

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

Report: April/May 2024



RACING
FOUNDATION



THE
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Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2024: Employer survey

Executive Summary

Introduction and aims of the research

1. The Racing Foundation, in association with the Thoroughbred Breeders' Association (TBA) and Horseracing Independent People Board (HIPB), 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 fourth survey in a series, with previous surveys in 2022, 2019 and 2017.

Approach to the research

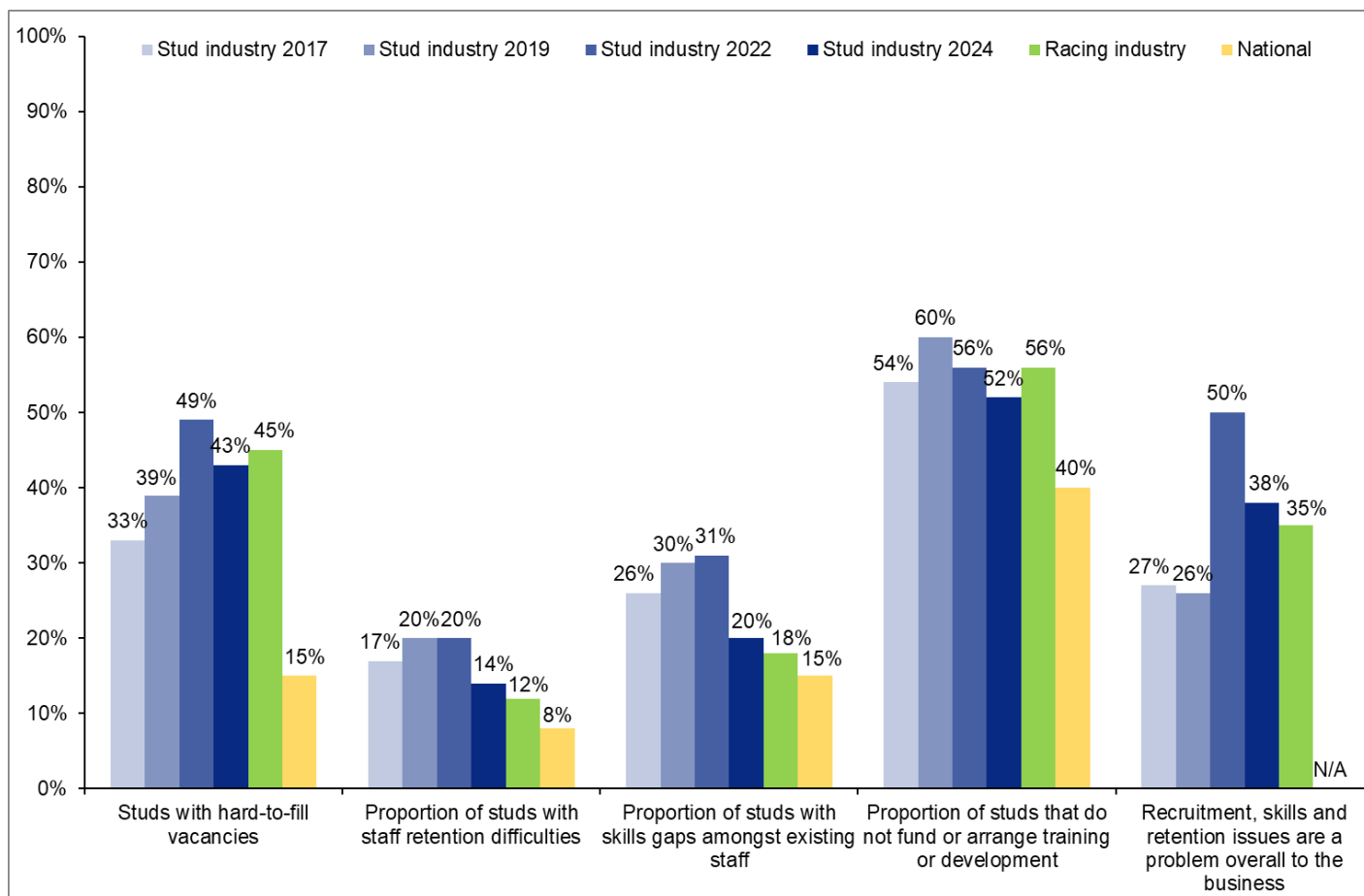
2. The research with studs adopted the same questionnaire used for racehorse trainers to provide for comparison, albeit with relevant wording tweaks to reflect the nature of studs. The survey was conducted from the end of January through to late March 2024.
3. At the time of the research there were approximately 369 studs that, according to TBA records, employed staff. The survey was administered initially via e-mail/on-line with several e-mail reminders and a telephone chase-up to non-respondents. In total, 183 studs responded to the survey, which represents a 50% response rate (49% in 2017, and 50% in 2019 and 2022).

Key findings

4. 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 2022):
 - There is an estimated **annual vacancy rate of 21% of all permanent stud jobs** (15% in 2017, 18% in 2019 and 15% in 2022) (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 stud, moving to another stud, leaving the industry and/or business growth creating new roles. This compares to a vacancy rate of 26% of permanent racing yard jobs. Nationally, the latest employer skills survey shows that at the time of interviewing 23% of businesses had at least one vacancy (up from 20% in 2017) (Employer Skills Survey, 2022). Please note this is not a direct comparison as it asks for current vacancies, rather than over the past 12 months, but suggests that the level of vacancies in the industry are broadly in-line with those nationally.
 - **43% of studs have hard-to-fill vacancies**, compared to 33% in 2017, 39% in 2019, 49% in 2022 and 45% of permanent racing yard vacancies. The national figure, based on the UK Employer Skills Survey, is 15%.

- 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**, while immigration changes appear to be exacerbating the issue.
- **14% of studs have retention difficulties**, compared to 17% in 2017 and 20% in 2019 and 2022. 12% of racehorse trainers have retention issues (which has also been on a positive downward trend) and 8% of businesses nationally (Employer Skills Survey, 2015 – this metric has not been reported since). The main difficulty, as in the past, is in the retention of stud hands and stud grooms. **Working patterns, motivation, and lack of career progression** continue to be the main issues cited for retention difficulties, exacerbated by other issues such as lack of accommodation and salary.
- **20% of studs said there are gaps in the skills or capabilities of their existing workforce, which is a notable improvement on previous results**. This compares to 26% in 2017, 30% in 2019, and 31% in 2022, 18% of racing yards (also on a positive downward trend) and a national figure of 15%. The main skills gaps continue to be amongst stud grooms and 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, 72% of studs are aware of the training and development initiatives. This compares to 78% in 2017, 71% in 2019, 68% in 2022 and 74% 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 small minority of studs have used the training and development initiatives**. For example, on average across all initiatives, 15% of studs have used the training and development initiatives (and 12% of all respondents found them helpful, which equates to 80% of those that used the training and development initiatives). This compares to 13% in 2017 and 2019, 14% in 2022 and 18% of racing yards (15% found them helpful or rather 83% of those that used them).
- **52% of studs have not funded or arranged any training or development in the past 12 months**, compared with 54% in 2017, 60% in 2019, 56% in 2022 and 56% of racing yards. This compares with 40% 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 some of these studs citing skills gaps amongst their workforce.
- **Overall, 38% of studs said that recruitment, skills and retention issues are a problem to their business**, a notable improvement on the 50% in 2022. It also compares to 27% in 2017, 26% in 2019 and 35% of racing trainers (which has improved from 40% 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 and be aware of, and use, industry training and development initiatives.

Figure 1: Summary of recruitment, skills and retention issues



Concluding points

5. Recruitment, skills and retention issues continue to impact on the Thoroughbred breeding industry, with over a third of studs stating these are issues to their business and with associated high-levels of hard-to-fill vacancies and relatively low levels of training and development uptake. This said, many of the metrics are moving in a positive direction, especially a notable reduction in skills gaps and in the proportion of studs that state recruitment, skills and retention are a problem. Nonetheless, figures are similar to those in racing yards, which themselves compare relatively poorly to national figures.
6. Recruitment of sufficient staff and adequately skilled staff continue to stand out as key issues, with the stud hand and stud groom roles remaining 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.

Racing and Thoroughbred Breeding Industry Recruitment, Skills and Retention Survey 2024: Employer 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 Independent People Board (HIPB), 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 fourth survey in a series, with previous surveys in 2022, 2019 and 2017.

Approach to the research

- 1.2. 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 January through to late March 2024.
- 1.3. At the time of the research there were approximately 369 studs that, according to TBA records, employed staff.² The survey was administered initially via e-mail/on-line with several e-mail reminders and a telephone chase-up to non-respondents.³ In total, 183 studs responded to the survey, which represents a 50% response rate (49% in 2017, and 50% in 2019 and 2022).
- 1.4. With this number of respondents, the survey provides for robust data. The confidence interval or accuracy of the survey result is no higher than +/- 6% at a 95% confidence level and for some results is as low as +/- 3%.⁴ This means that we can be 95% confident that the 'real' result for any given question would be within 6 percentage points of those stated

¹ The racehorse trainer survey was conducted predominantly via telephone. Theoretically, using two different methods – telephone and on-line – 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 381 studs was provided by the TBA. However, 12 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.

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.

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.

- 1.5. 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

- 1.6. 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.
- 1.7. Comparison is provided against the racehorse trainer results, where appropriate, and against the past survey results in 2017, 2019 and 2022.
- 1.8. In addition, where data exists, questions are compared against national data, primarily the UK Employer Skills Survey 2022 – a telephone survey of some 70,000 employers conducted nationally by the Department for Education/
- 1.9. 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'.
- 1.10. The remainder of this report is divided into the following sections:
 - Section 2: Labour force statistics, business performance and workforce demand
 - Section 3: Recruitment
 - Section 4: Retention
 - Section 5: Skills, training and development
 - Section 6: Concluding points

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

Introduction

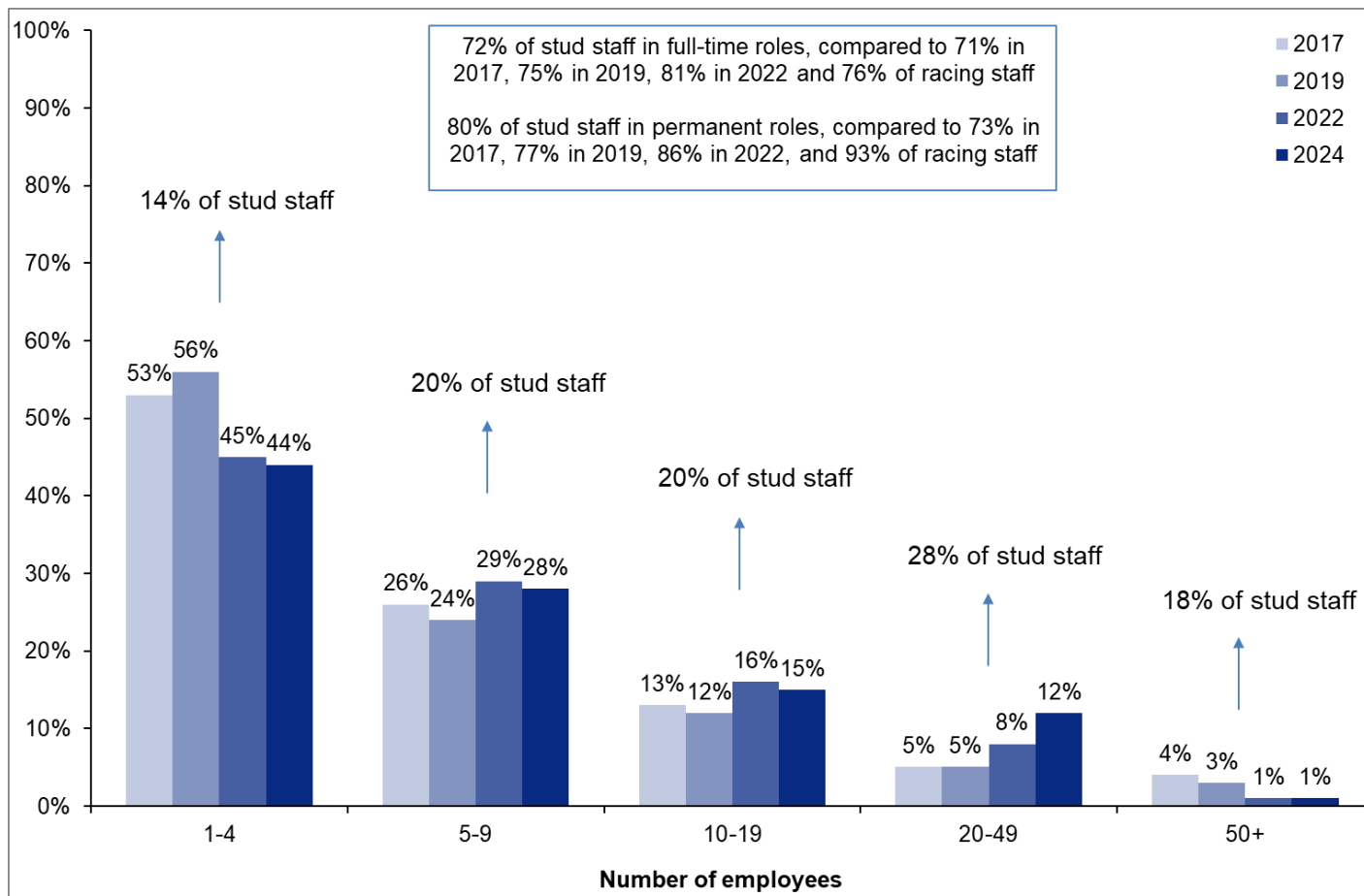
2.1. This section presents findings about the number of staff employed by studs, business performance and workforce demand.

Labour force statistics

Just under three-quarters of studs have 1-9 staff amounting to a third of all stud staff (similar to 2022), while slightly over a tenth have 20+ staff but account for just under half of all staff

- 2.2. 44% of studs that employ staff have 1-4 staff, accounting for 14% of stud staff and 28% have 5-9 staff, accounting for 20% of stud staff. This compares to 45% of racing trainers that have 1-9 staff, accounting for 19% of racing staff.
- 2.3. 15% of studs have 10-19 staff, accounting for 20% of stud staff and 12% have 20-49 staff, accounting for 28% of stud staff. This compares to 44% of racing trainers that have 10-49 staff, accounting for 45% of racing staff.
- 2.4. 1% of studs have 50 or more staff, accounting for 18% of all stud staff. This compares to 11% of trainers that have 50+ staff, accounting for 36% of racing staff.
- 2.5. 72% of stud staff are in full-time roles, compared to 76% of racing staff.
- 2.6. 80% of stud staff are in permanent roles, with the remainder in temporary, seasonal or casual roles. This compares to 93% of racing staff in permanent roles.
- 2.7. Studs were asked to indicate the proportion of their staff by gender, age and nationality (rounded to nearest 5% as based on estimates, and therefore the following should be treated indicatively):
 - Male: 45%
 - Female: 55%
 - Aged 16-24: 15%
 - Aged 25-34: 25%
 - Aged 35-44: 20%
 - Aged 45-54: 20%
 - Aged 55+: 20%
 - UK Citizen: 85%
 - Non-UK Citizen: 15%

Figure 2.1: Business size by number of employees



Number of respondents: 183 studs.

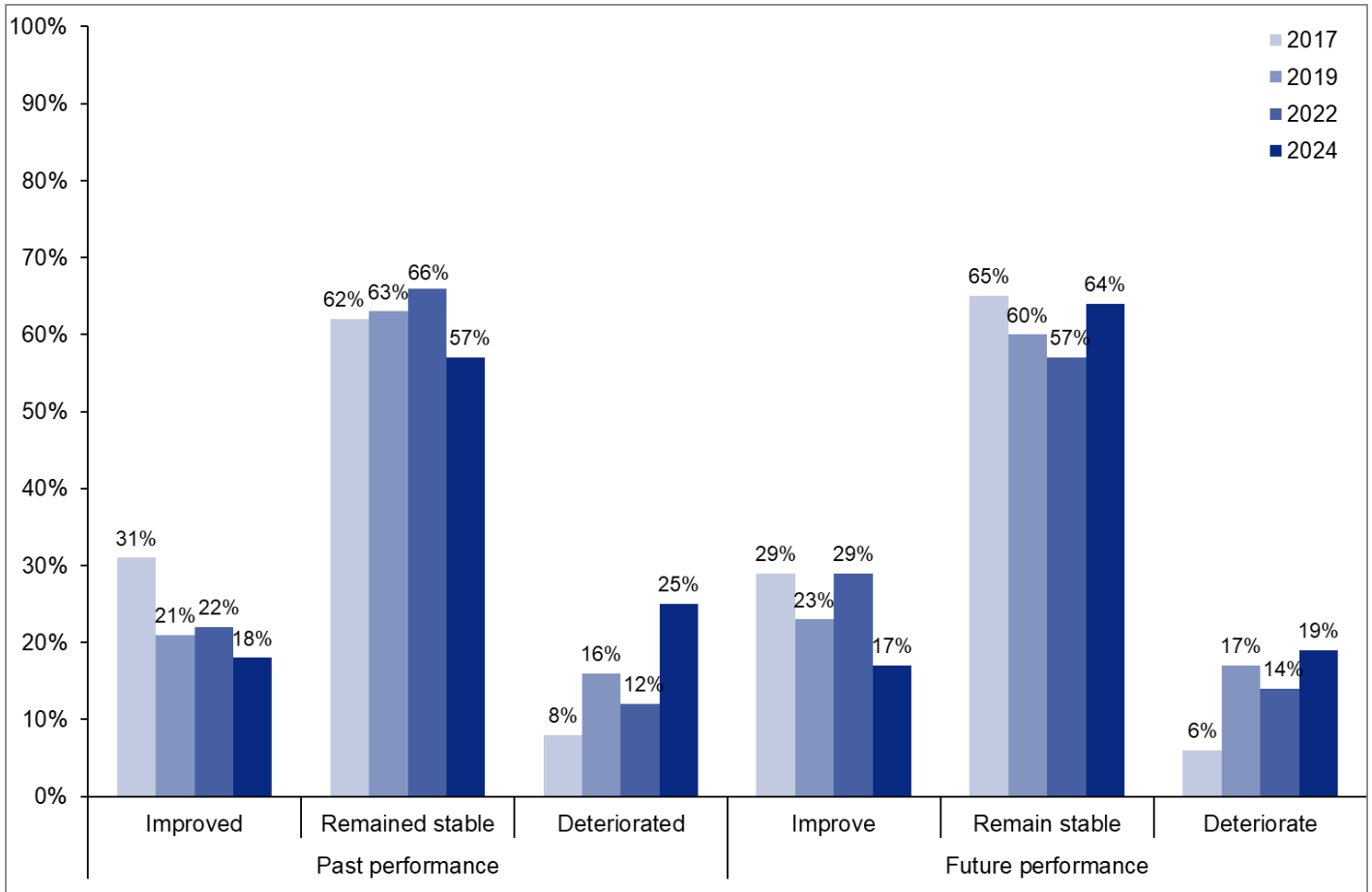
Question asked: Including you and any working proprietors/owners, how many people are employed by your business during your peak season? / How many are employed on a full-time basis (that is working 40 or more hours a week), and how many on a part-time basis (that is working fewer than 40 hours a week)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

Business performance

There has been an increase in the proportion of studs that reported a deterioration in business performance, and there is also less optimism for the future

- 2.8. 18% of studs said their business performance improved over the past 12 months, compared to 22% in 2022 and 32% of racing trainers. 25% said it deteriorated, compared to 12% in 2022 and 17% of racing trainers.
- 2.9. 17% of studs expect performance will improve over the next 12 months, compared to 29% in 2022 and 40% of racing trainers. 19% said it will deteriorate, compared to 14% in 2022 and 14% of racing trainers.

Figure 2.2: Past and future business performance



Number of respondents: 183 studs.

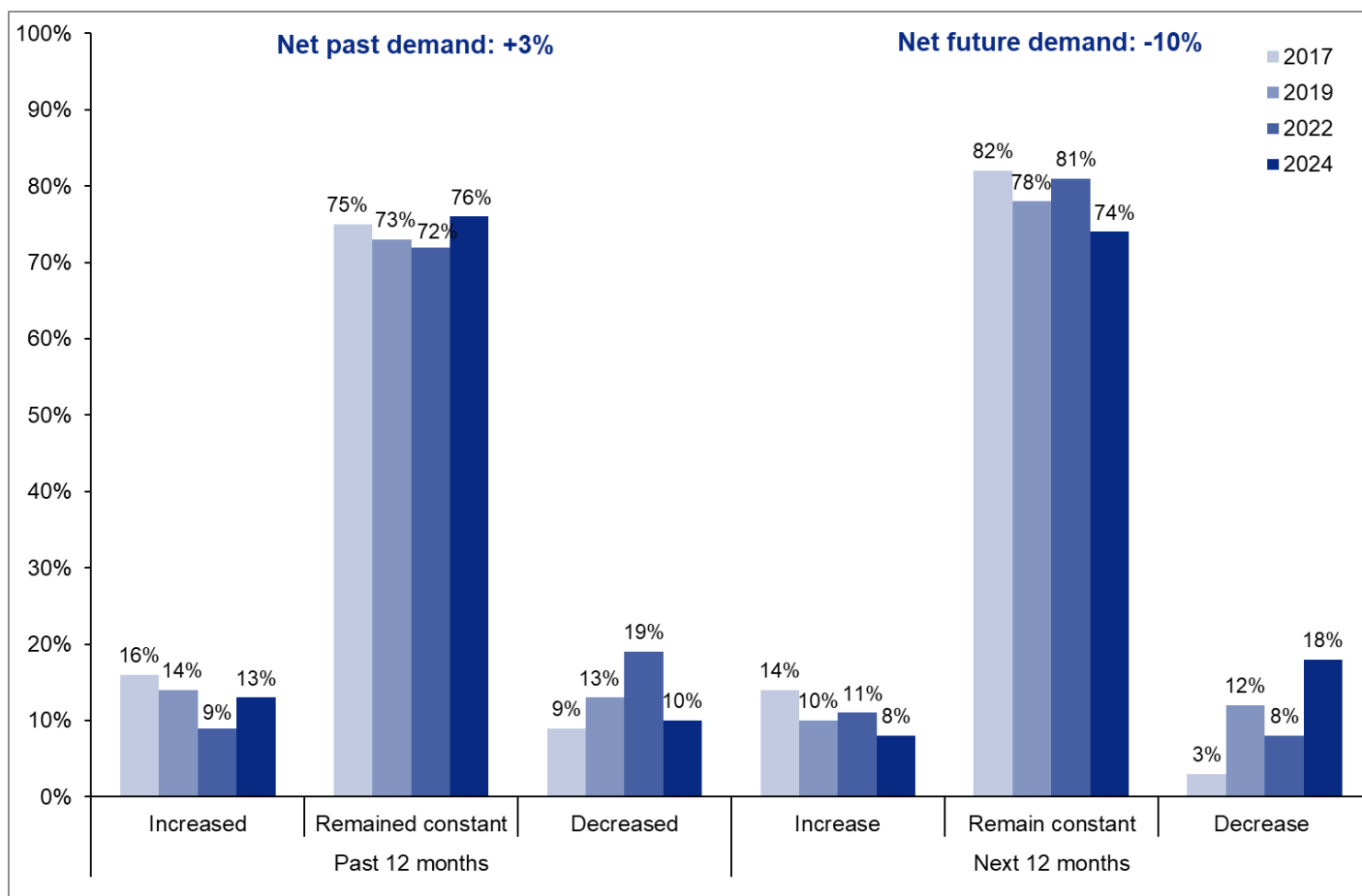
Questions asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? / Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?

Workforce demand

Most studs said their workforce remained constant over the last 12 months, with a slight contraction in workforce expected in the next 12 months

- 2.10. 13% of studs said that their workforce increased over the past 12 months, while 10% reported it decreased. This results in net past demand (i.e. the difference between the increase and decrease in workforce) of +3% (compared to +7% in 2017, +1% in 2019, -10% in 2022 and +7% for racing trainers).
- 2.11. 8% of studs expect their workforce to increase in the next 12 months, while 18% expect it to decrease, resulting in a net future demand of -10% (compared to +11% in 2017, -2% in 2019, +3% in 2022, and +16% for racing trainers).

Figure 2.3: Workforce demand



Number of respondents: 183 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

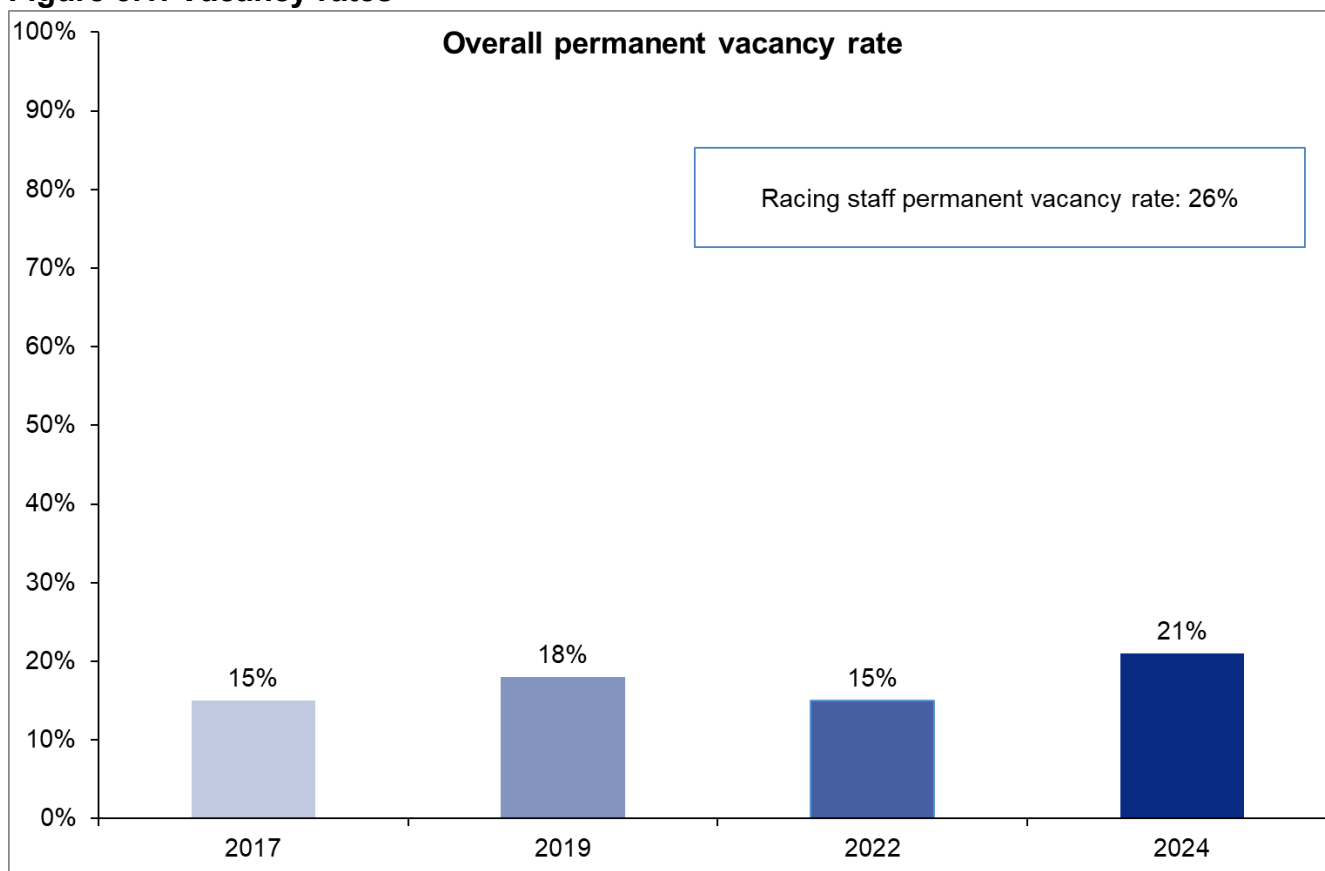
3.2. There is an estimated annual vacancy rate of 21% of all permanent stud jobs (15% in 2017, 18% in 2019 and 15% in 2022) (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs – this is essentially a measure of recruitment demand and is not a measure of staff shortages). These are permanent posts in studs that require recruitment activity annually, due to staff moving jobs within a stud, moving to another stud, leaving the industry and/or business growth creating new roles.

3.3. This compares to a vacancy rate of 26% of permanent racing yard jobs.

3.4. Nationally, the latest employer skills survey shows that at the time of interviewing 23% of businesses had at least one vacancy (up from 20% in 2017) (Employer Skills Survey, 2022). Please note this is not a direct comparison as it asks for current vacancies, rather than over the past 12 months, but suggests that the level of vacancies in the industry are broadly in-line with those nationally.

3.5. 17% said they recruited staff directly from the National stud and 27% rated these as very good, 40% as good, 20% as average and 13% as poor.

Figure 3.1: Vacancy rates



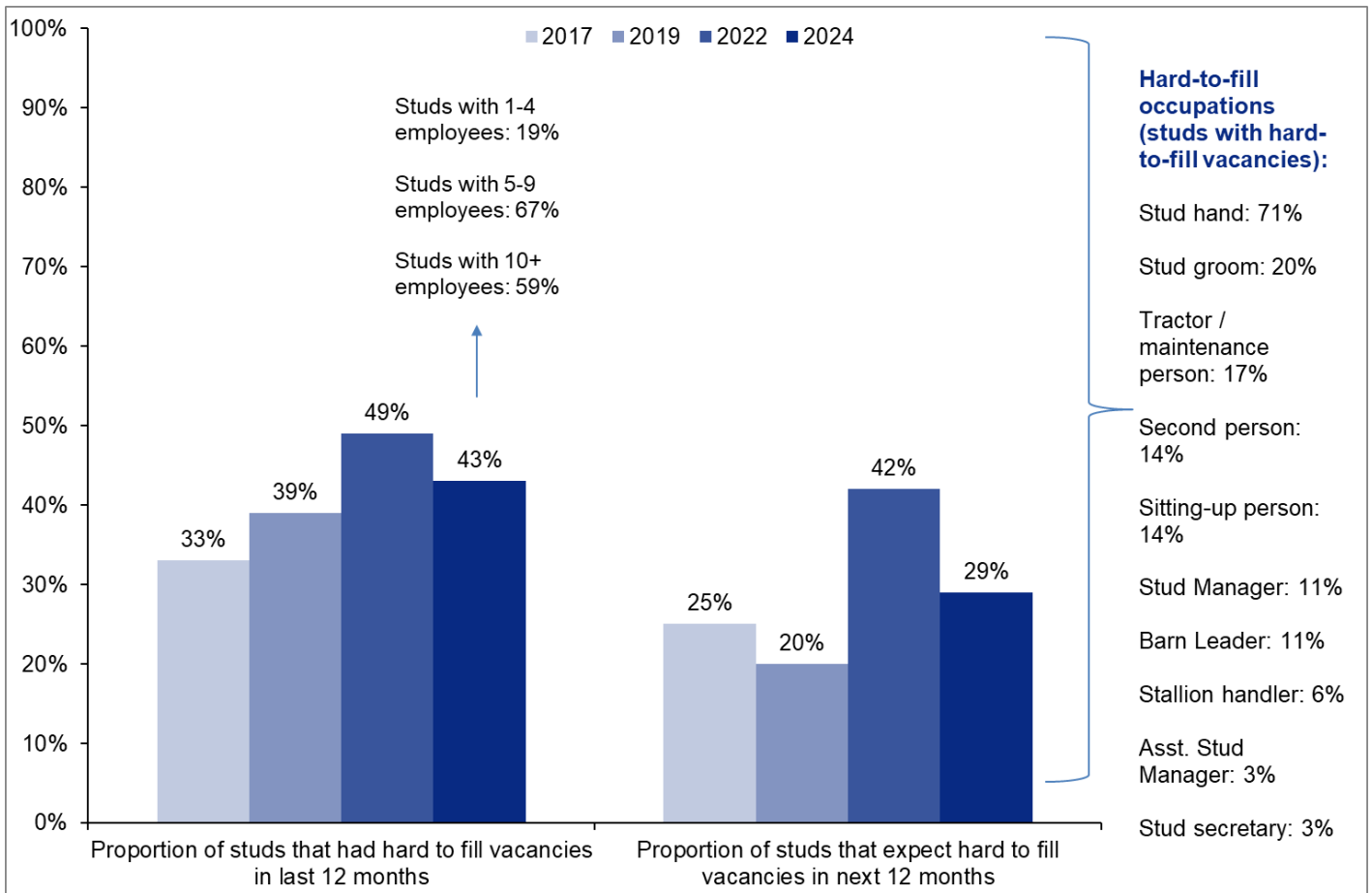
Number of respondents: 183 studs. Questions asked: Overall, how many full-time and part-time vacancies have you had in the last 12 months? / And roughly, in the last 12 months, how many vacancies have been permanent, temporary, seasonal and casual?

Hard-to-fill vacancies

Over two-fifths of studs have hard-to-fill vacancies, with larger studs most affected

- 3.6. 43% of studs said they had hard-to-fill vacancies in the last 12 months, compared with 49% in 2022 and 45% of racing yards. 39% said they did not have hard-to-fill vacancies and 18% said they did not have any vacancies. Once the studs without vacancies are removed, 52% of studs that have vacancies said they were hard-to-fill.
- 3.7. Nationally, 15% of businesses overall said they had at least one hard-to-fill vacancy (representing 57% of all vacancies), up from 8% in 2017 (Employer Skills Survey, 2022).
- 3.8. Similar to previous surveys, larger studs are more likely to say they had hard-to-fill vacancies. For example, 19% of studs with 1-4 employees said they had hard-to-fill vacancies, compared with 67% with 5-9 employees and 59% with 10+ employees.
- 3.9. 29% of studs expect to have hard-to-fill vacancies in the next 12 months, compared to 42% in 2022 and 41% of racing yards. 63% of studs that had hard-to-fill vacancies in the past also expect to have hard-to-fill vacancies in the future, highlighting this is an enduring problem for some studs.
- 3.10. The occupations which were most commonly cited as being hard-to-fill are similar to those in previous years - stud hands (cited by 71% of studs that said they had hard-to-fill vacancies – exactly the same figure as in 2022), stud grooms (20%), Tractor/maintenance person (17%), Second person (14%), and Sitting-up person (14%).

Figure 3.2: Hard-to-fill vacancies



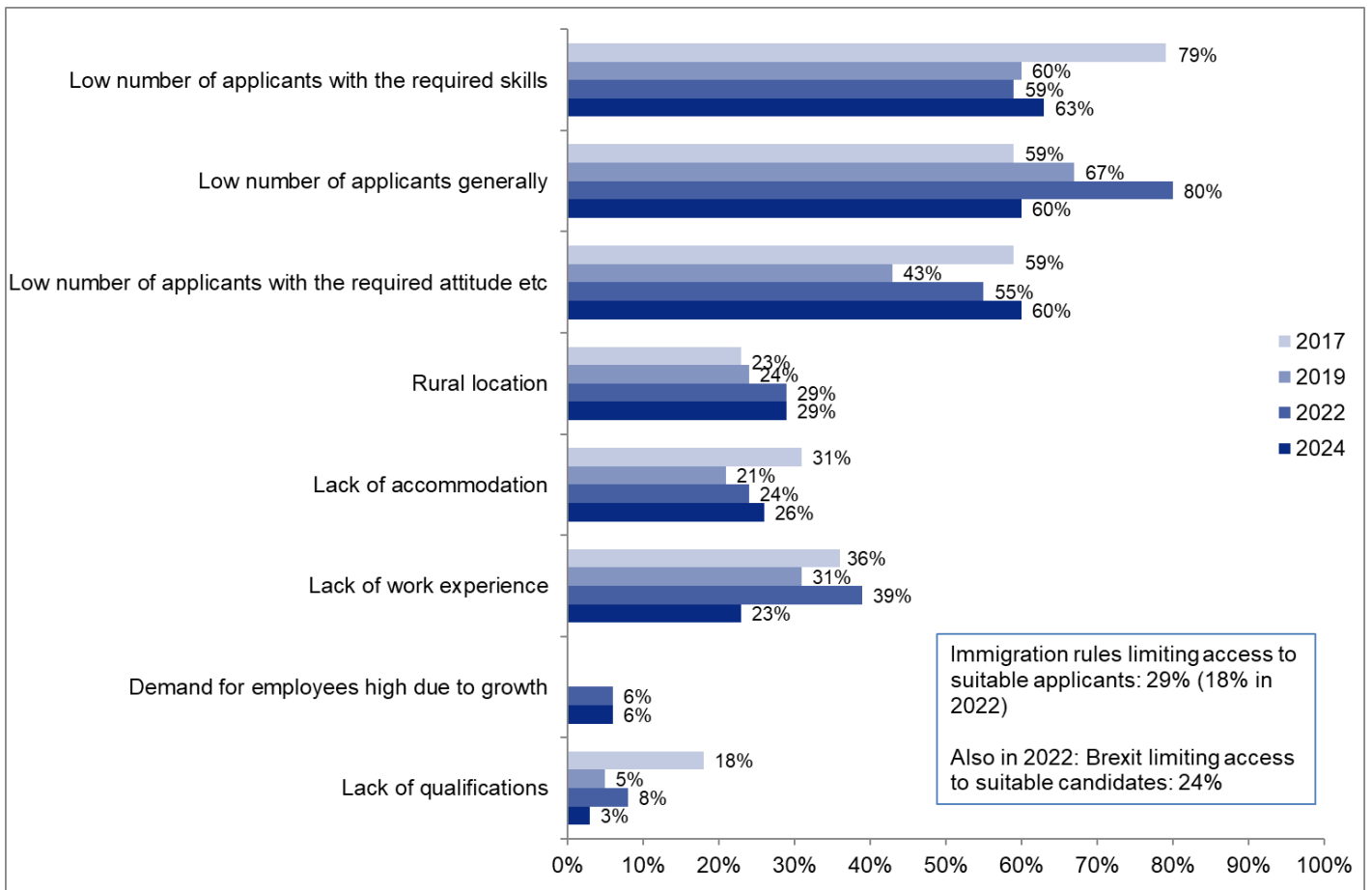
Number of respondents: 183 studs. Questions asked: Have you had any vacancies in the last 12 months that you have found hard to fill? / Which specific occupations have you found hard to fill? / Do you expect to have any vacancies that will be hard to fill in the next 12 months?

Reasons for hard-to-fill vacancies

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

- 3.11. 63% cited the low number of applicants with the required skills as the reason for hard-to-fill vacancies, 60% the low number of applicants in general and 60% the low number with the required attitude. Rural locations (29%), lack of accommodation (26%) and lack of work experience (23%) are also cited.
- 3.12. Immigration rules limiting access to suitable applicants was cited by 29% of employers with hard-to-fill vacancies, following on from 18% that cited this in 2022 and 24% that mentioned Brexit in 2022.

Figure 3.3: Reasons for hard-to-fill vacancies



Number of respondents: 77 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

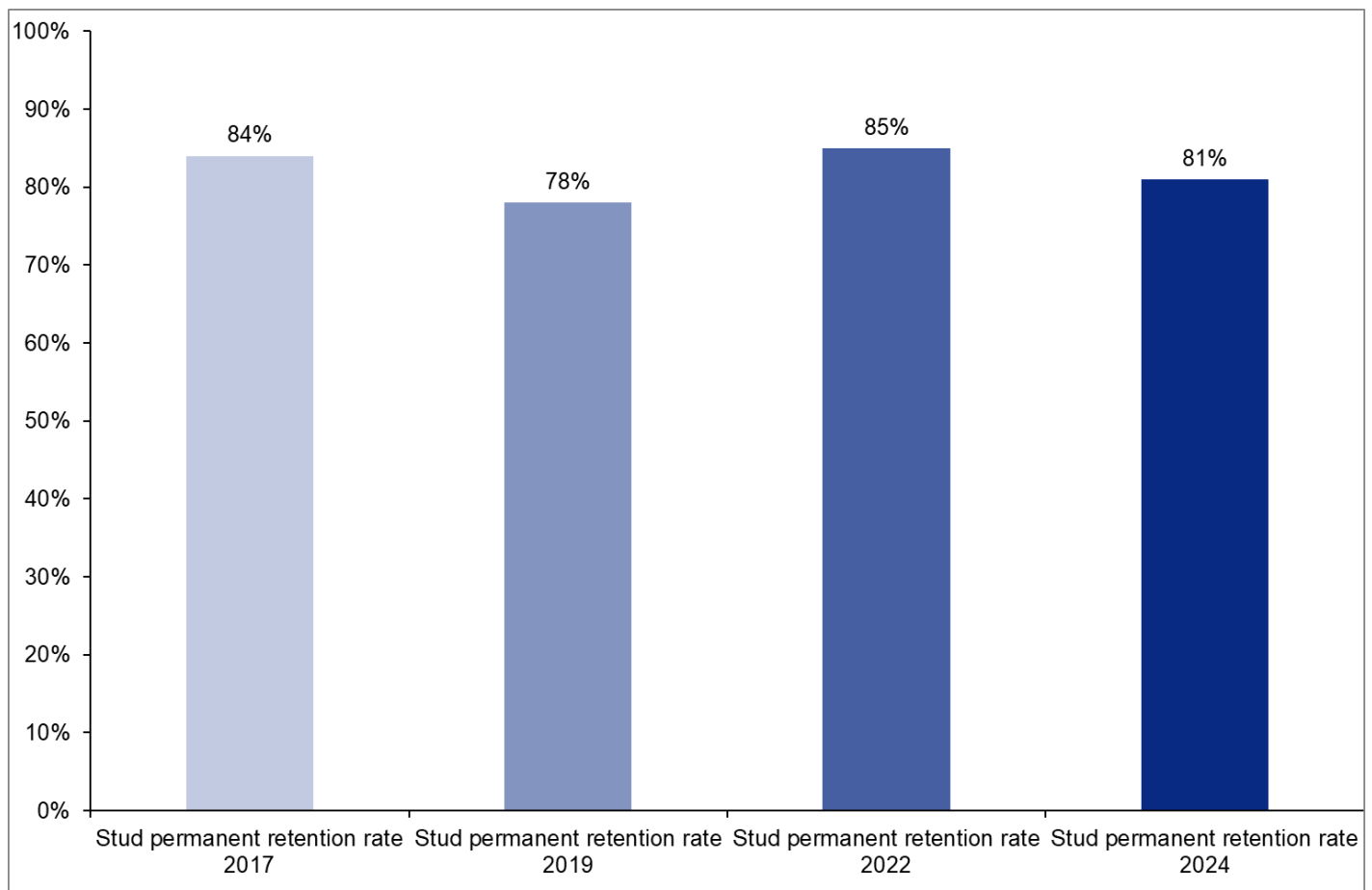
4.1. This section presents findings about staff retention, including information about retention rates, retention difficulties, the types of studs and occupations most affected, and the reasons for retention difficulties.

Retention rates

About 1 in 5 staff leave their job roles each year, broadly in line with previous years

4.2. Overall, there is an estimated retention rate of 81% of all permanent stud staff in their job roles per annum (84% in 2017, 78% in 2019 and 85% in 2022). In other words, some 19% 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 77% in racing yards.

Figure 4.1: Retention rates



Number of respondents: 183 studs.

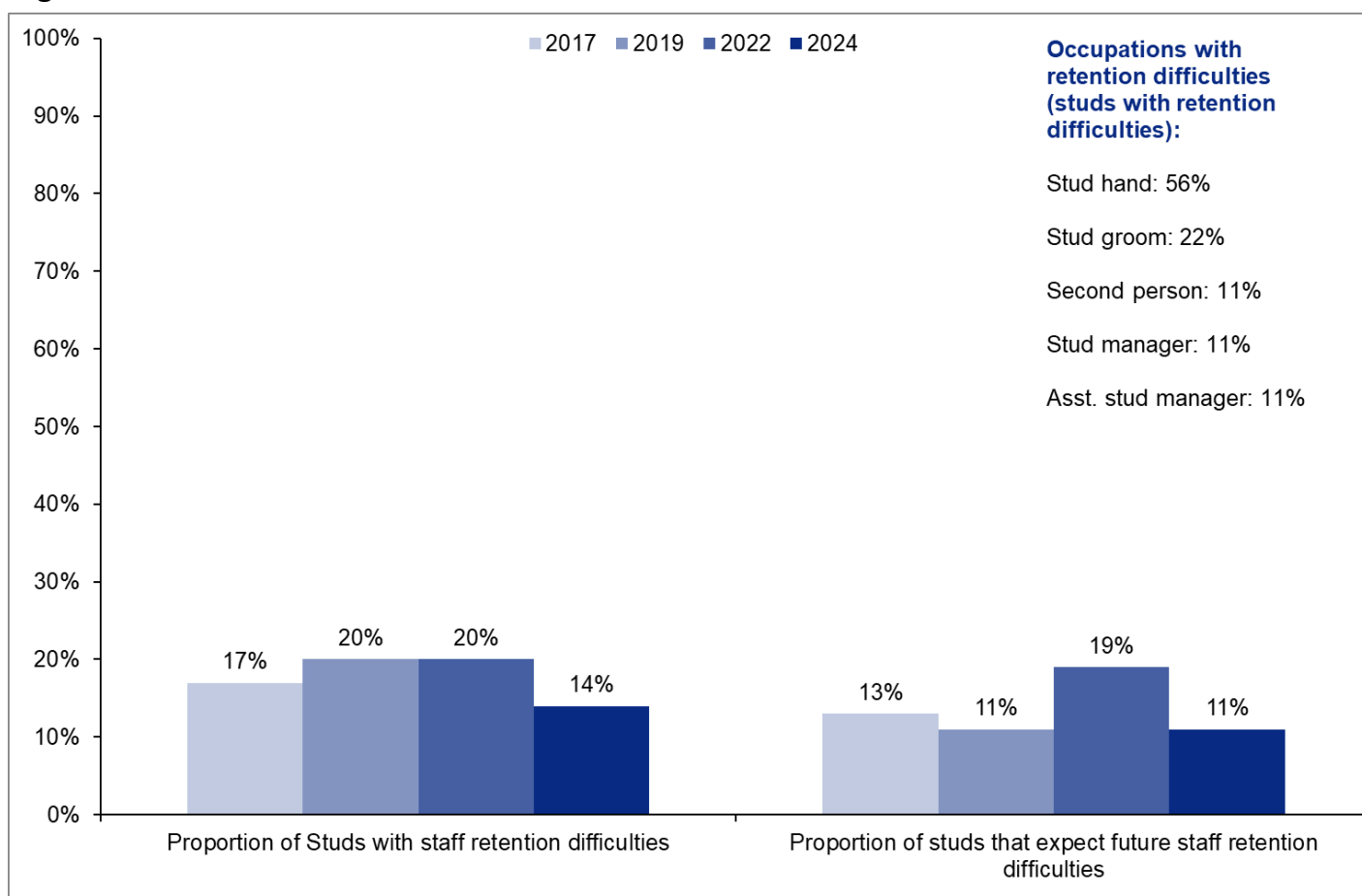
Question asked: Overall, how many permanent full-time and part-time staff have left their roles in the last 12 months?

Retention difficulties

Under 1-in-6 studs have retention difficulties, an improvement on previous years

- 4.3. 14% of studs (17% in 2017, 20% in 2019 and 2022) said they had difficulties retaining permanent staff in the last 12 months. This compares to 12% of racing yards (which themselves have been on a gradual downward trend). There is not a directly comparable or recent national comparison.
- 4.4. 12% of studs face a double problem of hard-to-fill vacancies and retention difficulties (19% in 2022).
- 4.5. 11% of studs expect to have retention difficulties in the next 12 months, compared to 13% in 2017, 11% in 2019 and 19% in 2022 (15% of racing yards). A third 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.
- 4.6. Similar to previous years, the occupations which were most commonly cited as being difficult to retain are stud hand (cited by 56% of studs that said they have retention difficulties) and stud groom (22%).

Figure 4.2: Retention difficulties



Number of respondents: 183 studs.

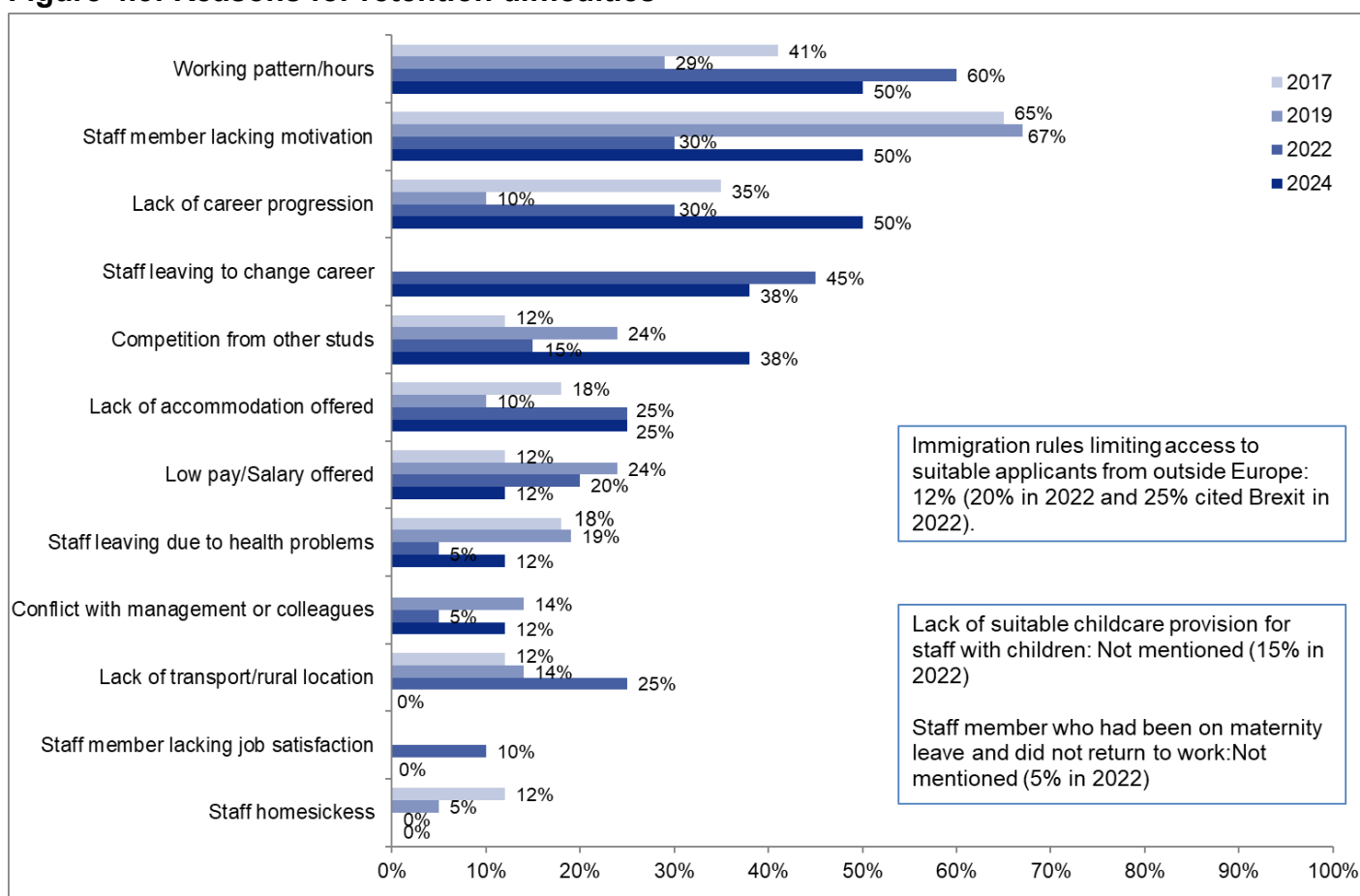
Questions asked: In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal, such as retirement or leaving a temporary role) / Which specific occupations have you had difficulties retaining staff? / Do you expect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

Reasons for retention difficulties

Working patterns, motivation, and lack of career progression continue to be the main issues cited for retention difficulties, exacerbated by other issues such as lack of accommodation and salary

- 4.7. Working pattern/hours continues to be cited as the main reason for staff retention difficulties (cited by 50% of studs with retention difficulties).
- 4.8. Staff lacking motivation and lack of career progression (both 50%) also continue to be mentioned as reasons for staff retention.
- 4.9. Other factors include staff leaving to change career (38%), competition from other studs (38%), lack of accommodation (25%), low pay (12%), health problems (12%) and conflict with management/colleagues (12%).
- 4.10. The impact of immigration rules was mentioned by 12%.
- 4.11. Lack of suitable childcare and maternity were not mentioned as issues in this survey.

Figure 4.3: Reasons for retention difficulties



Number of respondents: 23 studs (only respondents that said they had retention difficulties). Please note the low sample size, which can affect comparability of responses.

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

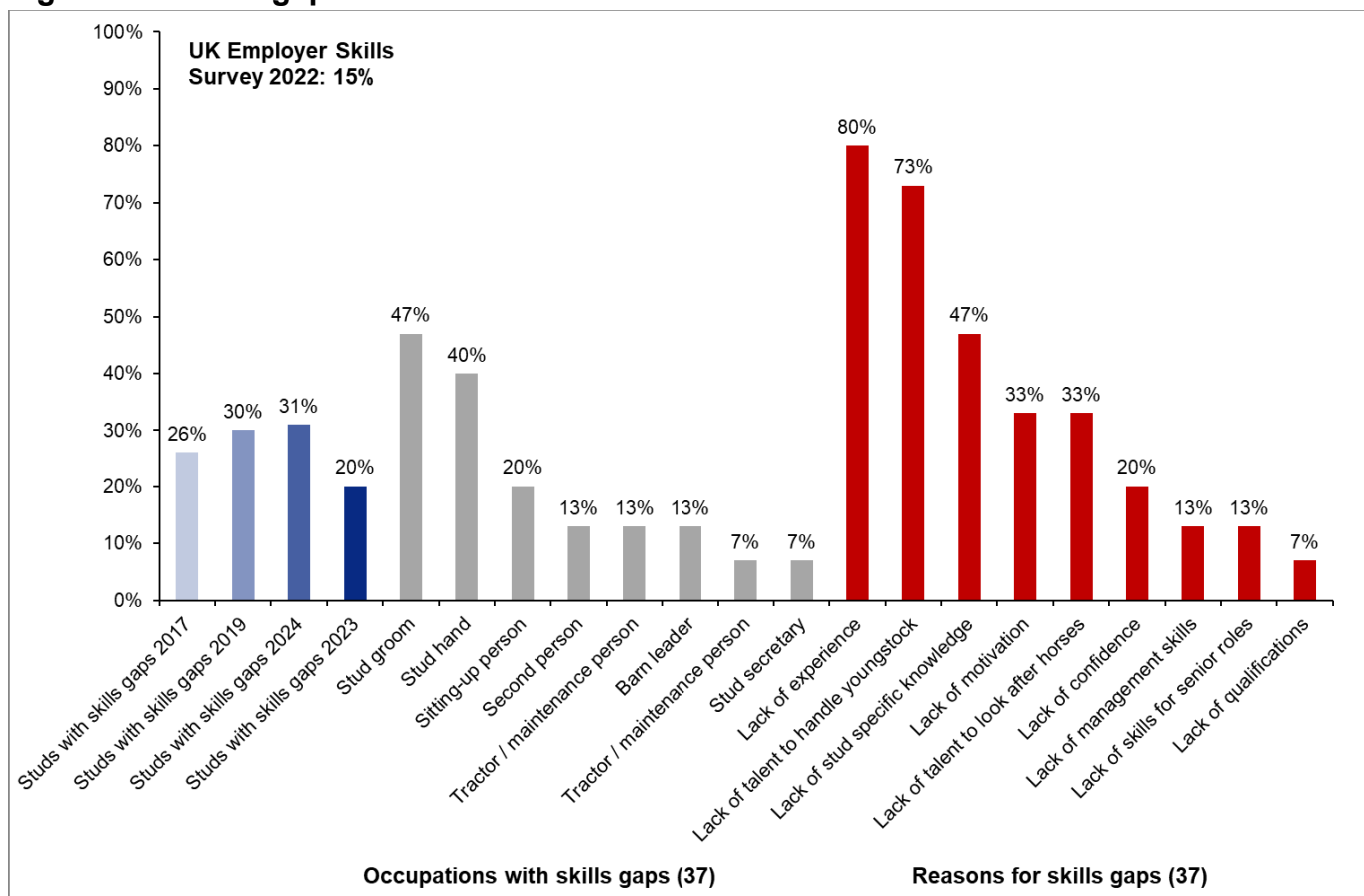
5.1. This section presents findings about skills gaps, training and development, and awareness and use of industry recruitment, training and retention initiatives and support.

Skills gaps

There has been a decrease in skills gaps, down to a fifth of studs, with the main gaps in experience of stud groom and hand roles, including capability to handle yearlings/youngstock

- 5.2. 20% of studs said there are gaps in the skills or capabilities of their existing workforce. This compares to 31% in 2022 and 18% of racing yards (itself an improved figure, down from 27% in 2021). This compares to a national figure of 15%, which has remained broadly consistent since 2015.
- 5.3. Some 5% of studs have a combination of skills gaps, hard-to-fill vacancies and retention difficulties.
- 5.4. Similar to previous surveys, the occupations most likely to have skills gaps are stud groom (cited by 47% of studs that have skills gaps) and stud hand (40%).
- 5.5. Also, similar to previous surveys, the main reasons for skills gaps are a lack of experience (cited by 80% of studs with skills gaps), lack of talent/capability handling yearlings/youngstock (73%), and lack of stud specific knowledge (47%).

Figure 5.1: Skills gaps



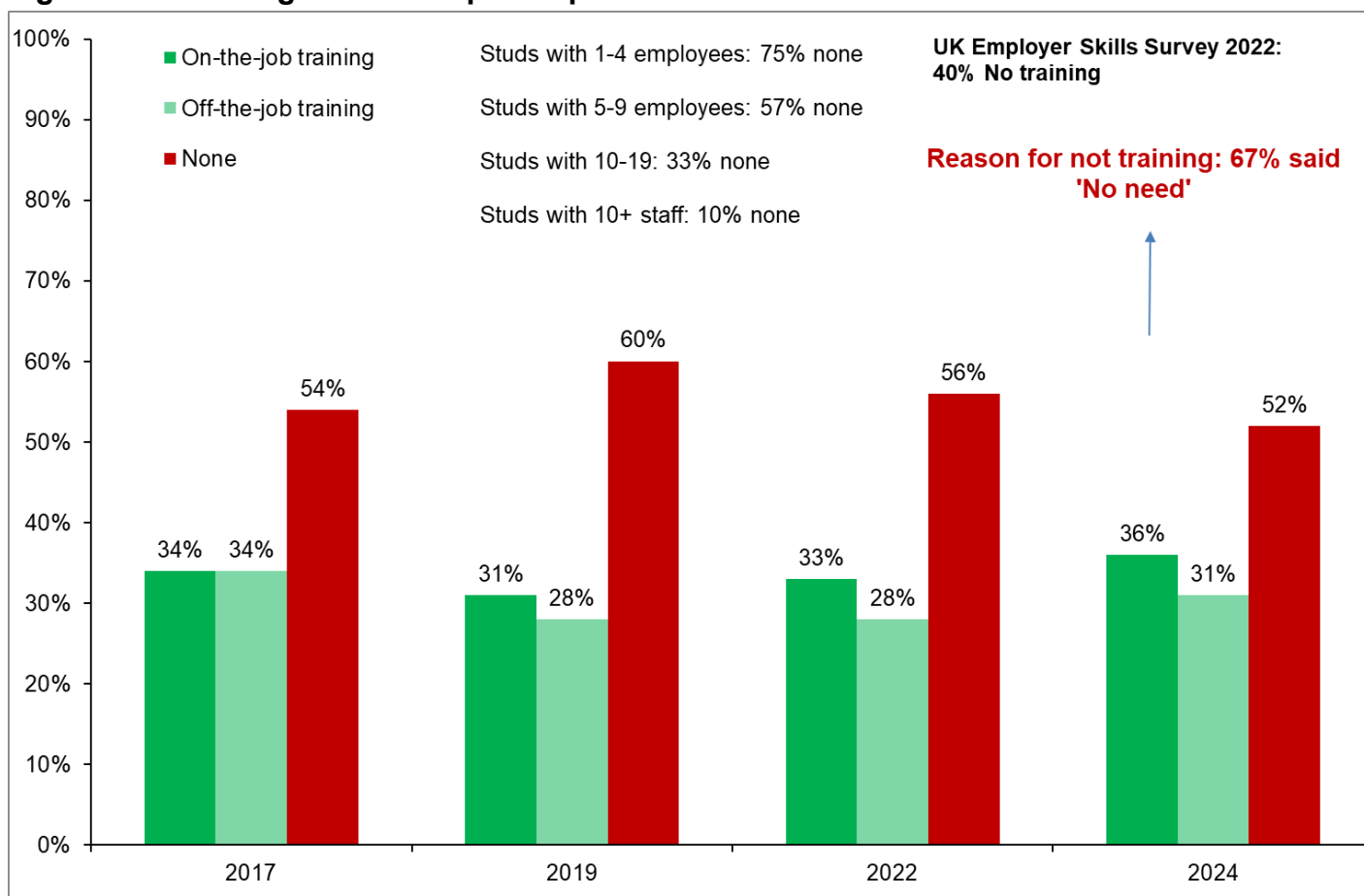
Number of respondents: 183 studs / numbers in brackets are the number of respondents to follow-up questions asked only to studs with skills gaps. Questions asked: Are there any gaps in the skills or capabilities of your existing workforce i.e. areas where existing staff lack the skills or capabilities 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 – similar to previous years

- 5.6. 52% of studs have not funded or arranged any training in the past 12 months, compared with 56% in 2022 and 56% of racing yards. 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).
- 5.7. 59% 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 75% of studs with 1-4 staff not providing training or development in the past 12 months, compared with 10% with 10 or more employees.
- 5.9. Similar to previous surveys, the main reason cited by employers that do not provide training is that there is 'no need' – cited by 67% of studs that did not provide training or development in the past 12 months. In addition, 14% cited lack of time, 14% lack of suitable courses and 12% funding/cost.
- 5.10. 48% of studs said they do not expect to fund or arrange training or development in the next 12 months, compared to 39% in 2022 and 48% of racing yards. Some 40% of employers said that they have not provided training in the past 12 months and do not intend to do so in the next 12 months.

Figure 5.2: Training and development prevalence



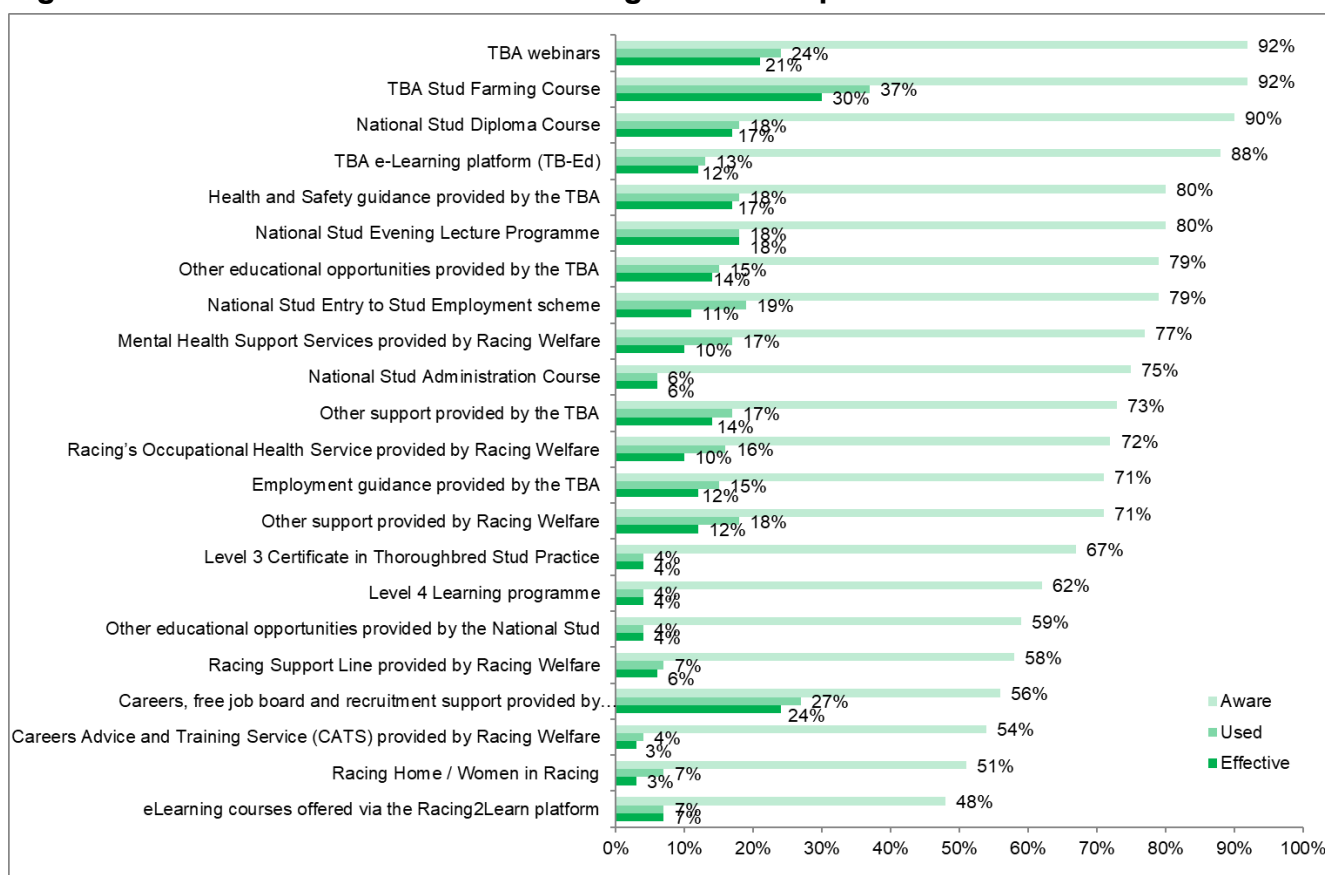
Number of respondents: 183 studs. Note: Respondents could select both on-the-job and off-the-job training response options. Questions asked: Over the past 12 months have you funded or arranged any off-the-job training or development or on-the-job or informal training or development for your staff? / 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, 72% of studs are aware of the training and development initiatives. This compares to 78% in 2017, 71% in 2019, 68% in 2022 and 74% 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, 15% of studs have used the training and development initiatives (and 12% of all respondents found them helpful, which equates to 80% of those that used the training and development initiatives). This compares to 13% in 2017 and 2019, 14% in 2022 and 18% of racing yards (15% found them helpful or rather 83% 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, 64% of studs with 1 to 4 employees are aware of the initiatives and 5% have used them, compared with 76% of larger studs aware and 20% 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 – the industry occupational health support (and other services delivered by Racing Welfare) and e-learning courses via Racing2Learn.

Figure 5.3: Awareness and use of training and development initiatives



Number of respondents: 183 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

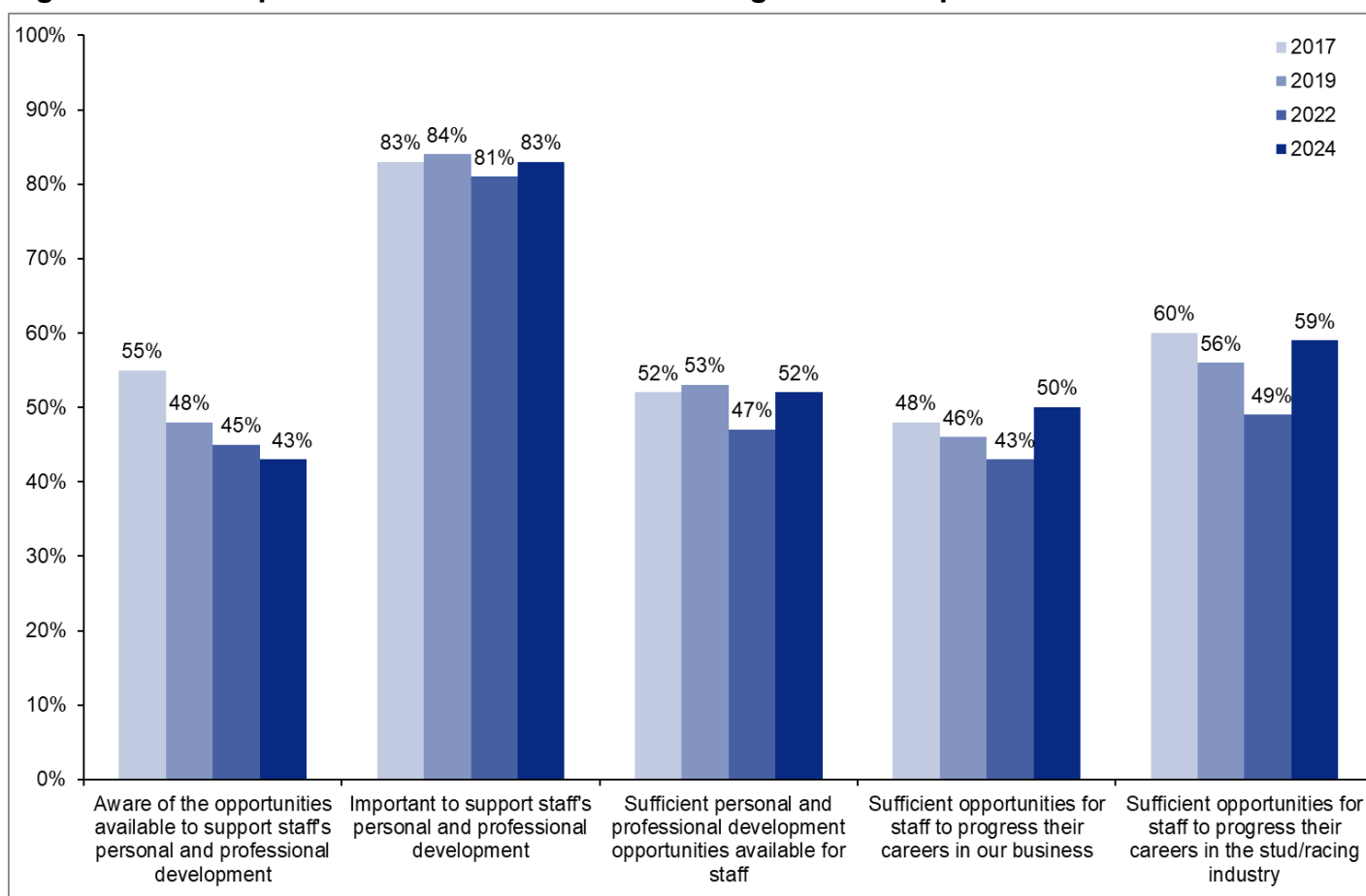
Across all indicators there are subtle decreases over time of perceptions and attitudes about training and development

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

- 43% are aware of staff training and development opportunities, compared to 45% in 2022 and 85% of racing trainers.
- 83% agree it is important to support staff to engage in training and development, compared to 81% in 2022 and 96% of racing trainers.
- 52% said there are sufficient staff training and development opportunities, compared to 47% in 2022 and 82% of racing trainers.
- 50% said there are sufficient staff career progression opportunities in their business, compared to 43% in 2022 and 80% of racing trainers.
- 59% said there are sufficient staff career progression opportunities in the industry, compared to 49% in 2022 (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: 183 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

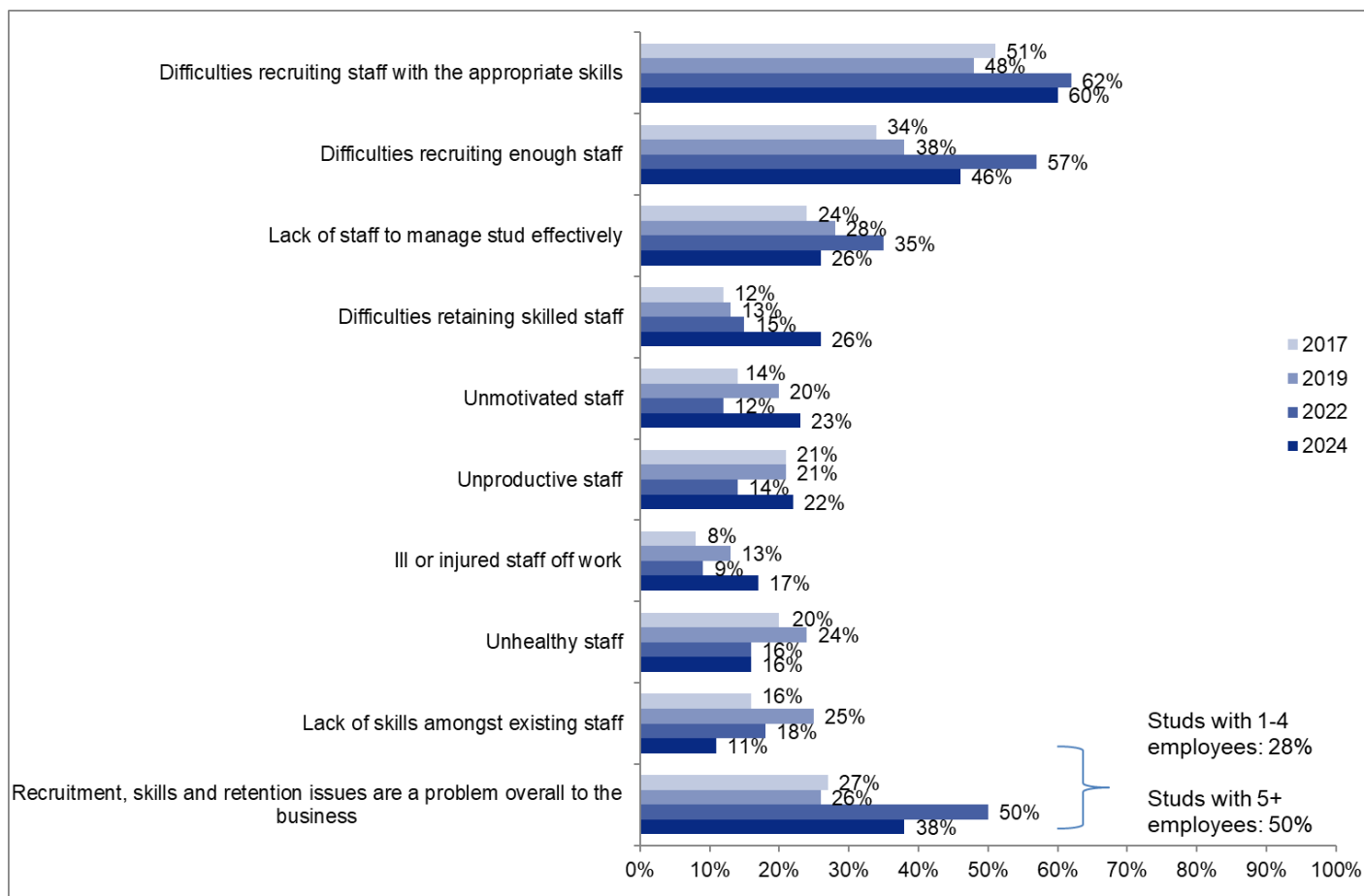
6.1. By way of conclusion, this section presents findings about the overall perceptions and size of recruitment, skills and retention problems. In addition, it presents whether studs perceive there to be improvements in recruitment, training and retention within the industry over recent years.

Perceptions about key recruitment, skills and retention issues

Recruitment, skills and retention issues remain a notable problem, with difficulties recruiting staff with enough skills and enough staff in general the main issues

- 6.2. The two most cited recruitment, skills and retention problems remain difficulties recruiting staff with the appropriate skills (60% of studs said this is a problem in 2024, compared with 62% in 2022) and difficulties recruiting enough staff in general (46% said this is a problem in 2022, compared with 57% in 2024). 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 26% of studs stating that a lack of staff to manage the stud effectively is a problem (35% in 2022).
- 6.4. Overall, 38% of studs said that recruitment, skills and retention issues are a problem to their business (essentially when placed in the context of other issues), which is an improvement on the 50% in 2022, but remains higher than earlier years.
- 6.5. These issues are a bigger problem to larger studs, as in previous years. For example, 28% of studs with 1-4 staff said recruitment, skills and retention issues are a problem, compared to 50% of studs with 5 or more staff.
- 6.6. In addition, the following were asked:
- 31% said there is a problem with a lack of overseas staff to meet their requirements (16% in 2022 and 21% of racing trainers).
 - 16% said they have problems retaining working mothers (14% in 2022 and 7% of racing trainers).
 - 16% said there are difficulties faced by female staff returning from maternity leave (12% in 2022 and 6% of racing trainers).

Figure 6.1: Recruitment, skills and retention problems



Number of respondents: 183 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

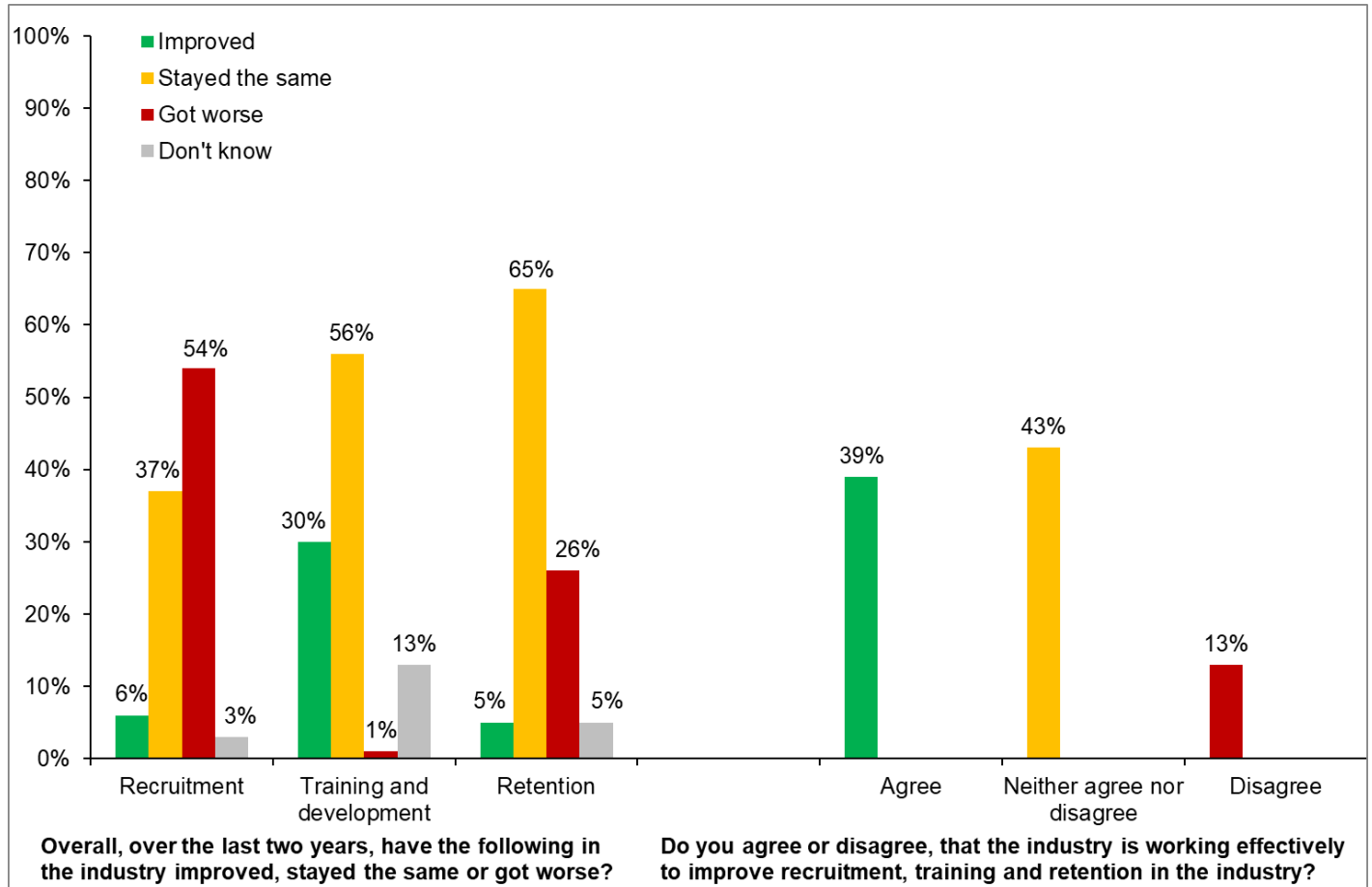
The majority of studs said that training and development for staff has improved or stayed the same in the last two years, but that recruitment and retention has worsened or stayed the same, and only just over a third agree that the industry is working effectively to address these issues – similar to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

6.7. Studs said the following about change over time:

- 54% said recruitment has got worse (46% in 2022), 37% said it has stayed the same (38% in 2022) and 6% said it has improved (2% in 2022) (this compares with 74% of racing trainers that said recruitment has got worse, 16% said it has stayed the same and 5% said it has improved).
- 30% said that training and development has improved (25% in 2022), 56% stayed the same (46% in 2022) and 1% got worse (5% in 2022) (this compares with 58% of racing trainers that said that training and development has improved, 29% stayed the same and 5% got worse).
- 26% said retention has got worse (21% in 2022), 65% stayed the same (64% in 2022) and 5% improved (4% in 2022) (this compares with 52% of racing trainers that said retention has got worse, 36% stayed the same and 6% improved).

6.8. 39% of studs said that the industry is working together effectively to address recruitment, training and retention issues (33% in 2022), while 13% disagree with this (16% in 2022) (the remainder 'neither agree nor disagree' or 'don't know'). This compares with 26% of racing trainers that said the industry is working together effectively to address recruitment, training and retention issues, while 8% disagree with this.

Figure 6.2: Recruitment, skills and retention changes over time



Number of respondents: 183 studs.

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