


New Zealand Thoroughbred Racing

Industry Workforce Report

July 2021



FOCUSED THINKING



Background and Research Approach

Background and Research Approach

BACKGROUND

IER was engaged by New Zealand Thoroughbred Racing (NZTR) to gather insights from racing industry participants through a quantitative survey. In particular, the key target population included racehorse trainers and Thoroughbred breeders. It is understood that the research will inform NZTR on the current and future needs of the racing industry in terms of recruitment, skills and staff retention.

RESEARCH OBJECTIVES

The research study aimed to achieve the following key objectives: -

Business profile: -

- Employment levels (inc. full-time, part-time, casual and seasonal)
- Vacancy levels
- Staff retention

Business Performance and Growth

- Business performance growth (improved, stable, or declined)
- Future perceptions of business performance
- Current and expected workforce levels (improved, stable, or declined)

Employment, Skills and Training

- Vacancy rates (inc. type of roles)
- Reasons for vacancy rates
- Roles which are challenging find suitable staff
- Reasons behind vacancy rates
- Reasoning behind staff retention (inc. type of roles)

- Type of staff retention problems perceived in the future
- Type of training and staff development offered
- Awareness of industry training and development initiatives
- Insights into how successful participants have been in recruiting staff (including feedback on tactics) and whether staff have been employed despite skill deficiencies
- Remuneration levels for a range of staff

RESEARCH METHODS

Population of Interest

The population of interest of this study comprised of a selection of Thoroughbred trainers and breeders who manage staff within the New Zealand Racing Industry. The training and breeding sectors within this study were cross-tabulated by trainers who currently have more than 20 horses in work (larger trainers) and breeders who maintained more than 20 broodmares (larger breeders). These groupings are identified throughout the report as trainers (>20) and Breeders (>20) respectively.

Instrumentation

IER used an on-line survey for the conduct of this study utilising trainer and breeder contact details from NZTR. IER wrote the survey in conjunction with NZTR.

Sample Size

IER obtained a sample size of 139 horse trainers and 42 thoroughbred breeders throughout New Zealand. It should be noted that caution must be taken when assessing some results due to small sample sizes.



Executive Summary

Executive Summary - Trainers

BUSINESS PERFORMANCE - TRAINERS

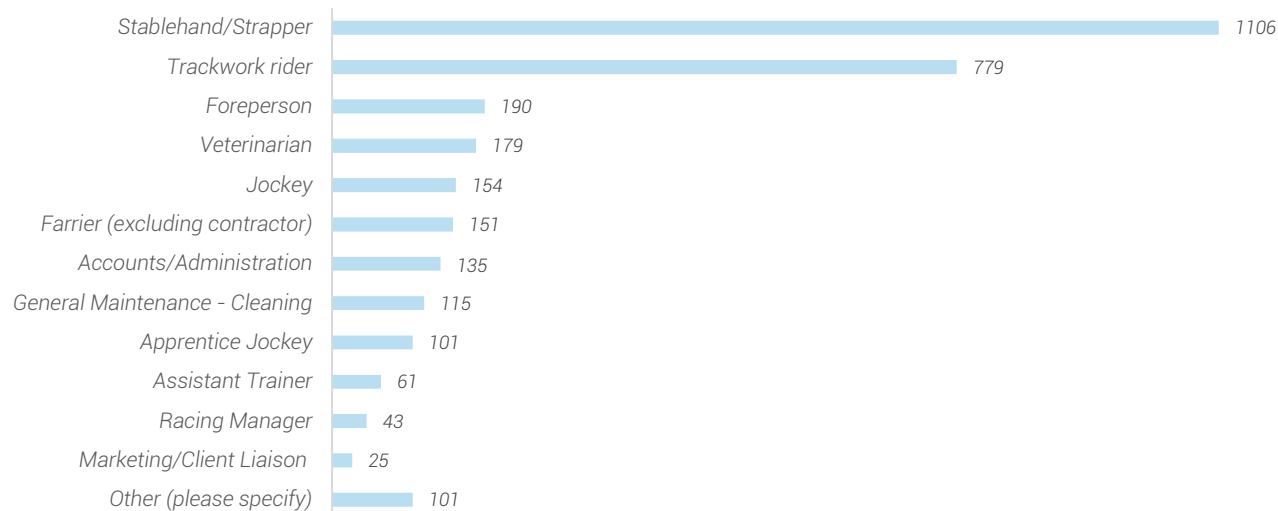
- *Thoroughbred trainers in New Zealand who managed staff were asked to complete a survey about recruitment, skills and staff retention.*
- *Around 30% of trainers indicated that their business performance over the last 12 months has deteriorated (slightly lower for larger trainers [28.1%]). Conversely, around 22% of trainers have seen improvement in their business (higher for larger trainers [28.1%]). This suggests that larger trainers have fared slightly better compared to the overall training cohort. It is worth noting however that Class A trainer's reported deterioration at much higher levels (34%) compared to Class B (19%) and Class C (20%).*
- *Amongst those who reported deteriorating business performance over the last 12 months, 88% indicated that difficulties recruiting staff with the appropriate skills was the largest issue that they faced. This was well ahead of any other factor, although the second largest issue was in a similar vein difficulties recruiting enough staff (78%). This was supported by the fact that amongst this cohort, 41% indicated that they had vacancies that they found hard to fill during the last 12 months.*
- *It must be noted that the assessment of the business performance over the last 12 months includes a period challenged by the COVID-19 pandemic. Interestingly, of those trainers who indicated that they had a decline in business, 61% believe that the next 12 months will see a continued decline. This means that 18% of the training population in NZ expect two consecutive years of declining business conditions.*

Executive Summary - Trainers

EMPLOYMENT

- The research revealed that, on average, trainers employ 3.6 full-time, 1.4 part-time and 1.0 casual staff – a total of 6.0 staff members per stable (9.0 full-time, 2.8 part-time and 1.4 casual staff – a total of 13.2 staff members per stable for larger trainers) in the past 12 months.
- The 2016-17 Size and Scope of the New Zealand Racing Industry reported that the training sector of the racing industry employed 3,140 staff members. Based on the current research, this equates to 1,884 full-time, 733 part-time and 523 casual staff. For larger trainers, this results in 2,512 staff members or 1,713 full-time, 533 part-time and 266 casual staff.
- What is evident from the research is that proportionally, the larger the trainer, the more full-time employees are engaged within their workforce and vice versa. That is, larger trainers employ over 90% of the full-time workforce, whereas smaller trainers (< 20 horses) employ 72% of the part-time workforce.
- Overall, the chart below illustrates the spread of roles within the New Zealand thoroughbred training sector, based on the number of people employed and the proportional distribution of roles. Stablehand/Strappers and trackwork riders constitute the roles with the largest number of jobs within the training sector.

ESTIMATED NUMBER OF ROLES EMPLOYED BY TRAINERS



*It is likely that veterinarians and apprentice jockeys are duplicated within this extrapolation as they are engaged by multiple trainers.

**NZTR figures for stablehands is 1,248 (survey 1,106) and trackwork riders 850 (survey 779) – indicating the extrapolation is relatively accurate (slightly understated).

Executive Summary - Trainers

EMPLOYMENT

- When asked how many full-time, part-time and casual vacancies trainers had in the last 12 months, trainers reported on average 2.8 staff members – 47 percent of their workforce. The highest vacancy rate was evident amongst part-time staff (57%) and least so for full-time staff (42%) – more than four in every 10 staff members. Larger trainers reported an average of 6.0 vacant roles or 45% of their workforce. The highest vacancy rate was evident amongst casual staff (57%) and least so for full-time staff (41%) – or more than four in every 10 full-time staff members (similar ratios to the entire trainer cohort).
- When asked how many staff had left their roles in the last 12 months, trainers reported an average of 2.1 staff members – 35 percent of their workforce. The highest level of churn was evident amongst part-time staff (50%) and least so for full-time staff (28%) – albeit close to three in every 10 staff members. For larger trainers, an average of 3.9 staff members had left their roles - or 30% of their workforce. The highest churn was evident amongst casual staff (50%) and least so for full-time staff (21%) – albeit more than one in five of their full-time workforce.
- In previous research, IER has found that racing stables generally operate below their desired (or required) workforce level – hence the difference between vacancy rates and departure rates. Furthermore, it is likely that many staff that leave roles, fill a role with another training operation.
- Overall, in the last 12 months, trainers had 1,465 vacancies and 1,099 staff members leave their role – 78% of these vacancies and 67% of departures were experienced within the larger training cohort.

Trainers (All)	Full-time	Part-time	Casual	Total
Staff Employed	3.6	1.4	1.0	6.0
Trainers Staff	1,884	733	523	3,140*
Vacancy	1.5	0.8	0.5	2.8
Vacancy Rate	42%	57%	50%	47%
Vacancies	785	419	262	1,465
Departure	1.0	0.7	0.4	2.1
Churn Rate	28%	50%	40%	35%
Trainers Staff (churn)	523	366	209	1,099

Trainers (> 20)	Full-time	Part-time	Casual	Total
Staff Employed	9	2.8	1.4	13.2
Trainers Staff	1,713	533	266	2,512‡
Vacancy	3.7	1.5	0.8	6.0
Vacancy Rate	41%	54%	57%	45%
Vacancies	704	285	152	1,142
Departure	1.9	1.3	0.7	3.9
Churn Rate	21%	46%	50%	30%
Trainers Staff (churn)	362	247	133	742

* Staffing levels based on the 2016-17 'Size and Scope of the New Zealand Racing Industry', IER Pty Ltd Feb 2018

‡ It is estimated that the larger thoroughbred trainers employ 80% of the training industry workforce

Executive Summary - Trainers

EMPLOYMENT

- A challenge facing the training sector is that although stablehand/strappers and trackwork riders constitute the roles with the largest number of jobs within the training sector, they also consist of the roles with the lowest length of service averaging 2.7 years for stablehand/strappers and 2.6 years for trackwork riders. This was compared to an average for 3.6 years for the overall training sector. These two roles also constitute the occupations which have the greatest skill gaps, with trainers indicating trackwork riders (75.9%) and stablehand/strappers (44.8%) lack the skills or capabilities to do their jobs as well as possible. Furthermore, trainers also indicated that the three most difficult roles to fill were trackwork riders (85.7%), stablehand/strappers (54.8%) and forepersons (11.9%).
- The roles indicated as having the highest average number of hours worked on average in a normal week were 'Assistant Trainer' (44.6 hours) and 'Foreperson' (40.3 hours) - Stablehand/Strappers were third working on average 36.6 hours per week.
- Trainers indicated that a stablehand/strapper with limited level of experience would make on average \$20.11 per hour. Those with more experience having completed a level 2 qualification makes on average \$21.15 and the most experienced (3 years experience and holding industry qualifications) would make \$24.00 per hour. A trackwork rider with limited level of experience would make on average \$20.58 per hour. Those with more experience having completed a level 2 qualification makes on average \$24.33 and the most experienced (3 years experience and holding industry qualifications) would make \$30.38 per hour.
- More than 42% of all trainers indicated that compared to their last business year, the amount paid on wages and salaries has increased more than 5% - this increased to two-thirds (66.7%) for the larger trainer cohort.
- Trainers indicated on average that 58.8% of their workforce work split shifts. Large trainers (trainer > 20) have 62.4% of their workforce working split shifts.
- In terms of impediments to their business relating to staff, trainers indicated that "difficulties recruiting staff with the appropriate skills" was the biggest problem (4.5 out of 5). "Difficulties recruiting enough staff" (4.1) and "a lack of staff to manage our stables/farm/number of horses effectively" (3.7) were the next highest rating impediments to managing their human resources. .
- Trainers perceived that the greatest opportunity for attracting people to work in racing was 'working with horses' (91.0%), followed by 'working outdoors' (52.8%).
- In terms of the impediments to attracting people to work in the training sector, trainers indicated 'working hours (e.g., early start, split shifts etc.)' – 71.6%, 'low wages' (67.0%) and the 'negative perceptions of the racing industry' (54.5%).
- Overall, close to two-thirds (63.8%) of respondents in the training sector indicated that they had vacancies at their workplace in the last 12 months which were difficult to fill. This rose to 72.4% for the larger trainer cohort. The roles most difficult to fill were full-time roles (73.8% for all trainers and 90.5% for larger trainers).
- In terms of staff retention, more than a quarter of trainers (27.4%) indicated that they had difficulties retaining staff in the past 12 months – this increased to 43.3% for the larger training cohort (note – this excludes staff who have left their roles for natural reasons (i.e., due to retirement, end of contract etc.). Close to 80% of the staff who have been difficult to retain are full-time staff and mainly consist of trackwork riders (87.0%) and stablehand/strappers (56.5%).

Executive Summary - Trainers

FOREIGN WORKERS

Category	All Trainers	Trainers (> 20)
<i>Employed Foreign workers</i>		
Employed in last 3 years	54.8%	80.0%
<i>Roles Employed foreign workers (top 3)</i>		
Trackwork rider	90.5%	100.0%
Stablehand/strapper	40.5%	47.8%
Apprentice jockey	23.8%	21.7%
<i>Retention of foreign workers</i>		
Difficulties retaining	32.6%	41.7%
<i>Reasons why difficult to retain</i>		
Competition from other stables	40.0%	50.0%
Stand down period	33.3%	40.0%
Staff member lacking motivation	33.3%	30.0%
<i>How foreign workers are supported (top 4)</i>		
Provision of accommodation	67.4%	62.5%
Training and development	58.7%	41.7%
Financial rewards	56.5%	70.8%
Time of in Lieu	45.7%	54.2%
<i>Reasons why Foreign workers are recruited (top 3)</i>		
Lack of NZ applicants	93.5%	95.8%
Skills not readily available in local workers	65.2%	79.2%
Migrant workers work harder than local workers	43.5%	50.0%

- The training sector relies heavily on foreign workers, with over half of all trainers (54.8%) employing this sector of the workforce within the past three years. This was significantly higher for the larger trainer cohort, with four in every five (80.0%) employing foreign workers.
- Trainers were more likely to rely on foreign workers for trackwork riders (90.5%), stablehand/strappers (40.5%) and apprentice jockeys (23.8%). The larger training cohort relied more heavily on foreign workers for both trackwork riders (100.0%) and stablehand/strappers (47.8%).
- Overall, close to one-third (32.6%) of trainers who employed foreign workers had difficulties retaining their services. This increased to nearly 42.0% for the larger trainer cohort.
- The main reasons why trainers found it difficult to retain foreign workers was mainly due to 'competition from other stables' (40.0%), 'having to leave NZ due to the stand down period' (33.3%) and the 'staff member lacking motivation' (33.3%).
- Trainers indicated that the 'provision of accommodation' (67.4%), 'training and development' (58.7%) and 'financial rewards' (56.5%) were the three main elements in terms of how foreign workers are supported. The larger training cohort however, indicated that financial rewards (70.8%) were the most significant way in which foreign workers are supported.
- The research also investigated why trainers recruited foreign workers to undertake specific roles within the training sector. The overwhelming response was the 'lack of NZ applicants' (93.5%), followed by the 'skills not being readily available in local workers' (65.2%) and that 'migrant workers work harder than local workers' (43.5%).

Executive Summary - Breeders

BUSINESS PERFORMANCE - BREEDERS

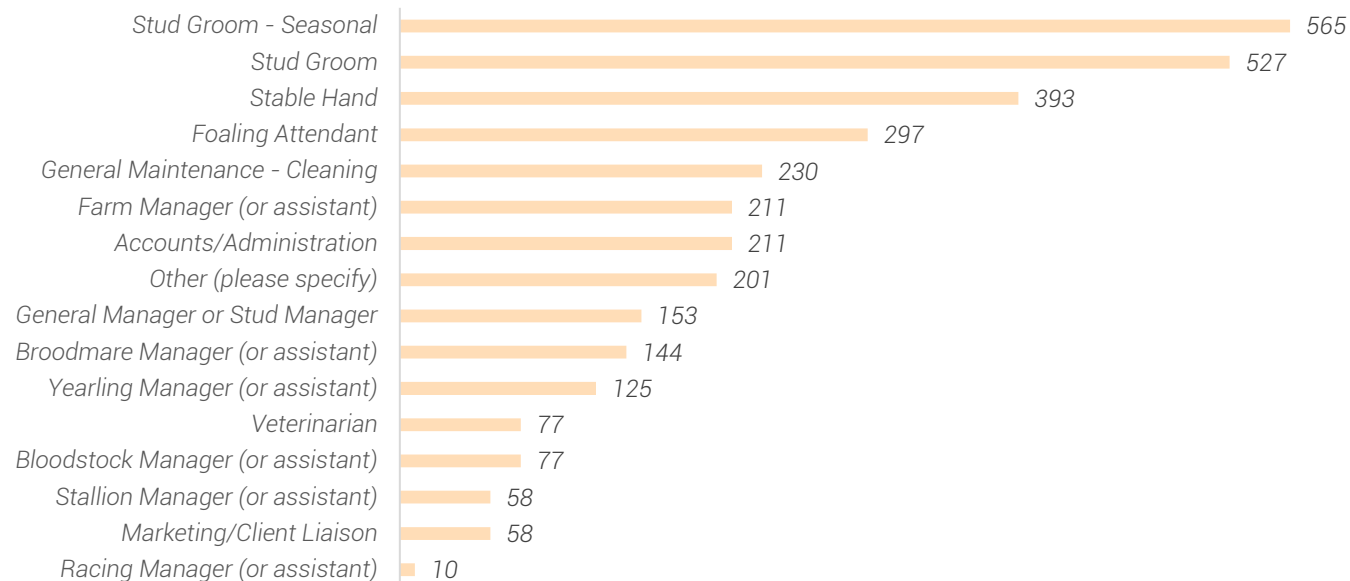
- *Thoroughbred breeders in who managed staff New Zealand were asked to complete a survey about recruitment, skills and staff retention.*
- *Around 25% of breeders indicated that their business performance over the last 12 months has deteriorated. There was no evidence that the result was better or worse for large breeders.*
- *Amongst those who reported deteriorating business performance over the last 12 months, 100% indicated that difficulties recruiting staff with the appropriate skills and difficulties recruiting enough staff were the most significant challenges that they faced. It is worth noting that even amongst those who reported improved business outcomes over the last 12 months, 82% have the same concerns relating to difficulties recruiting staff with the appropriate skills. This was supported by the fact that amongst this cohort, 100% indicated that they had vacancies that they found hard to fill during the last 12 months.*
- *It must be noted that the assessment of the business performance over the last 12 months includes a period challenged by the COVID-19 pandemic. Interestingly, of those breeders who indicated that they had a decline in business, 44% believe that the next 12 months will see a continued decline, whilst 22% expect to see an improvement.*

Executive Summary - Breeders

EMPLOYMENT

- The research revealed that, on average, breeders employed 5.6 full-time, 1.5 part-time, 0.9 casual and 3.2 seasonal staff – a total of 11.2 staff members per farm (7.5 full-time, 1.9 part-time, 0.9 casual staff and 4.0 seasonal staff – a total of 14.3 staff members per farm for larger breeders) in the past 12 months.
- The 2016-17 Size and Scope of the New Zealand Racing Industry reported that the breeding sector of the industry employed 3,335 staff members. Based on the current research, this equates to 1,668 full-time, 447 part-time, 268 casual and 953 seasonal staff. For larger breeders, this results in 2,668 staff members or 1,399 full-time, 354 part-time, 266 casual and 746 seasonal staff.
- Overall, the chart below illustrates the spread of roles within the New Zealand thoroughbred breeding sector, based on the number of people employed and the proportional distribution of roles. Stud grooms – season and stud grooms constitute the roles with the largest number of jobs within the breeding sector.

ESTIMATED NUMBER OF ROLES EMPLOYED BY BREEDERS



Executive Summary - Breeders

EMPLOYMENT

- When asked how many full-time, part-time, casual and seasonal staff vacancies breeders had in the last 12 months, breeders reported on average 6.1 staff members – 54 percent of their workforce. The highest vacancy rate was evident amongst seasonal staff (81%) and least so for full-time staff (34%) – more than three in every 10 full-time staff members. Larger breeders reported an average of 7.8 vacant roles or 55% of their workforce. The highest vacancy rate was evident amongst casual staff (89%) and least so for full-time staff (35%).
- When asked how many staff had left their roles in the last 12 months, breeders reported an average of 2.5 staff members – 22% percent of their workforce. The highest level of churn was evident amongst full-time staff (23%) – however, the churn rate was similar for all role types (i.e. full-time, [part-time etc.]). For larger breeders, an average of 3.3 staff members had left their roles - or 23% of their workforce. The highest churn evident amongst casual staff (33%) and least so for part-time staff (16%) – albeit just less than two in every 10 members of their part-time workforce.
- In previous research, IER has found that breeding farms generally operate below their desired (or required) workforce level – hence the difference between vacancy rates and departure rates. Furthermore, it is likely that many staff that leave roles, fill a role with another breeding operation.
- Overall, in the last 12 months, breeders had 1,816 vacancies and 744 staff members leave their role – 80% of these vacancies and 83% of departures were experienced within the larger breeding cohort.

Breeders (All)	Full-time	Part-time	Casual	Seasonal	Total
Staff Employed	5.6	1.5	0.9	3.2	11.2
Breeders Staff	1,668	447	268	953	3,335
Vacancy	1.9	0.9	0.7	2.6	6.1
Vacancy Rate	34%	60%	78%	81%	54%
Vacancies	566	268	208	774	1,816
Departure	1.3	0.3	0.2	0.7	2.5
Churn rate	23%	20%	22%	22%	22%
Breeder Staff (churn)	387	89	60	208	744

Breeders (> 20)	Full-time	Part-time	Casual	Seasonal	Total
Staff Employed	7.5	1.9	0.9	4	14.3
Breeders Staff	1,399	354	168	746	2,668
Vacancy	2.6	1	0.8	3.4	7.8
Vacancy Rate	35%	53%	89%	85%	55%
Vacancies	485	187	149	634	1,455
Departure	1.8	0.3	0.3	0.9	3.3
Churn rate	24%	16%	33%	23%	23%
Breeder Staff (churn)	336	56	56	168	616

* Staffing levels based on the 2016-17 'Size and Scope of the New Zealand Racing Industry', IER Pty Ltd Feb 2018
 ‡ It is estimated that the larger thoroughbred breeders employ 80% of the breeding industry workforce

Executive Summary - Breeders

EMPLOYMENT

- A challenge facing the breeding sector is that although stud grooms, stud grooms – seasonal and stablehand/strappers constitute the roles with the largest number of jobs within the breeding sector, they also consist of the roles with the lowest length of service averaging 0.7 years for stud grooms – seasonal, 2.0 for stud grooms and 2.2 for stablehands. This was compared to an average for 3.5 years for the overall breeding sector. These three roles also constitute the occupations which have the greatest skill gaps, with breeders indicating stud grooms – seasonal (36.8%), stud grooms (31.6%) and stablehands (21.1%) lack the skills or capabilities to do their jobs as well as possible. Furthermore, breeders also indicated that the three most difficult roles to fill were stud grooms (38.5%), stablehand (38.5%) and stud grooms – seasonal (23.1%).
- The roles indicated as having the highest average number of hours worked on average in a normal week were 'General Manager or Stud Manager' (51.2 hours) and 'Broodmare Manager' (47.8 hours) and Stallion Manager (47.2 hours) – most roles exceeded 40 hours per week.
- Breeders indicated that a foaling attendant with limited level of experience would make on average \$20.80 per hour. Those with more experience having completed a level 2 equine industry qualification makes on average \$22.90 and the most experienced (3 years experience and holding a level 3 industry qualification) would make \$27.10 per hour. A stablehand with a limited level of experience would make on average \$20.40 per hour. Those with more experience having completed a level 2 equine industry qualification makes on average \$22.20 and the most experienced (3 years experience and holding a level 3 industry qualification) would make \$23.90 per hour. A stud groom with a limited level of experience would make on average \$20.60 per hour. Those with more experience having completed a level 2 equine industry qualification makes on average \$22.80 and the most experienced (3 years experience and holding a level 3 industry qualification) would make \$25.90 per hour.
- Close to 62% of all breeders indicated that compared to their last business year, the amount paid on wages and salaries has increased more than 5% - this increased to two-thirds (66.7%) for the larger breeder cohort.
- Breeders indicated on average that 17.0% of their workforce work split shifts. Large breeders (breeder > 20) have 17.9% of their workforce working split shifts.
- In terms of impediments to their business relating to staff, breeders indicated that "difficulties recruiting staff with the appropriate skills" was the biggest problem (4.5 out of 5). "Difficulties recruiting enough staff" (4.2) and "a lack of staff to manage our stables/farm/number of horses effectively" (3.7) were the next highest rating impediments to managing their human resources. .
- Breeders perceived that the greatest opportunity for attracting people to work in racing was 'working with horses' (94.4%), followed by working in an 'enjoyable and supportive team culture' (75.0%) and 'working with professional people' (66.7%).
- In terms of the impediments to attracting people to work in the breeding sector, breeders indicated 'working hours (e.g., early start, split shifts etc.)' – 83.3%, 'low wages' (58.3%) and the 'lack of career pathways' (52.8%).
- Overall, more than one in four (82.8%) respondents in the breeding sector indicated that they had vacancies at their workplace in the last 12 months which were difficult to fill. This rose to 83.3% for the larger breeder cohort. The roles most difficult to fill were full-time roles (45.8%) and seasonal roles (29.2%).
- In terms of staff retention, more than a third of breeders (36.1%) indicated that they had difficulties retaining staff in the past 12 months (note – this excludes staff who have left their roles for natural reasons (i.e., due to retirement, end of contract etc.). These breeders indicated that over 90% of the staff who have been difficult to retain are full-time staff and mainly consist of stud grooms (38.5%) and stablehands (38.5%).

Executive Summary - Breeders

FOREIGN WORKERS

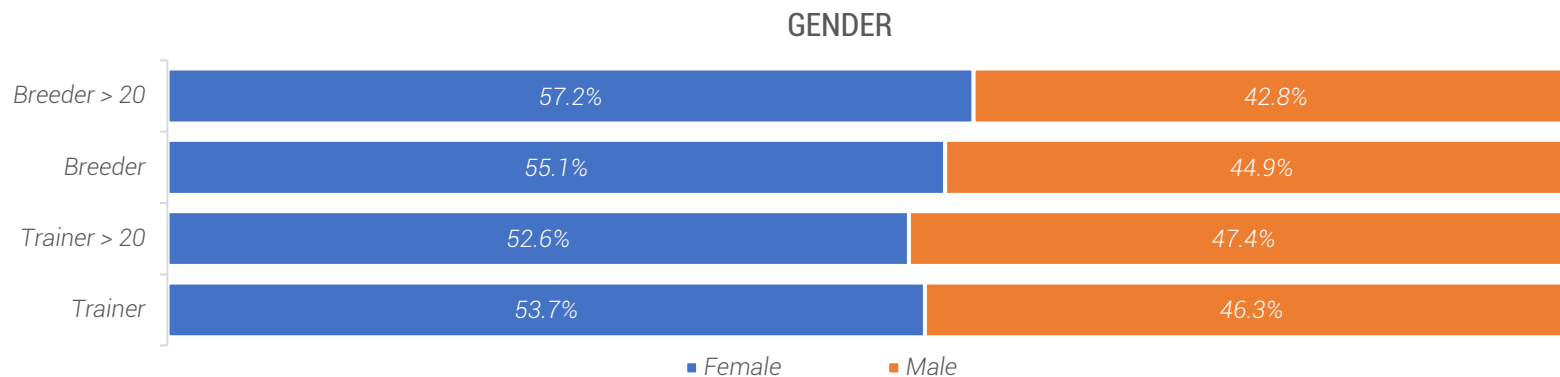
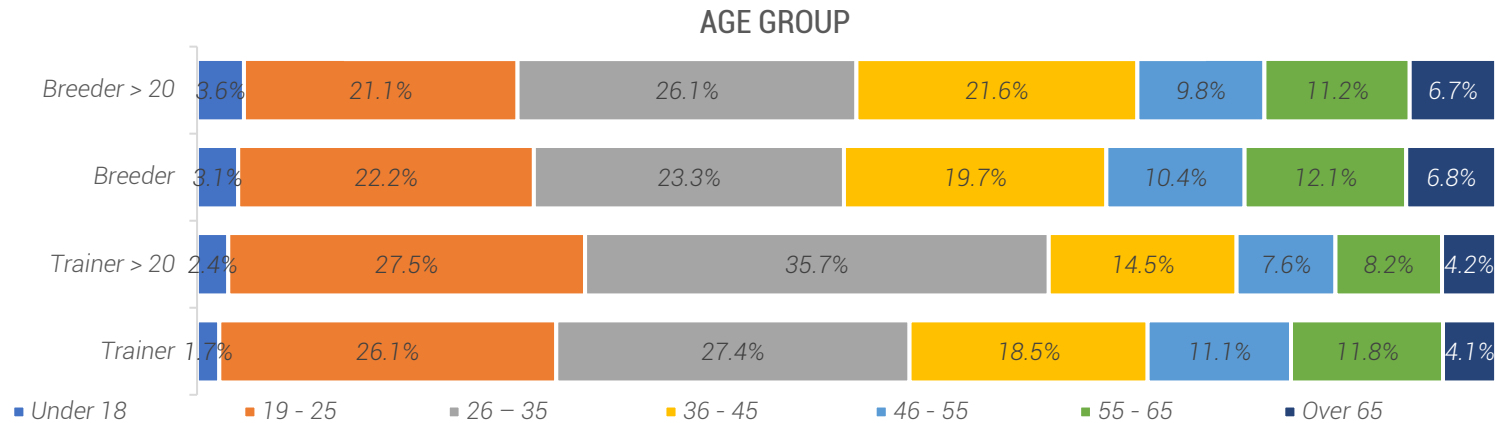
Category	All Breeders	Breeders (> 20)
<i>Employed Foreign workers</i>		
Employed in last 3 years	69.4%	72.4%
<i>Roles Employed foreign workers (top 3)</i>		
Stud Groom - Seasonal	41.2%	50.0%
Stablehand	41.2%	35.7%
Stud Groom	35.3%	42.9%
<i>Retention of foreign workers</i>		
Difficulties retaining	64.0%	61.9%
<i>Reasons why difficult to retain</i>		
Stand down period	43.8%	46.2%
Staff homesickness	18.8%	23.1%
Lack of career progression	12.5%	15.4%
<i>How foreign workers are supported (top 4)</i>		
Provision of accommodation	68.0%	71.4%
Financial rewards	56.0%	52.4%
Training and development	52.0%	57.1%
Prioritise work/life balance	48.0%	47.6%
<i>Reasons why Foreign workers are recruited (top 3)</i>		
Lack of NZ applicants	92.0%	90.5%
Skills not readily available in local workers	72.0%	66.7%
Migrant workers work harder than local workers	56.0%	57.1%

- The breeding sector relies heavily on foreign workers, with over two-thirds of all breeders (69.4%) employing this sector of the workforce within the past three years. This was higher for the larger breeder cohort, with close to three-quarters (72.4%) employing foreign workers.
- Breeders were more likely to rely on foreign workers for stud grooms – seasonal (41.2%), stablehands (41.2%) and stud grooms (35.3%). The larger breeding cohort relied more heavily on foreign workers for both seasonal (50.0%) and all-year-round stud grooms (42.9%).
- Overall, close to two-thirds (64.0%) of breeders who employed foreign workers had difficulties retaining their services. This decreased slightly to 61.9% for the larger breeder cohort.
- The main reasons why breeders found it difficult to retain foreign workers was mainly due to 'having to leave NZ due to the stand down period' (43.8%) and the 'staff homesickness' (18.8%).
- Breeders indicated that the 'provision of accommodation' (68.0%), 'financial rewards' (56.0%) and 'training and development' (52.0%) were the three main elements in terms of how foreign workers are supported.
- The research also investigated why breeders recruited foreign workers to undertake specific roles within the breeding sector. The overwhelming response was the 'lack of NZ applicants' (92.0%), followed by the 'skills not being readily available in local workers' (72.0%) and that 'migrant workers work harder than local workers' (56.0%).



Demographics

Respondent Demographics



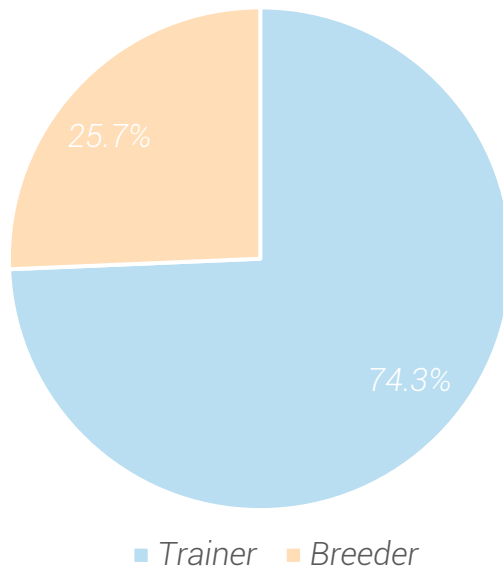
- Over half of the trainer respondents were aged between 19-35 years of age (52.8%). Meanwhile, 45% of breeders were also in the 19-35 age bracket
- The majority of breeder respondents were female 55.1% and the majority of trainers were also female 52.6%. When considering the split of the major breeder and trainers they also had a majority representation of females.

Q10. Approximately, what percentage of your workforce would be...? (n=134)

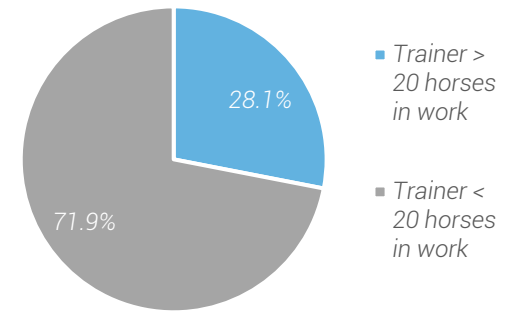
Q11. Approximately, what percentage of your workforce would be aged ...? (n=128-130)

Split of Respondents

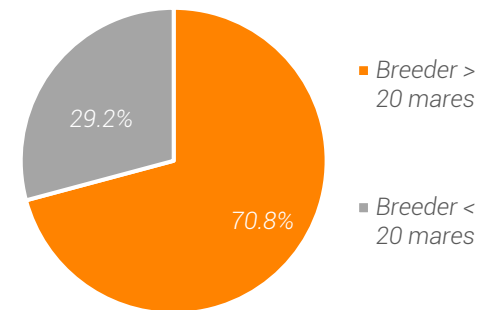
TRAINER VS BREEDER RESPONDENTS



PERCENTAGE OF MAJOR TRAINERS (TRAINERS > 20)



PERCENTAGE OF MAJOR BREEDERS (BREEDERS > 20)



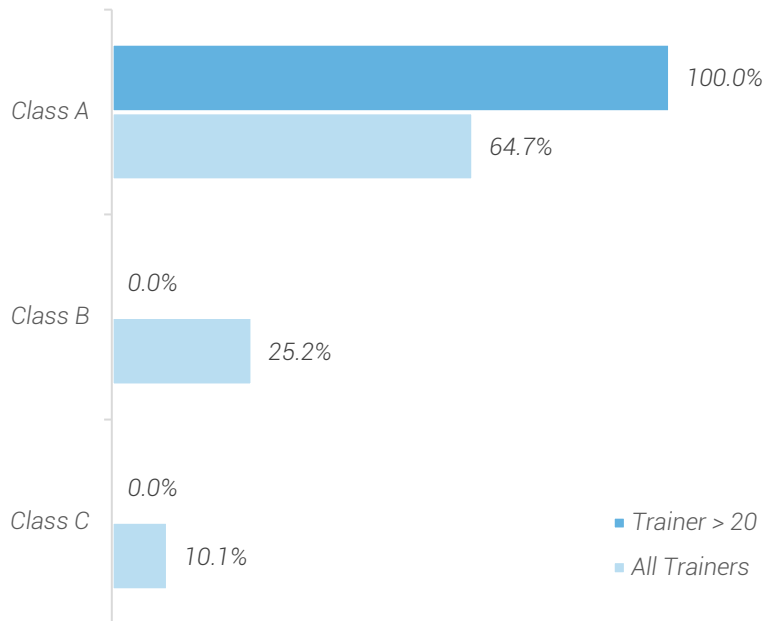
- The breakdown of respondents for the study had a split of 25.7% being a breeder and 74.3% being a trainer.
- Of the trainer respondents, 28.1% of them have more than 20 horses in work.
- For the breeder respondents, 70.8% of them indicated that they have more than 20 mares on their farm.



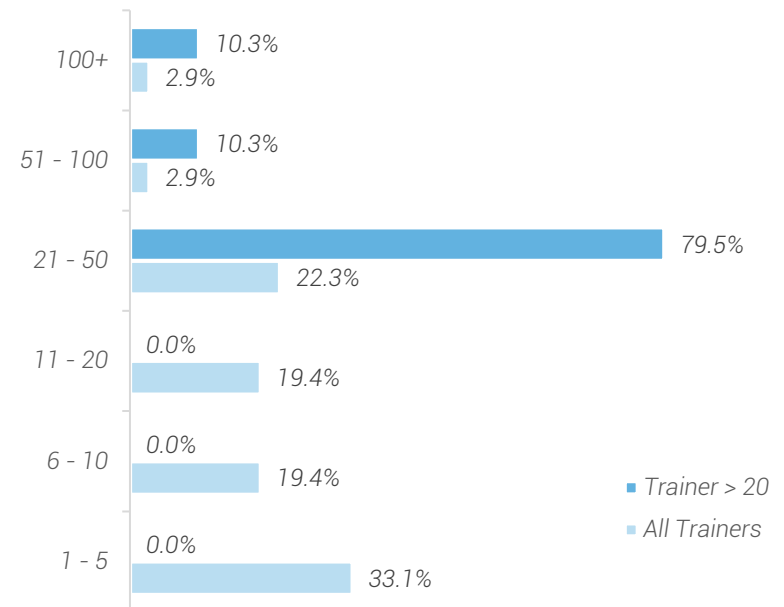
Research Insights

Licenses held

LEVEL OF LICENSE HELD BY RESPONDENT



NUMBER OF HORSES IN TRAINING



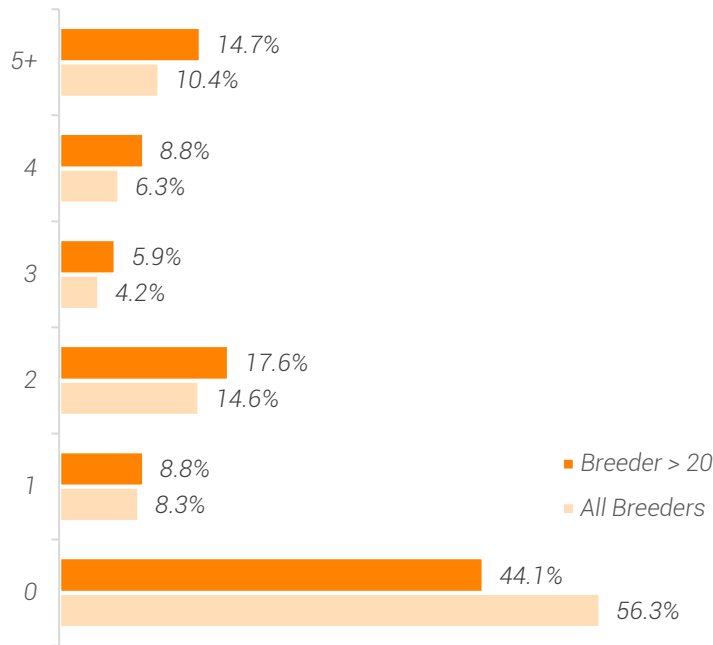
- The most common level of license held by the trainer respondents was Class A (64.7%), just over a quarter hold a Class B license (25.2%) whilst the remaining 10.1% hold a Class C license - All of the major trainers (trainer > 20) hold a Class A license.
- Trainers had to indicate how many horses they currently had in training, the most common range of number of horses in training among the total trainer respondents was 1-5 (33.1%). The split was then spread relatively evenly across the 6-10, 11-20 and 21-50 brackets.
- For the major trainers (trainer > 20), almost 80% indicated that they currently have 21-50 horses in training.

Q1. Which of the following category of trainer's license do you hold? (n=139)

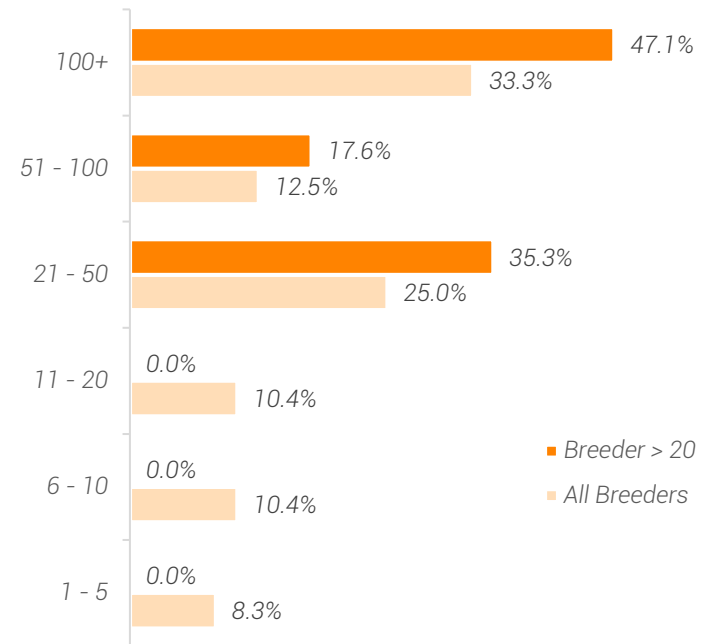
Q1A. Approximately, how many horses do you currently have in training? (n=139)

Stallions and Mares on Respondent Farm

NUMBER OF STALLIONS ON FARM



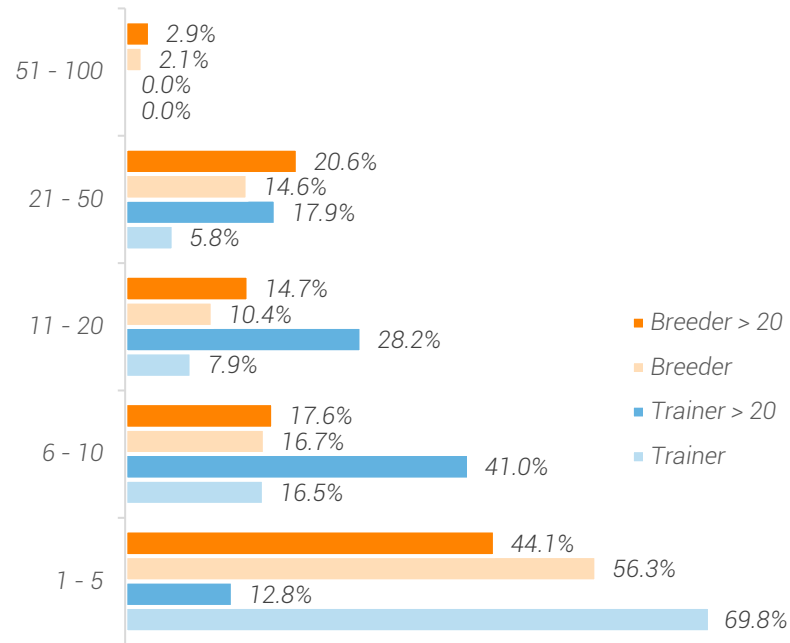
NUMBER OF MARES ON FARM



- Breeders were asked to indicate how many stallions and mares they have on their farm.
- The majority of breeders did not stand stallions (56.3%), this was followed by 2 (14.6%). Major breeders (breeder > 20) were more likely to have a stallion on their farm - the most common number for those who had a stallion on their farm was 2 (17.6%).
- Regarding mares, 100+ was the most common range for the number of mares held on the farm for breeders (33.3%) in a season, this was followed by the 21-50 bracket (25.0%). Nearly half of the major breeders (breeder > 20) have over 100 mares on their farm (47.1%).

Employment

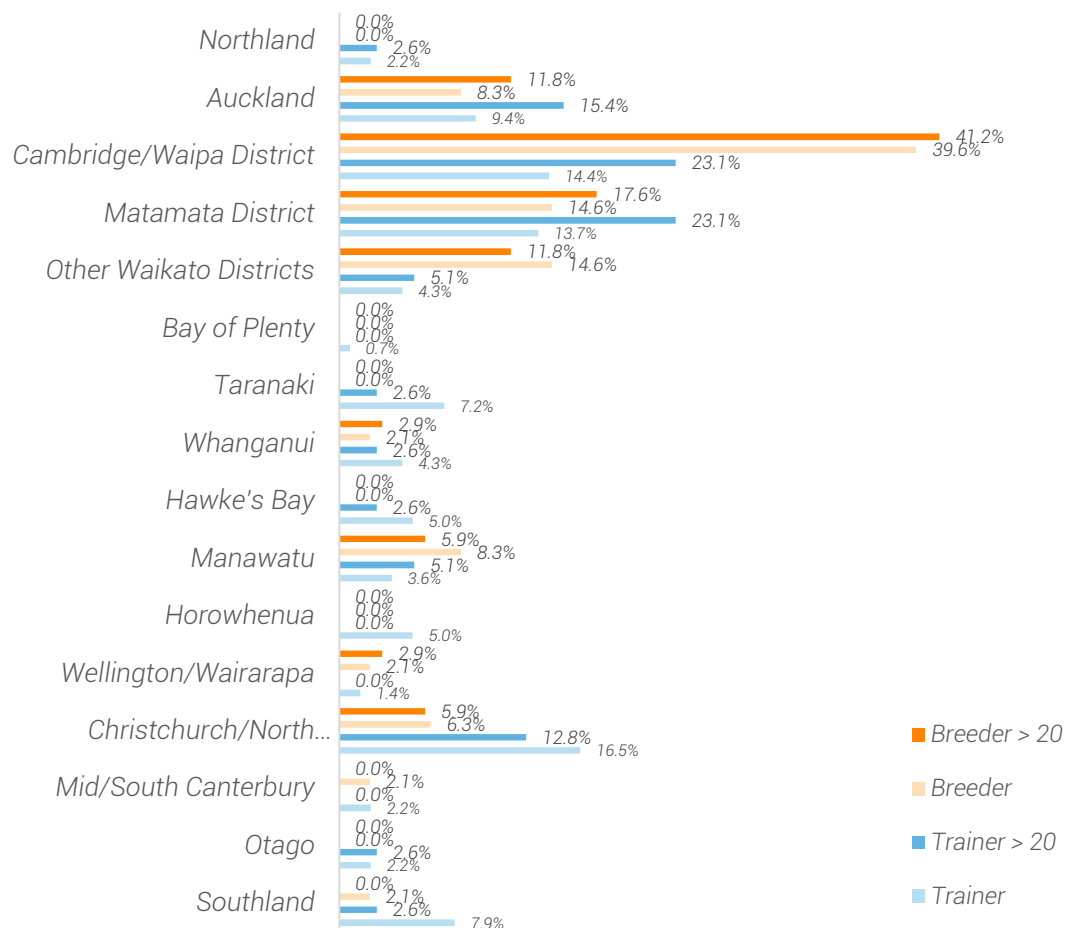
NUMBER OF PEOPLE EMPLOYED



- For trainers, the most common bracket of people employed within the respondent's business was 1-5 (69.8%). The most frequent bracket of employees indicated by major trainers (trainer > 20) was 6-10 people (41.0%).
- Breeders similarly were most likely to have 1-5 people employed at their business (56.3%). This amount was also the most common amount of people employed for major breeders (breeder > 20) (44.1%).

Location of Respondent Operations

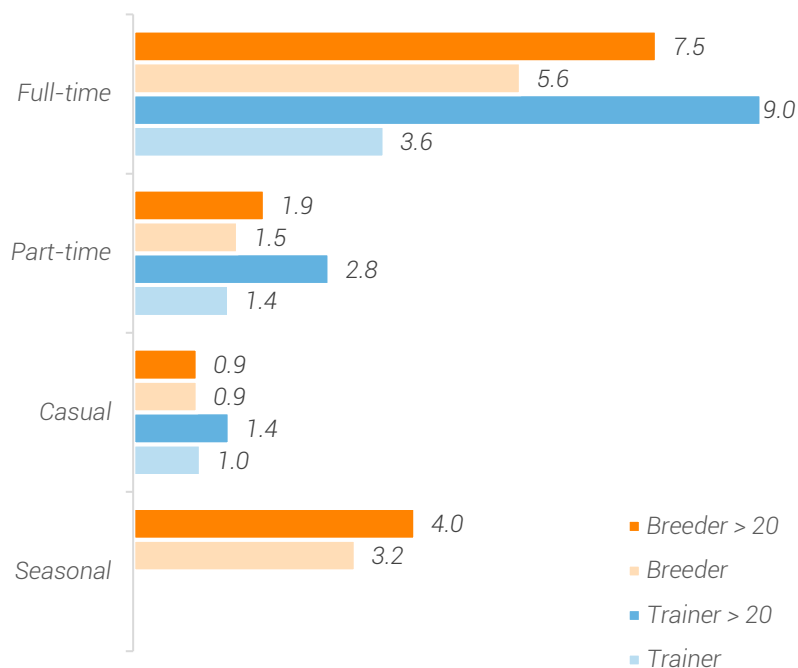
LOCATION OF TRAINING/BREEDING



- Respondents were asked to indicate where their principle operations for training and breeding were located.
- For trainers the Christchurch/North Canterbury (16.5%) was the most common selection as their principle training location. This was followed by the Cambridge/Waipā District.
- Among breeders, the most common location was the Cambridge/Waipā District (39.6%) followed by Matamata and other Waikato Districts.

Staff Employed

AVERAGE NUMBER OF PEOPLE EMPLOYED BY CAPACITY



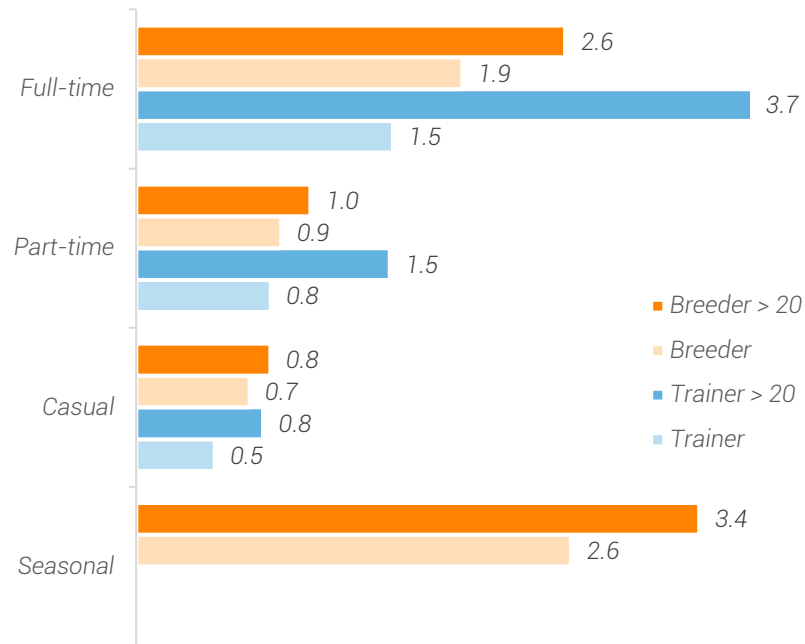
- Overall, trainers employed 3.6 full time staff, 1.0 part-time staff and 1.4 casual staff. Trainers who currently have more than 20 horses in work employed (on average) significantly higher staff numbers – 9.0 full time staff, 2.8 part-time staff and 1.4 casual staff members.
- On average, breeders employed 5.6 full time staff, 1.5 part-time staff and 0.9 casual staff – and in addition to this employ 3.2 seasonal staff each year. When assessing larger breeders, the research indicated that they employ on average 7.5 full time staff, 1.9 part-time staff, 0.9 casual staff members and 4.0 seasonal staff each year.

Q4. How many staff do you employ on a full time basis (that is working 30 or more hours a week), how many on a part time basis (that is working fewer than 30 hours a week) and how many on a casual basis (staff as required) in a 12 month period? (excluding proprietors/owners) (n=129-130)

Q4. How many staff do you employ on a full time basis (that is working 30 or more hours a week), how many on a part time basis (that is working fewer than 30 hours a week), how many on a casual basis (staff as required) and how many on a seasonal basis in a 12 month period? (excluding proprietors/owners) (n=38)

Number of Vacancies

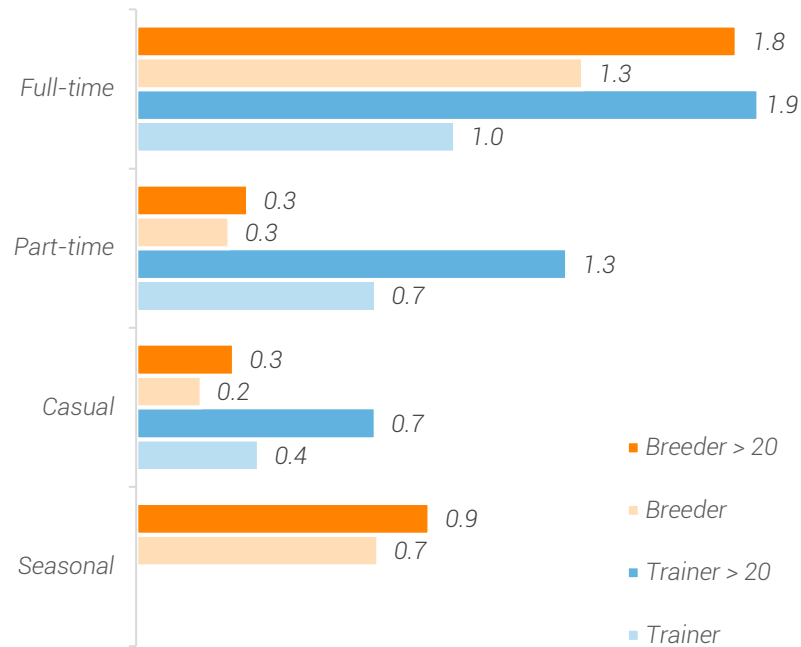
NUMBER OF VACANCIES BY ROLE



- In the last 12 months, trainers indicated that on average they have 1.5 full-time vacancies in a 12 months period and less than one vacancy for part-time and casual roles. However, when these roles are assessed by trainers with more than 20 horses currently in work, this increases to 3.7 full-time, 1.5 part-time and 0.8 casual roles.
- For the breeders, the average number of full-time vacancies available in the past 12 months was 1.9 and although part-time and casual staff roles were less than one vacancy, seasonal staff recorded on average 2.6. When these roles are assessed by larger breeders, the full-time vacancies rose to 2.6, while seasonal roles increased to 3.4.

Number of Departures

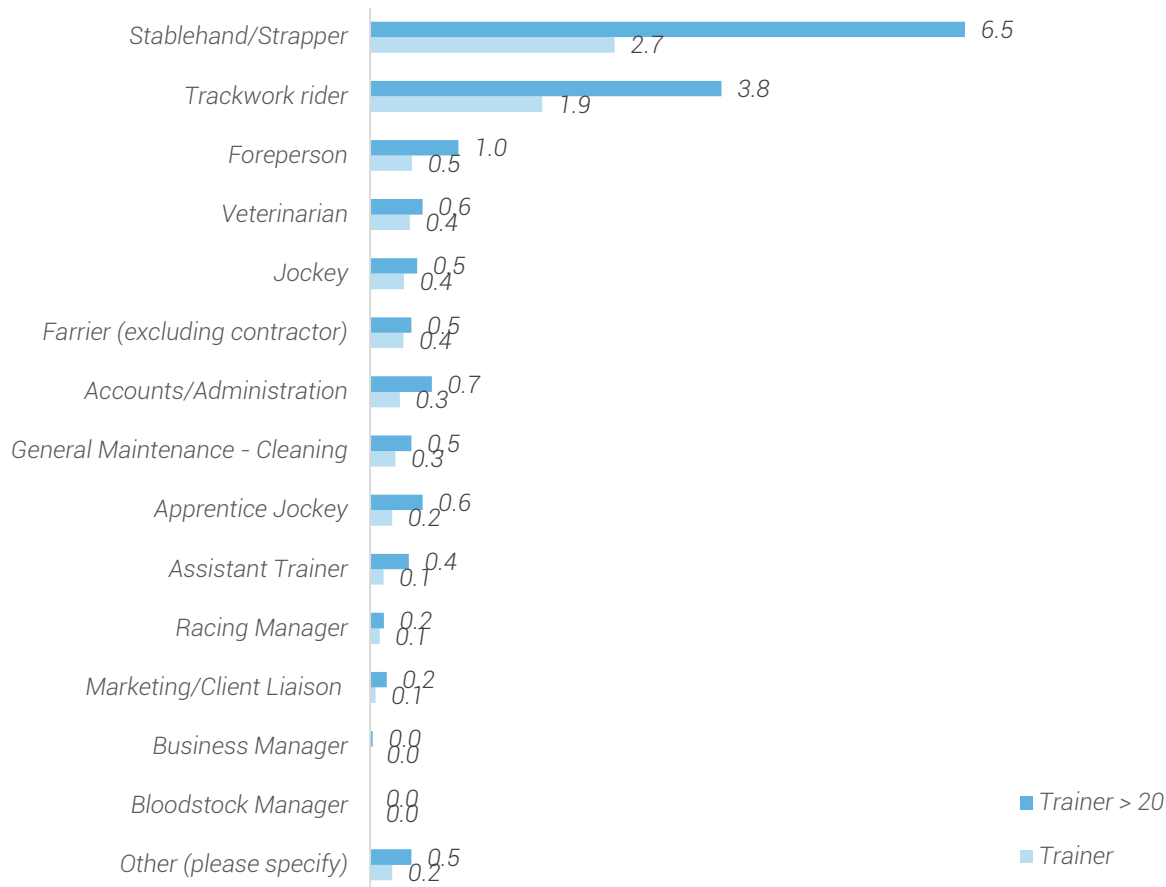
NUMBER OF DEPARTURES BY CAPACITY



- In the last 12 months, trainers indicated that on average 1.3 full-time staff have left their roles. This was followed by 0.7 part-time and 0.4 casual roles. When these roles are assessed by trainers with more than 20 horses currently in work, this increases to 1.9 full-time, 1.3 part-time and 0.7 casual roles.
- In terms of breeders, 1.3 full-time staff have left their roles in the past 12 months. This was followed by 0.3 part-time, 0.2 casual and 0.7 seasonal roles. When these roles are assessed by the larger breeder cohort, this increases to 1.8 full-time, 0.3 part-time, 0.3 casual and 0.9 seasonal roles.

Employee Roles - Trainers

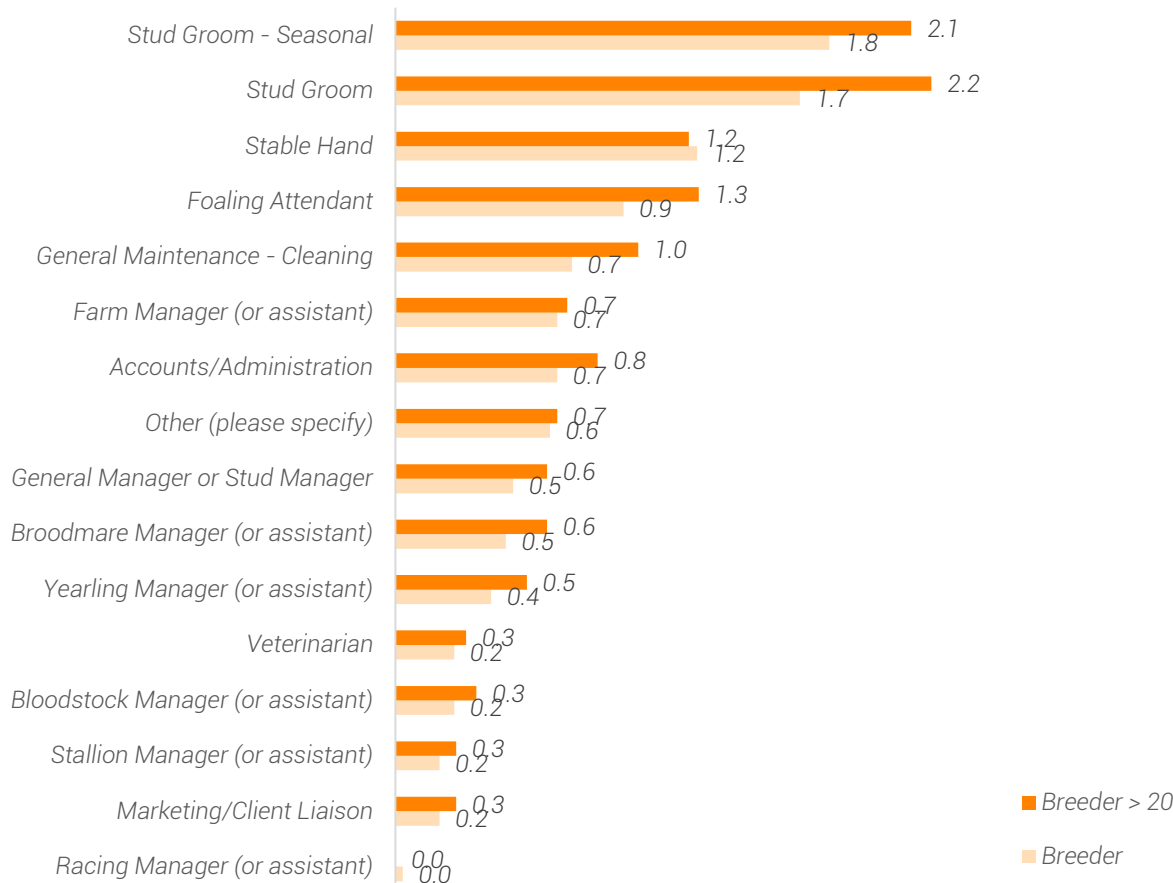
ROLES EMPLOYED BY TRAINERS



- Stablehand/strappers (2.7 positions) were the most common role employed by trainer respondents.
- This was followed by trackwork riders (1.9 positions) and foreperson (0.5 positions).
- When assessed by the larger training cohort, stablehand/strappers rose to 6.5 positions, trackwork riders increased to 3.8 positions, while accounts and administration roles consisted of 0.7 positions.

Employee Roles - Breeders

ROLES EMPLOYED BY BREEDERS



- Stud grooms – both all-year-round and seasonal (3.5 positions) was the most common role employed by breeder respondents.
- This was followed by stablehands (1.2 positions) and foaling attendants (0.9 positions).
- When assessed by the larger breeding cohort, stud grooms – both all-year-round and seasonal rose to 4.3 positions, foaling attendants increased to 1.3 positions, while stablehands remained the same (1.2 positions).

Length of Service for Roles

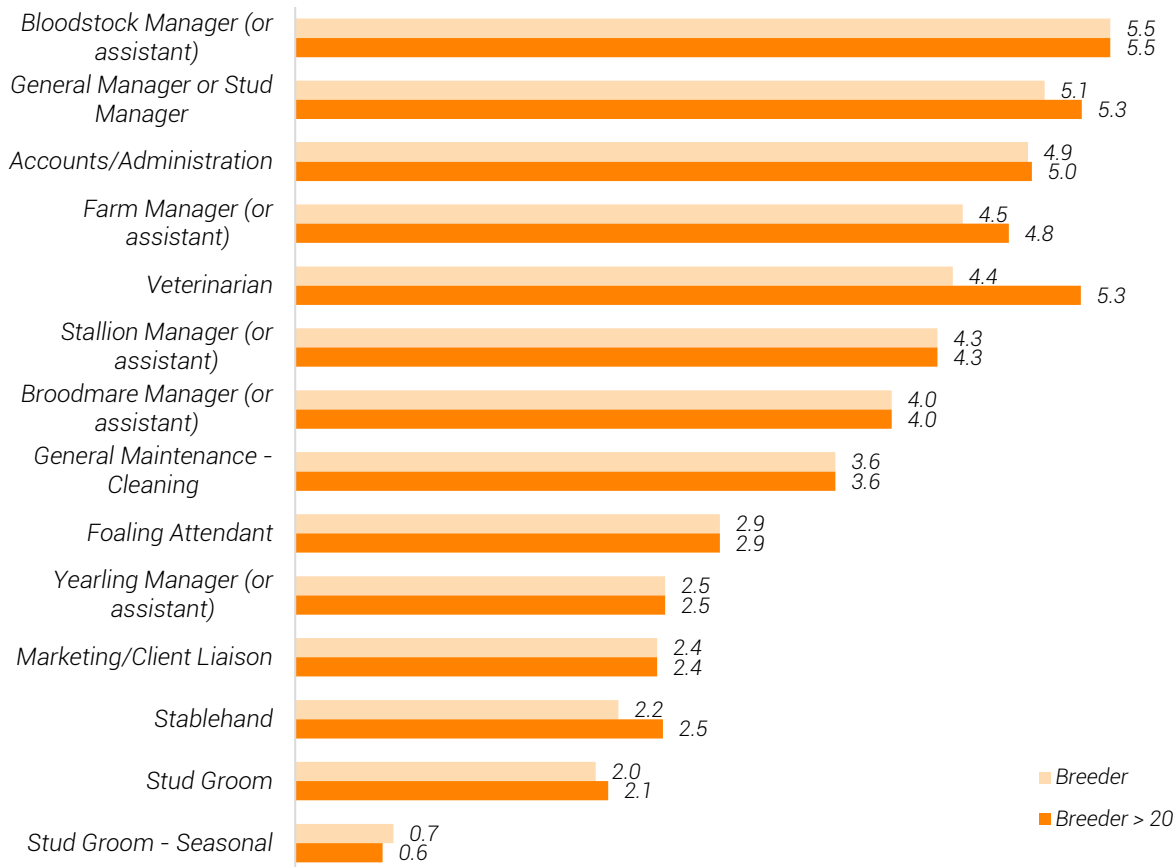
AVERAGE LENGTH OF SERVICE FOR DIFFERENT ROLES IN THE WORKFORCE (YEARS)



- Trainers were asked to indicate the average length of service for each individual role held in their workforce.
- The role which trainer respondents indicated as having the longest average length of service was 'Accounts/Administration' (5.2 years) which was followed by 'Veterinarian' (5.0 years).
- Meanwhile, the roles with the lowest average length indicated were 'Business Manager', 'Trackwork rider' and 'Stablehand/Strapper'
- Differing to the overall trainer sample, the top role in terms of length of service for the larger trainers was 'Farrier (excluding contractor)' (5.9 years). It is noted that veterinarians are typically engaged on a demand for fee basis.

Length of Service for Roles

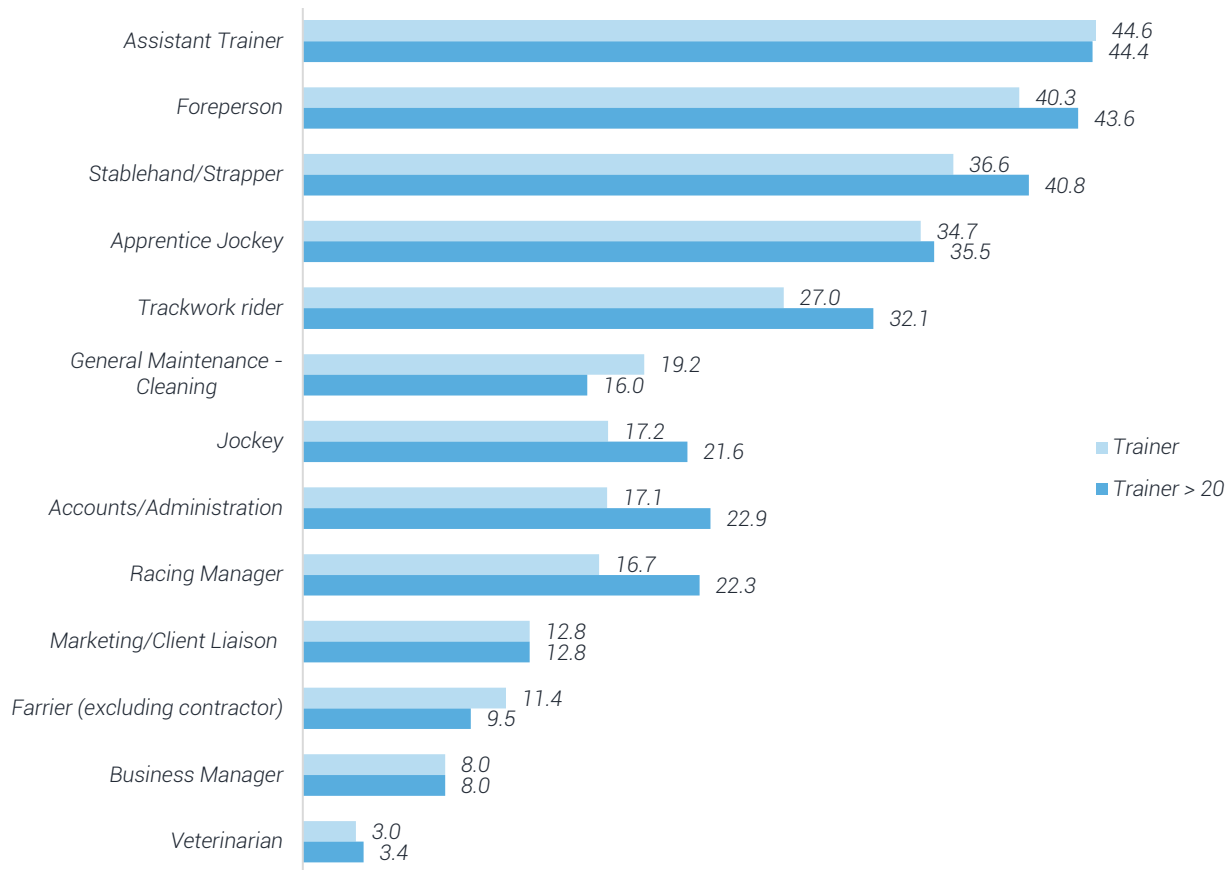
AVERAGE LENGTH OF SERVICE FOR DIFFERENT ROLES IN THE WORKFORCE (YEARS)



- Breeders were asked to indicate the average length of service for each individual role held in their workforce.
- The role which breeder respondents indicated as having the longest average length of service was 'Bloodstock Manager (or assistant)' (5.5 years) which was followed by 'General Manager or Stud Manager' (5.1 years).
- Meanwhile, the roles with the lowest average length indicated were 'Stud Groom - Seasonal', 'Stud Groom' and 'Stablehand'.
- Differing to the overall breeder sample, the second top role in terms of length of service for the larger breeders was 'Veterinarian' (5.3 years). It is noted that veterinarians are typically engaged on a demand for fee basis.

Average Hours for Roles – Trainers

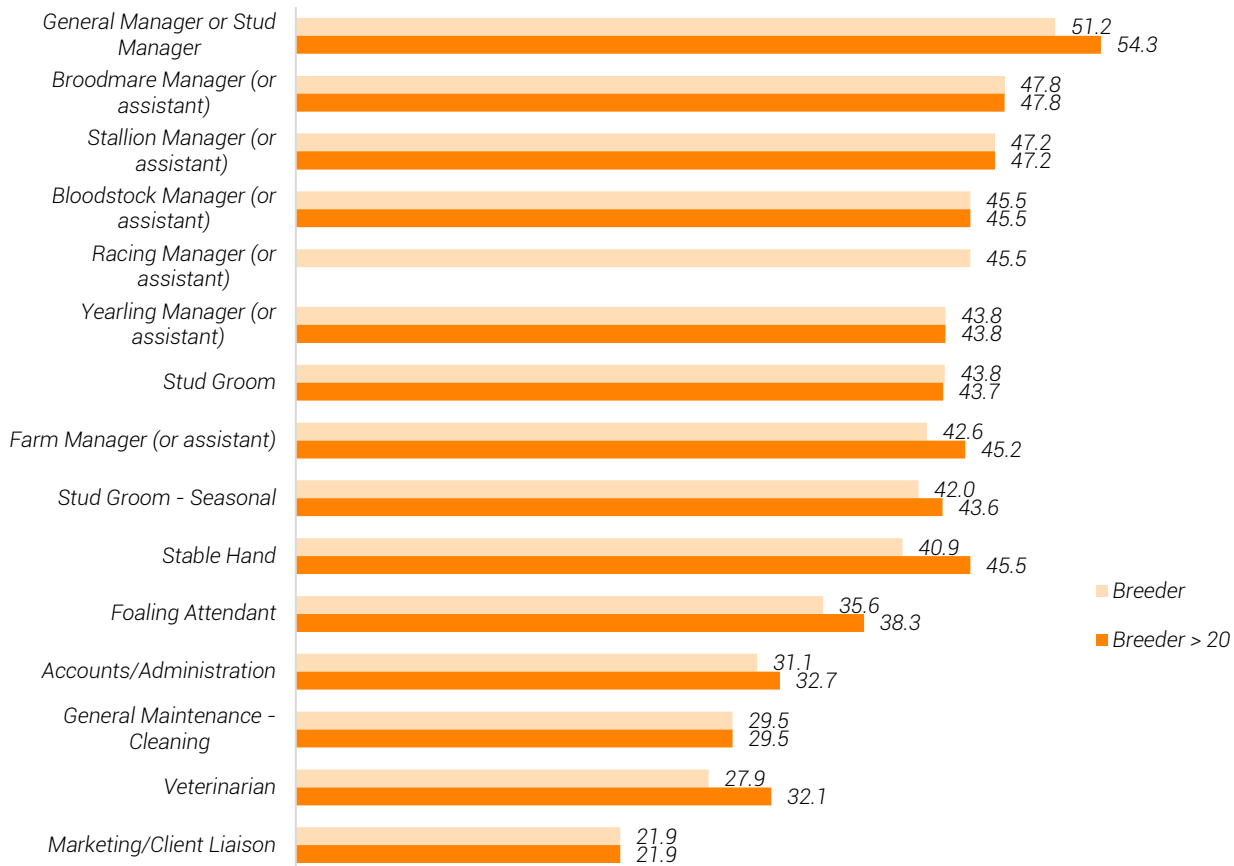
AVERAGE HOURS WORKED FOR DIFFERENT ROLES IN THE WORKFORCE



- Trainers were asked to indicate the average weekly hours for the different roles held in their workforce.
- The roles indicated as having the highest average number of hours worked on average in a normal week were 'Assistant Trainer' (44.6 hours) and 'Foreperson' (40.3 hours).
- In contrast to above, 'Veterinarian' and 'Business Manager' were indicated as being the roles with the lowest average hours per week.
- The top and bottom results were both similar when comparing the total trainer response with the larger trainer group.

Average Hours for Roles – Breeders

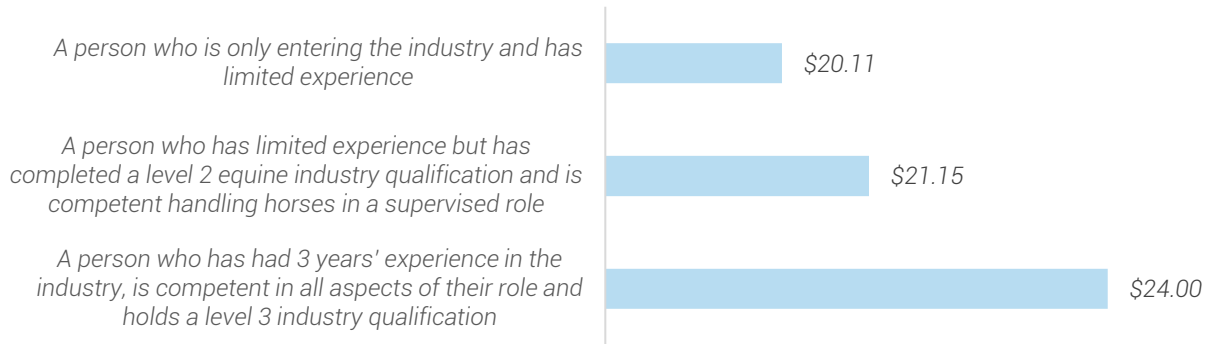
AVERAGE HOURS WORKED FOR DIFFERENT ROLES IN THE WORKFORCE



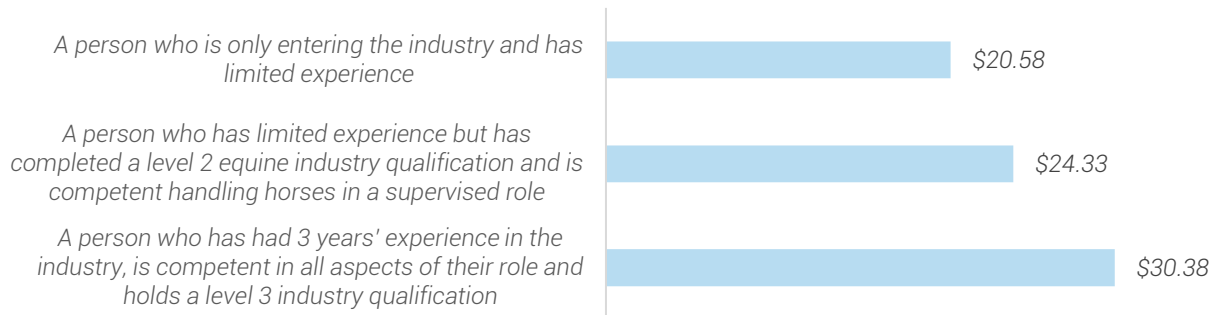
- Breeders were asked to indicate the average weekly hours for the different roles held in their workforce.
- The roles indicated as having the highest average number of hours worked on average in a normal week were 'General Manager or Stud Manager' (51.2 hours) and 'Broodmare Manager (or assistant)' (47.8 hours).
- In contrast to above, 'Veterinarian' and 'Marketing/Client Liaison' were indicated as being the roles with the lowest average hours per week.
- The top and bottom results were both similar when comparing the total breeder response with the larger breeder groups.
- Note – it is likely that the number of veterinarian hours relate to peak season.

Employee Roles - Trainers

REMUNERATION GUIDE FOR A STABLEHANDS/STRAPPER (\$ RATE PER HOUR)



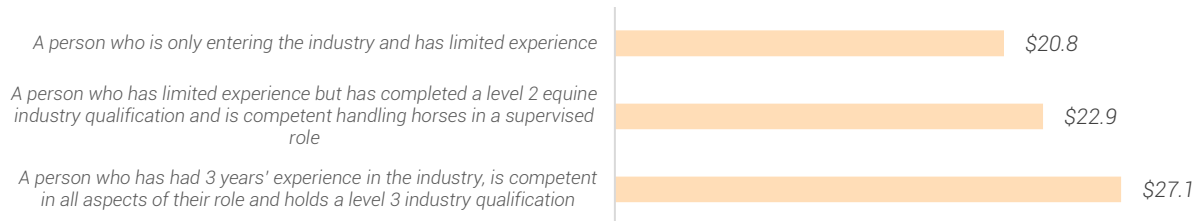
REMUNERATION GUIDE FOR A TRACKWORK RIDER (\$ RATE PER HOUR)



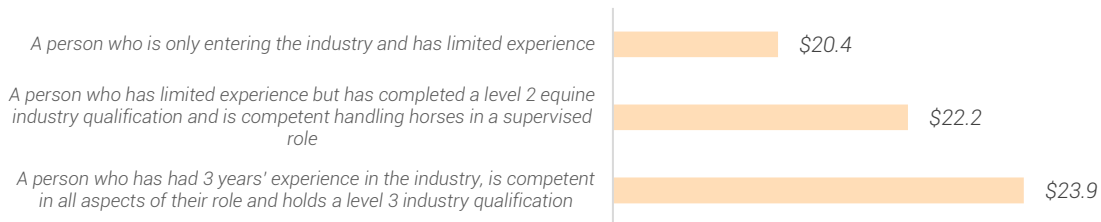
- Trainers indicated that a stablehand/strapper with limited level of experience would make on average \$20.11 per hour. Those with more experience having completed a level 2 qualification makes on average \$21.15 and the most experienced of the prompted responses \$24.00.
- Trainers indicated that a trackwork rider with limited level of experience would make on average \$20.58 per hour. Those with more experience having completed a level 2 qualification makes on average \$24.33 and the most experienced of the prompted responses \$30.38.

Employee Roles - Breeders

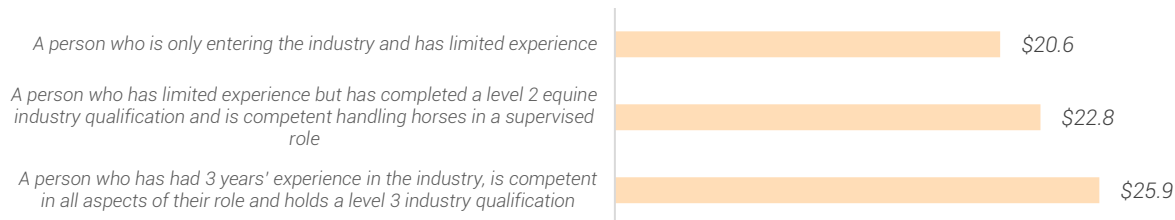
REMUNERATION GUIDE FOR A FOALING ATTENDANT (\$ RATE PER HOUR)



REMUNERATION GUIDE FOR A STABLE HAND (\$ RATE PER HOUR)



REMUNERATION GUIDE FOR A STUD GROOM (\$ RATE PER HOUR)



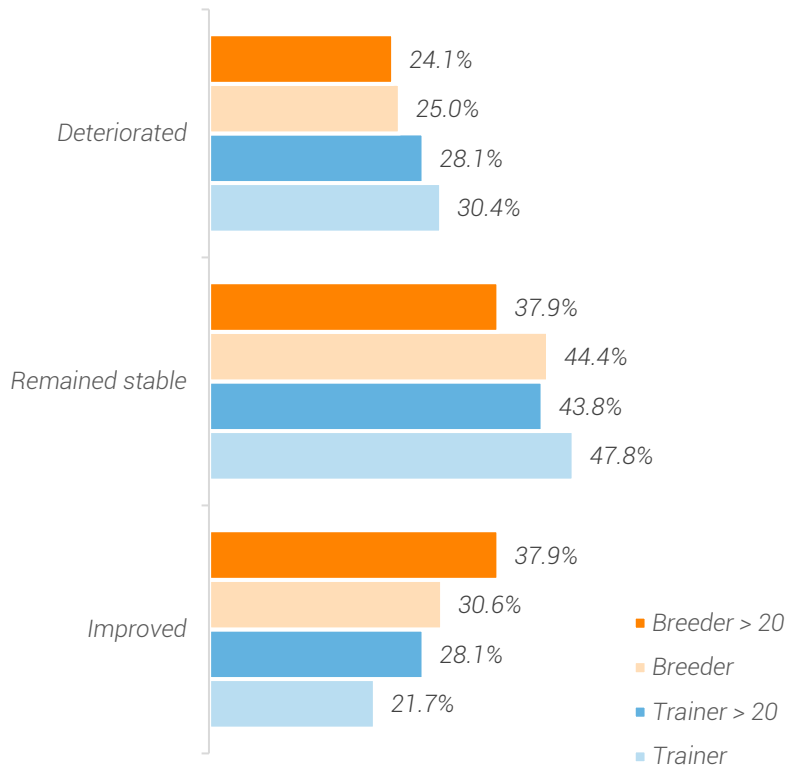
- When assessing the remuneration (pay rate per hour) for different levels of experience across the roles of foaling attendant, stable hand and stud groom, the adjacent graphs indicate the average pay rate per hour.
- It is evident across the three different roles that those who have greater experience or qualification are paid on average a higher rate.
- There was little variation between the overall breeder group and the larger breeders.



Business Performance

Business Performance past 12 months

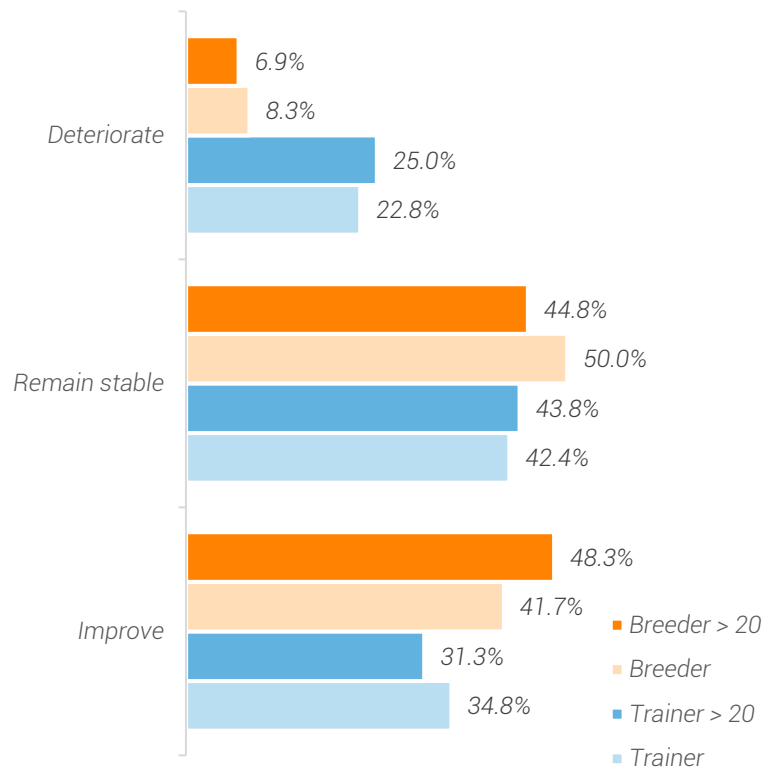
BUSINESS PERFORMANCE OVER PAST 12 MONTHS



- Over 30% of trainers indicated that their business performance deteriorated over the past 12 months – with close to 22% indicating that their business performance had improved.
- The breeder respondents indicated that 25% of them experienced deterioration in business performance whilst nearly 22% felt that it improved.
- The larger groups of trainers and breeders both indicated a slightly higher representation of them experiencing improved conditions compared to the overall samples for each.

Business Performance over next 12 months

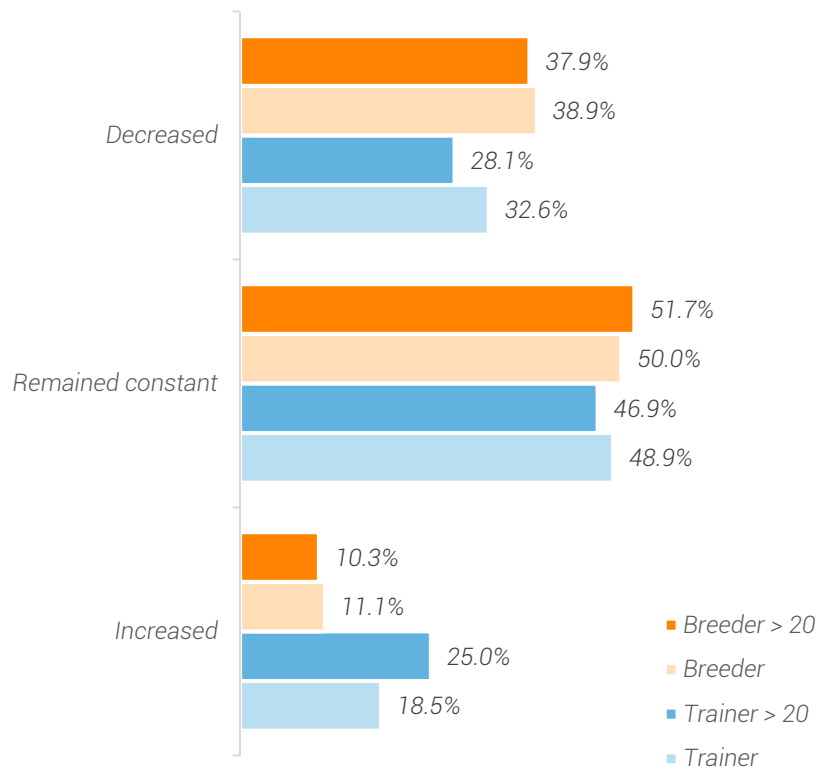
BUSINESS PERFORMANCE OVER NEXT 12 MONTHS



- Almost 35% of trainers indicated that they believe their business performance will improve over the next 12 months. The majority indicated that they believe it will remain stable (42.4%). This pattern was also similar for only the major trainers (trainer > 20), whilst there was more doubt that the business would improve (31.3%).
- The breeder respondents indicated that 41.7% of them will experience an improvement in business performance whilst 8.3% felt that it will deteriorate. Half of breeder respondents indicated that their business performance will remain stable.

Workforce size over past 12 months

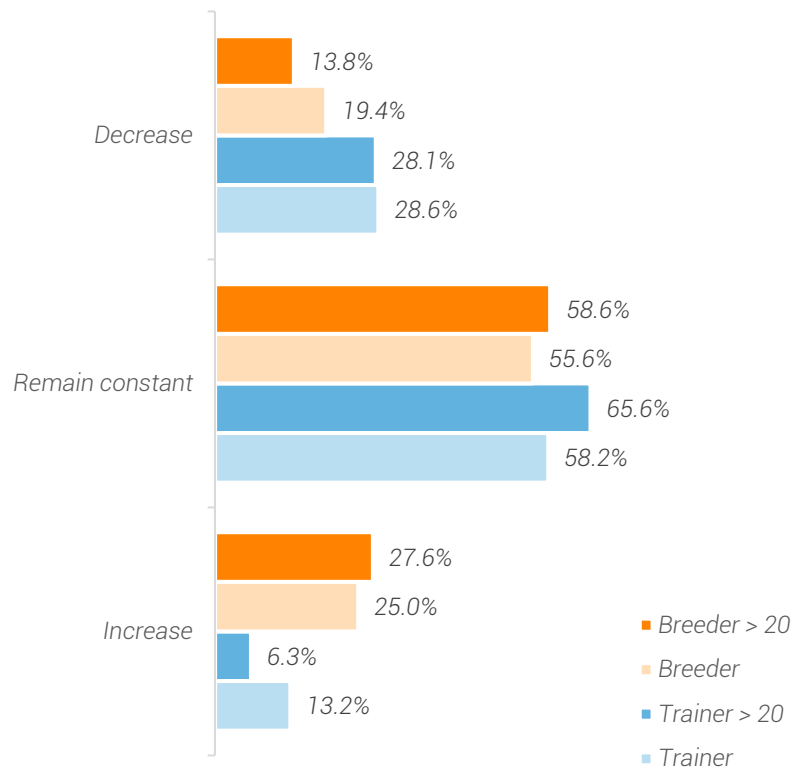
WORKFORCE SIZE CHANGE OVER PAST 12 MONTHS



- Over 32% of trainers indicated that their workforce size decreased over the past 12 months and 18.5% noted that it had increased.
- The breeder respondents indicated that 38.9% of them experienced a decrease in workforce size whilst 11.1% felt that it had increased.
- Larger breeders provided very similar results to the total breeder respondents, whilst larger trainers indicated a greater trend for experiencing an increase and less decrease in workforce over the past months compared to the entire trainer sample results.

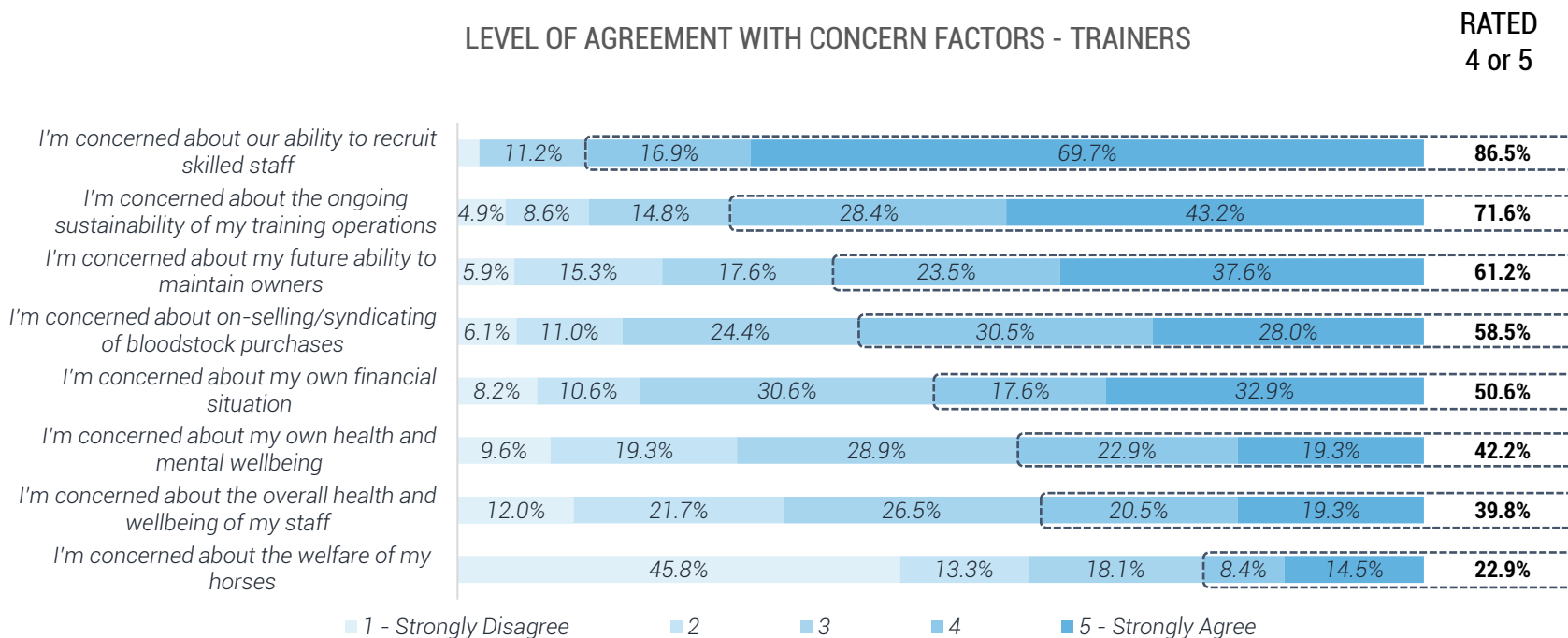
Workforce size over next 12 months

WORKFORCE SIZE CHANGE OVER NEXT 12 MONTHS



- Over 28% of trainers indicated that their workforce size will decrease over the next 12 months and 13.2% noted that it is expected to increase.
- The breeder respondents indicated that 19.4% of them believe they will have a decrease in workforce size whilst 25.0% feel that it will increase.
- Larger breeders indicated a slightly lower response rate of expecting a decrease in workforce size over the next 12 months compared to the overall breeder samples.
- The larger trainer respondents indicated a smaller level of expectation that their workforce size will increase in size over the next 12 months compared to the entire trainer respondent sample.

Level of concern about factors - Trainers

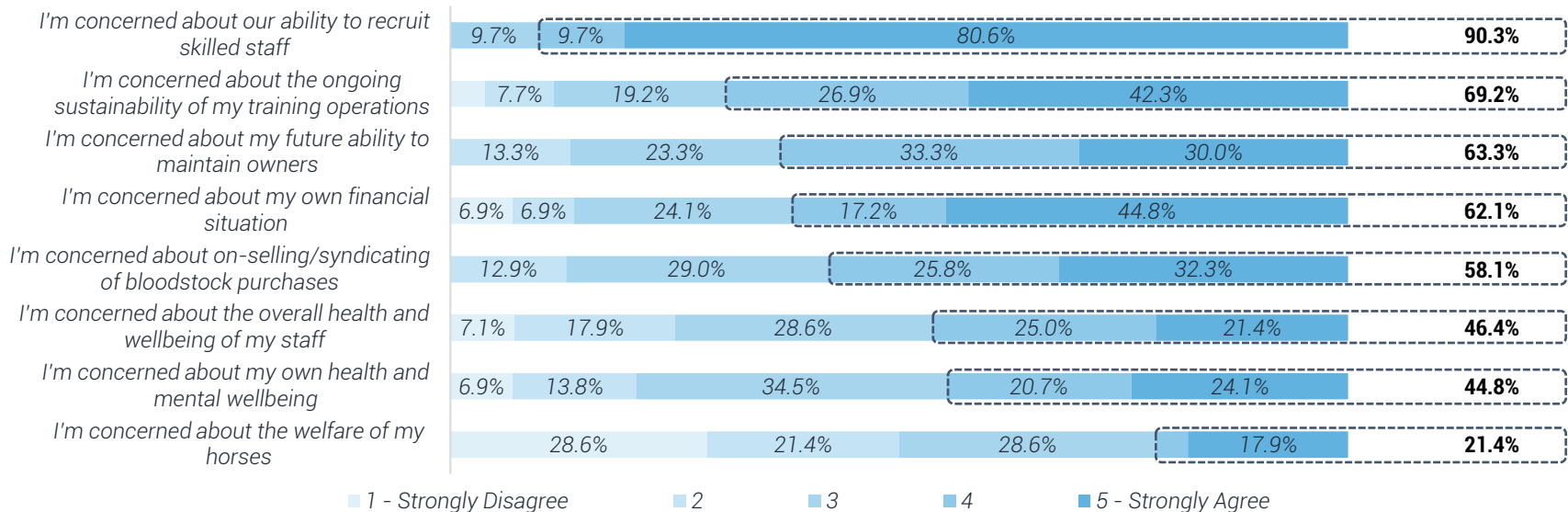


- When asked to indicate the level of concern across different factors, trainers indicated that they had on average the strongest level of concern with "I'm concerned about our ability to recruit skilled staff" (86.5% rated 4 or 5). This was followed by "I'm concerned about the ongoing sustainability of my training operations" (71.6%) and "I'm concerned about my future ability to maintain owners" (61.2%).
- The factor which trainers were least concerned about on average was "I'm concerned about the welfare of my horses" (22.9% rated 4 or 5). The next lowest rating factors was "I'm concerned about the overall health and wellbeing of my staff" (39.8%).

Level of concern about factors - Trainers > 20

LEVEL OF AGREEMENT WITH CONCERN FACTORS – LARGE TRAINERS

RATED
4 or 5

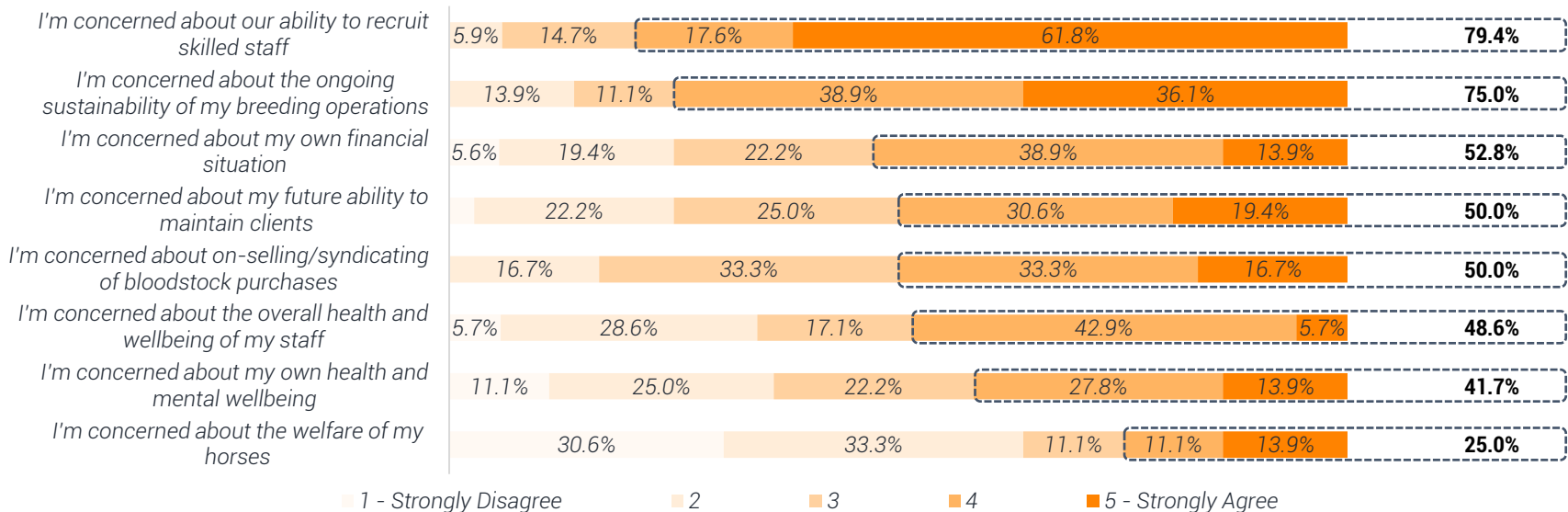


- When asked to indicate the level of concern across different factors, the major trainers (trainer > 20) indicated that they had on average the strongest level of concern with "I'm concerned about our ability to recruit skilled staff" (90.3% rated 4 or 5). This was followed by "I'm concerned about the ongoing sustainability of my training operations" (69.2%) and "I'm concerned about my future ability to maintain owners" (63.3%).
- The factor which larger trainers were least concerned about on average was "I'm concerned about the welfare of my horses" (21.4% rated 4 or 5). The next lowest rating factors was "I'm concerned about the my own health and mental wellbeing" (44.8%).

Level of concern about factors - Breeders

LEVEL OF AGREEMENT WITH CONCERN FACTORS - BREEDERS

RATED
4 or 5

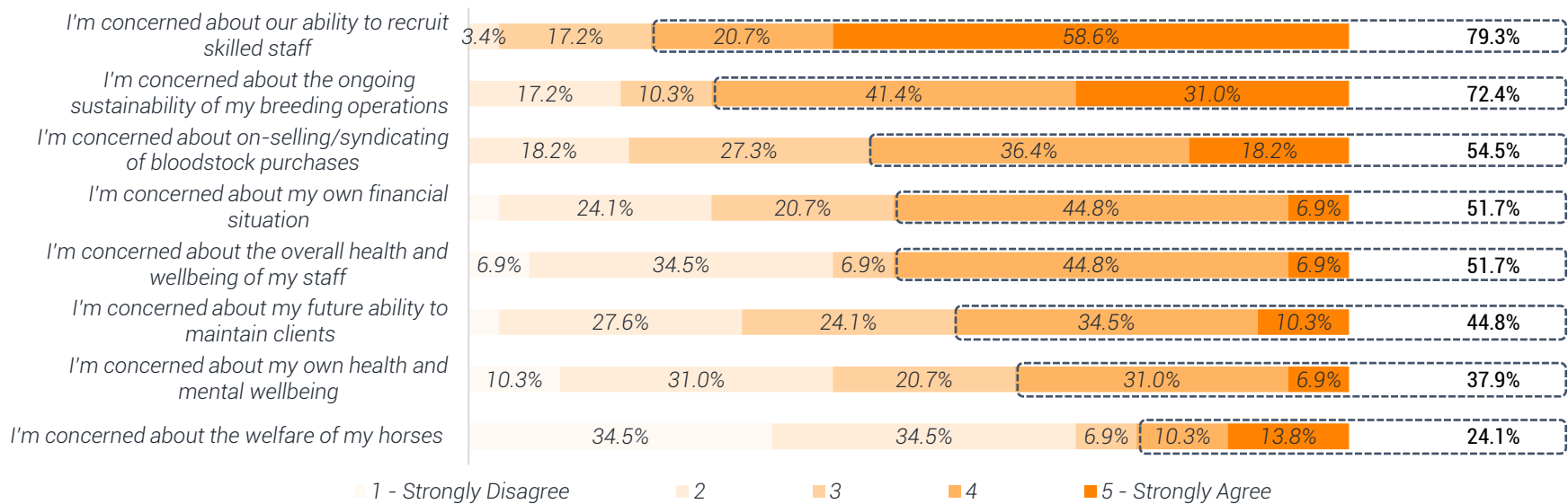


- When asked to indicate the level of concern across different factors, breeders indicated that they had on average the strongest level of concern with "I'm concerned about our ability to recruit skilled staff" (79.4% rated 4 or 5). This was followed by "I'm concerned about the ongoing sustainability of my breeding operations" (75.0%) and "I'm concerned about my own financial situation" (52.8%).
- The factor which breeders were least concerned about on average was "I'm concerned about the welfare of my horses" (25.0% rated 4 or 5). The next lowest rating factors was "I'm concerned about my own health and mental wellbeing" (41.7%).

Level of concern about factors - Breeders > 20

LEVEL OF AGREEMENT WITH CONCERN FACTORS – LARGE BREEDERS

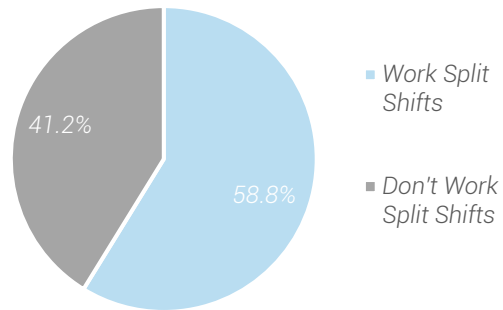
RATED
4 or 5



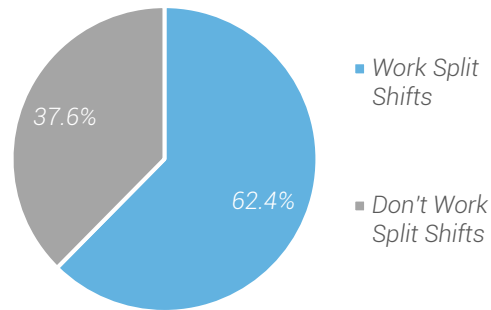
- When asked to indicate the level of concern across different factors, larger breeders (breeder > 20) indicated that they had on average the strongest level of concern with "I'm concerned about our ability to recruit skilled staff" (79.3% rated 4 or 5). This was followed by "I'm concerned about the ongoing sustainability of my breeding operations" (72.4%) and "I'm concerned about on-selling/syndicating of bloodstock purchases" (54.5%).
- The factor which breeders were least concerned about on average was "I'm concerned about the welfare of my horses" (24.1% rated 4 or 5). The next lowest rating factors was "I'm concerned about my own health and mental wellbeing" (37.9%).

Split Shifts

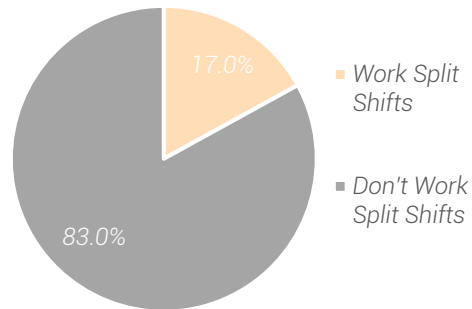
PERCENTAGE OF WORKFORCE THAT WORK SPLIT SHIFTS (TRAINERS)



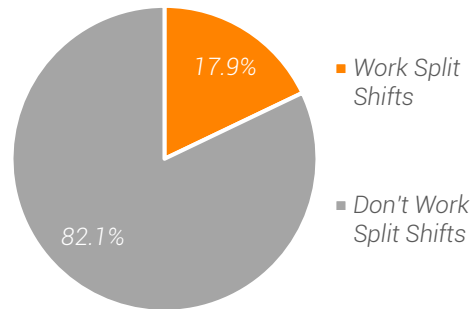
PERCENTAGE OF WORKFORCE THAT WORK SPLIT SHIFTS (TRAINERS > 20)



PERCENTAGE OF WORKFORCE THAT WORK SPLIT SHIFTS (BREEDERS)



PERCENTAGE OF WORKFORCE THAT WORK SPLIT SHIFTS (BREEDERS > 20)



- When assessing trainers, they indicated on average that 58.8% of their workforce work split shifts. Large trainers (trainer > 20) have 62.4% of their workforce work split shifts.
- Breeders indicated that on average 17.0% of their workforce work split shifts, whilst major breeders (breeders > 20) indicated that 17.9% would work split shifts.

Issues for business - Trainers

IMPEDIMENTS IMPACTING THE TRAINERS SECTOR FOR STAFFING



- In terms of staffing impediments, trainers were asked to indicate what level of a problem they perceive it to be for their business (rating out of 5).
- "Difficulties recruiting staff with the appropriate skills" was identified as being the biggest problem achieving an average rating of 4.5 out of 5. "Difficulties recruiting enough staff" (4.1) and "A lack of staff to manage our stables/farm/number of horses effectively" (3.7) were the next highest rating problems.
- The issue which was indicated as being the least problem by trainers was "Too many staff that are off work ill or injured" (2.2).
- Major trainers (trainer > 20), indicated a higher level of concern for "A lack of appropriate skills amongst existing staff" compared to the overall trainer response". For the remainder options the ratings were quite similar.

Issues for business - Breeders

LEVEL OF PROBLEM ISSUES ARE FOR BUSINESS - BREEDERS



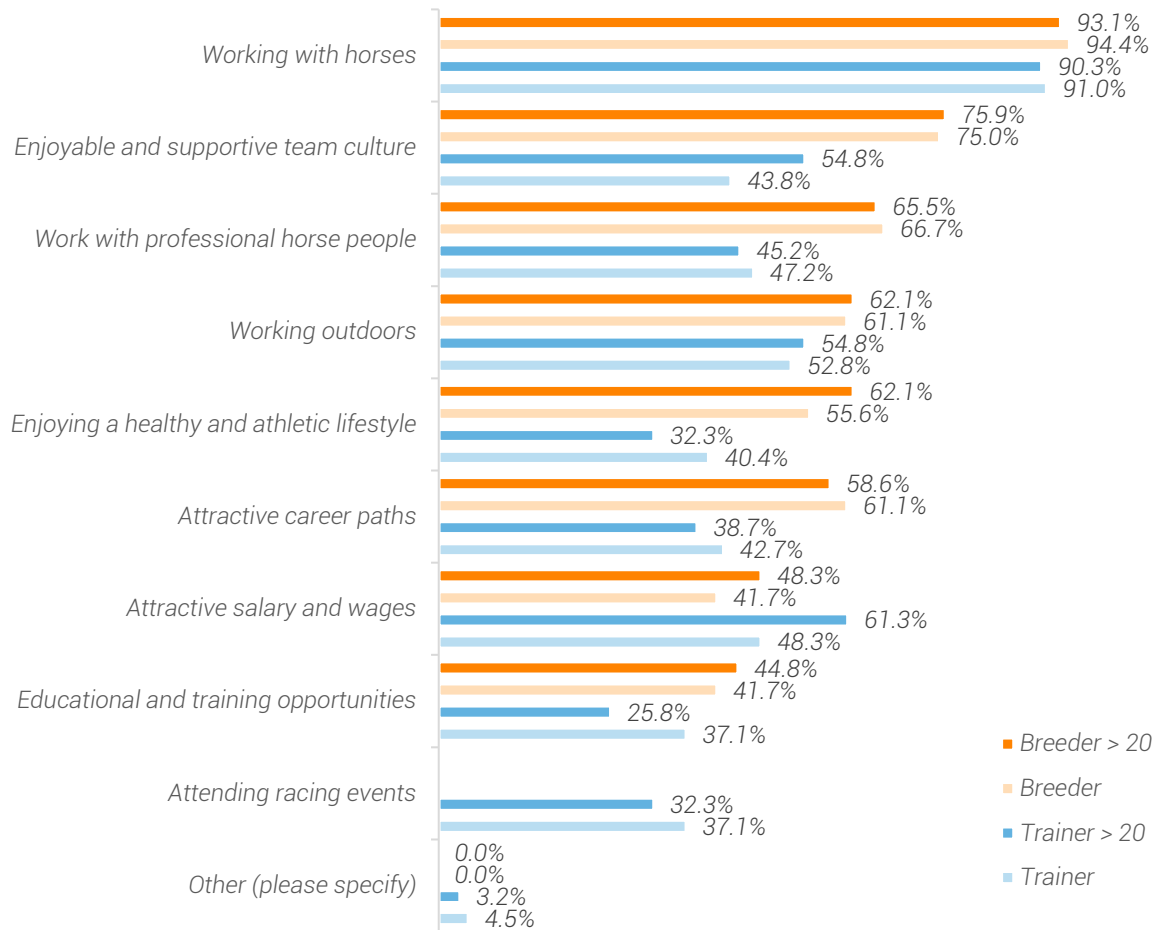
- There are a number of potential problems which a business may face and breeders were asked to indicate what level of a problem they perceive it to be for their business (rating out of 5).
- "Difficulties recruiting staff with the appropriate skills" was identified as being the biggest problem achieving an average rating of 4.5 out of 5. "Difficulties recruiting enough staff" (4.2) and "A lack of staff to manage our stables/farm/number of horses effectively" (3.7) were the next highest rating problems.
- The issue which was indicated as being the least problem by trainers was "Too many staff that are off work ill or injured" (2.3).
- Larger breeders (breeder > 20) had very similar response rates with the overall breeder samples to the question.



Employments, Skills and Training

Greatest opportunities to attract workers

GREATEST OPPORTUNITIES FOR ATTRACTING PEOPLE TO WORK IN RACING



- The most common response provided by both trainers and breeders seen as the greatest opportunity for attracting people to work in racing was 'working with horses'.
- For trainers the next greatest opportunity which was perceived was 'working outdoors' (52.8%). The order of the responses also was generally consistent when considering only the major trainers (trainer > 20) against all trainer responses.
- Meanwhile for breeders the next greatest opportunity which was perceived was an 'enjoyable and supportive team culture' (75.0%). The order of the responses was generally consistent when considering only the major breeders (breeder > 20) against all breeder responses.

Greatest impediments to attract workers

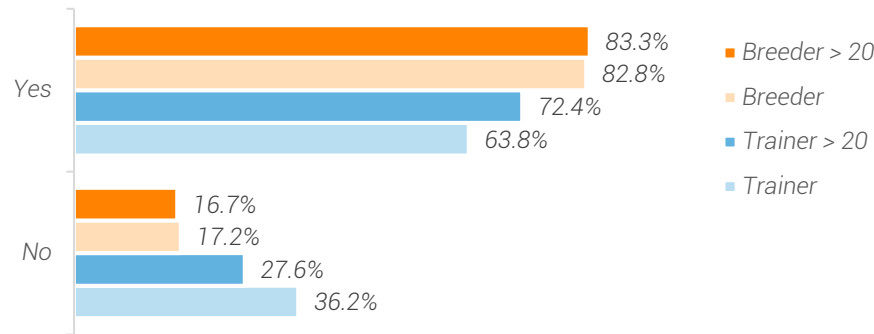
GREATEST IMPEDIMENTS FOR ATTRACTING PEOPLE TO WORK IN RACING



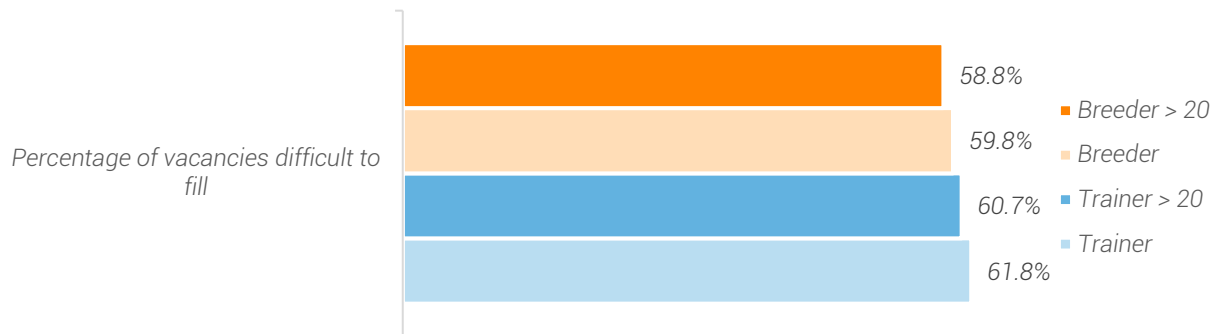
- The most common response provided by both trainers and breeders seen as the greatest impediment for attracting people to work in racing was 'working hours (e.g. early start, split shifts etc.)'.
- For trainers the next greatest impediment which was perceived was also 'low wages' (67.0%), followed by 'negative perceptions of the industry' (54.5%). Also the order of the responses were generally consistent when considering only the major trainers (trainer > 20) against all trainer responses.
- Similar to above, for breeders the next greatest impediment which was perceived was 'low wages' (58.3%). The order of the responses was generally consistent when considering only the major breeders (breeder > 20) against all breeder responses.

Vacancies difficult to fill over past 12 months

VACANCIES DIFFICULT TO FILL OVER PAST 12 MONTHS

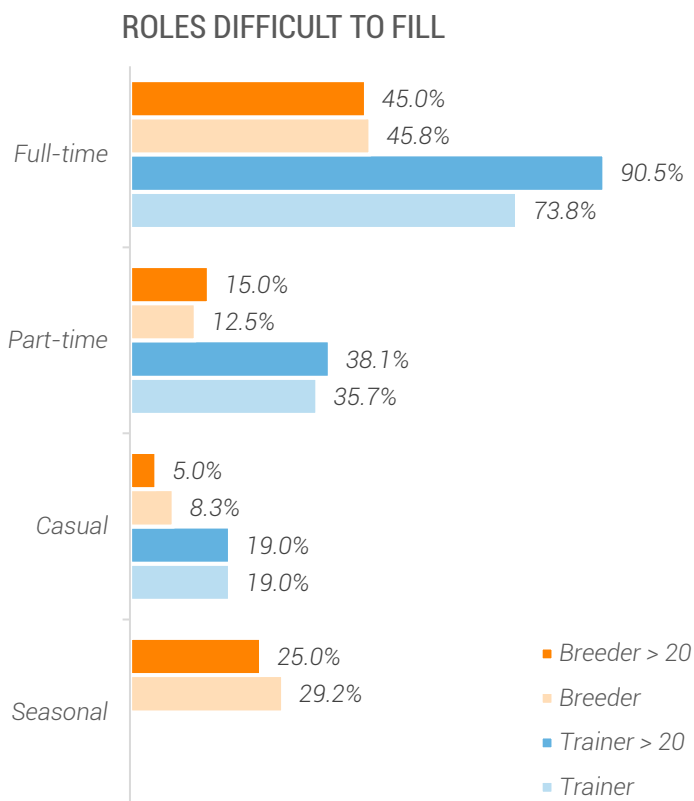


PERCENTAGE OF VACANCIES DIFFICULT TO FILL OVER PAST 12 MONTHS



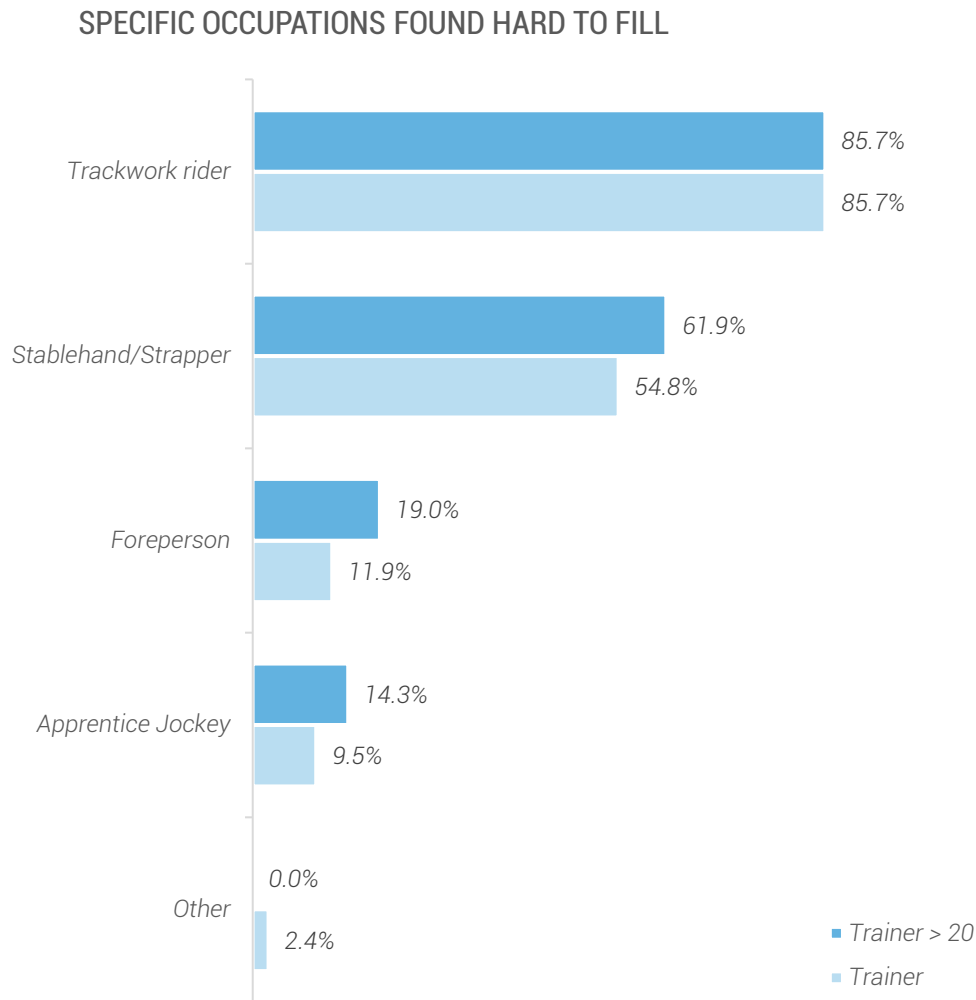
- Overall, 82.8% of all breeder respondents indicated that they had vacancies at their workplace in the last 12 months which were difficult to fill, whilst 63.8% of trainer respondents were faced with problems filling vacancies.
- Larger trainers (trainer > 20) perceive to have found it more difficult to fill the vacancies compared to the total trainer response rate. The larger breeders (breeder > 20) provided very similar rates with the total breeder response.
- When considering what percentage of those vacancies were difficult to fill, 59.8% was the average percentage indicated across all breeders, whilst trainers indicated 61.8% on average.
- The larger trainers and breeders provided very similar rates to the total samples for the average percentage of vacancies difficult to fill over the past 12 months.

Roles difficult to fill



- For trainers, they believed that "Full-time" (73.8%) also were the hardest to fill. This was followed by 'Part-time' roles (35.7%).
- Major trainers (Trainer > 20) followed the same pattern of roles indicated, however 90.5% of respondents indicated 'Full-time' compared to the 73.8% across the whole sample of trainers.
- For breeders, the level the role which was indicated as being the most difficult to fill was 'Full-time' (45.8%). This was followed by 'Seasonal' roles (29.2%).
- Major breeders (breeder > 20) followed very similar ratios of roles to the overall breeder response rate.

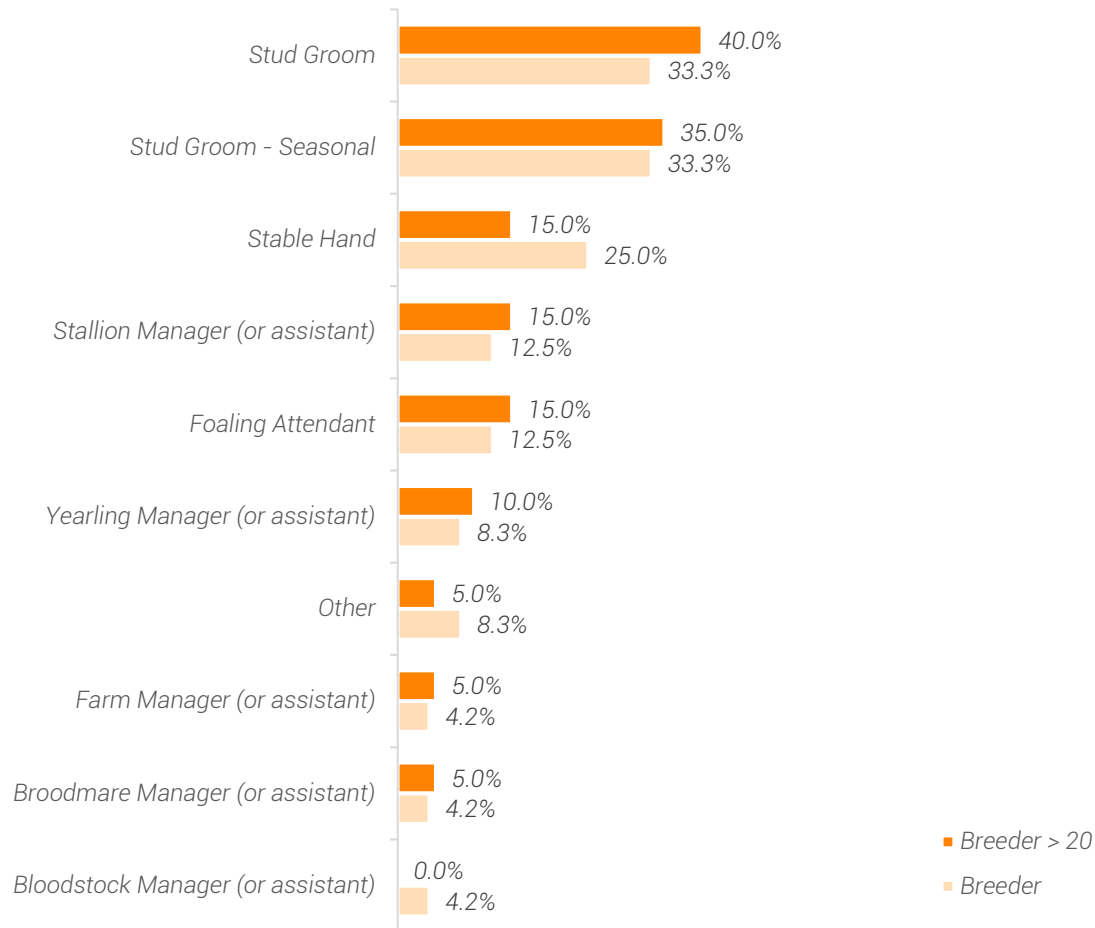
Occupations difficult to fill - Trainers



- Trainers indicated that they feel that the 'Trackwork rider' (85.7%) jobs are the most difficult to fill.
- This was followed by 'Stablehand/Strapper' (54.8%) and 'Foreperson' (11.9%) jobs.
- The pattern of occupations hard to fill was similar for major trainers (trainer > 20) compared to the total trainer responses.

Occupations difficult to fill - Breeders

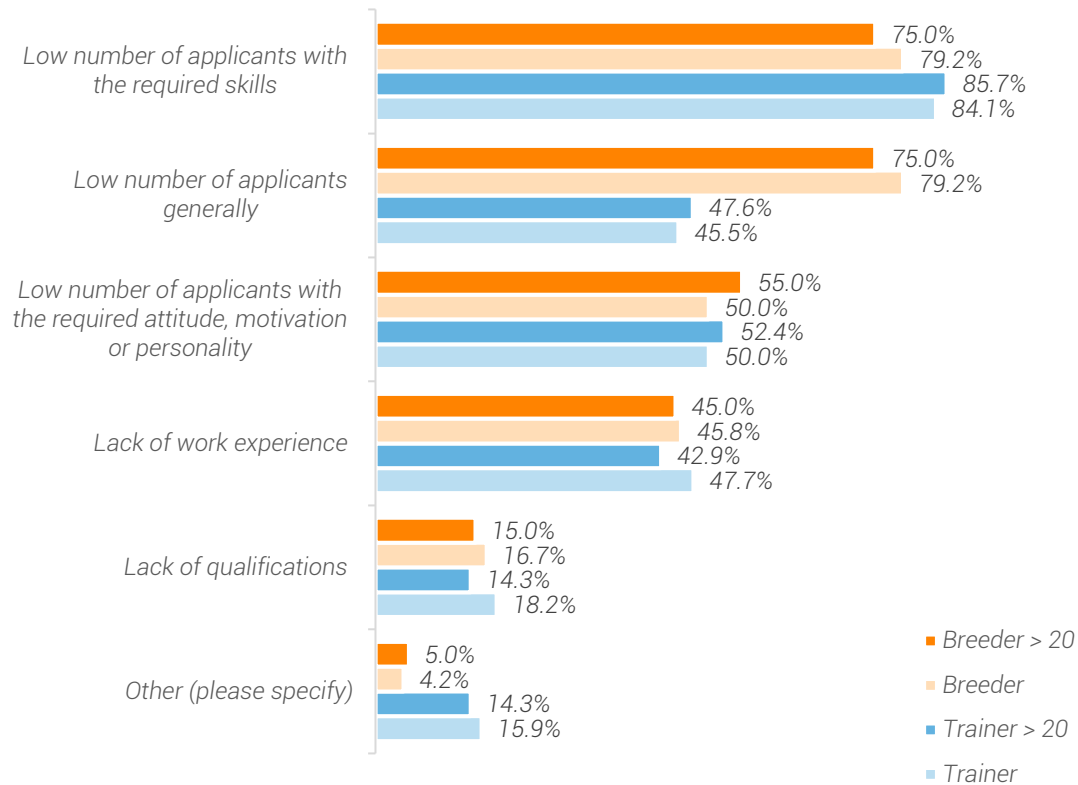
SPECIFIC OCCUPATIONS FOUND HARD TO FILL



- Breeders indicated that they feel that the 'Stud Groom' and 'Stud Groom – Seasonal' (33.3%) jobs are the most difficult to fill.
- These were followed by 'Stable Hand' (25.0%) and 'Stable Manager (or assistant)' and 'Foaling Attendant' (12.5%) jobs.
- When considering the major breeders (breeder > 20) compared to the total breeders responses, the pattern remained similar in order of occupations. However, there was a slight decrease in the perception that the 'Stable Hand' jobs (15.0%) are difficult to fill compared to the total sample for breeders (25.0%).

Reasons impacting filling vacancies

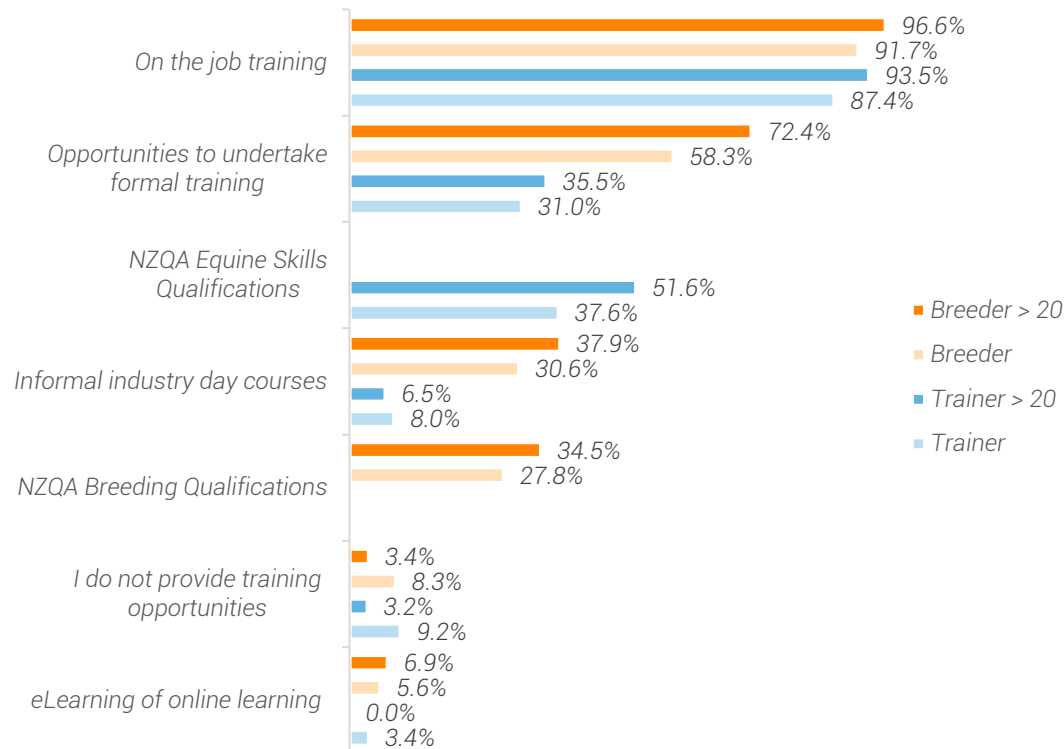
MAIN REASON IMPACTING ABILITY TO FILL VACANCIES



- Overall, both breeder and trainer respondents indicated that the main reason they feel that is impacting their ability to fill vacancies is "low number of applicants with the required skills".
- Trainers indicated that a "low number of applicants with the required attitude, motivation or personality" (50.0%) is the next highest reasons which they believe is behind why it is hard to fill vacancies.
- Looking at breeder responses only, they identified "low number of applicants generally" (79.2%) as being the equal main reason impacting the ability to fill vacancies.
- There were no major differences between the larger breeders and trainers compared to the total respondents for the groups.

Types of training opportunities provided

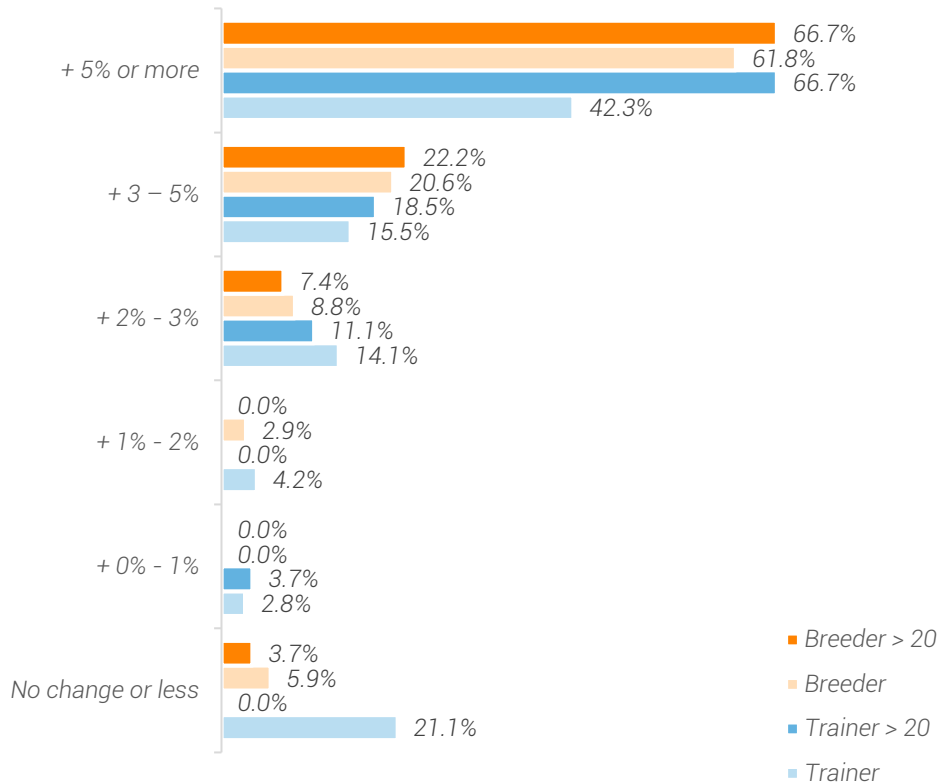
TYPES OF TRAINING PROVIDED TO STAFF



- The training opportunity which was indicated across both trainers and breeders as being the most common type offered by respondents was “on the job training”.
- “NZQA Equine Skills Qualifications” (37.6%) was identified as being the next most offered form of training by trainers for their staff.
- Meanwhile, breeders indicated that “opportunities to undertake formal training” (58.3%) was the next most offered type of training to staff.

Change in wages and salaries provided

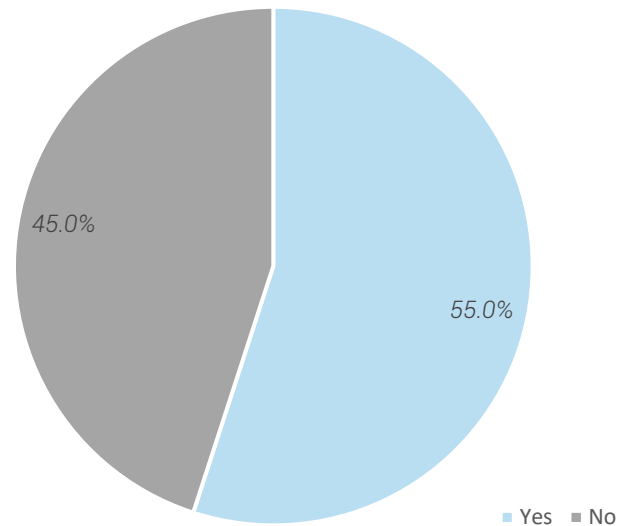
CHANGE IN AMOUNT PAID FOR WAGES AND SALARIES COMPARED TO PREVIOUS BUSINESS YEAR



- The most common bracket of percentage for which wages and salaries changed to the previous business year for both breeder and trainer respondents was '+5% or more'.
- The bracket which was next most prevalent among breeders and trainers was "+3-5%".
- For trainers, there was a higher proportion of larger trainers (trainer > 20) who indicated '+5% or more' and less proportion who indicated 'no change or less' compared to the total trainer responses.
- There was no major difference between the larger breeder responses (breeder > 20) and the total breeder responses.

Apprentice Jockeys - Trainer

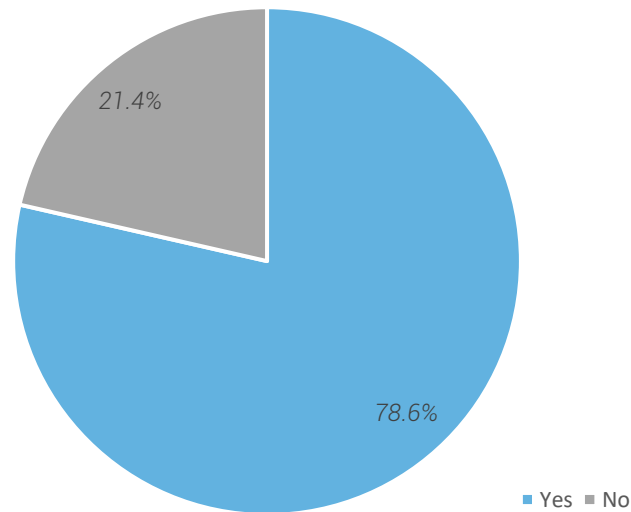
WOULD TAKE ON AN APPRENTICE JOCKEY



- *Of the trainers, 55.0% indicated that they would consider taking on an apprentice jockey.*
- *Those who indicated that they would take on an apprentice jockey were asked what type of support would be required for them to take them on – examples of responses included financial support to assist with salary while training, ongoing training opportunities and support with the rules.*

Apprentice Jockeys – Trainer > 20

WOULD TAKE ON AN APPRENTICE JOCKEY



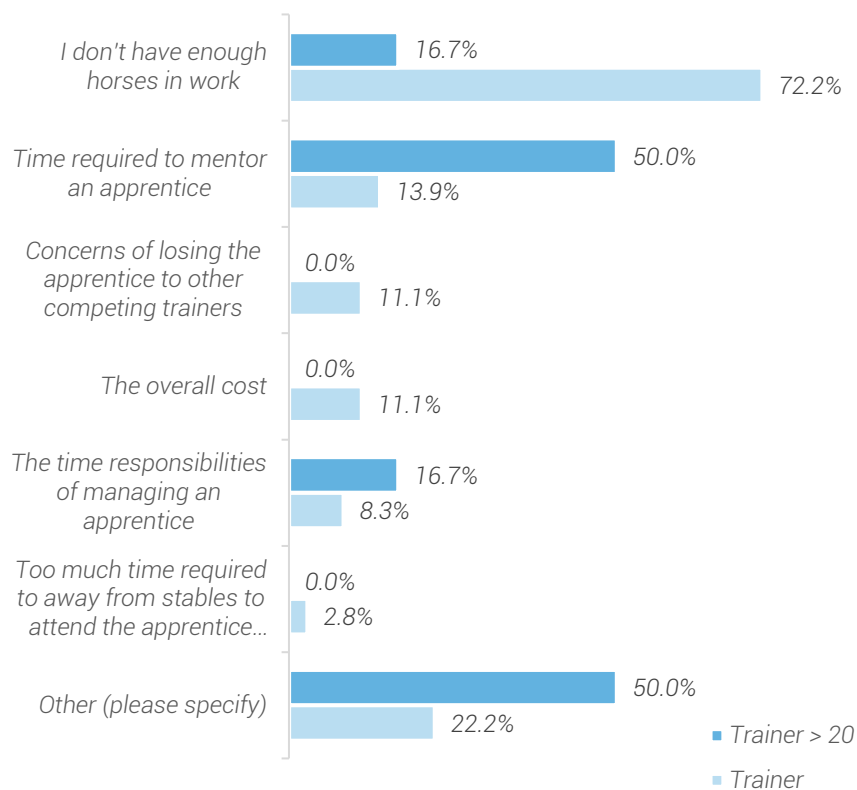
- *Of the larger trainers, 78.6% indicated that they would consider taking on an apprentice jockey.*
- *Those who indicated that they would take on an apprentice jockey were asked what type of support would be required for them to take them on – examples included funding from NZTR and an incentive to train apprentices to become jockeys that become part of the product that is used to generate income for the industry, finding someone within the right weight range and has some level of industry experience and the amount of time required to spend on training the apprentice.*

Q27. Would you consider taking on an apprentice jockey? (n=28)

Q27a. What type of support would you require to take on an apprentice? (n=22)

Apprentice Jockeys

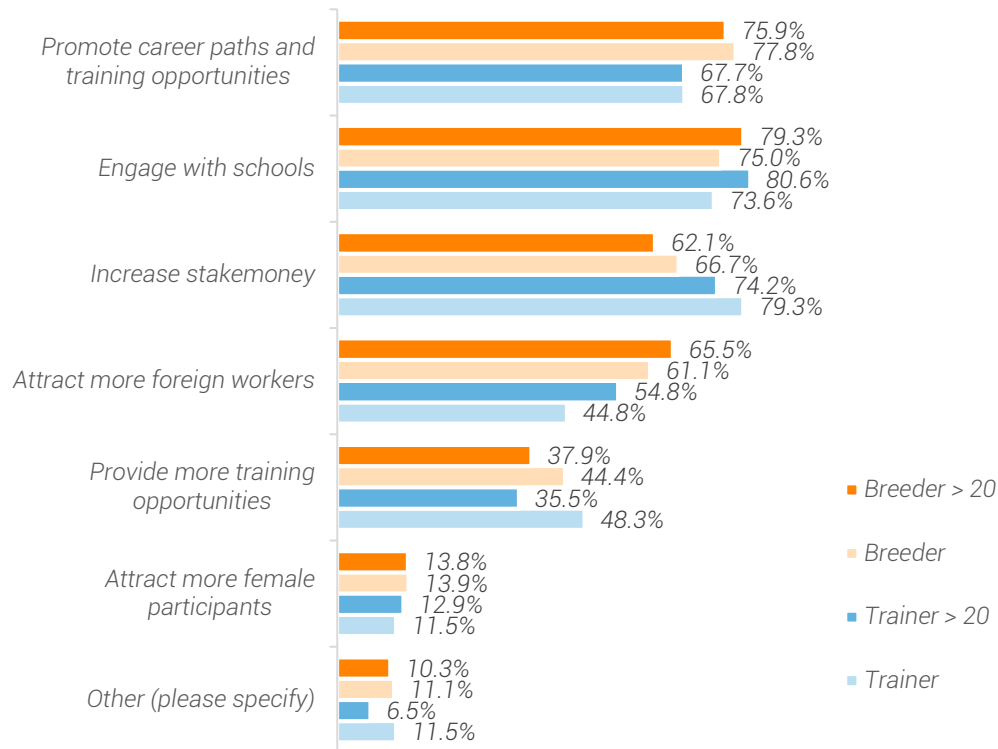
MAIN REASONS FOR NOT TAKING ON AN APPRENTICE JOCKEY



- Those trainers which indicated that they would not take on an apprentice jockey indicated that the main reason why that they would not take on an apprentice jockey is "I don't have enough horses in work" (72.2%).
- For the major trainers only (Trainer > 20), they indicated to a greater amount that "time required to mentor an apprentice" as a factor (50.0%) compared to the all trainer response.
- When looking at the "other" responses provided, apart from those who indicated that they already have one at the moment, the key references were mentioned:
 - "Hard to find someone good enough to take on"
 - "Private trainer wouldn't be able to give an apprentice enough opportunities"
 - "Need to be able to ride trackwork first. Poor attitude to work"

Methods for attracting workers

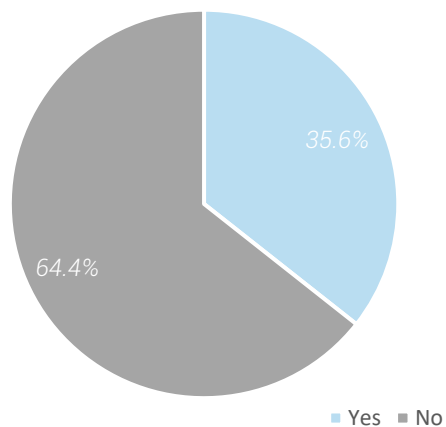
THINGS WHICH NZTR SHOULD DO TO ATTRACT MORE WORKERS



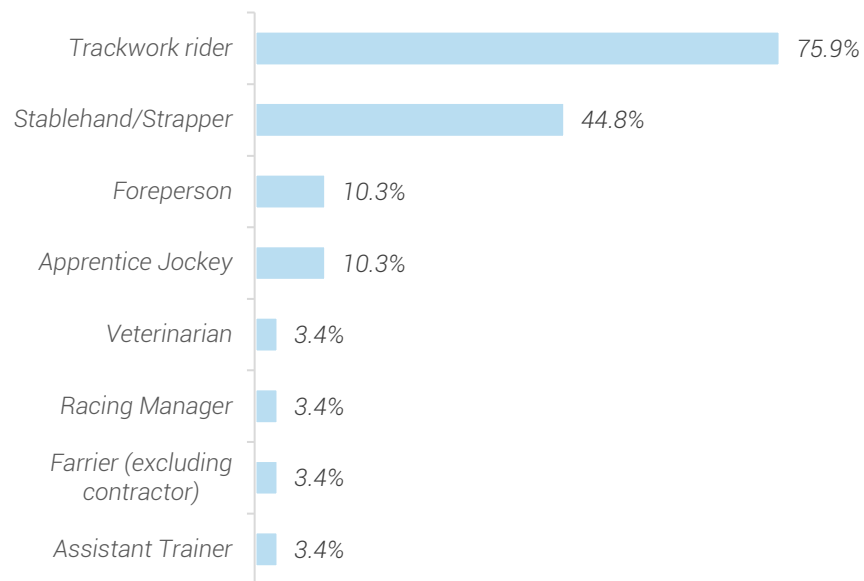
- Trainers identified "increase stakemoney" (79.3%) most frequently as a way to attract more workers. The larger trainers, similar to large breeders indicated that "engage with schools" is their most identified way to attract more workers (80.6%).
- Looking across all breeder respondents, the most commonly referenced thing which NZTR should do to attract more workers is "promote career paths and training opportunities" (77.8%). For major breeders, the most indicated response was "engage with schools" (79.3%).

Gaps in skills or capabilities - Trainers

GAP IN THE SKILLS OR CAPABILITIES OF EXISTING WORKFORCE



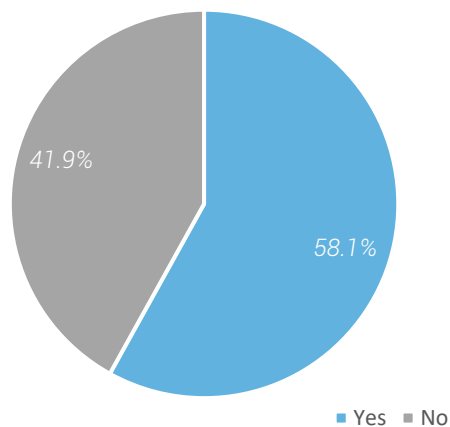
SPECIFIC OCCUPATIONS WITH SKILLS GAPS



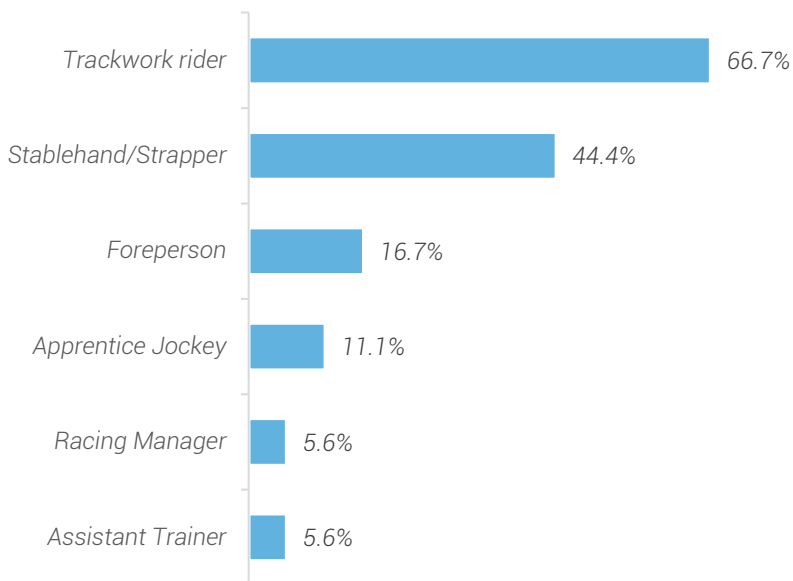
- When asked to indicate, 35.6% of trainers believed that there are gaps in the skills or capabilities of their existing workforce.
- The occupation believed to most commonly have gaps was "Trackwork rider" (75.9%).
- This was followed by "Stablehand/Strapper" (44.8%) and "Foreperson" and "Apprentice Jockey" equally (10.3%).

Gaps in skills or capabilities – Trainers > 20

GAP IN THE SKILLS OR CAPABILITIES OF EXISTING WORKFORCE



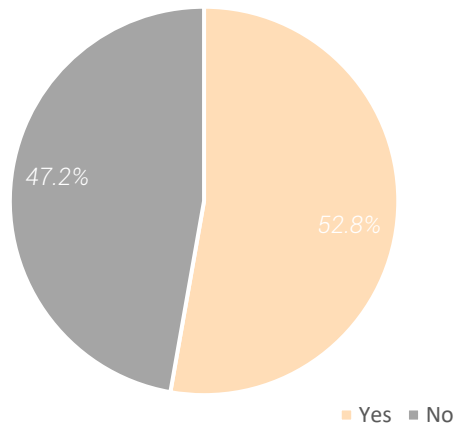
SPECIFIC OCCUPATIONS WITH SKILLS GAPS



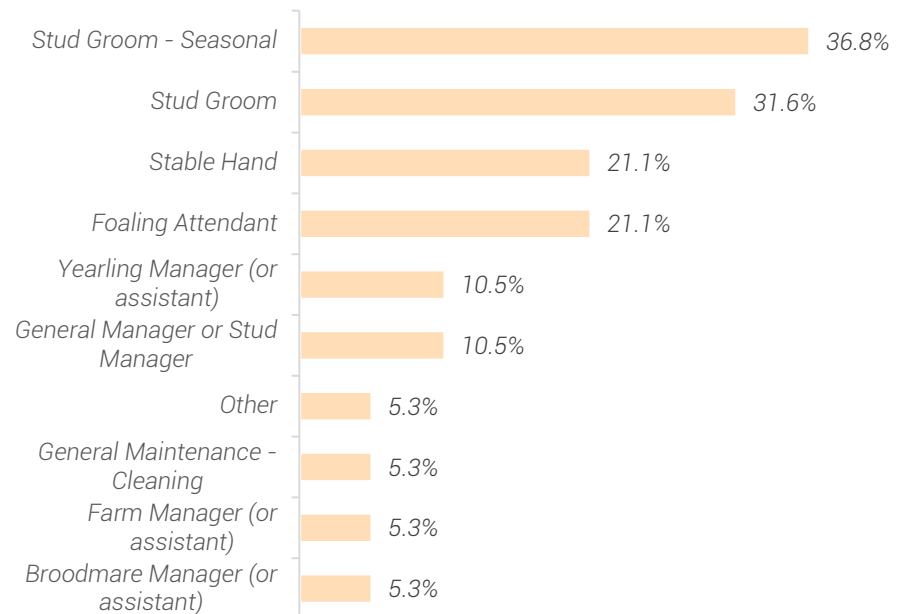
- When asked to indicate, 58.1% of major trainers (trainer > 20) believed that there are gaps in the skills or capabilities of their existing workforce.
- The occupation believed to most commonly have gaps was "Trackwork Rider" (66.7%).
- This was followed by "Stablehand/Strapper" (44.4%) and "Foreperson" (16.7%).

Gaps in skills or capabilities - Breeders

GAP IN THE SKILLS OR CAPABILITIES OF EXISTING WORKFORCE



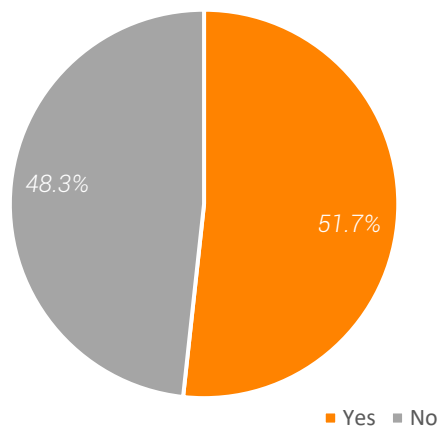
SPECIFIC OCCUPATIONS WITH SKILLS GAPS



- When asked to indicate, 52.8% of breeders believed that there are gaps in the skills or capabilities of their existing workforce.
- The occupation believed to most commonly have gaps was "Stud Groom - Seasonal" (36.8%).
- This was followed by "Stud Groom" (31.6%) and "Stable Hand" (21.1%).

Gaps in skills or capabilities – Breeders > 20

GAP IN THE SKILLS OR CAPABILITIES OF EXISTING WORKFORCE



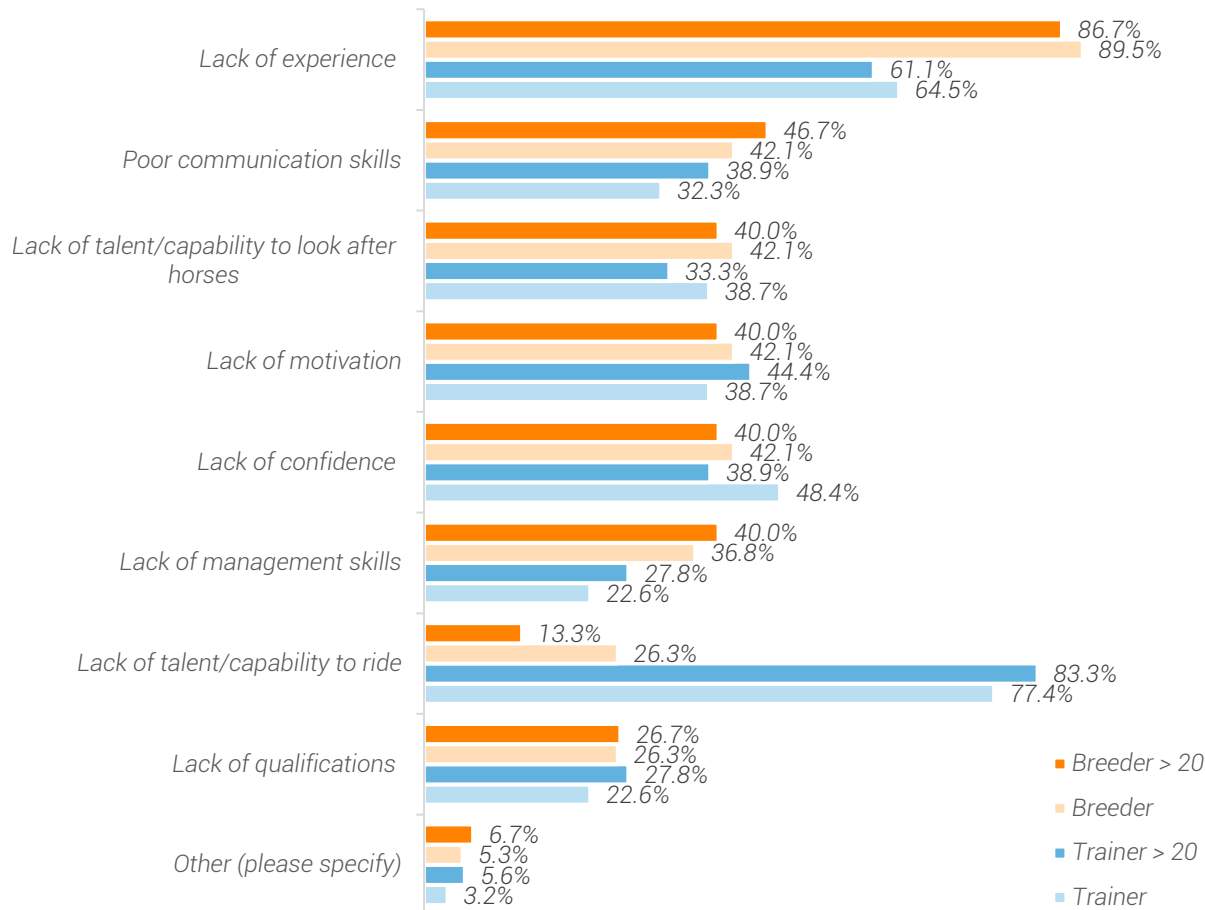
SPECIFIC OCCUPATIONS WITH SKILLS GAPS



- When asked to indicate, 51.7% of breeders believed that there are gaps in the skills or capabilities of their existing workforce.
- The occupations believed to most commonly have gaps were "Stud Groom - Seasonal" and "Stud Groom" equally (40.0%).
- These were followed by "Foaling Attendant" (26.7%) and "Stable Hand" (20.0%).

Gaps in skills or capabilities

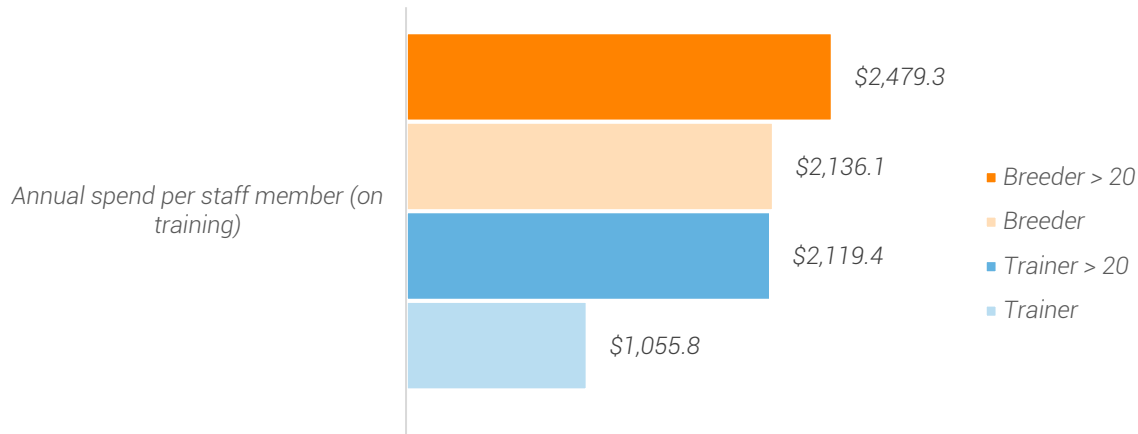
SKILL GAPS THAT EXIST



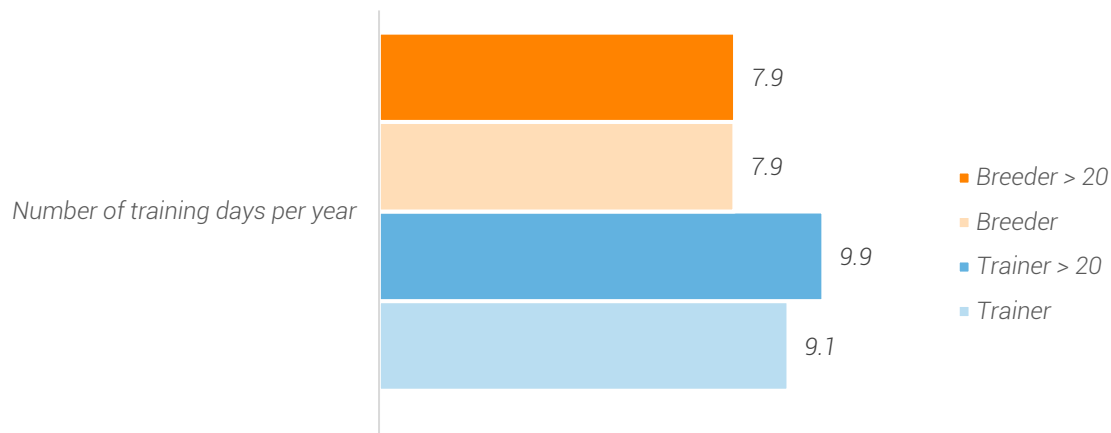
- Trainers and major trainers (trainer > 20) felt that "lack of talent/capability to ride" is the skill gap which is most prevalent. This was closely followed by "lack of experience" for the two groups.
- Breeders and major breeders (breeder > 20) both identified that "lack of experience" was the most common gap that exists. There pattern of order of skills gaps was similar for both the total breeder response and major breeder response.
- Similar to trainers, the pattern of order for the skill gaps remained fairly consistent across the major trainers and the total breeder responses.

Potential Investment in training

ANNUAL SPEND PER STAFF MEMBER ON TRAINING



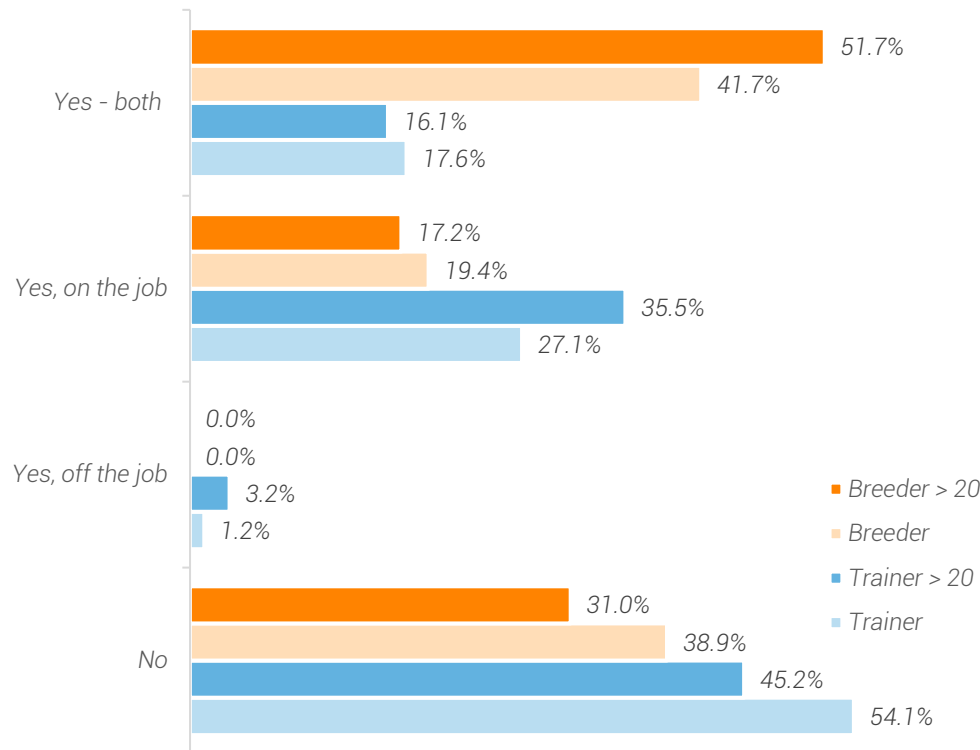
NUMBER OF TRAINING DAYS PER YEAR



- The average potential spend per staff member on training each year was asked – if the right training was available and accessible. For breeders the average spend was \$2,136.1, whilst trainers indicated an average of \$1,055.8 per staff member per year on training.
- Both the major breeders (breeder > 20) and major trainers (trainer > 20), were both higher than the aggregate response average for the groups with \$2,479.3 and \$2,119.4 averages per staff per year on training respectively.
- The average potential number of training days per year (if the right training was available and accessible) for major breeders and breeders was the same (7.9), whilst the major trainers had a higher 9.9 average number of days compared to the total trainer response average (9.1).

Training and Development

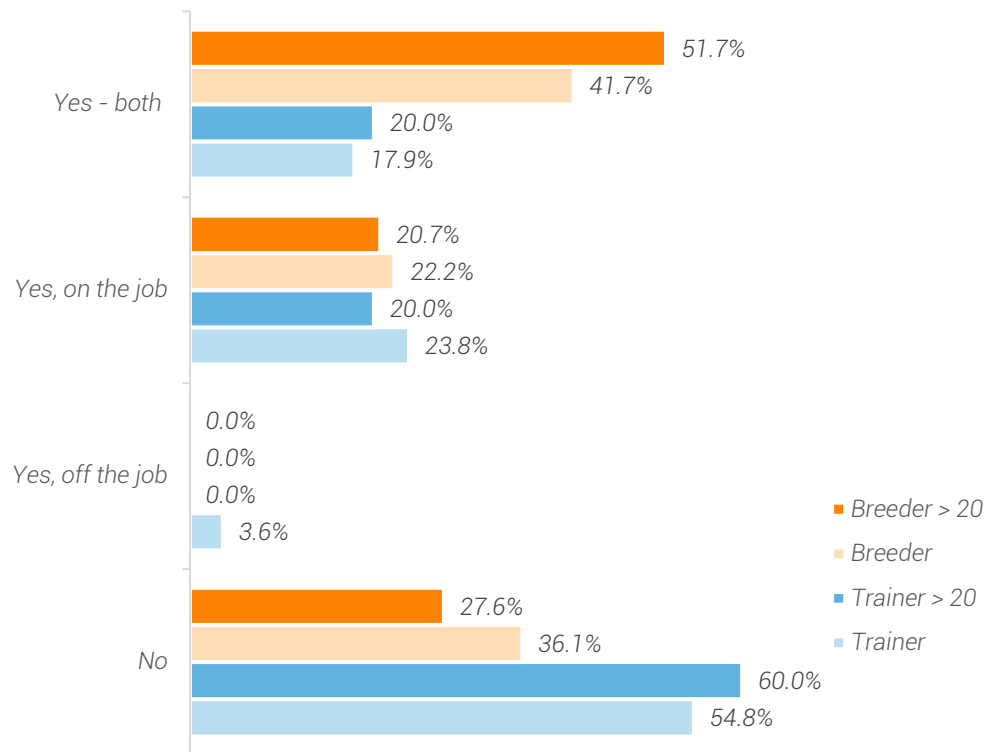
FUNDED TRAINING AND DEVELOPMENT FOR STAFF



- When considering over the past 12 months if any funded training and development for staff had been arranged, breeders were most likely to have arranged both on the job and off the job training and development (41.7%). This was also the case for major breeders (breeder > 20), however there was a slightly higher likelihood that they organised some form compared to the average indicated by the entire breeder samples.
- For trainers, the most common response by both major trainers (trainer > 20) and trainers was no training and development. However, the most common form offered was on the job for across both splits.

Training and Development

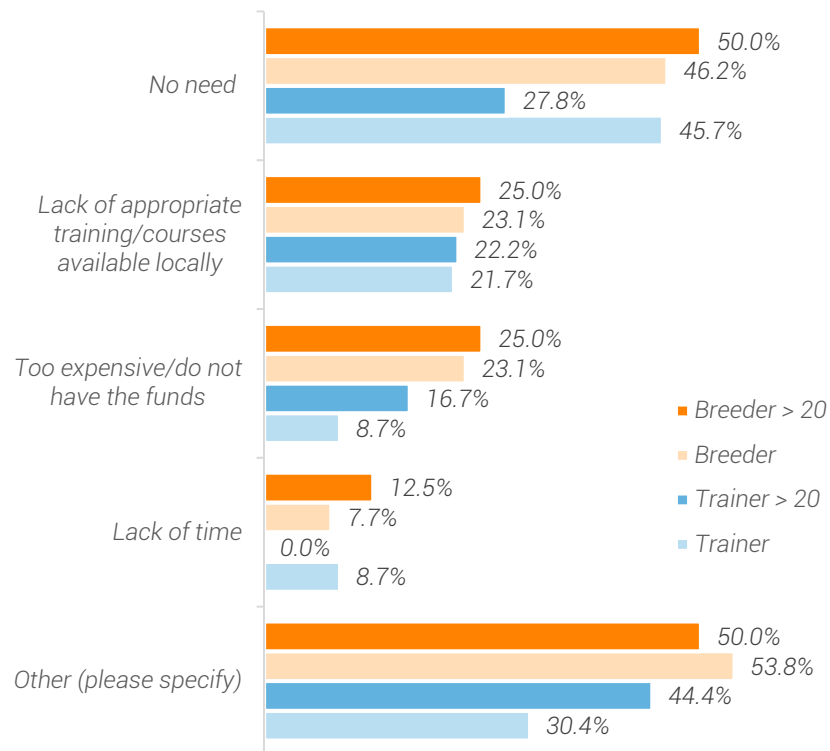
FUNDED TRAINING AND DEVELOPMENT FOR STAFF IN THE NEXT 12 MONTHS



- When considering the next 12 months if any funded training and development for staff will be arranged, breeders are most likely to arrange both on the job and off the job training and development (41.7%). This was also the case for major breeders (breeder > 20), however there is a slightly higher likelihood that they will organise some form compared to the average indicated by the entire breeder sample.
- For trainers, the most common response by both major trainers (trainer > 20) and trainers was no training and development. However, the most common form offered was on the job for across both splits (yes – both was equal highest for the major trainer sample).

Training and Development

WHY TRAINING OR DEVELOPMENT WON'T BE FUNDED OR ARRANGED IN THE NEXT 12 MONTHS



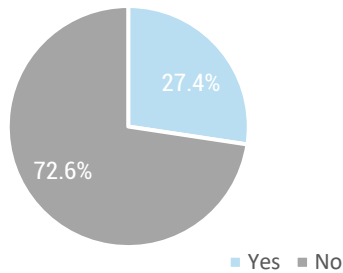
- The most highly recognised prompted reason for why training or development won't be funded or arranged in the next 12 months across all breeder respondents was "no need" (46.2%).
- Trainers indicated that "no need" (45.7%) was their most common prompted reason.
- When comparing the major breeder and trainer responses, the difference worth noting is that major trainers (trainer > 20) were less likely to identify "no need" as a reason (27.8%) compared to the total trainer response rate (45.7%).
- When looking at the "other" responses, excluding those who referenced that they lack staff or are in a bad financial situation, examples of responses were:
 - "Don't know enough about what is available"
 - "I have offered it to my staff but none are interested it"



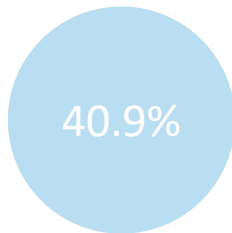
Staff Retention

Difficulties retaining staff - Trainers

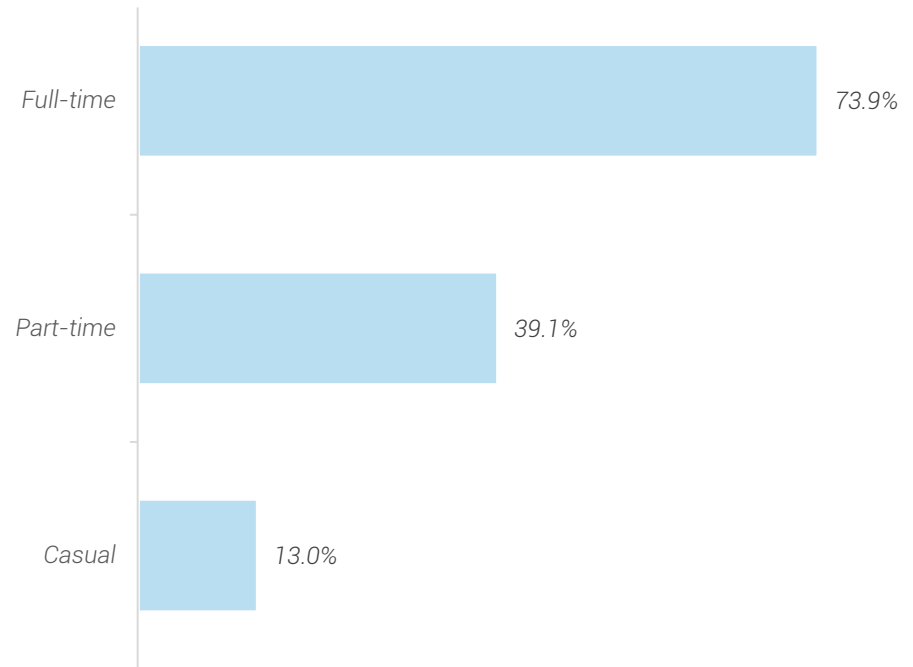
DIFFICULTIES RETAINING STAFF



PERCENTAGE OF STAFF DIFFICULT TO RETAIN



WHAT TYPE OF STAFF HAVE BEEN DIFFICULT TO RETAIN



- Overall there were 27.4% of trainers felt that they had difficulties retaining staff in the past 12 months.
- Of their entire staff, they felt that 40.9% of them were difficult to retain on average.
- The type of staff which was indicated by trainers as being the most difficult to retain was "full-time" (73.9%).

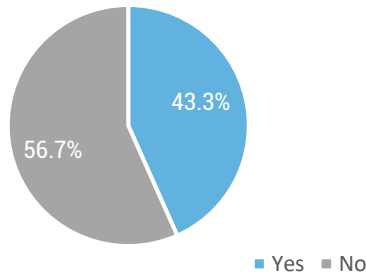
Q32. In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal e.g. such as retirement)? (n=84)

Q32a. What percentage of your staff have been difficult to retain? (n=23)

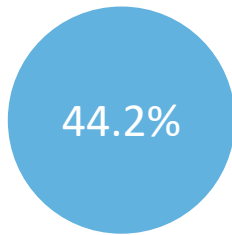
Q32b. Have the difficulties retaining staff mainly been for full-time staff, part-time or casual staff? (n=23)

Difficulties retaining staff – Trainers > 20

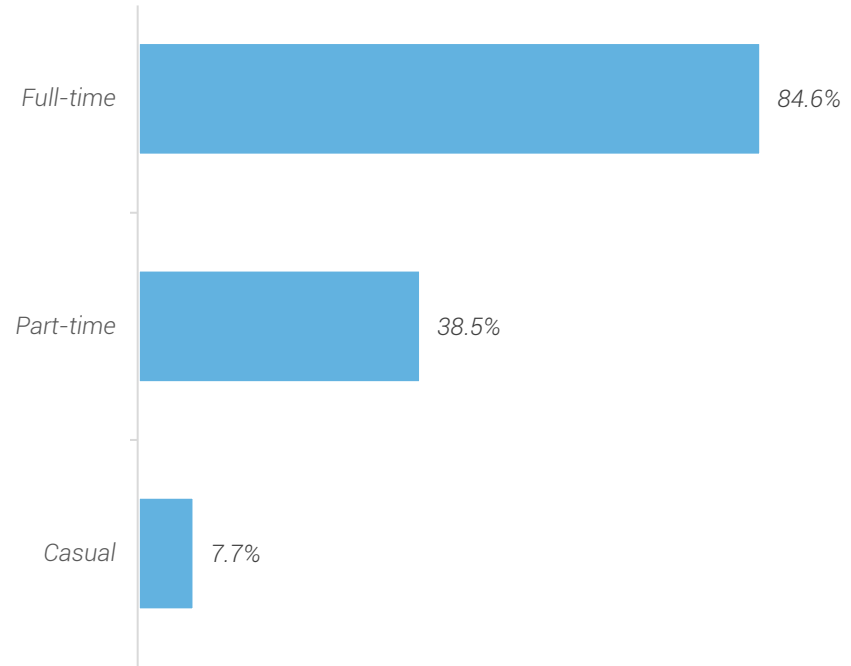
DIFFICULTIES RETAINING STAFF



PERCENTAGE OF STAFF DIFFICULT TO RETAIN



WHAT TYPE OF STAFF HAVE BEEN DIFFICULT TO RETAIN



- Overall there were 43.3% of major trainers (trainers > 20) who felt that they had difficulties retaining staff in the past 12 months.
- Of their entire staff, they felt that 44.2% of them were difficult to retain on average.
- The type of staff which was indicated by trainers as being the most difficult to retain was "Full-time" (84.6%).

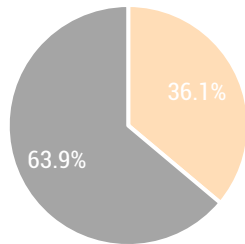
Q32. In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal e.g. such as retirement)? (n=30)

Q32a. What percentage of your staff have been difficult to retain? (n=13)

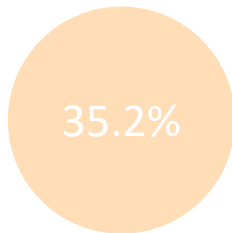
Q32b. Have the difficulties retaining staff mainly been for full-time staff, part-time or casual staff? (n=13)

Difficulties retaining staff - Breeders

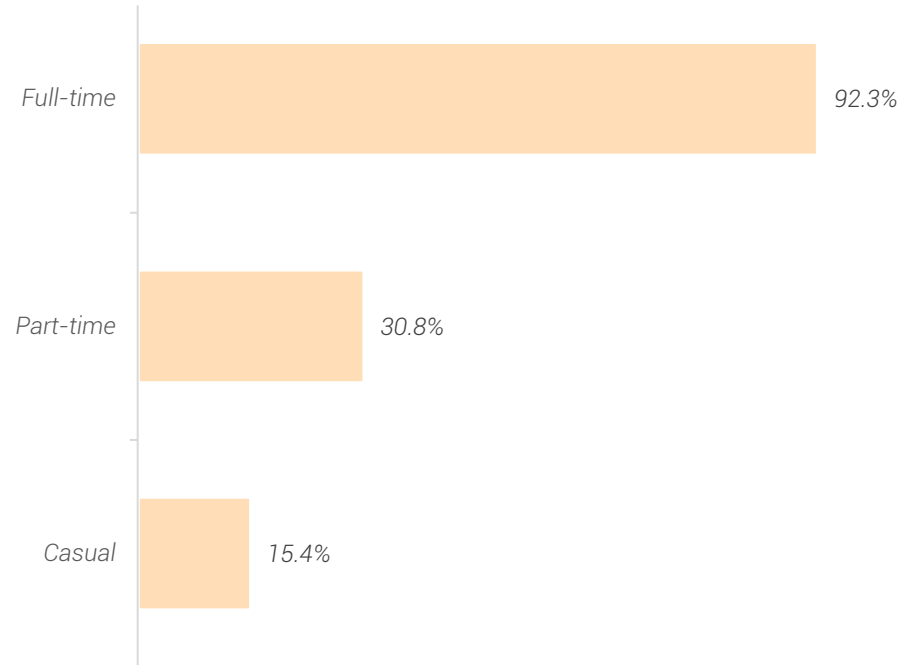
DIFFICULTIES RETAINING STAFF



PERCENTAGE OF STAFF DIFFICULT TO RETAIN



WHAT TYPE OF STAFF HAVE BEEN DIFFICULT TO RETAIN



- Overall there were 36.1% of breeders who felt that they had difficulties retaining staff in the past 12 months.
- Of their entire staff, they felt that 35.2% of them were difficult to retain on average.
- The type of staff which was indicated by breeders as being the most difficult to retain was "Full-time" (92.3%).

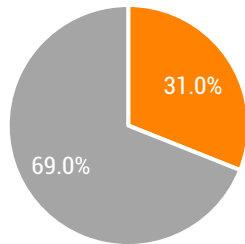
Q32. In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal e.g. such as retirement)? (n=36)

Q32a. What percentage of your staff have been difficult to retain? (n=13)

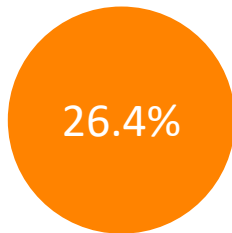
Q32b. Have the difficulties retaining staff mainly been for full-time staff, part-time or casual staff? (n=13)

Difficulties retaining staff – Breeders > 20

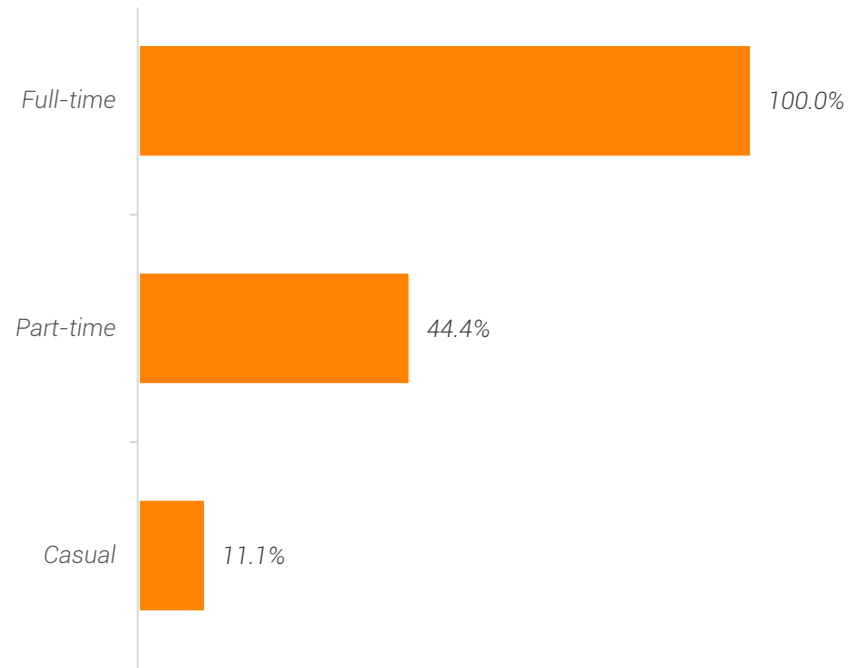
DIFFICULTIES RETAINING STAFF



PERCENTAGE OF STAFF DIFFICULT TO RETAIN



WHAT TYPE OF STAFF HAVE BEEN DIFFICULT TO RETAIN



- Overall there were 31.0% of breeders who felt that they had difficulties retaining staff in the past 12 months.
- Of their entire staff, they felt that 26.4% of them were difficult to retain on average.
- The type of staff which was indicated by breeders as being the most difficult to retain was "Full-time" (100.0%).

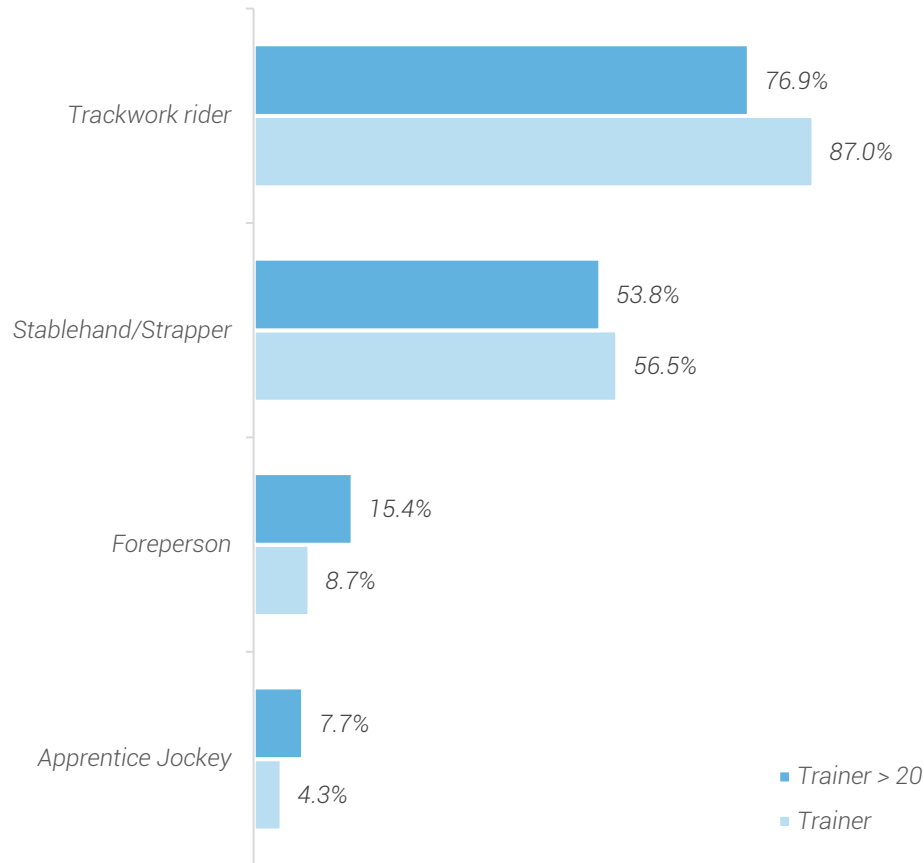
Q32. In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal e.g. such as retirement)? (n=29)

Q32a. What percentage of your staff have been difficult to retain? (n=9)

Q32b. Have the difficulties retaining staff mainly been for full-time staff, part-time or casual staff? (n=9)

Difficulties retaining staff - Trainers

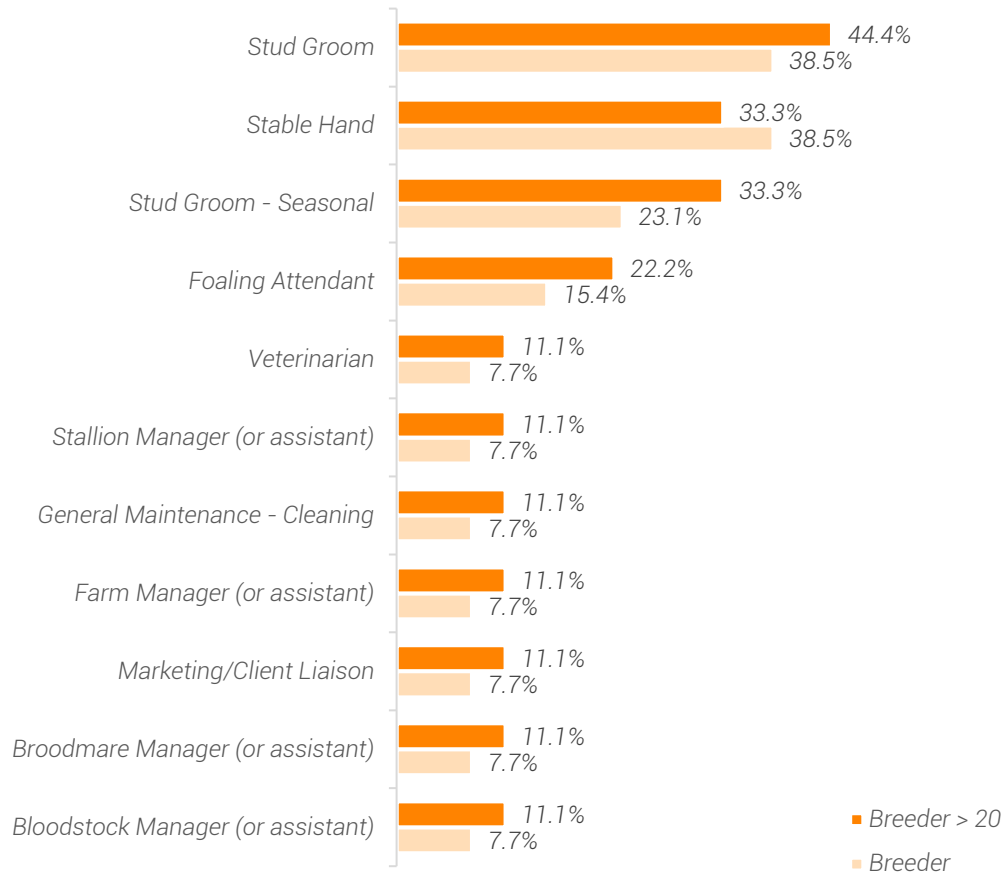
SPECIFIC OCCUPATIONS WITH DIFFICULTIES RETAINING STAFF



- Trainers indicated that the specific occupation which is most commonly difficult to retain staff in is 'Trackwork Rider' (87.0%).
- This was followed by 'Stablehand/Strapper' (56.5%) and 'Foreperson' (15.4%).
- The major trainers (trainer > 20) followed a similar pattern of frequency to the total trainer responses.

Difficulties retaining staff - Breeders

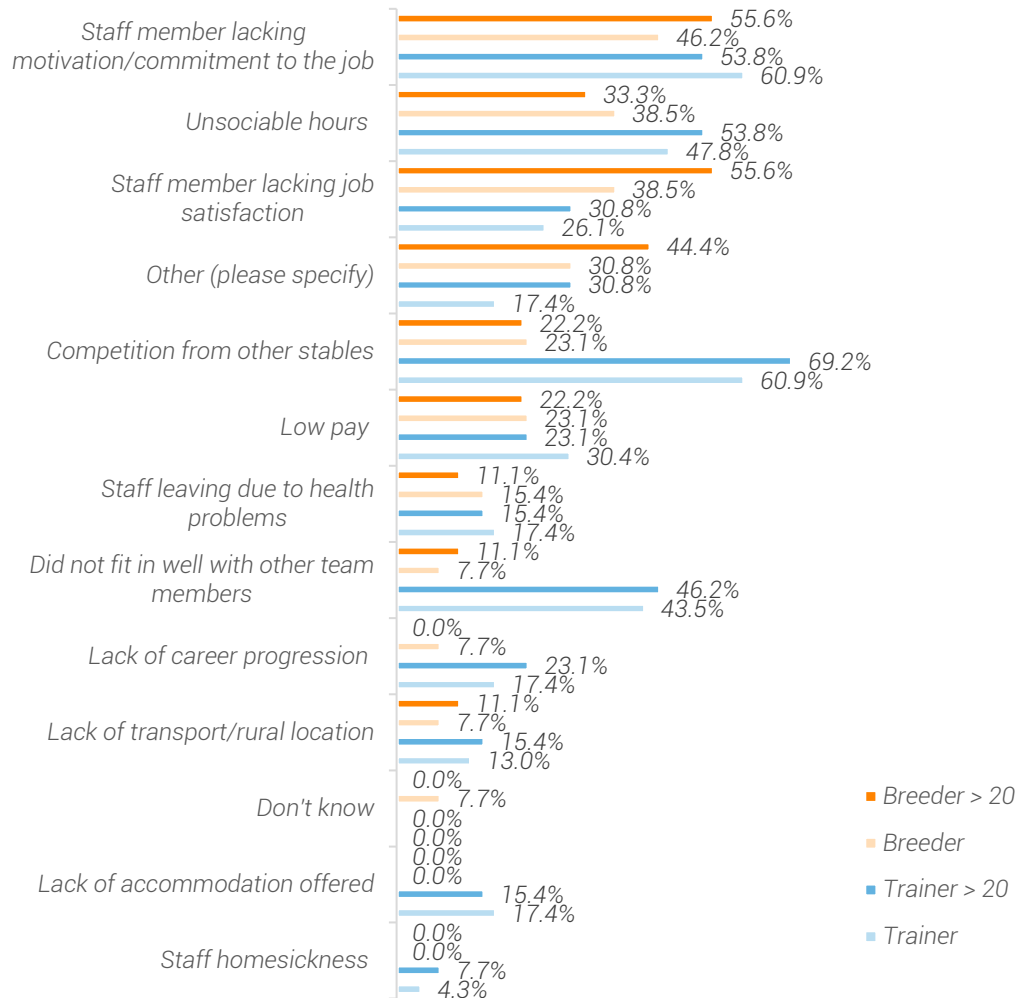
SPECIFIC OCCUPATIONS WITH DIFFICULTIES RETAINING STAFF



- Breeders indicated that the specific occupation which is most commonly difficult to retain staff in are 'Stud Groom' and 'Stable Hand' (38.5%).
- These were followed by 'Stud Groom – Seasonal' (23.1%) and 'Foaling Attendant' (15.4%).
- When comparing the major breeders (breeder > 20) responses to the total breeder response, the pattern of order of occupations remained consistent, however there was a higher proportions indicating 'Stud Groom' and 'Stud Groom – Seasonal' occupations comparatively.

Difficulties retaining staff

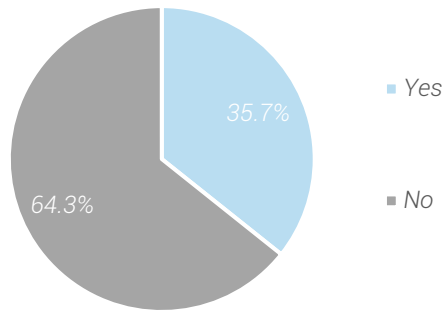
MAIN REASONS FOR DIFFICULTIES RETAINING STAFF



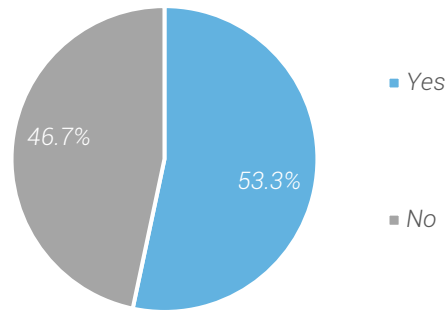
- The two main reasons trainers found it difficult to retain staff indicated by respondents were "staff member lacking motivation/commitment to the job" and "competition from other stables" (60.9%). For major trainers, they most frequently indicated that "competition from other stables" was most common reason (69.2%).
- Among breeders, "staff member lacking motivation/commitment to the job" was the most identified reason (46.2%). Major breeders indicated a much higher frequency for "staff member lacking job satisfaction" in comparison to the total breeder sample.

Difficulties retaining staff in next 12 months

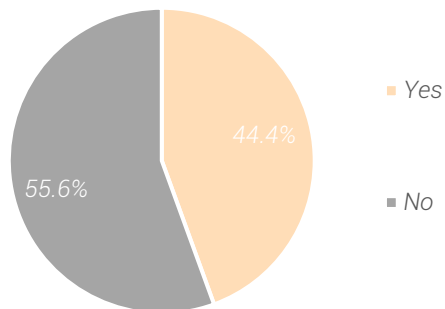
EXPECT TO HAVE STAFF RETENTION PROBLEMS IN NEXT 12 MONTHS (TRAINER)



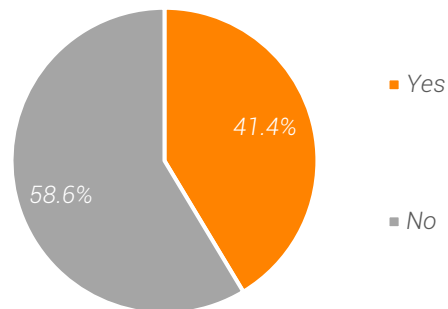
EXPECT TO HAVE STAFF RETENTION PROBLEMS IN NEXT 12 MONTHS (TRAINER > 20)



EXPECT TO HAVE STAFF RETENTION PROBLEMS IN NEXT 12 MONTHS (BREEDER)



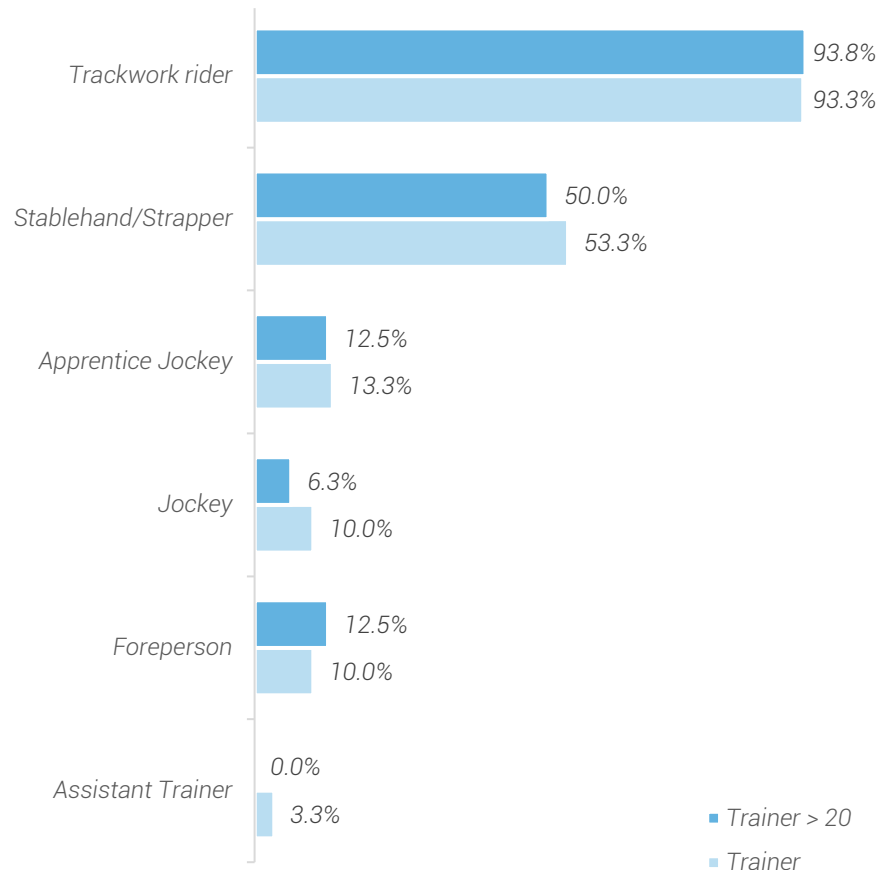
EXPECT TO HAVE STAFF RETENTION PROBLEMS IN NEXT 12 MONTHS (BREEDER > 20)



- For trainers, 35.7% of individuals felt that they will have staff retention problems in the next 12 months. The major trainers (trainer > 20) was slightly higher in response rate with 53.3% indicating that they expect problems.
- Staff retention problems are expected for 44.4% of breeder respondents, and was slightly lower in frequency when considering only the major breeders (breeder > 20).

Difficulties retaining staff - Trainer

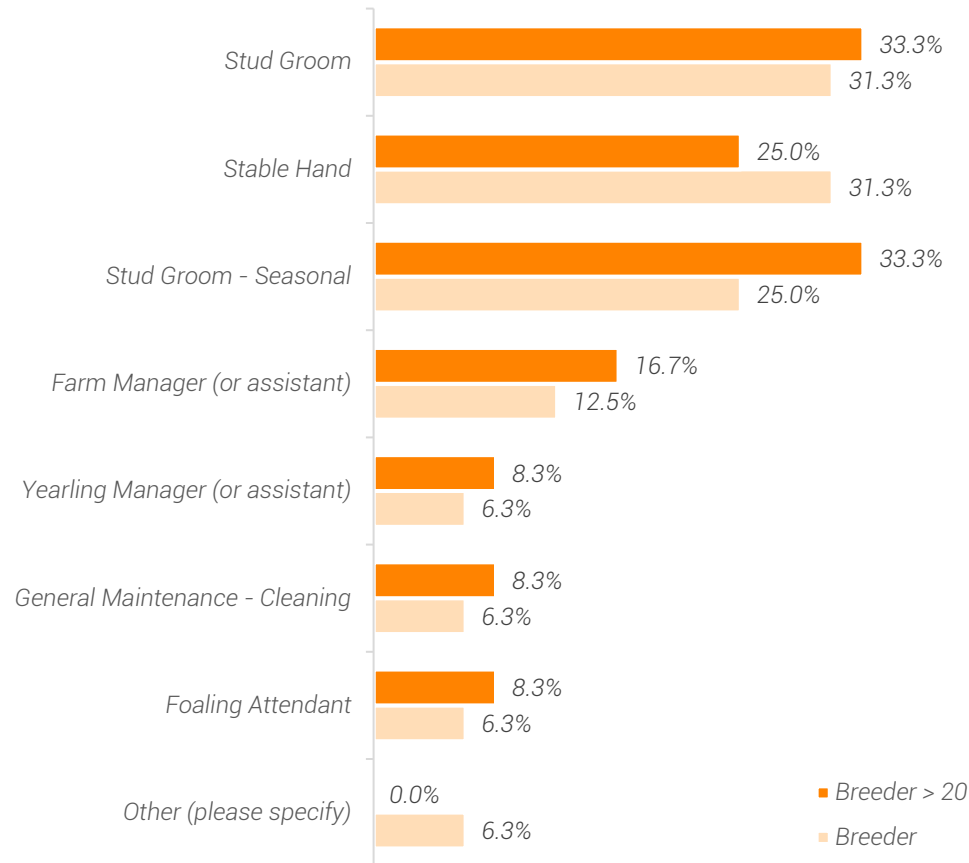
SPECIFIC OCCUPATIONS ANICIPATED TO HAVE DIFFICULTIES RETAINING STAFF



- Trainers indicated that they feel that they will have difficulties most commonly with retaining staff in the 'Trackwork rider' role (93.8%).
- The next most identified occupation was "Stablehand/Strapper" (53.3%) followed by "Apprentice Jockey" (13.3%).
- Major trainers (trainer > 20) followed a similar pattern to the total trainer response except that they indicated jockey concerns less proportionally compared to the total response as well as more concerns around foreperson roles.

Difficulties retaining staff - Breeder

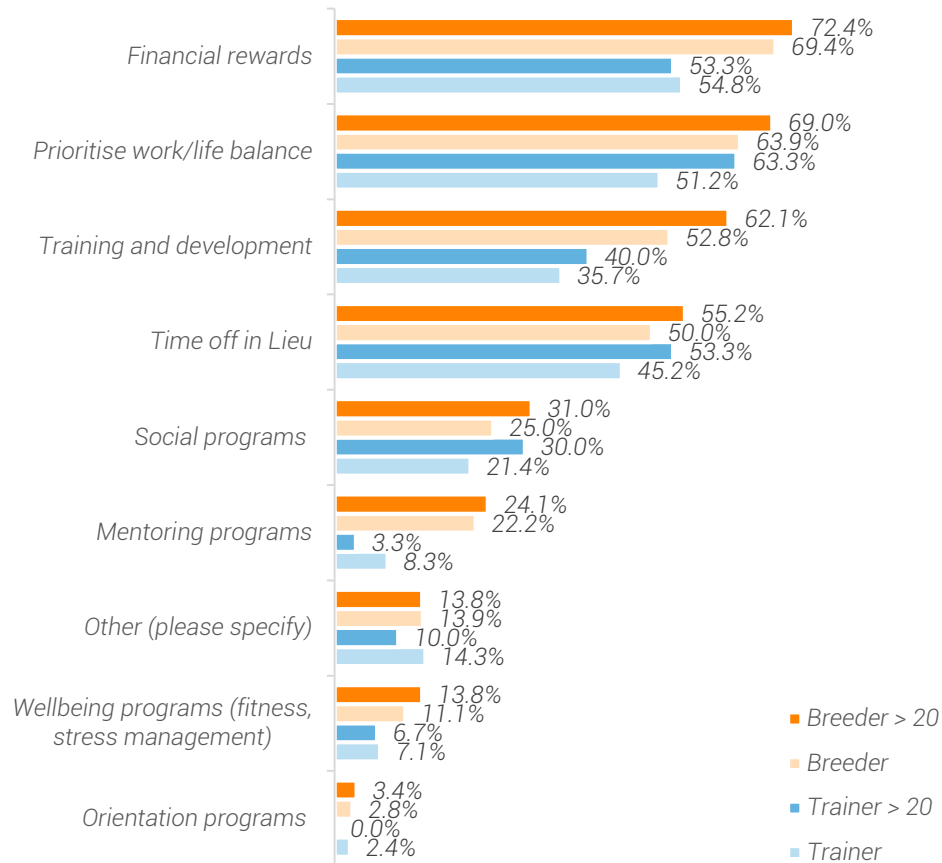
SPECIFIC OCCUPATIONS ANTICIPATED TO HAVE DIFFICULTIES
RETAINING STAFF



- Breeders indicated that they feel that they will have difficulties most commonly with retaining staff in the 'Stud Groom' and 'Stable Hand' roles (31.3%).
- The next most identified occupation was 'Stud Groom – Seasonal' (25.0%) followed by 'Farm Manager' (12.5%).
- Major breeders (breeders > 20) followed a similar pattern to the overall breeder sample, however they indicated 'Stud Groom – Seasonal' as being a greater concern than 'Stable Hand' positions.

Improving staff retention

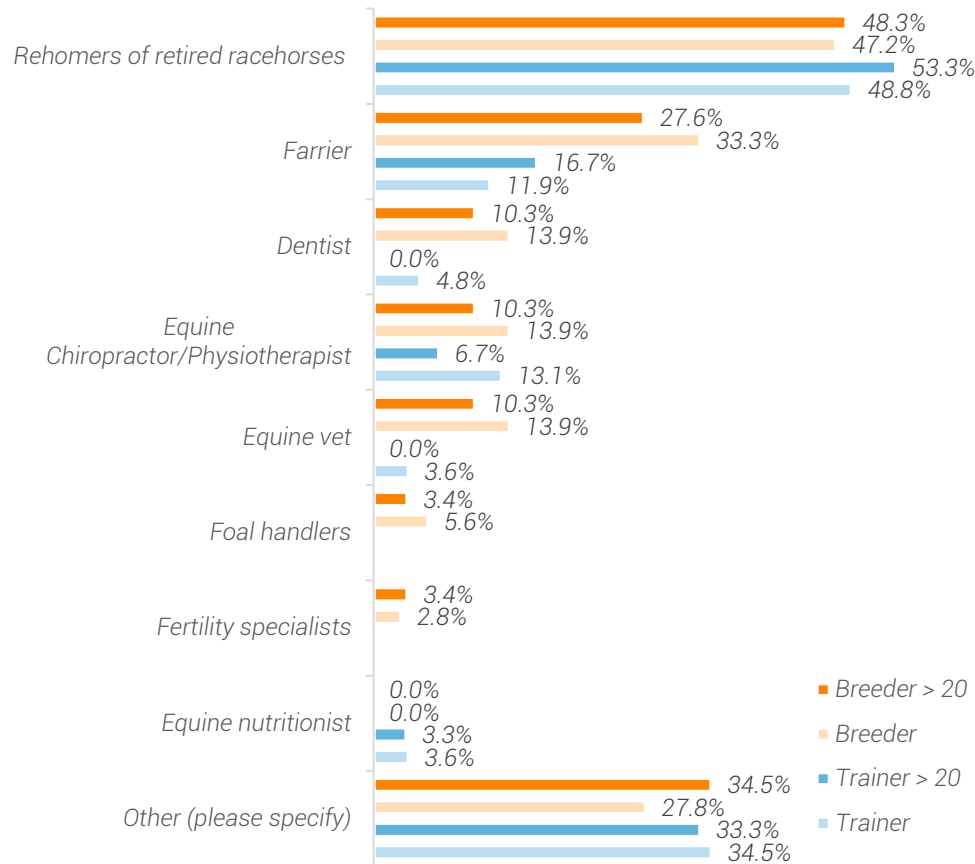
INITIATIVES OFFERED TO IMPROVE STAFF RETENTION



- Across both breeder and trainer respondents, the initiative which was identified most commonly to improve staff retention by offering it to employees was 'financial rewards'. This was followed closely by "prioritise work/life balance" for both groups.
- When considering the larger breeders and trainers, there was a difference in pattern of response for major trainers who indicated that "prioritise work/life balance" was the most common initiative.

Difficulty with retention of Contract Services

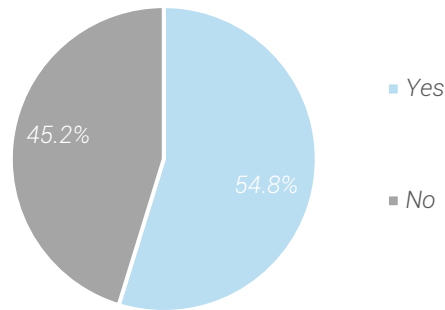
CONTRACT SERVICES DIFFICULT TO OBTAIN



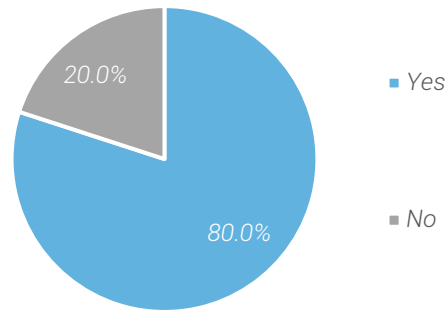
- The most commonly identified contract service to obtain indicated across both breeders and trainers was 'Rehomers of retired racehorses'.
- Breeders indicated 'Farrier' (33.3%) as the service they believe to be next most difficult to obtain, whilst trainers felt that 'Equine Chiropractor/Physiotherapist' (13.1%) is the next prompted service.
- There was no major difference between the response rates from the major breeders (breeder > 20) compared to the total breeder response rates.
- Meanwhile, major trainers (trainer > 20) indicated that 'Farrier' services are slightly more difficult to obtain whilst 'Equine Chiropractor/Physiotherapist' is not as difficult to obtain when compared to the total trainer response field.

Employed foreign workers in past 3 years

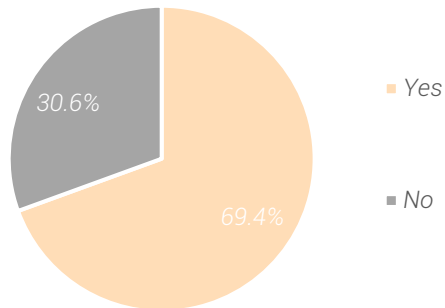
EMPLOYED FOREIGN WORKERS ON A WORK OR STUDY VISA IN PAST 3 YEARS (TRAINERS)



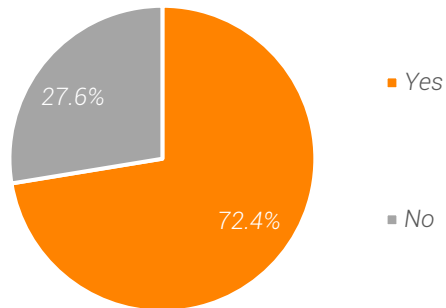
EMPLOYED FOREIGN WORKERS ON A WORK OR STUDY VISA IN PAST 3 YEARS (TRAINERS > 20)



EMPLOYED FOREIGN WORKERS ON A WORK OR STUDY VISA IN PAST 3 YEARS (BREEDERS)



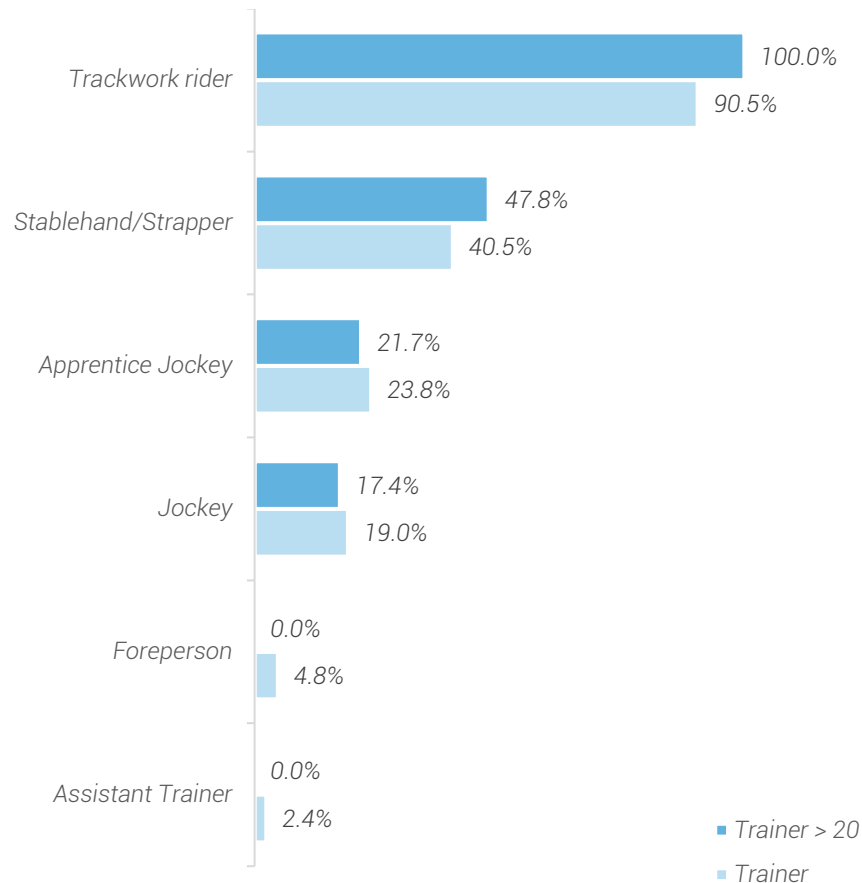
EMPLOYED FOREIGN WORKERS ON A WORK OR STUDY VISA IN PAST 3 YEARS (BREEDERS > 20)



- For trainers, 54.8% indicated that they employed foreign workers on a work or study visa in the past 3 years. The major trainers (trainer > 20) were higher in response rate with 80.0% indicating that they had.
- Foreign worker employment on a visa over the past 3 years was indicated by 69.4% of breeder respondents, and was slightly higher in frequency when considering only the major breeders (breeder > 20) (72.4%).

Employing foreign workers - Trainers

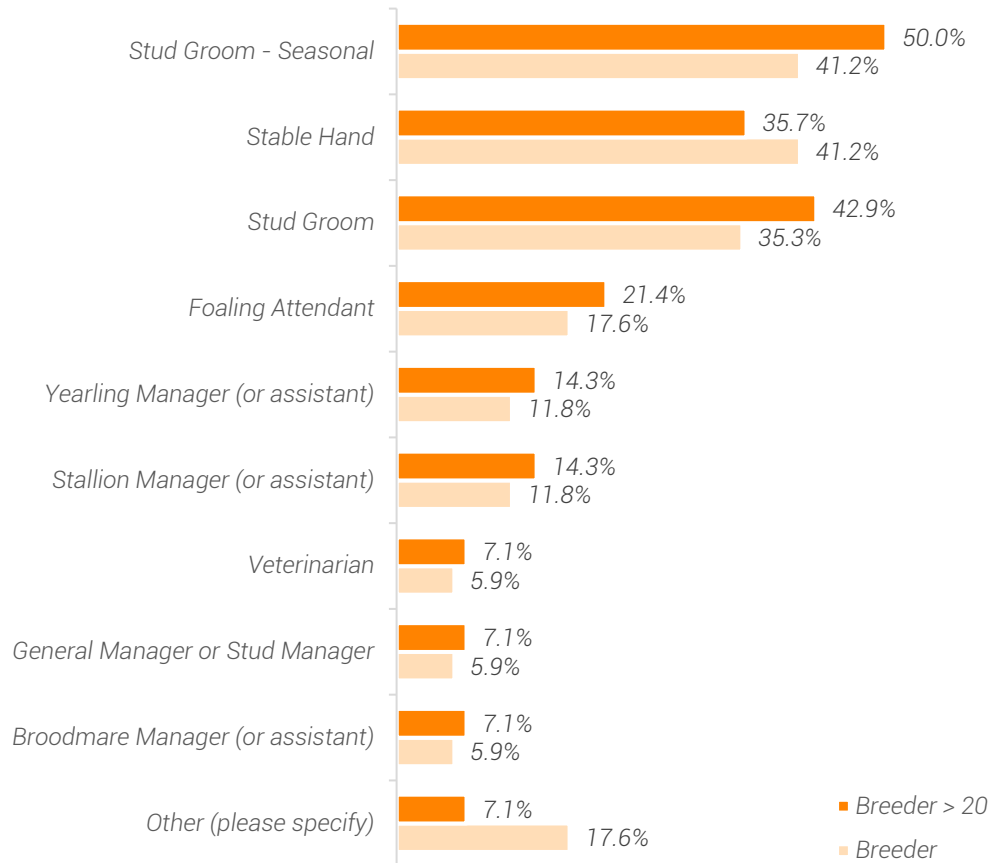
ROLES IN WHICH FOREIGN WORKERS ARE EMPLOYED



- For trainers, the role which was most identified as having a foreign worker employed in it was 'Trackwork rider' (90.5%).
- Other popular roles for foreign workers were 'Stablehand/Strapper' (40.5%) and 'Apprentice Jockey' (23.8%).
- Major trainers (trainer > 20) provided similar response rates to the overall trainer sample.

Employing foreign workers - Breeders

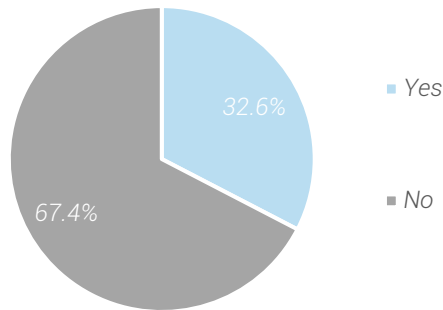
ROLES IN WHICH FOREIGN WORKERS ARE EMPLOYED



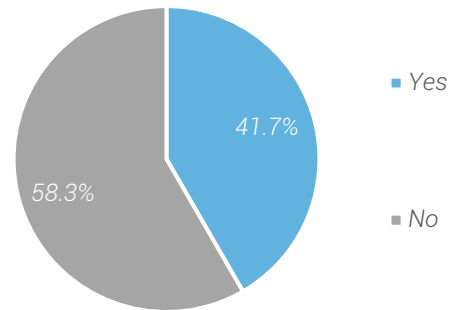
- For breeders, the roles which were equally most identified as having a foreign worker employed in it was 'Stud Groom - Seasonal' and 'Stable Hand' (41.2%).
- Other popular roles for foreign workers were 'Stud Groom' (35.3%) and 'Foaling Attendant' (17.6%).
- Major breeders (breeder > 20) indicated comparatively that they more commonly have foreign workers in 'Stud Groom' roles rather than 'Stable Hand' compared to the total breeder samples response rate.

Difficulties with retaining foreign workers

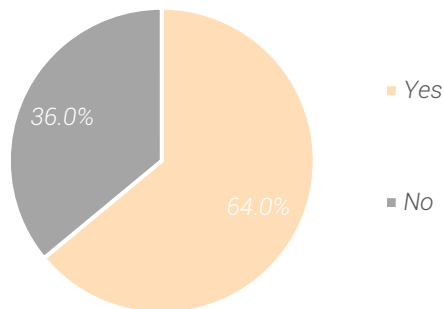
HAD DIFFICULTIES RETAINING FOREIGN WORKERS (TRAINERS)



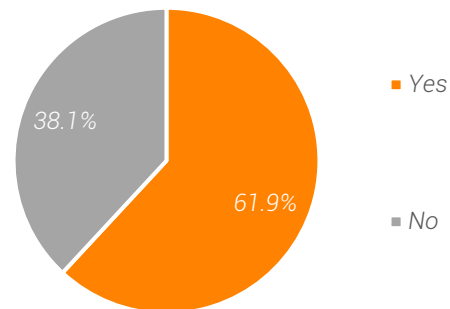
HAD DIFFICULTIES RETAINING FOREIGN WORKERS (TRAINERS > 20)



HAD DIFFICULTIES RETAINING FOREIGN WORKERS (BREEDERS)



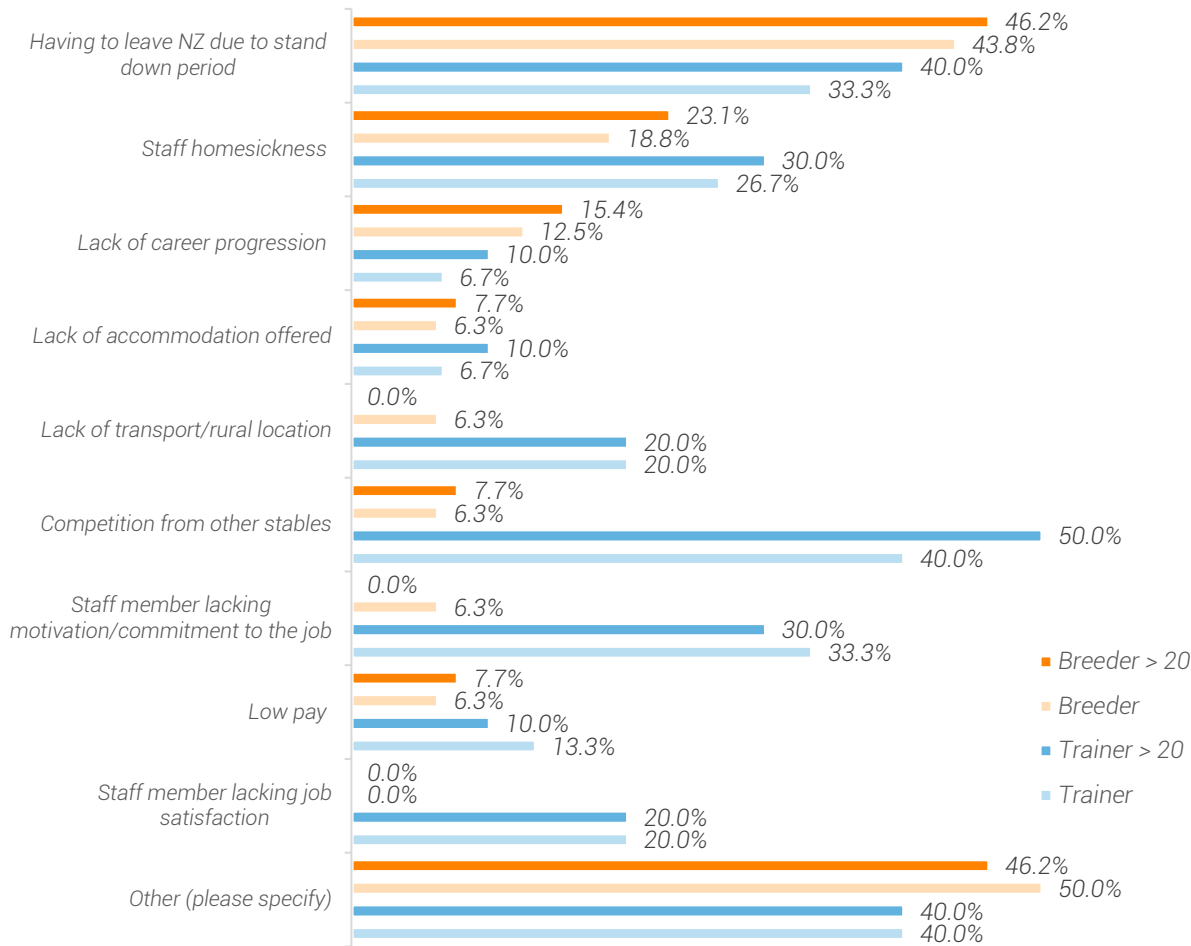
HAD DIFFICULTIES RETAINING FOREIGN WORKERS (BREEDERS > 20)



- For trainers, 32.6% indicated that they have found it difficult to retain foreign workers. The major trainers (trainer > 20) were higher in response rate with 41.7% indicating that they had.
- Foreign work retention difficulty was indicated by 64.0% of breeder respondents, and was slightly lower in frequency when considering only the major breeders (breeder > 20) (61.9%).

Difficulties with retaining foreign workers

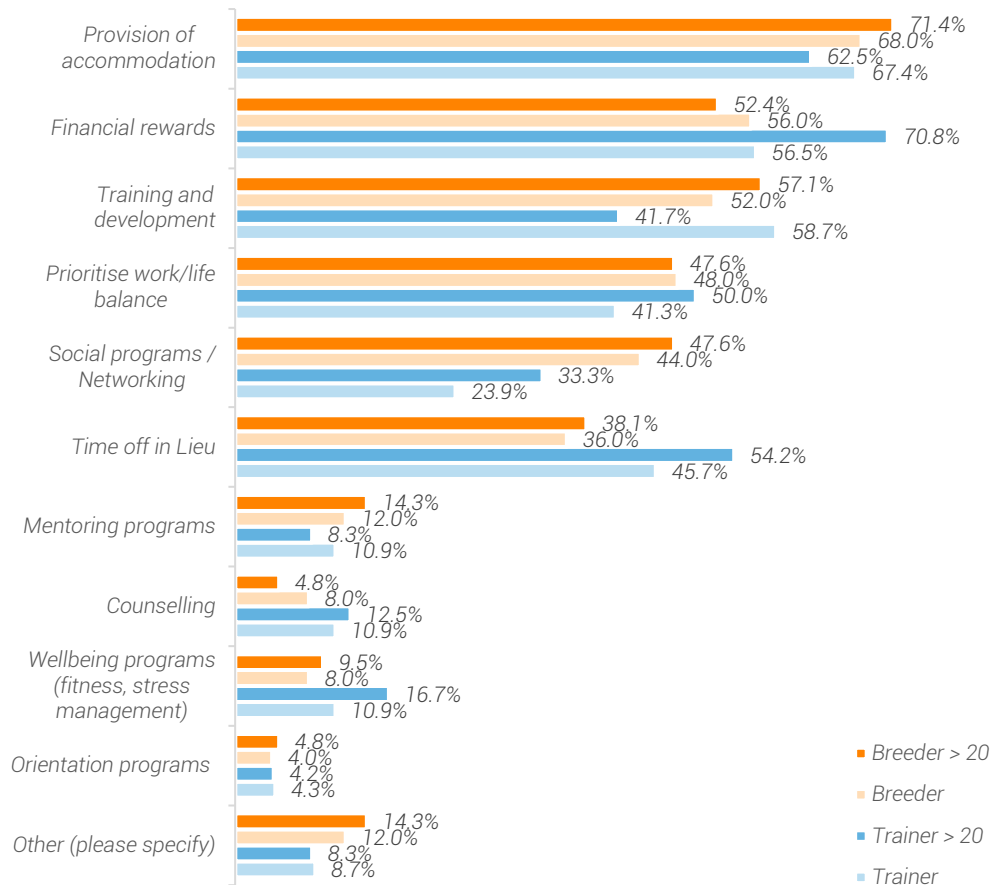
MAIN REASONS WHY RETAINING FOREIGN WORKERS IS DIFFICULT



- Breeders identified "Having to leave NZ due to stand down period" as the main prompted reason for as to why they find it difficult to retain foreign workers (43.8%).
- Meanwhile, trainers identified "having to leave NZ due to stand down period" as well as the "competition from other stables" as the most popular reason (40.0%).
- In terms of pattern the larger breeders and trainers followed similar to the rankings indicated by the overall samples of breeders and trainers.

Supporting foreign workers

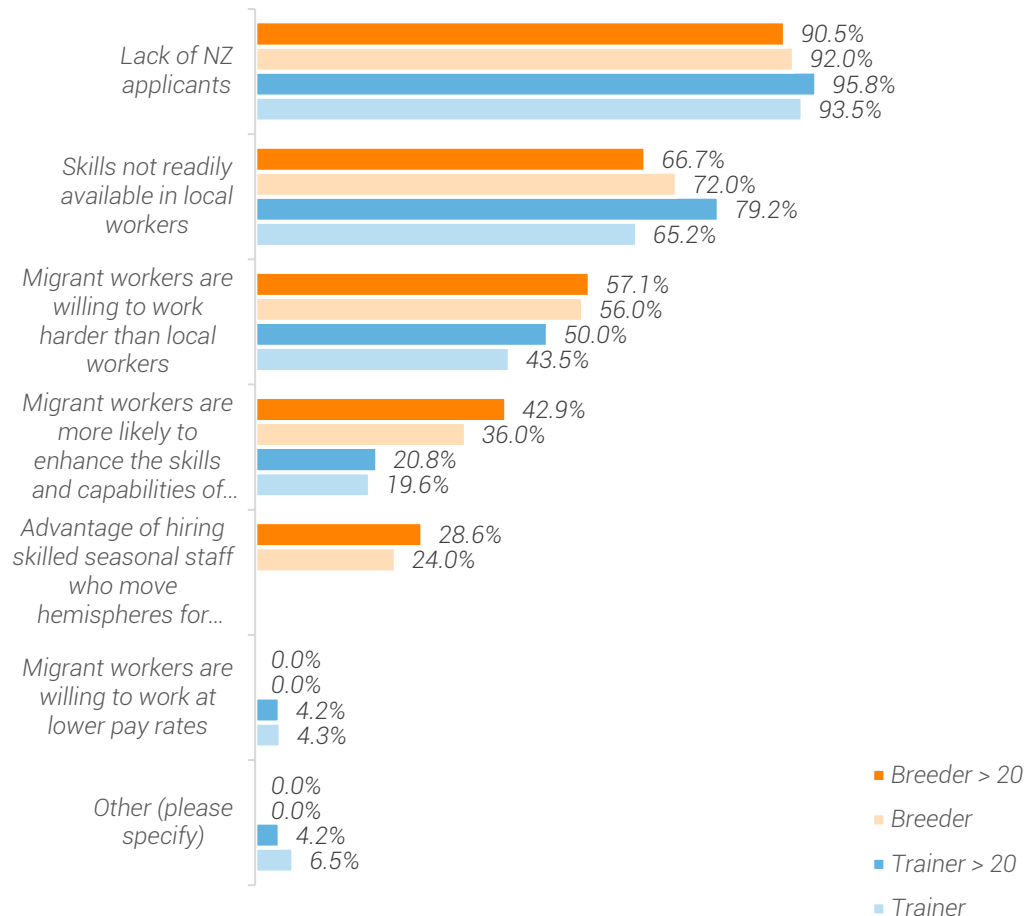
WAYS IN WHICH FOREIGN WORKERS ARE SUPPORTED



- Across all breeder respondents, 'Provision of accommodation' (68.0%) was the most common way in which foreign workers are supported. This was also the most common way for trainers (67.4%).
- When looking at the rates of responses for larger breeders (breeder > 20) compared to the total breeder response, they ranked 'training and development' above 'financial awards' as a method to support foreign workers.
- When comparing larger trainers (trainer > 20) compared to the total trainer sample, there was higher indication of 'financial awards' and 'time off in Lieu' and a lesser result for 'prioritise work/life balance'.

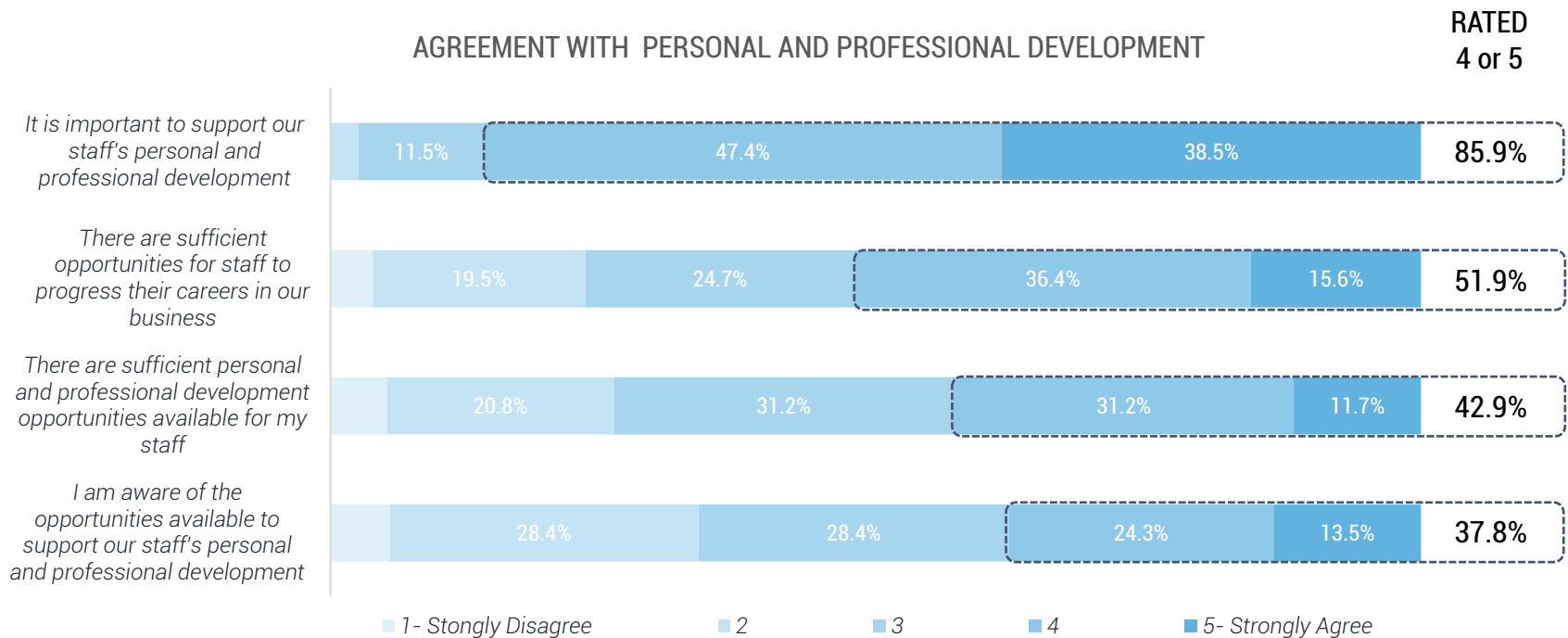
Supporting foreign workers

REASONS WHY FOREIGN WORKERS HAVE PREVIOUSLY BEEN RECRUITED



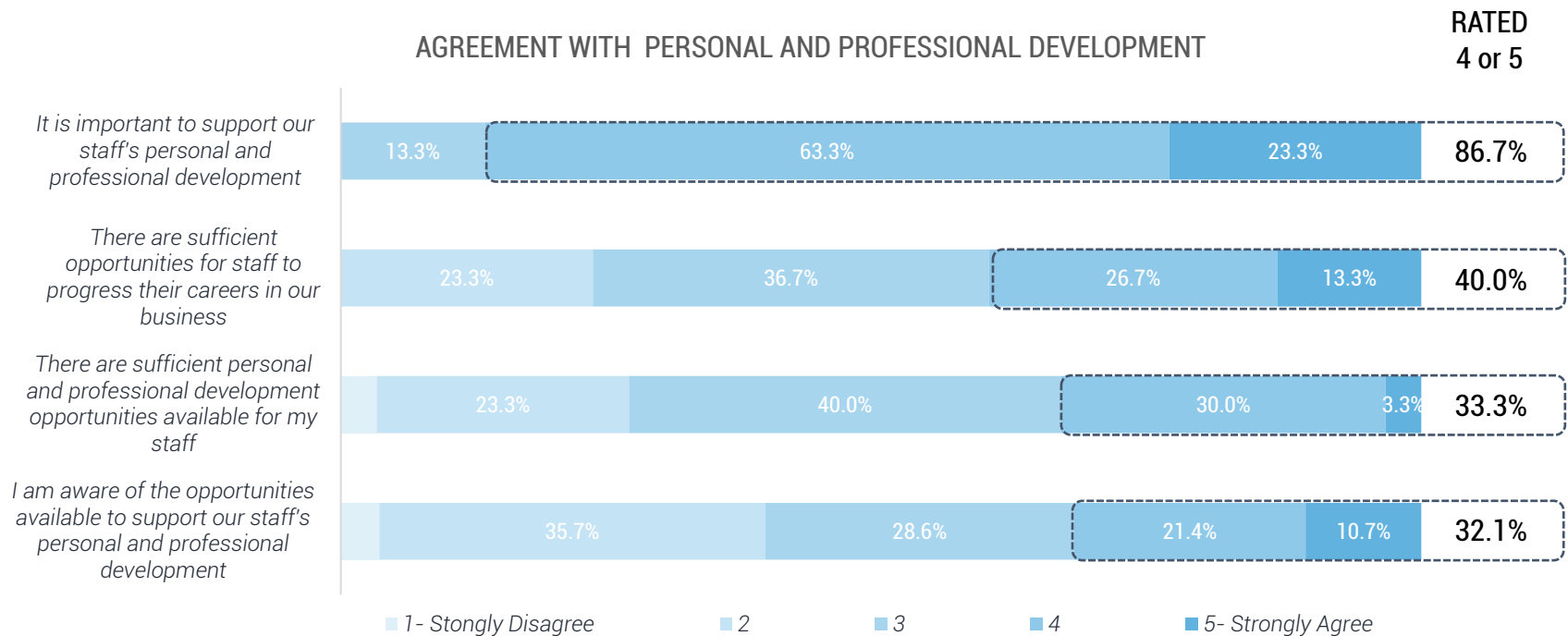
- Overall, the most common reason for having previously recruited foreign workers indicated across breeder and trainer respondents was "Lack of NZ applicants".
- The pattern was the same in terms of ranking for both the trainers and breeders as well as major trainers and breeders.

Development opportunities for staff - Trainers



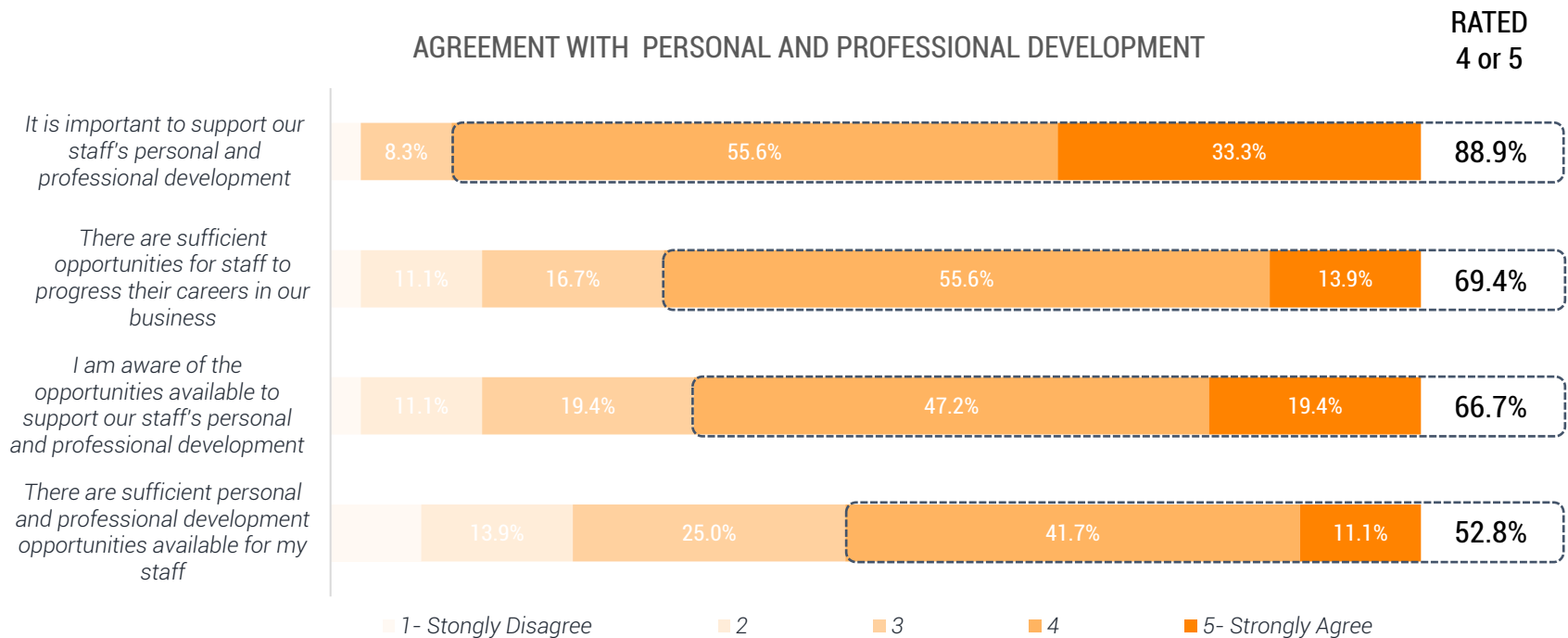
- Looking at the trainer responses only, the statement which had the highest level of agreement regarding personal and professional development opportunities for staff was "It is important to support our staff's personal and professional development" (85.9% rated 4 or 5).
- This was followed by "There are sufficient opportunities for staff to progress their careers in our business" (51.9% rated 4 or 5).
- The responses which had the lowest level of agreement was "I am aware of the opportunities available to support our staff's personal and professional development" (37.8% rated 4 or 5).

Development opportunities for staff – Trainers > 20



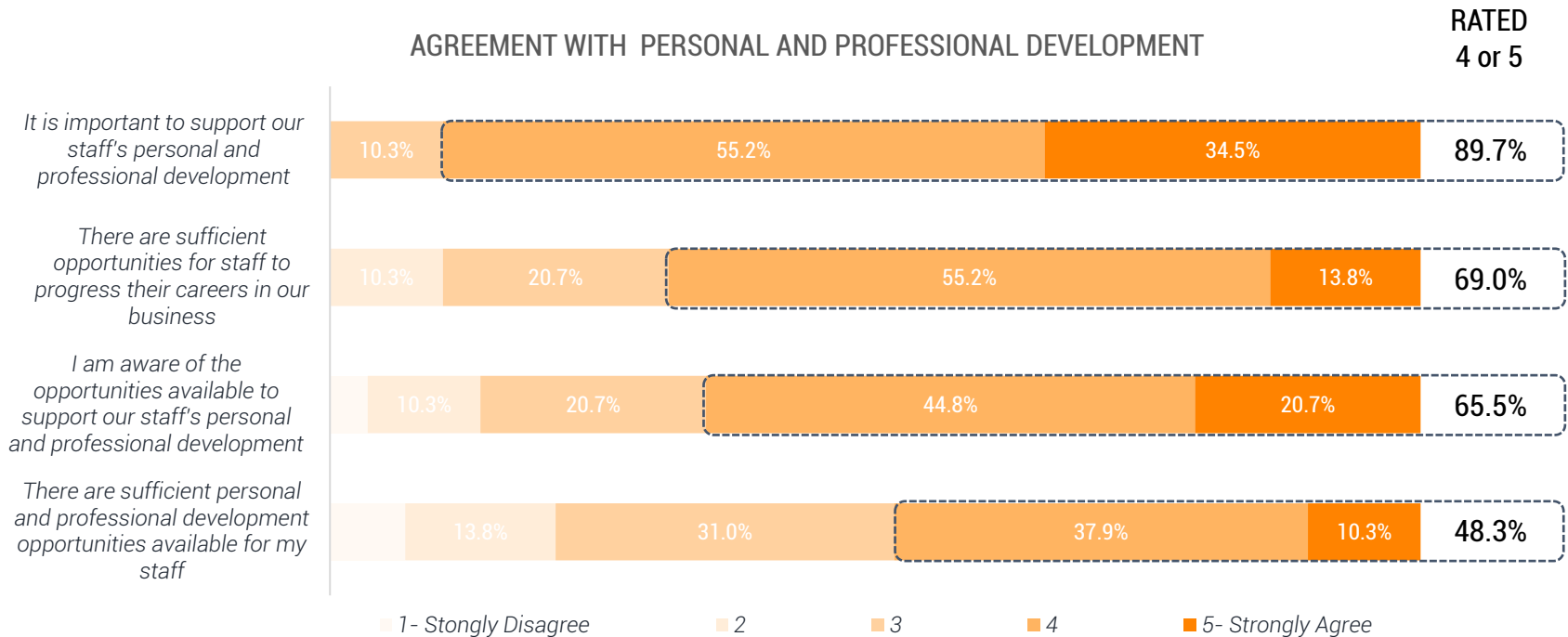
- Looking at the larger trainer (trainer > 20) responses only, the statement which had the highest level of agreement regarding personal and professional development opportunities for staff was "It is important to support our staff's personal and professional development" (86.9% rated 4 or 5).
- This was followed by "There are sufficient opportunities for staff to progress their careers in our business" (40.0% rated 4 or 5).
- The responses which had the lowest level of agreement was "I am aware of the opportunities available to support our staff's personal and professional development" (32.1% rated 4 or 5).

Development opportunities for staff - Breeders



- Looking at the breeder responses only, the statement which had the highest level of agreement regarding personal and professional development opportunities for staff was "It is important to support our staff's personal and professional development" (88.9% rated 4 or 5).
- This was followed by "There are sufficient opportunities for staff to progress their careers in our business" (69.4% rated 4 or 5).
- The responses which had the lowest level of agreement was "There are sufficient personal and professional development opportunities available for my staff" (52.8% rated 4 or 5).

Development opportunities for staff – Breeders > 20



- Looking at the major breeders (breeder > 20) responses only, the statement which had the highest level of agreement regarding personal and professional development opportunities for staff was "It is important to support our staff's personal and professional development" (89.7% rated 4 or 5).
- This was followed by "There are sufficient opportunities for staff to progress their careers in our business" (69.0% rated 4 or 5).
- The responses which had the lowest level of agreement was "There are sufficient personal and professional development opportunities available for my staff" (48.3% rated 4 or 5).