compensation for working long hours, as well as lack of career progression opportunities.
  - 22% of stud staff are planning to leave the industry in the next two years, compared with 31% of racing staff. There is a close relationship between job satisfaction and intention to leave the industry, and the reasons for lack of job satisfaction are similar to those for wanting to leave the industry.
  - 41% of stud staff would like to train for a career in a different industry, compared with 32% of racing staff.
  - 43% of stud staff said they received training and development in the last 12 months, compared with 30% of racing staff. It also compares with 48% of studs based on employer responses and 60% of businesses nationally that funded or arranged training (based on the UK Employer Skills Survey 2022). Those that did not take part in training said this was mainly because they were not offered the chance and/or did not have the time.
  - 57% of stud staff are satisfied with training and development opportunities (compared with 64% of staff in racing yards) and 53% are satisfied with career progression opportunities (59% of staff in racing yards).
  
9. As amongst racing staff, there are close relationships between these issues. For example, staff that are unsatisfied with training, development and career progression opportunities are less likely to be satisfied with their job and more likely to plan to leave the industry.

**Figure 1: Job satisfaction, retention and training**



# Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2024: Employee survey

## Main Report

### Section 1: Introduction

#### Introduction and aims of the research

- 1.1. The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA) and Horseracing Industry People Board (HIPB), commissioned Public Perspectives, an independent research and evaluation organisation, to conduct a survey of employees working on Thoroughbred Studs about recruitment, skills and retention in the breeding industry. Similar surveys have been conducted with Thoroughbred Stud employers, as well as racing trainers and racing staff. Whilst the aforementioned have been subject to four surveys since 2016/2017, this is the first attempt at surveying employees working in studs.

#### Approach to the research

- 1.2. The research with stud employees adopted a similar questionnaire as that used for staff working in racing yards, utilising tried and tested questions and providing for comparison, albeit with relevant wording tweaks to reflect the nature of studs.
- 1.3. Unlike racing staff, racing employers and stud employers, there is not a database of stud employees nor an established representative organisation.<sup>1</sup> This has meant data collection is more challenging, requiring widespread promotion of the survey. The survey was conducted online and promoted through a combination of social media and other communication channels, as well as using the networks of key stakeholders in the industry.<sup>2</sup>
- 1.4. The survey was conducted from the end of March 2024 through to the start of May 2024 – approximately a seven-week period, designed to allow the promotion of the survey to gain momentum.
- 1.5. Overall, there were 284 respondents to the survey that currently work (250, including 28 that stated they work in both the racing and thoroughbred breeding industries) or previously worked (34) in the Thoroughbred breeding industry. Approximate estimates suggest this represents about 10% of the workforce. Given that this survey was conducted for the first time and the related challenges in reaching stud employees, this number of responses is a reasonable start. The hope is that it provides the foundation to increase response rate in future iterations of the survey.

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<sup>1</sup> One of the objectives of the survey was to start establishing a stud employee voluntary register to assist with engaging with stud employees.

<sup>2</sup> The racing staff survey was also conducted on-line, but to an established database of staff on the racing staff employee database. This allowed for a higher response rate and means that comparisons between the two surveys should be treated cautiously.

- 1.6. The demographic profile and background of respondents is provided in the form of a marked-up questionnaire in the appendix.
- 1.7. With this number of respondents, the survey provides for robust data. The confidence interval or accuracy of the survey result is no higher than +/- 5.5% at a 95% confidence level and for some results is as low as +/- 2.5%.<sup>3</sup> This means that we can be 95% confident that the 'real' result for any given question would be within 5.5 percentage points of those stated within the survey findings. This provides for robust data when analysed at a headline level and to a lesser degree when different questions are cross-referenced against each other.
- 1.8. The above figures about sample accuracy are important because they help determine whether differences in results over time (for future surveys) and between racing and stud staff are statistically significant, once sample accuracy is taken into account - in broad terms a difference of approximately 8 percentage points or more is required between racing staff and Thoroughbred breeding staff to be statistically significant.

## Reporting

- 1.9. The following report summarises the key findings from the survey. Comparison is provided against the latest racing staff survey results and also the stud employer survey, where appropriate.
- 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'.

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<sup>3</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 studs had responded, i.e. had a census been conducted.

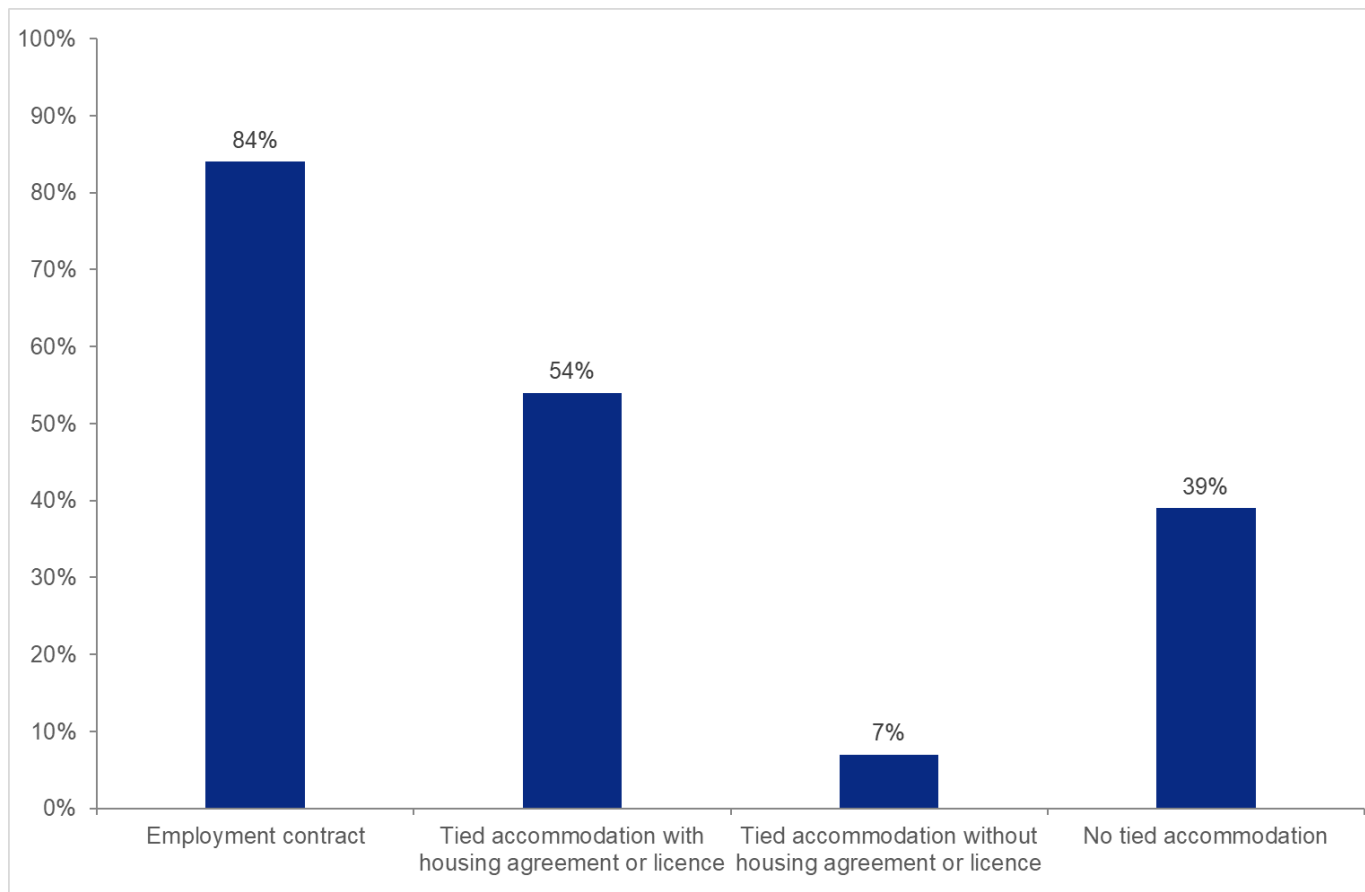
## Section 2: Key findings

### Employment practice

#### **Most stud employees have an employment contract and over half have tied accommodation**

- 2.1. 84% of stud staff said they have an employment contract.
- 2.2. 54% have tied accommodation with a housing agreement or licence provided with their job, and a further 7% have tied accommodation without an agreement or licence.

**Figure 2.1: Employment practice**



Number of respondents: 284.

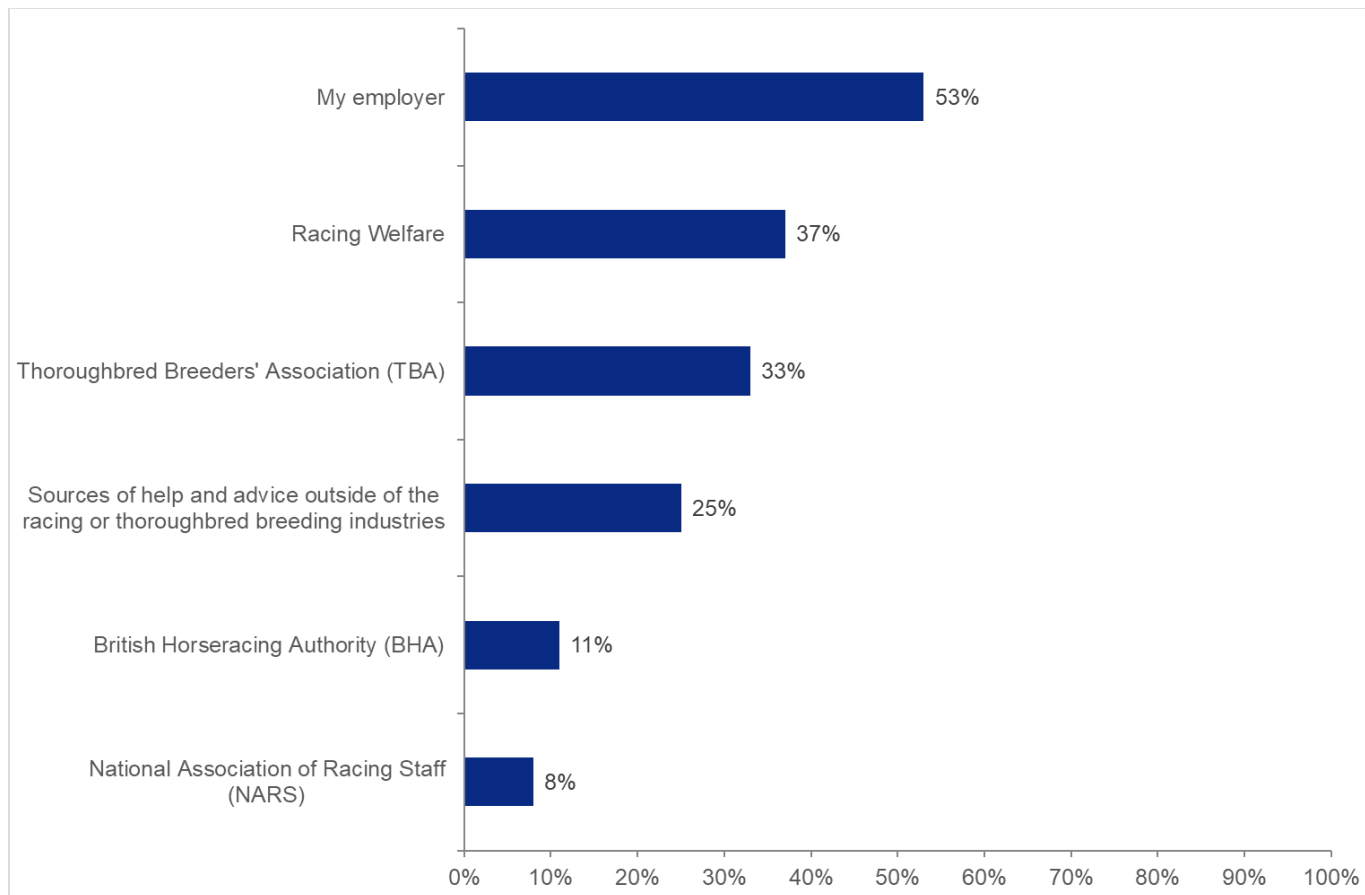
Questions asked: Do you have an employment contract in place? / Do you have tied accommodation? (i.e. accommodation provided as part of your job)



## Some half of staff receive job related information and support from their employer and about a third from Racing Welfare or the TBA

2.3. 53% said they receive information and support from their employer, 37% from Racing Welfare and 33% from the TBA, while just 11% receive information and support from the BHA and 8% from NARS. In addition, around 5% said they receive information from social media and a similar proportion from colleagues working in the industry.

**Figure 2.2: Sources of information and support**



Number of respondents: 284.

Questions asked: Where do you go for information and/or support related to working in the Thoroughbred Breeding industry? (Respondents could select more than one answer).

2.4. Some half of staff that responded said they would be interested in joining a register of staff working in the Thoroughbred breeding industry (although only about a quarter shared their details) and 34% said maybe or don't know.

2.5. Those that said they are interested in joining a register mentioned it could offer the following:

- Improved communication
- Support opportunities for people working in the industry
- Information about training opportunities
- Information about job opportunities
- Information about latest developments in the industry
- A form of representation for staff working in the industry

- Help create a sense of community amongst those working in the industry

2.6. As the following respondents said:

“I think it’s a great idea. It would provide a means to communicate and engage effectively with staff working in the industry about training opportunities, the support available and other developments, instead of relying on getting this through their employers – some of which are good at sharing information and providing support, while others are less so.”

“The Thoroughbred breeding industry has a high turnover of staff due to a lack of training and very little HR. I feel when a stud or yard sign up new staff they should register that person onto your database where you send them a welcome pack and email training days out with a monthly newsletter.”

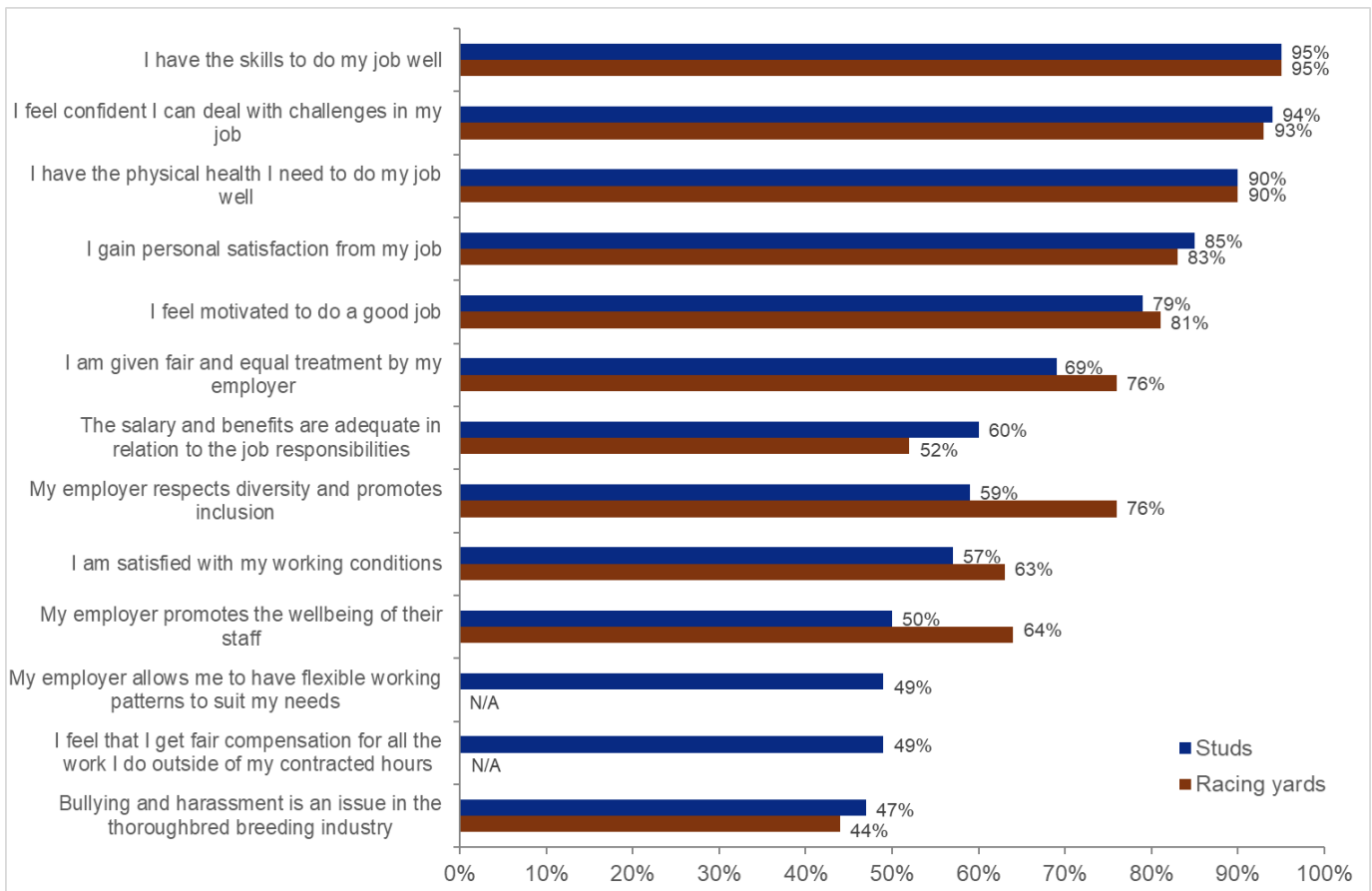
“I feel that stud staff are underrepresented in the wider racing industry and are a silent minority. There is no NARS or other support organisation directly for them. Having a register would help to recognise their importance and input, and help create a sense of community.”

## Job experience and perceptions

**Most stud employees have positive experiences and perceptions of working in studs, and similar to those in racing yards, although there are some issues around inclusion, wellbeing, working conditions and bullying**

- 2.7. 95% of stud staff said they have the skills to do their job well and 85% said they get personal satisfaction from their job.
- 2.8. Staff in studs (60%) are more likely than staff in racing yards (52%) to agree their salary and benefits are appropriate.
- 2.9. In contrast 59% of stud staff said their employer respects diversity and inclusion compared with 76% of racing yard staff. Similarly, 50% of stud staff said their employer promotes staff wellbeing compared with 64% of racing yard staff. In addition, just over half of stud staff (57%) said they are satisfied with working conditions and relatedly only 49% said they have flexible working and get fair compensation for all their work (in the open-ended comments some said that tied housing meant they are essentially always on-call).
- 2.10. 47% of staff working in studs said bullying and harassment is an issue.

**Figure 2.3: Experience and perceptions of working in studs**



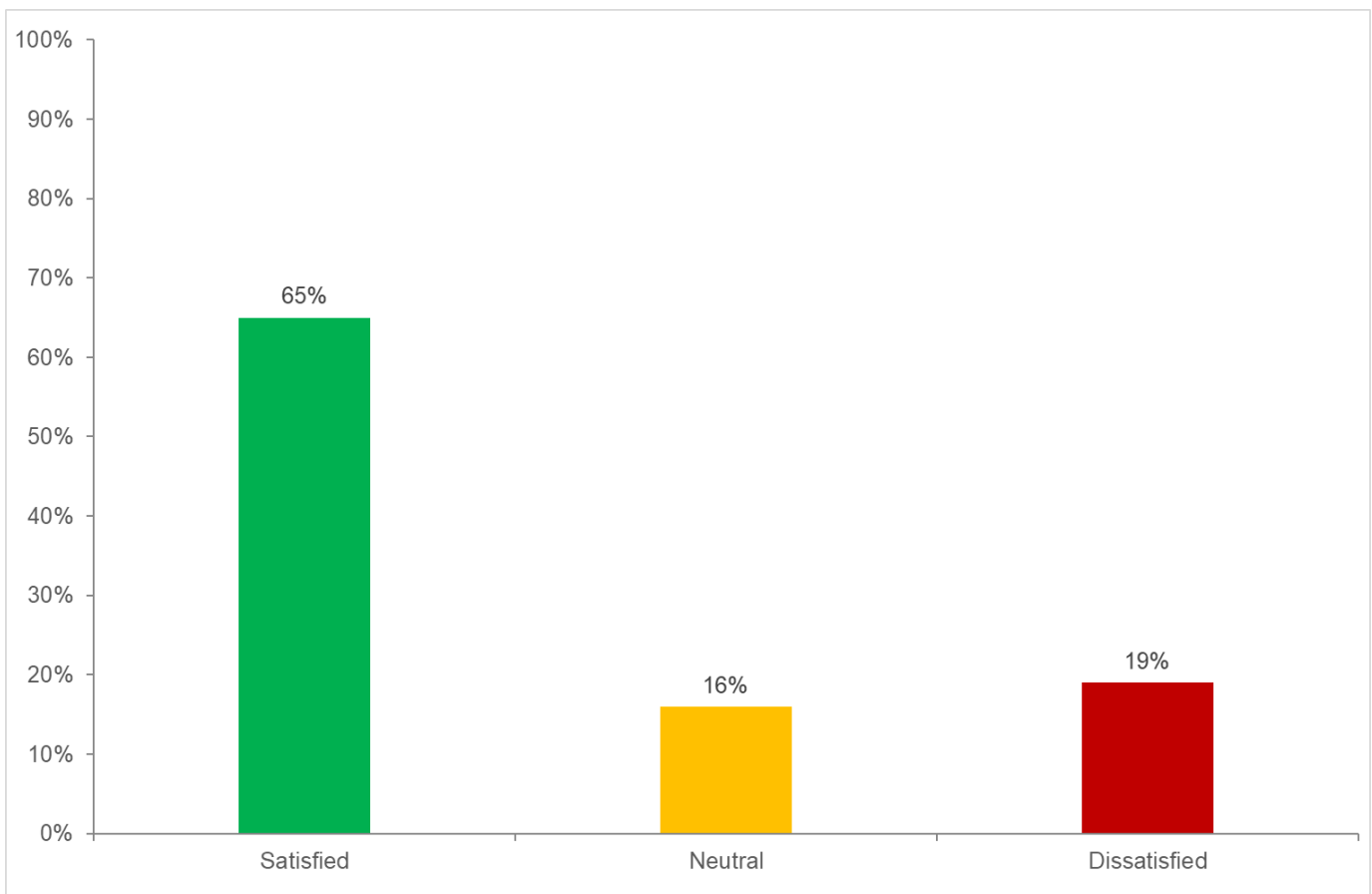
Number of respondents: 284.

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

## Almost two-thirds of stud staff are satisfied with their job, similar to those working in racing yards

- 2.11. 65% of staff are satisfied with their job overall and 19% dissatisfied. This compares with 67% of racing staff that are satisfied with their jobs.
- 2.12. Similar to racing staff, the main reasons staff cited for being satisfied were a love of, or passion for, working with horses. The reasons for lack of satisfaction include work-life balance, working conditions and compensation for working long hours, as well as lack of career progression opportunities.
- 2.13. There are close links between overall job satisfaction and the indicators in the previous question e.g. satisfied staff are well motivated and tend to speak positively about their employer and working conditions.

**Figure 2.4: Overall job satisfaction**



Number of respondents: 284.

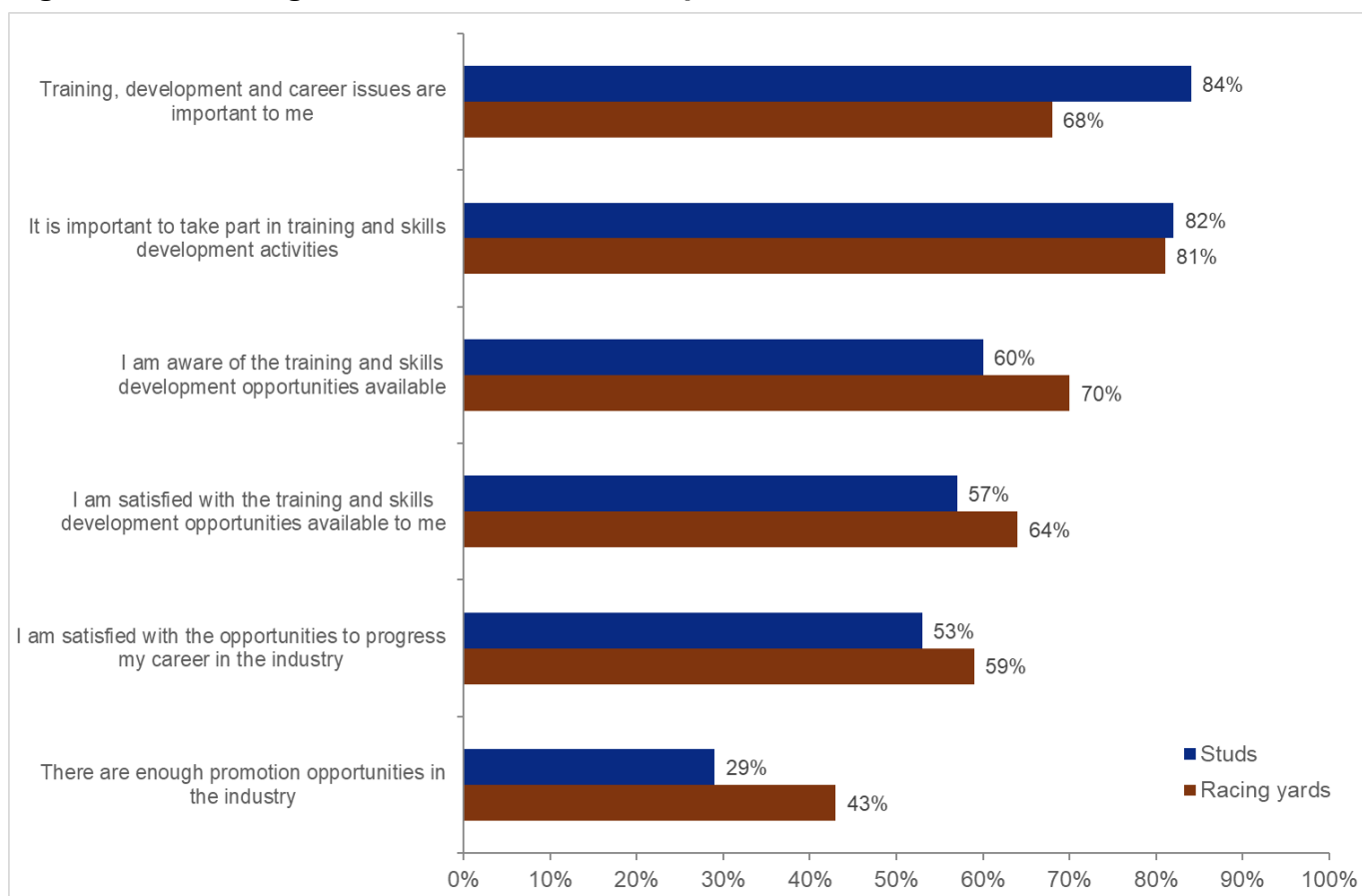
Question asked: Overall, how satisfied are you with your job in the Thoroughbred Breeding industry?

## Training and development

**Whilst most stud staff said it is important to take part in training and skills development, there are relatively low levels of awareness and satisfaction with opportunities including in comparison with racing staff**

- 2.14. 84% of staff said that training, development and career issues in the industry are important to them (68% in racing yards).
- 2.15. 82% of stud staff said it is important to take part in training and skills development activities (81% in racing yards and 83% of stud employers). However, only 60% are aware of opportunities (70% in racing yards and 43% of stud employers) and 57% are satisfied with opportunities (64% in racing yards and 52% of stud employers).
- 2.16. Similarly, only 53% are satisfied with career progression opportunities (59% in racing yards and 59% of stud employers) and just 29% said there are enough promotion opportunities in the industry (43% in racing yards).
- 2.17. In the open-ended comments some said there are a lack of progression opportunities in the industry and that staff are stuck in their roles. Consequently, there is some interest in management and administrative training, as well as more advanced industry specific training to help staff develop and progress.

**Figure 2.5: Training, skills and career development**



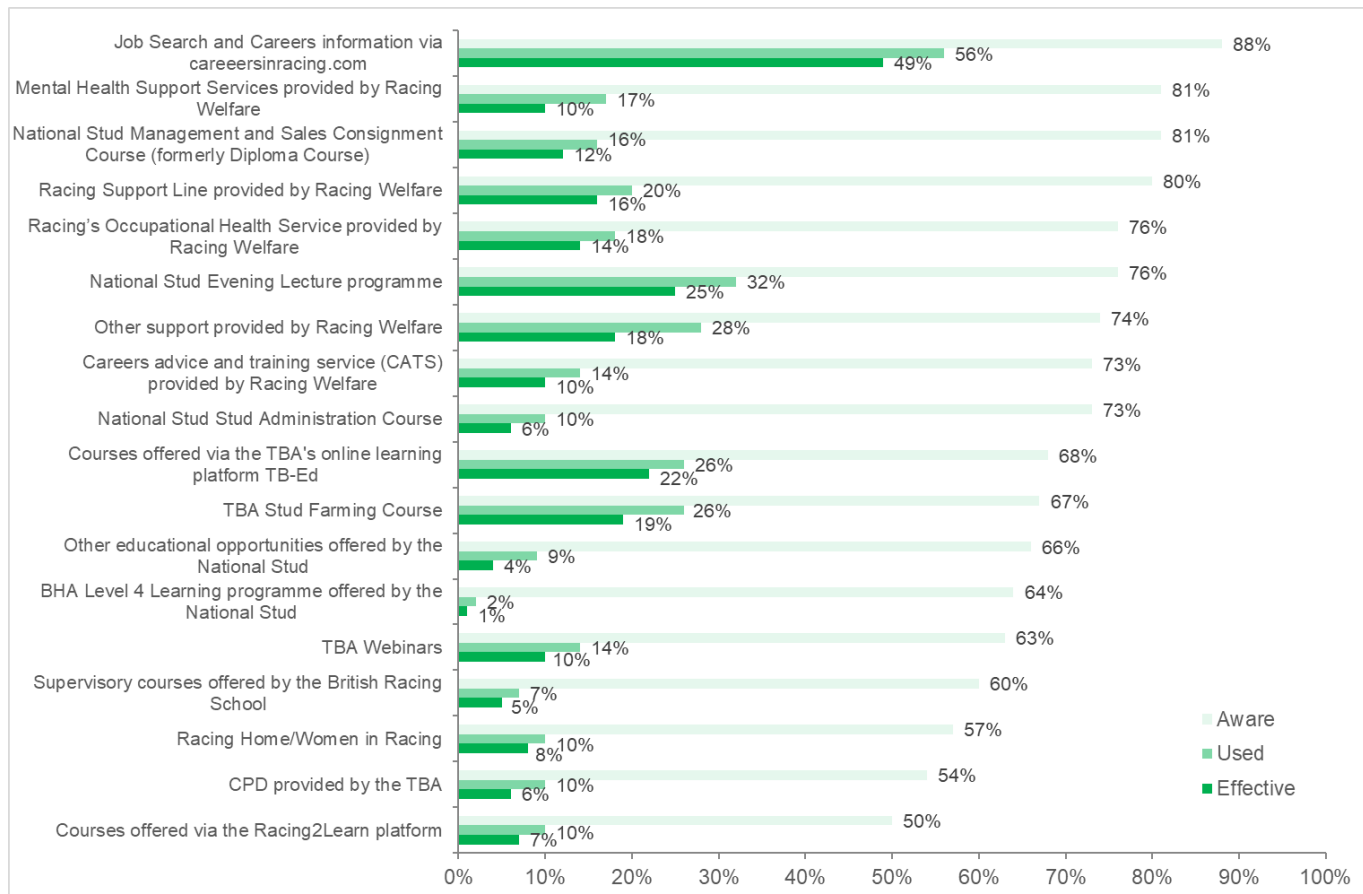
Number of respondents: 284.

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

**Most staff are aware of the training and support initiatives in the industry, although only a minority are using them, similar to racing staff**

- 2.18. On average, across all the initiatives, 70% of staff are aware of the training and support initiatives (72% in racing yards and also 72% amongst stud employers) (although the list of initiatives in racing yards is different, so results are not directly comparable).
- 2.19. On average, across all the initiatives, 18% of staff have used the initiatives (13% in racing yards and 15% of stud employers) and 13% said they are effective/helpful (10% in racing yards and 12% of stud employers), which represents 72% of those that have used the initiatives.

**Figure 2.6: Awareness and use of training and support initiatives (ordered by awareness)**



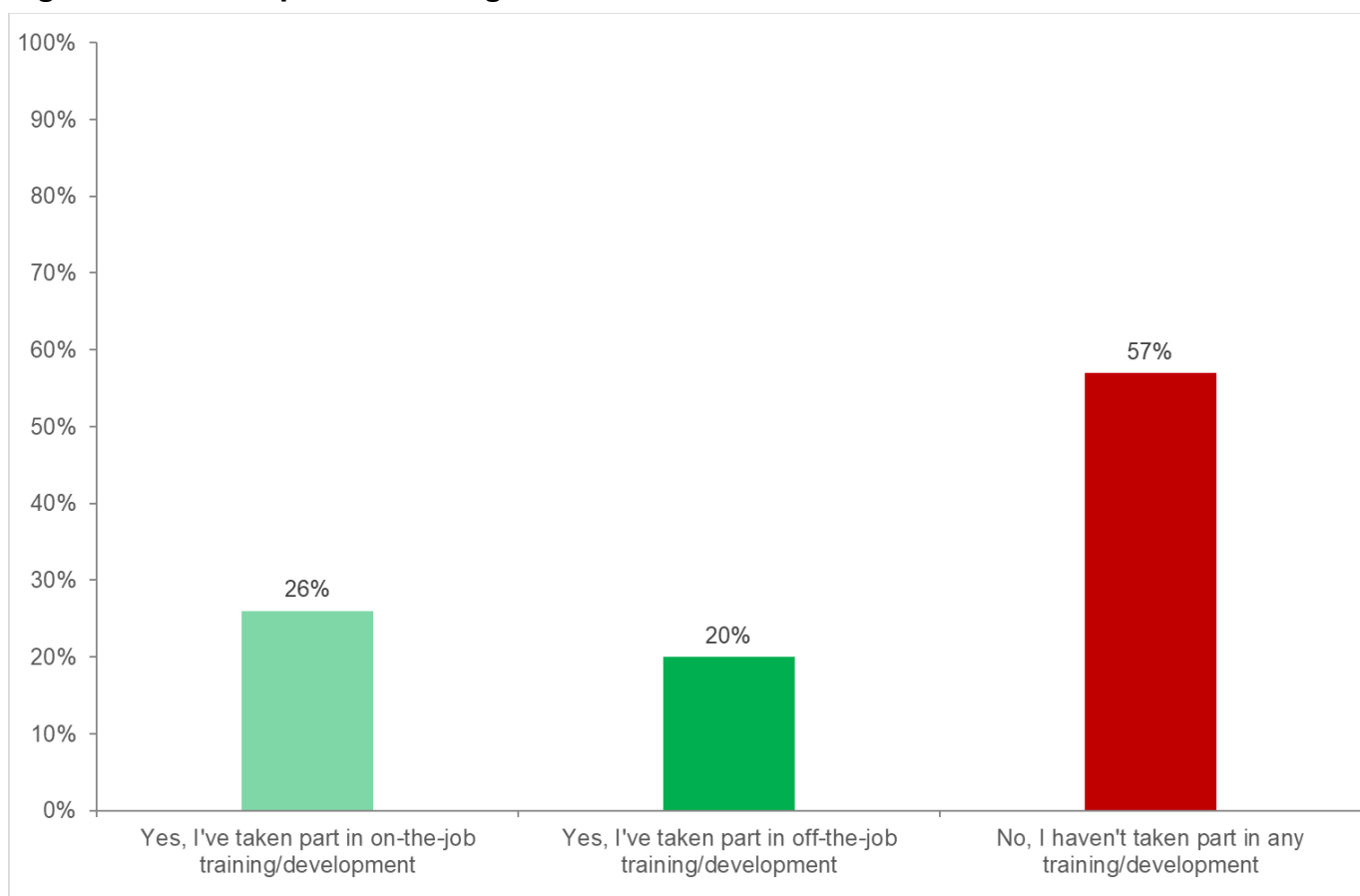
Number of respondents: 284.

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

## Under half of stud staff have received training in the last 12 months

- 2.20. 57% of stud staff have not taken part in any on or off the job training or development in the past 12 months (this compares with 70% of racing yard staff and 52% of stud employers).
- 2.21. 26% of staff have taken part in on-the-job training/development and 20% have taken part in off-the-job training/development.
- 2.22. These results compare with 40% of businesses nationally that did not fund or arrange training (based on the UK Employer Skills Survey 2022, which has worsened from 34% in previous years).
- 2.23. Those that did not take part in training said this was mainly because they were not offered the chance and/or did not have the time.

**Figure 2.7: Taken part in training**



Number of respondents: 284.

Question asked: In the last 12 months, have you taken part in any on or off the job training or development?

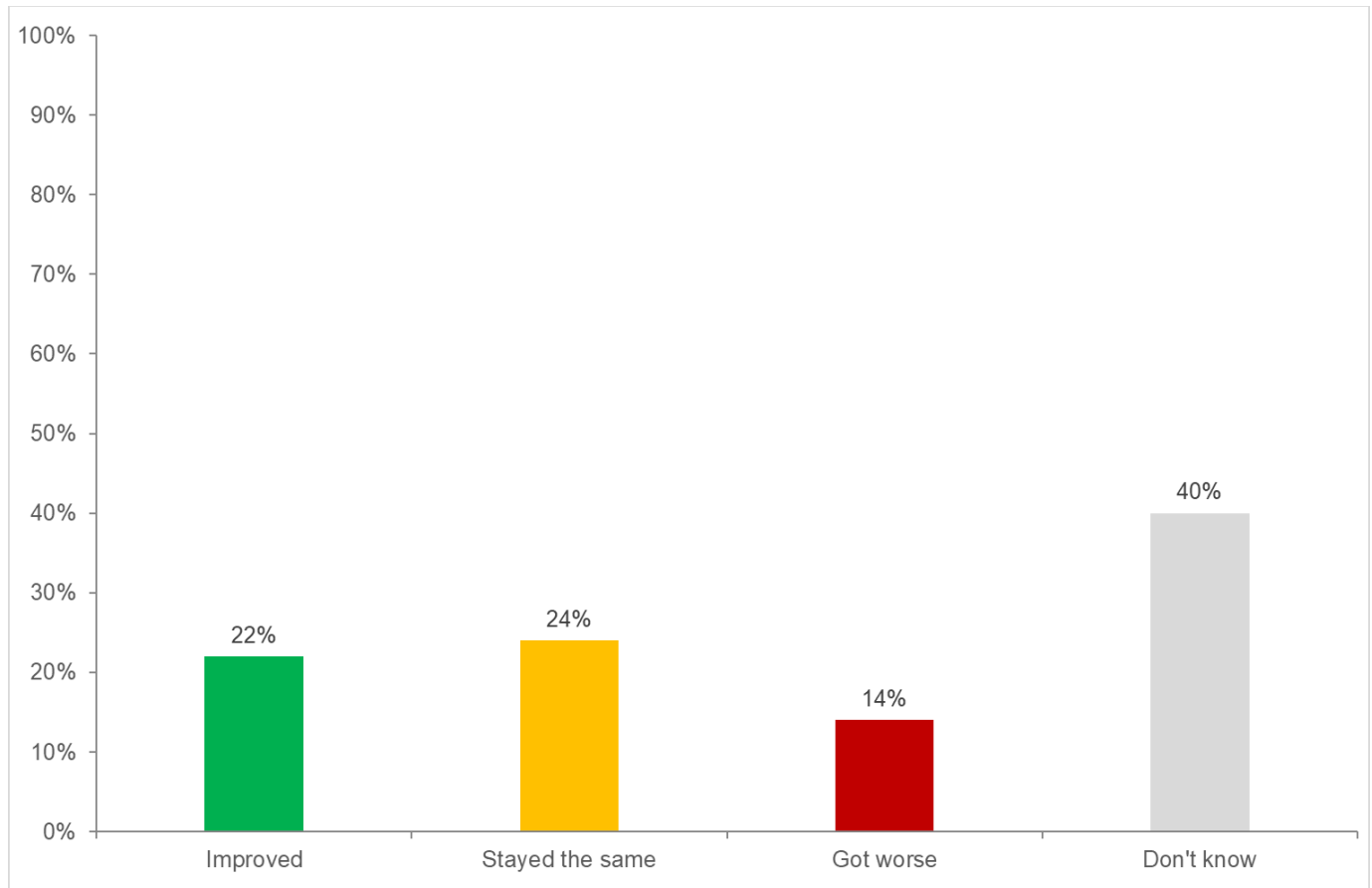
Note: Respondents could select both on-the-job and off-the-job training response options.

- 2.24. Respondents suggested a wide range of courses, including:
- Managerial, HR and business administration.
  - Horsecare courses such as Equine first aid, veterinary skills and foal handling.
  - Practical courses such as health and safety, first aid, tractor/JCB/horse box driving and handling heavy machinery training.
  - Breeding specific courses such as around bloodstock and pedigree, as well as job specific courses.

## There are mixed views about whether opportunities have improved, stayed the same or worsened over time

2.25. 22% of staff said that training, development and career opportunities, services and support have improved over the last 2 years (26% in racing yards), 24% said stayed the same (30% in racing yards) and 14% said they had got worse (8% in racing yards), while 40% did not know (37% in racing yards).

**Figure 2.8: Changes over time**



Number of respondents: 284.

Question asked: Overall, over the last two years, have training, development and career opportunities, services and support in the Thoroughbred Breeding industry improved, stayed the same or got worse?

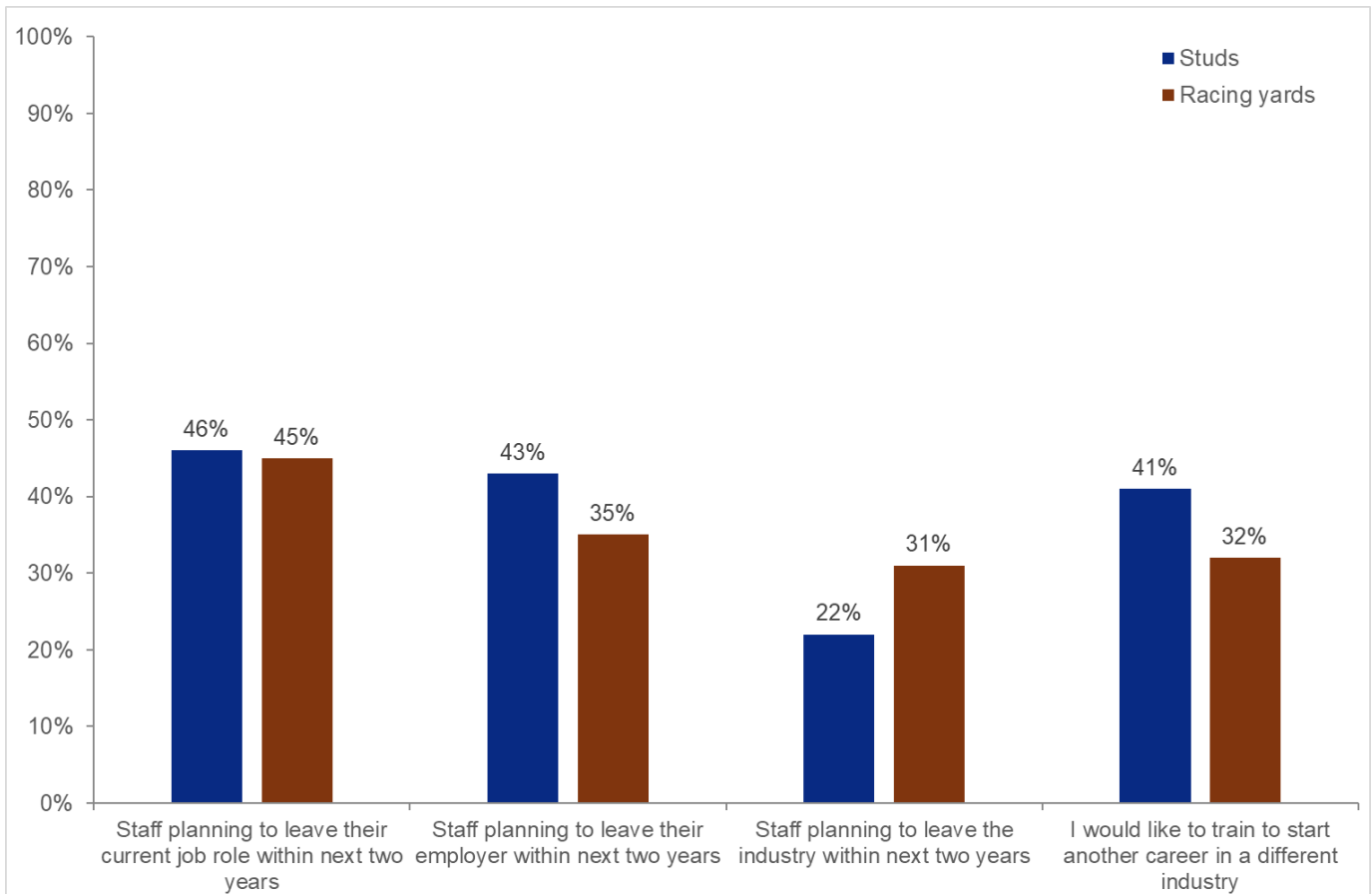


## Retention

### Over a fifth of staff are planning to leave the industry in the next two years and two-fifths would like to train to start a career in another industry

- 2.26. 46% of staff are planning to leave their current role in the next two years and a similar proportion are looking to leave their current employer in the same time frame.
- 2.27. 22% said they are planning to leave the industry in the next two years, compared with 31% of staff in racing yards. The reasons provided for this are similar to those related to job satisfaction – work-life balance and working conditions, along with lack of opportunities to progress.
- 2.28. In addition, 41% said they would like to train to start another career in a different industry (32% in racing yards).

Figure 2.9: Retention



Number of respondents: 250 (excludes those not working in the industry anymore).

Questions asked: How much longer do you intend to be working in your current job role? / How much longer do you intend to be working with your current employer? / How much longer do you intend to carry on working in the Thoroughbred breeding industry? Thinking about training, development and career issues, do you agree or disagree with the following statements?

### **Training, Development and Careers in the Thoroughbred Breeding Industry – Respondent background and demographics (284 respondents)**

#### **How long have you been working in the Thoroughbred Breeding industry?**

- 5% Under 12 months
- 7% One to two years
- 15% Three to five years
- 14% Six to ten years
- 54% Over ten years
- 6% No longer work in the industry

#### **How much longer do you intend to carry on working in the Thoroughbred Breeding industry?**

- 7% Under 12 months
- 13% One to two years
- 18% Three to five years
- 11% Six to ten years
- 42% Over ten years
- 9% No longer work in the industry

#### **How long have you been working with your current employer?**

- 18% Under 12 months
- 20% One to two years
- 24% Three to five years
- 8% Six to ten years
- 22% Over ten years
- 8% No longer work in the industry

#### **How much longer do you intend to be working with your current employer?**

- 17% Under 12 months
- 23% One to two years
- 13% Three to five years
- 11% Six to ten years
- 28% Over ten years
- 8% No longer work in the industry

#### **How long have you been working in your current job role?**

- 19% Under 12 months
- 23% One to two years
- 22% Three to five years
- 10% Six to ten years
- 18% Over ten years
- 7% No longer work in the industry

### How much longer do you intend to be working in your current job role?

- 15% Under 12 months
- 28% One to two years
- 12% Three to five years
- 10% Six to ten years
- 28% Over ten years
- 7% No longer work in the industry

### What is your current employment status?

- 11% Employed part-time
- 72% Employed full-time
- 5% Self-employed part-time
- 3% Self-employed full-time
- 1% Retired
- 2% Other
- 5% No longer work in the industry

### Is your role permanent or temporary?

- 86% Permanent
- 8% Temporary
- 6% No longer work in the industry

### How would you describe your occupation? Please select all relevant answers

- |     |                        |     |                   |     |                            |
|-----|------------------------|-----|-------------------|-----|----------------------------|
| 11% | Stud Manager           | 6%  | Barn leader       | 6%  | Tractor/maintenance person |
| 8%  | Assistant Stud Manager | 5%  | Stallion handler  | 9%  | Stud secretary             |
| 23% | Stud groom             | 33% | Stud hand         | 18% | Other                      |
| 8%  | Second person          | 13% | Sitting-up person |     |                            |

### Which of the following applies to you regarding how you entered into the industry and/or the work and activities you did before joining the Thoroughbred Breeding industry? Please select all relevant answers

- |     |  |     |  |
|-----|--|-----|--|
| 15% | I entered the industry after studying at the National Stud         | 42% | Prior to entering the industry I worked with ponies and/or horses outside of the racing or thoroughbred breeding industries e.g. Livery Yard, other equestrian sport |
| 15% | I entered the industry after studying at Equine College            | 27% | I have also worked in the racing industry e.g. in training yard  |
| 2%  | I entered the industry after studying at one of the racing schools | 15% | Prior to entering the industry I was involved in farming   |
| 15% | Prior to entering the industry I was a member of the Pony Club     | 18% | Any other answers  |
| 2%  | Prior to entering the industry I used to take part in pony racing  |     |  |

### How old are you?

- 0% 16-17
- 7% 18-24
- 12% 25-29
- 10% 30-34
- 14% 35-39
- 12% 40-44
- 12% 45-49
- 9% 50-54
- 6% 55-59
- 9% 60-64
- 7% 65+
- 0% Prefer not to say

### Are you . . . ?

(A question about gender identity will follow.)

- 38% Male
- 61% Female
- 1% Prefer not to say

### Is the gender you identify with the same as your sex registered at birth?

- 97% Yes
- 1% No, my gender identity is different (e.g. trans, non-binary)
- 2% Prefer not to say

### Which of the following best describes your sexual orientation?

- 2% Bisexual
- 6% Gay or Lesbian
- 87% Straight or Heterosexual
- 0% Other / self-identify
- 5% Prefer not to say

### Which best describes your ethnic group?

(Ethnic group is not about nationality, place of birth or citizenship. It is about the group to which you perceive you belong. Please select the appropriate box)

- |    |                                       |     |  |     |                            |
|----|---------------------------------------|-----|--|-----|----------------------------|
| 1% | Asian/Asian British                   | 0%  | Any other Black/African/Caribbean background | 10% | Irish                      |
| 0% | Bangladeshi                           | 0%  | Mixed/multiple ethnic groups                 | 0%  | Northern Irish             |
| 0% | Chinese                               | 0%  | White and Asian                              | 1%  | Scottish                   |
| 0% | Indian                                | 0%  | White and Black African                      | 0%  | Welsh                      |
| 0% | Pakistani                             | 1%  | White and Black Caribbean                    | 1%  | Any other white background |
| 0% | Any other Asian background            | 0%  | Any other mixed background                   | 0%  | Arab or other ethnic group |
| 0% | Black/African/Caribbean/Black British | 21% | White  | 0%  | Arab                       |
| 0% | African                               | 38% | British                                      | 0%  | Any other ethnic group     |
| 0% | Black British                         | 27% | English                                      | 1%  | Prefer not to say          |
| 0% | Caribbean                             | 0%  | Gypsy or Irish Traveller                     |     |                            |

**What is your religion?**

0%	Buddhist	1%	Jewish	0%	Sikh
41%	Christian (Including Church of England, Catholic, Protestant and all other Christian denominations)	0%	Muslim	1%	Any other religion
1%	Hindu	53%	No religion	4%	Prefer not to say

**Do you have any physical or mental health conditions or illnesses lasting or expected to last 12 months or more?**

(This is about health conditions, illnesses or impairments you may have. Consider conditions that always affect you and those that flare up from time to time. These may include, for example, sensory conditions, developmental conditions or learning impairments.)

25%	Yes
74%	No
1%	Prefer not to say

**If the answer is yes, please select all that apply below:**

15%	Hearing impairment	52%	Mental health condition	6%	Visual impairment
18%	Learning difficulty	21%	Physical impairment - ambulant	6%	Other or you prefer to use your own term
6%	Learning impairment/disability	0%	Physical impairment - wheelchair user	9%	Prefer not to say
3%	Long term illness	6%	Social/communication impairment		

**Do you have caring responsibilities? If yes, please select all that apply.**

This question asks if you look after, or give any help or support to, anyone because they have long-term physical or mental health conditions or illnesses, or problems related to old age. Please exclude anything you do as part of your paid employment.

85%	None	0%	Primary carer of a disabled child/children	2%	Other
11%	Primary carer of a child/children (under 18)	1%	Primary carer of an older person	1%	Prefer not to say
0%	Primary carer of a disabled adult (18 and over)	2%	Secondary carer (another person carries out the main caring role)		

**Are you currently pregnant or taking parental leave?**

0%	Yes
99%	No
1%	Prefer not to say

**What was the occupation of your main household earner when you were about aged 14?** This question has been provided by the Social Mobility Commission.

- 24% **Modern professional & traditional professional occupations** such as: teacher, nurse, physiotherapist, social worker, musician, police officer (sergeant or above), software designer, accountant, solicitor, medical practitioner, scientist, civil / mechanical engineer.
- 22% **Senior, middle or junior managers or administrators** such as: finance manager, chief executive, large business owner, office manager, retail manager, bank manager, restaurant manager, warehouse manager.
- 12% **Clerical and intermediate occupations** such as: secretary, personal assistant, call centre agent, clerical worker, nursery nurse. Technical and craft occupations such as: motor mechanic, plumber, printer, electrician, gardener, train driver.
- 17% **Routine, semi-routine manual and service occupations** such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, sales assistant, HGV driver, cleaner, porter, packer, labourer, waiter/waitress, bar staff.
- 1% **Long-term unemployed** (claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year).
- 10% **Small business owners who employed less than 25 people** such as: corner shop owners, small plumbing companies, retail shop owner, single restaurant or cafe owner, taxi owner, garage owner.
- 9% **Other** such as: retired, this question does not apply to me, I don't know.
- 6% I prefer not to say.

**How many dependent children do you have aged 19 or under?**

- 73% None
- 16% 1
- 9% 2
- 2% 3
- 0% 4
- 0% 5+

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