

Racing, Farriery and Equine

Industry Coverage: Sports and Physical Recreation Activities; Horse and Dog Racing Activities; Amusement and Other Recreational Activities; and Gambling Activities

Industry overview

The racing, farriery and equine sector is a major contributor to the WA economy. In 2013/14 horse and greyhound racing alone contributed around \$1.5 billion to the Australian GDP, with further contributions attributed through breeding, horse sales, prize money and wagering. In 2015/16 auction sales for thoroughbred horses generated \$530 million, returns to owners from prize money and other payouts rose to more than \$600 million and wagering on races amounted to \$28.8 billion.¹

Traditionally, the sector has also been a contributor to social vibrancy, ranging from elite participation and breeding through to riding schools and hobbyists. Yet despite its breadth of coverage, in Western Australia the sector finds itself in decline, reflected by decreased levels of breeding, racing, participation and on-course attendance resulting in reduced opportunities for revenue and industry growth. This has resulted in industry assigning considerable focus on major events such as racing carnivals where partnerships and marquees continue to attract participants.

The future presents both challenges and opportunities. Collaborative effort is needed to shift negative public perception of careers in racing, implement succession planning, attract young talent into what is an ageing workforce, retain them in the profession and provide long term career progression across the industry. A key challenge in attracting talent and meeting workforce needs is lack of local racing, farriery and equine delivery. This is being exacerbated by the current restriction of migration used to meet labour shortages.

Current and future labour market conditions

Industry is experiencing a decline in racing attendance and on-course and off-course race wagering which has a negative effect on racing authorities, race clubs, animal owners and trainers. Accordingly, IBISWorld predicts a decrease in employment resulting from what it anticipates will be a long-term decline in activity.

In 2016, this sector included 3,459 horse farms and 1,908 racing businesses, directly employing around 12,800 people. Industry figures report approximately 50,000 people in fulltime employment, with an excess of 127,500 people involved in the sector as race owners, trainers, jockey, trackriders and registered greyhound racing industry participants.²

Industry is also represented by a large number of hobbyists and people volunteering at race clubs assuming roles in administration, hospitality, racing operations and preparations for race day.

Industry development issues

Industry image, working conditions and the high risk nature of many industry occupations can make it difficult to attract young people into training and employment. This is of particular relevance to apprentice jockeys and trackriders. The challenge lies in not just attracting them into the industry but providing them with opportunities, incentives and sustainable remuneration for longevity in industry well past racing.

Safety in horse riding and handling, together with animal integrity and welfare, are key priorities being addressed nationally

through training package reviews covering racing and equine sectors by Skill Service Organisations: Skills Impact (RGR Racing and ACM Animal Care and Management Training Packages) and SkillsIQ (SIS Sport Fitness and Recreation).

ASQA's audit into equine safety in training and Skills Impact's subsequent stakeholder consultation and development of safety and animal welfare units embedded into equine related qualifications, highlights the importance of formal training in this industry to minimise exposure to dangerous situations and mitigate risk.

Industry supports a balanced approach to increasing safety and mitigating risks in training, providing students have adequate exposure to workplace learning and realistic experiences with a range of horses to ensure workplace readiness and alleviate risk post qualification completion.

There is a developing need to service animal athletes throughout their life and provide ex-racing animals with opportunities to be repatriated as companion animals. This has resulted in emerging new skills and employment opportunities within niche areas such as animal rescue groups undertaking behavioural assessment and training tailored for ex-racing greyhounds.³

The WA TAB is a significant contributor to the state budget, with its proceeds supporting industry activity and its workforce development. Discussions around its privatisation have been ongoing for over two years, needing resolution to settle uncertainty within industry. Although the previous WA State Government stated it would consult with the racing industry to develop an agreed solution, seeking an industry funding structure that would enable the government to realise the value of the TAB, the current Labour Government will consider the sale, subject to the whole of industry supporting it.

Workforce challenges and issues

The racing sector workforce is beginning to reach retirement age in high numbers, creating significant challenges for employers, particularly their ability to attract people into the industry and develop their skills through on the job learning and formal training.

With the current age of working jockeys being 35 and an average occupational retirement age being 34, industry is facing a growing shortage of jockey, partially being addressed by RWWA with its Apprentice Jockey Training program.

The continued supply of qualified farriers to the racing and broader equine servicing industries (equestrian, horse riding schools, horse breeding, hobbyists) is of critical importance. Although current industry needs appear to be met by a private provider based in South Australia, further support with local vocational delivery is needed to attract and train adequate numbers to replace an ageing workforce upon retirement.

South Metropolitan TAFE has ceased delivery of racing and equine qualifications in Western Australia in preference of companion animal and veterinary nursing qualification delivery. Industry believes this will have a significant negative impact on the supply of qualified and skilled graduates in the future, particularly stablehands and trackriders who play an integral part in supporting the work of jockeys. This situation reportedly exacerbates the compelling need for industry to employ unqualified people into high risk roles with in-house training instead of skilling its workforce through the vocational system, leading to occupational health and safety concerns for unskilled workers in what are dangerous occupations.

Although Rural Training Australia delivers Certificate III Racing – Trackrider traineeships as part of Racing and Wagering WA's (RWWA) Apprentice Jockey Training program, traineeships for actual trackriders are not available through this program. This is due to the prohibitive cost to employers and the intrinsic nature of trackraider employment across multiple licensed racehorse trainers whilst under a training contract, with industry not supporting group training arrangements.

To date, employers have relied on skilled migration to fill vacancies particularly trackrider (aligned to ANZSCO 361112 Horse Trainer), with acute shortages found in regional WA. The ability for industry to meet labour shortages is expected to diminish under emerging national and state migration reforms. Changes to visa programs, related occupation lists used for skilled migration visas and removal of horse trainer/trackrider and farrier from these will aggravate supply of trained and experienced workers. These have alarmed industry, prompting a formal response being submitted to the Federal Government from the national industry peak body, Racing Australia (incorporating RWWA's concerns).

A major NSW business employs 150 trackriders, half of whom are employed on 457 visas. Although, industry and employment

requirements for trackriders in Western Australia are smaller in size, industry's reliance on this stream of experienced worker is equally critical.

The racing industry has expressed a desire to link qualifications to licensing, particularly skill sets for stablehands, trackriders, and horse and greyhound trainers. Progress is impeded by the cost of enrolment for employers and the lack of local delivery in the state to support these occupations.

Appetite also exists in the sector to formalise training and assessment (currently offered internally through RWWA for stewards, barrier attendants and harness catchers) for RTO delivery at a cost viable to industry. Some of these skill sets are planned to be reviewed in the Skills Impact proposed schedule of work in the coming years (Racing Industry Sector IRC Skills Forecast and Proposed Schedule of Work 2017 – 2020).

Industry has identified race stewards' integrity and high quality investigation skills as priority areas for review. The impact of technology on roles moving away from the requirement to stand in towers on race days has also elevated the need to address skill requirements, flagged for development over 2017 and 2018.

Racing and Wagering WA (RWWA) are reviewing their Cadet Steward Program to capture a changing skill set, including the need for soft skills and reflecting the impact of technology.

Employers (racing and farriers) report the cost of vocational training (additional training, apprenticeships and traineeships) to provide skilled labour as prohibitive in an industry predominantly characterised by very small businesses (mostly less than 5 employees). Similarly, the application process for employers seeking trainees deters them from participating in the system and is seen as convoluted, compliance heavy and an impost on resources.

Current Training Council areas of focus

FutureNow will:

- continue to monitor the availability of racing, equine and farriery delivery, including the effects of reduced delivery on supply and safety of workers into the industry.
- work with Racing and Wagering WA (RWWA) to explore feasible solutions for delivery of foundation level equine and racing qualifications, including the delivery of skill sets (eg: trackriders), to ease the need for industry to employ entry level workers without formal qualifications into high risk occupations.
- monitor the impact of skilled migration reforms on industry and work with RWWA to advocate for availability of skilled horse trainers (trackriders) through a migration pathway.
- continue to gather information related to occupations experiencing labour shortages in the racing and equine industries through its Racing and Equine Industry Advisory Group and broader stakeholder network.
- support the schedule of training package work being undertaken by Skills Service Organisations and advocate stakeholder feedback to guide industry priority skills for development over 2017 and 2018.

References

1. Skills Impact, Racing Industry Sector IRC Skills Forecast and Proposed Schedule of Work 2017 - 2020.
2. Skills Impact, Racing Industry Sector IRC Skills Forecast and Proposed Schedule of Work 2017 - 2020.
3. Department of Employment, 2016 Industry Employment Projections – Five Years to November 2020, report cited in Skills Impact, Racing Industry Sectors IRC Skills Forecast and Proposed Schedule of Work 2017 - 2020.