

RACING AND BREEDING INDUSTRY SECTOR

IRC Skills Forecast and Proposed Schedule of Work

2019–2022

Prepared on behalf of the Racing and Breeding Industry Reference Committee for the Australian Industry Skills Committee (AISC).

Racing and Breeding IRC Skills Forecast and Proposed Schedule of Work 2019-2022

Purpose

The Industry Reference Committee (IRC) Skills Forecast and Proposed Schedule of Work identifies proposed Vocational Education and Training (VET) training package development work necessary to meet the needs of industry and sets out the evidence of that need. The Australian Industry and Skills Committee (AISC) consider this information in prioritising and commissioning training package development work.

The IRC annual review of the Skills Forecast and Proposed Schedule of Work allows the identification of priority projects and provides the likely timing of training package development work over the next four years.

The Skills Forecast and Proposed Schedule of Work needs to provide the AISC with sufficient information on each project to consider:

- What work is to be commissioned;
- Clear evidence of employer and industry need;
- Alignment to Ministers' Priorities (see Appendix).

The Skills Forecast and Proposed Schedule of Work is to be developed in line with:

- Standards for Training Packages 2012;
- Training Package Products Policy;
- Training Package Development and Endorsement Process Policy.

This Skills Forecast presents the latest industry intelligence and resulting schedule of work for priority industry skills areas of the Agriculture and Production Horticulture Industry Reference Committee (IRC) and the Amenity Horticulture, Landscaping and Conservation & Land Management IRC.

This document is not intended to identify and address every challenge faced across all industry sectors; it identifies and addresses the issues, challenges and opportunities that industry has identified as 'priority' for this stage of the schedule and acts as a resource and reference for industry and associated skills, learning and accreditation bodies seeking to act upon them.

Detailed data and information concerning industry skills needs across all sectors covered by the Agriculture and Production Horticulture IRC and the Amenity Horticulture, Landscaping and Conservation & Land Management IRC, including information from previous Skills Forecasts, can be found on the Skills Impact website www.skillsimpact.com.au and is available to Industry, RTO and consumers in line with Ministerial priorities.

Method & Structure

This Skills Forecast and Proposed Schedule of Work was developed through research of national and industry data sources, and ongoing input from IRC members and key stakeholders.

IRC members undertake consultation with industry, and guide consultation processes undertaken on their behalf throughout each year. Consultation may include personal meetings, conference attendance, organised workshops, surveys, project feedback collection and unsolicited contributions sent to the SSO.

The Skills Forecast structure is guided by the Australian Industry Skills Commissions (AISC), which requires the following to be included:

- **Sector overview:** Brief description of the industry and industry sub-sectors, the Training Package, and current challenges and opportunities.
- **Employment & Skills Outlook:** Overview of the data, strategies and policies relevant to the industry.
- **Key Changes and Proposed Responses:** identifying the drivers for change from industry (e.g. occupations, technology, emerging markets), regulation, and nationally important policies, and proposed responses including the impact on stakeholders.
- **Consultation Undertaken:** Information on the consultation previously undertaken to support the proposed responses, including issues and sensitivities raised.
- **Proposed Schedule of Work:** The current proposed schedule of work over the next four-year period as modified from previous plans as a result of consultations and the need to meet changing priorities
- **Project Details:** details of proposed projects proposed for approval of the AISC to be undertaken in 2019 – 2020.

Administrative Information

Name of Industry Reference Committee (IRC): Racing and Breeding

Name of Skills Service Organisation (SSO): Skills Impact

This IRC Skills Forecast and Proposed Schedule of Work 2019–2022 has been produced with the assistance of funding provided by the Commonwealth Government through the Department of Education and Training.

www.skillsimpact.com.au

CONTENTS

EXECUTIVE SUMMARY	3
Proposed Schedule of Work 2019–2022	4
Racing and Breeding Industry Reference Committee	5
Sector Overview	6
Introduction	6
Sector Description	6
Businesses	9
Stakeholders.....	11
Industry Challenges and Opportunities	15
Training Package Overview	20
Employment & Skills Outlook	21
Employment.....	21
Skills Outlook.....	25
Key drivers for Change and Proposed Solutions	26
Consultation Undertaken.....	27
Proposed Project.....	2
Project 1: Creation of National Assessment Tools and Associated Resources and Materials	2
IRC SIGN-OFF	7
APPENDIX 1: RGR Training Package Information.....	8
APPENDIX 2: Industry Regulations and Standards	15
APPENDIX 3: Industry Priority for Generic Skills.....	17

EXECUTIVE SUMMARY

The Racing and Breeding Industry Reference Committee (IRC) is currently overseeing the finalisation of projects that complete the update of the national Racing and Breeding Industry Training Package. The update involved extensive industry input and consultation to better support modern job outcomes in the industry, which have changed considerably in some areas.

These updates, once approved and implemented, will need to be taught for a period prior to further review and identification of new skills, competencies and job functions.

Work on these updates have highlighted the fundamental imperative for complimentary national assessment, training and learning resources and materials, to ensure consistency of delivery and learner support. The structure of the industry has Principal Racing Authorities operating at different levels in the vocational training space. The Racing and Breeding IRC believes there is an exciting opportunity for the industry to pool resources to bench mark and evaluate best practise and enhance the learning and experience for learners in the industry.

The industry faces other challenges that impact on the uptake and implementation of training within the industry, including:

- Labour and skill shortages;
- Attracting and recruiting young people;
- Restrictions on visa programs for skilled migration;
- Limited options for subsidised training;
- Geographical and regional dispersion of businesses;
- Limited access to training;
- Competing industries;
- Regulation and licensing implications.

These barriers to training remain an ongoing concern for the IRC and during 2019-2020, the IRC will seek to develop strategies for consideration by government and industry bodies to address additional barriers, acknowledging that these are not exclusive to racing and breeding.

Over the last few years, businesses have had to respond to challenges and opportunities in all related occupations, particularly in relation to the integrity of horse races, and social and workplace obligations in all classes of horse and greyhound racing. Racing businesses and RTOs have been required to embed numerous changes into their operations, including: safe horse riding and handling practices; revised and modernised racing practices; greater support for 'new life after racing' options for retired animals; career planning for industry participants, especially jockeys; specialist breeding techniques; greater promotion to increase exposure of race products ahead of other sports betting products; growing use of technology, including computerised registration and identification of individual horses and greyhounds; and expansion of racing club operations to include special events (such as animal and horticultural shows), hospitality and broader gaming. The workforce needs to incorporate job-specific skills to support these innovations.

Higher demands on businesses have also added new functions to job roles to support broader processes and outcomes. Working in the industry increasingly requires a range of additional skills in: animal welfare; compliance with racing practices and workplace obligations; leadership; digital literacy, marketing and commercialisation; data analysis; specific product and brand knowledge; negotiation; and customer service. The IRC will be consulting on the training opportunities needed to support the expansion of job functions and roles.

PROPOSED SCHEDULE OF WORK 2019–2022

2019-2020	<p>Project 1: Creation of National Assessment Tools and Associated Resources and Materials</p> <p>To support the implementation of national skills standards through the creation of assessment tools and associated resources and materials to ensure industry participants can meet local, national and international participation requirements and benchmarks while maintaining the highest practicable level of safety.</p>
2020-2021	<p>Project 1: Review of new job functions and associated roles</p> <p>Review of the defined job roles in the Training Package and the need to adjust qualifications, units and skill sets to address expansion of functions and flexibility requirements within roles.</p>
2021-2022	<p>Project 1: TBA</p> <p>Projects to be identified based on feedback on the implementation of recent training products and those currently under review.</p>
2022-2023	<p>Project 1: TBA</p> <p>Projects to be identified based on feedback on the implementation of recent training products and those currently under review.</p>

RACING AND BREEDING INDUSTRY REFERENCE COMMITTEE

The Racing and Breeding Industry Reference Committee (IRC) is responsible for national training package qualifications relevant to the racing and breeding industry.

The relevant qualifications are found in the RGR Racing and Breeding Training Package.

The Chair of the Racing and Breeding IRC is Geoff Bloom and the Deputy Chair is Ron Fleming.

Table 1: IRC Membership as at January 2019

Name	Organisation or Area of expertise
Geoff Bloom	Racing Australia
Ron Fleming	Racing and Wagering WA
Ruth Taylor	Animal Welfare and Breeding
John Sunderland	Animal Welfare and Breeding
Ali Wade	Animal Welfare and Breeding
Kevin Ring	Australian Jockeys Association
Wayne Lee	Australian Trainers Association
Paul Delaney	Australian Workers Union
Cecilia Huynh	Greyhound Racing NSW
Scott Parker	Greyhounds Australasia
Kathleen Mullan	Harness Racing Australia
Isabella Galati	Harness Racing Victoria
Karlie Triffitt	Racing NSW
Rachael Bambry	Racing Queensland
Melissa Weatherley	Racing Victoria
Briony Moore	Thoroughbred Racing SA

SECTOR OVERVIEW

Introduction

The Racing and Breeding industry is a regulated industry operating across Australia, with strict conditions on participation. Racing Australia calculates industry revenue (inclusive of wagering expenditure) at \$6.3 billion¹, which is generated through membership and training fees, event admission charges, breeding, horse sales (including auctions) and prize money. Racing Australia also state that, when all direct and indirect impacts of industry activities are taken into account, there is an annual contribution of \$9.1 billion to the Australian economy (please see **Businesses** for a discussion of how industry's contribution to the economy is regularly under-reported).

In addition, racing generated wagering turnover of almost \$24 billion in 2016-2017, resulting in direct government revenue of \$178 million². The industry generates over \$800 million in taxes each year, of which more than \$530 million goes to state governments and around \$270 million to federal government³.

According to Australian Bureau of Statistics (ABS) figures, the Racing and Breeding industry directly employs approximately 17,000 people in Australia. Research by industry stakeholders demonstrates that there are numerous individuals who perform roles not captured in ABS data, with employment generated indirectly through veterinary and welfare services, food and beverage, tourism and hospitality, entertainment, stock feed and sales, transport and logistics, and other associated activities.

Stakeholders specify that there is extraordinary under-reporting of true employment in the industry, with releases detailing that there are 79,100 full-time equivalent jobs supported nationally by economic activity associated with thoroughbred racing⁴, 19,000 people directly employed in harness racing⁵ and 7,000 in greyhound racing⁶ (see discussion under **Employment**).

The *RGR Racing and Breeding Training Package* contains 15 qualifications, 43 skills sets and 127 units of competency. There are currently 16 RTOs with *RGR* components on scope.⁷ In 2017, there were 1,345 program enrolments, 334 program completions and 11,740 subject enrolments.

Sector Description

The Australian racing and breeding industry integrates a diverse range of businesses, whose principal activities include:

Horse and Dog Racing

The racing industry comprises three 'codes'⁸: thoroughbred, harness and greyhound. With 35,107 registered horses and 19,409 races in the 2017-2018 season⁹, thoroughbred racing in Australia is second

¹ IER, 2018, Racing Australia: Size & Scope Study, viewed March 2019, <https://ier-study.racingaustralia.horse/direct-spending/>

² Queensland Government Statistician's Office, Queensland Treasury, Australian Gambling Statistics, 34th edition

³ IER, 2018, Racing Australia: Size & Scope Study, viewed March 2019, <https://ier-study.racingaustralia.horse/thoroughbred-racing-nationally/>

⁴ IER, 2018, Racing Australia: Size & Scope Study, viewed February 2019, <https://ier-study.racingaustralia.horse/thoroughbred-racing-nationally/>

⁵ Harness Racing Australia, 2013, Harness Racing: an industry, a sport, a supporter of regional Australia, https://www.harness.org.au/media-room/news-article/?news_id=20703

⁶ Greyhound Racing Australasia Chairman's Message, <http://www.galtd.org.au/general/chairman%E2%80%99s-message>

⁷ training.gov.au, 2019, RGR - Racing and Breeding Training Package, viewed February 2019, <<https://training.gov.au/Training/Details/RGR>>

⁸ 'Code' refers to the breed and type of animal that races.

⁹ Racing Australia Fact Book 2017/18, p.7

only to the USA in the scale of its operations¹⁰. There were 2,777 horses named¹¹ and 14,087 races¹² in harness racing. Greyhound racing includes around 30,000 'registered participants'¹³. Businesses administer horse and dog racing activities or operate horse and dog racing venues. The industry also includes organisations that own racehorses or greyhounds, operate horseracing stables or dog racing kennels, or provide related training services.¹⁴

Horse Breeding

Industry businesses breed thoroughbred and standardbred horses, which are mainly sold to trainers for horse and harness racing¹⁵. Horse breeding activities are hugely important to the regional economy in Australia as they support thousands of jobs directly, in addition to interrelated sectors such as horse transport, fodder, fencing and insurance. The continued health of domestic breeding also plays a crucial role in sustaining the racing sector. Breeding world-renowned sprinters further ensures that international investors visit Australia to secure horses for export, both to race and breed.

In the 2017-2018 season, thoroughbred racing took place at 385 race clubs and 372 racetracks¹⁶, harness racing was staged across 94 racetracks¹⁷, and greyhound racing was conducted at 76 venues across Australia and New Zealand¹⁸.

Industry activities occur over a range of professional and amateur contexts, recreational settings and age and ability groups, and are monitored by a variety of industry regulators¹⁹. Industry activities make major contributions to local economies in regional and rural areas of Australia; for example, the City Council of Warrnambool, in south-west Victoria, estimates that horse racing is one of the region's biggest industries, with one in every 14 people employed or involved in the industry²⁰. Special events in regional areas, including harness and jump racing events, deliver huge injections into local economies.

Racing and breeding is a regulated and licensed industry in Australia. Almost all roles in racing require licensing, including trainers, jockeys (including international, interstate, apprentice, picnic and jumps jockeys), stable employees, float drivers, farriers, syndicate promoters and rider agents, while breeding also requires registration for a number of roles.

Current job roles described in the *RGR Racing and Breeding Training Package* include:

Generic roles

- Stable/Kennel hand
- Stable/Kennel Foreman
- Racing Administrator
- Racing Nominations and Acceptances Clerk
- Racing Secretary
- Racing Licensing and Registration Clerk

¹⁰ Agrifood, 2015, Environmental scan of the Agrifood industry, p.34

¹¹ Harness Racing Australia, 2018, National Registration Statistics – 2017/2018

¹² Harness Racing Australia, 2018, National Stake money Statistics – 2017/2018

¹³ Agrifood, 2015, Environmental Scan of the Agrifood Industry, p.39.

¹⁴ IBISWorld, 2018, R9120 Horse and Dog Racing in Australia Industry Report

¹⁵ IBISWorld, 2018, A0191 Horse Farming in Australia Industry Report

¹⁶ Racing Australia Fact Book 2017/18, p.7

¹⁷ Harness Racing Australia, 2018, National Registration Statistics – 2017/2018

¹⁸ Greyhound Racing Australasia Chairman's Message, <http://www.galtd.org.au/general/chairman%E2%80%99s-message>

¹⁹ <https://www.asqa.gov.au/about/strategic-reviews/training-equine-programs-australia-2016>

²⁰ <https://www.abc.net.au/news/2018-05-01/how-a-controversial-jumps-carnival-keeps-a-country-town-kicking/9713896>

- Timekeeper (Racing)
- Photo Finish Operator
- Swab Attendant
- Cadet Steward
- Steward
- Club Steward
- Chief Steward
- Chairman of Stewards

Breeding (note: additional breeding job roles will be included in RGR after revision of the Training Package has been completed in 2019)

- Stud Hand

Greyhound Racing

- Greyhound Race Day Attendant
- Greyhound Race Club Kennel Attendant
- Greyhound Attendant
- Greyhound Race Club Parade Official
- Greyhound Trainer
- Greyhound Owner Trainer
- Greyhound Clerk of Scales
- Greyhound Lure Driver

Harness Racing

- Harness Trackwork Driver
- Harness Driver
- Harness Mobile Start Driver
- Harness Racing Trainer
- Harness Racing Owner Trainer

Thoroughbred Racing

- Apprentice Jockey
- Jockey
- Trackrider
- Thoroughbred Fast Work Rider
- Clerk of Course (Horse Racing)
- Thoroughbred Clerk of Scales

- Thoroughbred Trainer
- Thoroughbred Owner Trainer

Few of these job roles are recognised in ANZSCO Codes, and there is no comprehensive coverage of the Racing and Breeding industry in official statistical data.

Businesses

There were 5,301 racing and breeding businesses operating at the end of the financial year in 2017 (see Table 2), around 72 per cent of which were 'non-employing'. Overall, there were 73 fewer businesses than were trading one year previously, likely due to smaller, less profitable participants ceasing operations.

Most thoroughbred breeders (almost 80 per cent) are non-employing and have just one or two mares. In terms of production, more than half of all mares are owned by breeders with five or fewer horses²¹.

Table 2: Count and size of businesses

ANZSIC Industry Name	Business Size			
	Non-Employing	Small: 1-19 Employees	Medium: 20-199 Employees	Large: 200+ Employees
Other Horse and Dog Racing Activities	1,068	695	55	0
Horse Farming (Breeding)	2,739	669	28	0
Horse and Dog Racing Administration and Track Operation	24	8	7	8

Source: 8165.0 Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017

An interim report by IER for Racing Australia, which includes revenue data from wagering and other supporting industries, states that thoroughbred racing directly adds \$3.2 billion to the Australian economy annually. This figure rises to \$9.15 billion when associated flow-on expenditure is included²².

This varies greatly from ABS and IBISWorld estimates. The latter places the value added by industry to the Australian economy at \$1.8 billion (including horse and sport betting – see 'IVA' in Table 3). This data includes only the economic contribution of businesses that are unambiguously exclusive to these sectors and not the extensive flow-on expenditure associated with industry activities and events. While this methodology is logical given cautions over exaggerating the cumulative value of Australian industry (which is covered by an extensive array of IBISWorld reports and ABS releases), data will always underestimate the true value of industry to the Australian economy.

Racing Australia also estimate an annual industry revenue of \$6.3 billion, which is generated through thoroughbred breeding, preparing racehorses, wagering (net revenue), product fees and other race day activities²³.

²¹ Thoroughbred Breeders Australia, <https://www.tbaus.com/australian-breeding/our-industry/>

²² IER, 2018, Racing Australia: Size & Scope Study, viewed February 2019, <https://ier-study.racingaustralia.horse/thoroughbred-racing-nationally/>

²³ <https://www.theaustralian.com.au/sport/turf-thoroughbreds/nine-billion-reasons-why-racing-matters/news-story/16d381f391e1f02092c48510b8ce89f6>

Table 3: Industry performance

Title	Domestic Demand ²⁴	IVA ²⁵	Exports	Imports	Wages
Horse Breeding	\$1.1bn	\$242.4m	\$204m	\$119m	\$91.2m
Horse and Dog Racing	\$1.4bn	\$348.2m	n/a	n/a	\$274.2m
Horse and Sports Betting	\$4.6bn	\$1.2bn	n/a	n/a	\$353.8m

Source: IBISWorld Industry Wizard

There are almost 20,000 thoroughbred horse races each year²⁶, involving horses that are bred for extremely competitive markets, trained to high levels and ridden by elite jockeys²⁷. Only Japan and the USA pay out more than Australia in prize money²⁸, which totalled more than \$733.4 million in the 2017-2018 season²⁹. In the 2017-2018 season³⁰, there were 14,087 harness races in Australia, featuring 10,162 horses and 127,437 starts, an average of between 12 and 13 starts per horse. Total stakemoney for the season was almost \$119 million, the highest recorded. There were 3,192 licensed trainers and 2,247 licensed drivers for the season.

In the 2017-2018 season, there were 347,000 starters in greyhound racing across Australia and New Zealand, with total prizemoney at a record \$120 million³¹.

The Australian horse breeding industry is the second largest in the world³². The horse breeding industry has grown over the past five years as the average price paid per horse (and associated services) has increased, especially with rising export demand. According to Thoroughbred Breeders Australia³³, the thoroughbred horse population, including 21,500 mares and 700 stallions, demonstrates that Australia outperforms other established breeding countries such as the UK, Ireland, Japan and New Zealand. Profit margins have also improved due to falling wheat feed and coarse grain prices.

The standardbred breeding industry produced 3,404 foals during the 2017-2018 season, while 2,777 horses were named. There are 163 stallions registered in Australia, while semen was imported from 42 sires³⁴.

Over the last four years, greyhound breeding has dropped by 39 per cent, with just over 11,000 greyhounds bred during the 2017-2018 season³⁵. The dropping level of breeding in the greyhound industry is a response to overbreeding issues identified between 2014 and 2017, in well-documented enquiries into the industry. During the last four years, rehoming of greyhounds after racing had increased by 67 per cent, in addition to more owner/trainers retaining greyhounds after racing retirement.

The Australian racing and breeding industries are commercially challenging environments. Turning a thoroughbred foal into a racehorse is an extremely expensive and complex process, involving breeders, investors, trainers and jockeys. Purchasing a racehorse costs an average \$70,000, and then around \$30,000 to \$50,000 in training and maintenance costs each year. Around 63 per cent of racehorses will

²⁴ Domestic demand: a measure of total consumption of an industry's goods and services within this country

²⁵ IVA (industry value added): The measure of the contribution by businesses in each industry to gross domestic product (GDP).

²⁶ Racing Australia Fact Book 2017/18, p.6

²⁷ T. Pizzey, 2015, The Common Good and the Horse Racing Industry, Australian Catholic University

²⁸ Which includes prizemoney, trophies, incentive payout schemes, and returns and other fees paid to owners.

²⁹ Racing Australia Fact Book 2017/18, p.6

³⁰ Harness Racing Australia Inc, Annual on-line National Stakemoney Statistics

https://www.harness.org.au/hra/annual/public/stats/stakes_info.pdf

³¹ Greyhound Racing Australasia Chairman's Message, <http://www.galtd.org.au/general/chairman%E2%80%99s-message>

³² <http://www.tbaus.com/about-the-tba/about-us/>

³³ Thoroughbred Breeders Australia, <https://www.tbaus.com/australian-breeding/our-industry/>

³⁴ Harness Racing Australia, Annual on-line State Registrations Statistics 2017/2018

https://www.harness.org.au/hra/annual/public/stats/regn_1718.pdf

³⁵ Greyhound Racing Australasia Chairman's Message, <http://www.galtd.org.au/general/chairman%E2%80%99s-message>

earn less than \$10,000 per year, and less than three per cent will make upwards of \$100,000 (and so cover their costs)³⁶.

Stakeholders

Key Stakeholders include:

- Principal Racing Authorities: each state and territory has a Principal Racing Authority, which are members of Racing Australia, responsible for:
 - Registering and supervising race clubs;
 - Licensing trainers, jockeys, bookmakers and their clerks and other industry participants;
 - Handicapping;
 - Appointing Stewards' panels to apply the Rules of Racing;
 - Administration of industry funding.
- Harness Racing State Controlling Bodies: each state has a controlling body overseeing harness racing, with WA incorporating harness racing into Racing and Wagering WA, with similar responsibilities as Principal Racing Authorities.
- Greyhound authorities: bodies which are members of Greyhounds Australasia (including the NZ Greyhound Racing Association Inc and WA incorporating greyhound racing into Racing and Wagering WA), with similar responsibilities as Principal Racing Authorities.
- Associated regulatory and licensing bodies, including government authorities and tribunals, drug control authorities, and Occupational Health and Safety bodies.
- Racing Clubs: Australia has 364 Thoroughbred racing clubs,³⁷ 117 harness racing clubs³⁸ and 79 greyhound racing clubs.³⁹
- National peak bodies representing numerous participant groups in the industry including owners; breeders; trainers; and jockeys and drivers.
- Employee unions representing workers in the industry, including the Australian Workers Union.
- Equine and Veterinary Associations with interests in industry issues, animal welfare and health, equine dentistry, disability participation and the roles of horses outside of the racing and breeding industry.
- Gaming bodies and representative organisations, which participate in the horse and greyhound racing sectors and provide significant industry funding.
- Key research and development organisations, including the Equine Genetics Research Centre and AgriFutures Australia.
- Bodies seeking to improve training, education and employment opportunities, such as NCVER and university-based education centres.
- Registered Training Organisations (RTOs) with relevant training on scope.
- Federal, State and Territory Government departments and authorities

Important industry-based stakeholder bodies include:

³⁶ <https://sydney.edu.au/news-opinion/news/2016/10/31/3-horse-racing-myths-busted-for-the-melbourne-cup.html>

³⁷ Racing Australia, 2017, *Racing season 2016/2017 fact book*.

<<http://publishingservices.risa.com.au/otherpublications/Factbook%202016-2017/>>.

³⁸ Australian Harness Racing, 2013, *Size and scope of the harness racing industry in Australia*.

³⁹ Greyhounds Australasia, 2015, *Australasian statistics*, < <http://www.galtd.org.au/industry/australasian-statistics>>.

National

- Racing Australia
- Harness Racing Australia
- Greyhounds Australasia
- Australian Greyhound Racing Association
- Australian Jockeys' Association
- Australian Jumps Racing Association
- Australian Standardbred Breeders Association
- Australian Trainers' Association
- Australian Genetics Testing
- Australian Workers' Union
- Australian Bookmakers' Association
- Equine Veterinary Association
- Federation of Bloodstock Agents Australia Limited
- Racing Analytical Services Ltd
- Thoroughbred Breeders Australia
- Thoroughbred Racehorse Owners' Association
- Thoroughbred Racehorse Owners' Council of Australia

Victoria

- Racing Victoria
- Harness Racing Victoria
- Greyhound Racing Victoria
- Association of Victorian Country Harness Racing Clubs
- Country Racing Victoria
- Greyhound Owners, Trainers and Breeders Association of Victoria
- Harness Breeders Victoria
- Melbourne Greyhound Racing Association
- Metropolitan and Country Harness Racing Association
- Thoroughbred Breeders Victoria
- Victorian Bookmakers' Association
- Victorian Jockeys Association
- Victorian Trainers and Drivers Association
- Victorian Trainers' Association
- Victorian Square Trotters Association

New South Wales

- Racing NSW
- Harness Racing NSW
- Greyhound Welfare & Integrity Commission
- Greyhound Racing NSW
- Harness Breeders NSW
- NSW Standardbred Owners Association
- United Harness Racing Association
- Provincial Racing Association of NSW
- Racing NSW Country
- Regional Racing Associations
- NSW Trainers Association
- NSW Bookmakers Association
- NSW Jockeys Association
- NSW Racehorse Owners Association
- Thoroughbred Breeders NSW
- Hunter Thoroughbred Breeders Association
- Greyhound Breeders Owners and Trainers Association

Queensland

- Racing Queensland
- Queensland Racing Integrity Commission
- Queensland Breeders, Owners, Trainers and Reinspersons Association
- Queensland Country Racing Committee
- Queensland Department of National Parks, Sport and Racing
- Queensland Racehorse Owners' Association
- Country Racing Associations
- Thoroughbred Breeders Queensland

South Australia

- Thoroughbred Racing South Australia
- Harness Racing South Australia
- Greyhound Racing South Australia
- South Australia Breeders, Owners, Trainers and Reinspersons Association
- South Australian Country Harness Racing Clubs Association

- South Australian Harness Racing Club
- South Australian Harness Racing Pony Association
- South Australian Racehorse Owners' Association
- South Australian Racing Clubs Council
- South Australian Reinswomens' Association
- South Australian Thoroughbred Breeders

Tasmania

- TasRacing (Tasmanian Racing Board)
- BOTRA Tasmania: Breeders, Owners, Trainers and Reinspersons Association
- Tasmanian Racehorse Owners Association
- Thoroughbred Breeders Tasmania

Western Australia

- Racing and Wagering Western Australia
- Country Racing Association of Western Australia
- Greyhounds Western Australia
- Harness Racing Owners Association of Western Australia
- West Australian Breeders, Owners, Trainers and Reinspersons Association (BOTRA)
- Western Australian Racehorse Owners' Association
- Western Australian Provincial Thoroughbred Racing Association
- Western Australian Standard Breeders Association
- Western Australian Racing Trainers' Association
- Western Australia Jockeys Association
- Thoroughbred Breeders Western Australia

Northern Territory

- Northern Territory Treasury Racing Gaming & Licensing
- Darwin Greyhound Association of the Northern Territory
- Racehorse Owners Association of the Northern Territory
- Thoroughbred Racing Northern Territory
- Northern Territory Bloodhorse Breeders Association

Australian Capital Territory

- Canberra Racing Club
- Canberra Greyhound Racing Club

Industry Challenges and Opportunities

National Assessment Tools and Associated Resources

The Racing and Breeding IRC supports industry calls to formalise training and assessment, in order to support the developed national skills standards as outlined in the training package, to improve the safety of workers, to continue the development of consistency across jurisdictions, and to address the increasing level of movement nationally and internationally among industry participants.

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 each state to support these occupations. The development of national assessment tools and associated resources would go a considerable distance towards addressing these issues.

Employers 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 five 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.

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 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 dangerous occupations.

Similar concerns are held for qualifications in horse and greyhound training. In each industry, the trainer faces ultimate responsibility for all industry integrity issues. The need for formal training and assessment, recognised by qualifications and licensing, has grown with the increasing focus on social licence to operate and changing community standards, combined with expansion of fields covered by regulation and changing training skills.

Issues continue to exist for RTOs attempting to deliver the new qualifications. For example, while 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 trackrider employment across multiple licensed racehorse trainers while under a training contract, with regulators and industry not supporting group training arrangements (partially due to integrity considerations). Employers have been forced to rely on skilled migration to fill vacancies particularly trackrider (aligned to ANZSCO 361112 Horse Trainer), with acute shortages found in regional areas.

There is support for a balanced approach to increasing safety and mitigating risks in vocational training, providing students have adequate exposure to workplace learning and realistic experiences with a range of horses or greyhounds to ensure workplace readiness and alleviate risk post qualification completion. The Racing and Breeding IRC believes that the best way to enable this balanced approach is through supporting and working with a national network of RTOs who are committed to servicing the industry. A key aspect of this would be through the IRC supporting the development of national assessment tools and associated resources. This would enable more economic application of skills training to national standards across all jurisdictions, including the transferability of trainers across jurisdictions and the use of workplace-based staff in the gathering of assessment evidence.

Jockey welfare

A 2009 Medical Journal of Australia study⁴⁰ found that only offshore fishing is a more dangerous occupation than being a jockey. The report noted that Australian rates of injury were consistent with international expectations, although the potential exists for improvement to safety standards. This is being addressed through improvements to the RGR Training Package which have been recently introduced, as well as in other industry initiatives.

The Australian Jockeys Association published⁴¹ that 883 Australian jockeys have lost their lives since 1847 as a result of their vocation. Other statistics include:

- Seventeen of these riders have lost their lives this century;
- One in 620 falls results in death;
- Approximately 200 riders are injured each year on Australian racetracks;
- Combined with track work, there are approximately 500 falls annually;
- When licensed jockeys fall:
 - 9% have fallen more than 20 times;
 - 89% of jockeys will have a fall that requires medical assistance;
 - Each year, 40% of jockeys that fall that will incur an injury preventing them from riding for an average of five weeks;
 - Approximately 5% of these falls result in career-ending injuries.

It is estimated that in the next 10 years there will be 10-12 jockey deaths, and 50 jockeys will suffer career ending injuries including paraplegia, quadriplegia and severe brain injury.

The profession of a jockey or track-work rider in the thoroughbred racing industry is physically demanding. Strength, strength endurance, balance, reaction time and flexibility are all considered to be important attributes of a successful rider. Jockeys had better balance, a faster mean reaction time and a lower fatigue index their track-work riding counterparts. Jockeys were also younger and smaller in stature than track-work riders. Important factors found to be associated with falls were lower aerobic and anaerobic fitness, greater muscular strength and power, and riding with the full foot in the stirrup irons compared with riding on the ball of the foot. This pilot study shows that physiological attributes of jockeys and track-work riders can predict their risk of falling and are measurable⁴².

This is a complex issue: in races, trials and training, multiple horses are running at high speeds in a relatively small space, and any loss of balance or control by one jockey may have significant impacts on other participants. There is a need to prevent falls wherever possible to avoid possible knock-on effects in races, trials and training, and consequent impacts that may include trampling and being dragged by horses. Consideration has been given to the question of whether “fall safely” training may be suitable for this industry. The IRC has accepted the expert advice of members of the Australian Jockeys Association and racing bodies that jockeys need to be focused on preventing falls, and that given the complexities of racing, jockeys decision-making in emergency situations needs to be as simple as possible. As a result, the Racing and Breeding IRC believes that “fall safely” training, which may be suitable in other equestrian pursuits, is not suitable for the racing industry.

⁴⁰ P.L. Hitchens et al., 2009, Medical Journal of Australia, Volume 190 Number 2, <https://www.mja.com.au/journal/2009/190/2/incidence-race-day-jockey-falls-australia-2002-2006>

⁴¹ Australian Jockeys Association, 2017, <http://www.australianjockeys.org/news/tragic-week-jockeys-nationally>

⁴² Hitchens P, Blizzard L, Jones G, et al. Are physiological attributes of jockeys predictors of falls? A pilot study. *BMJ Open* 2011;1:e000142. doi:10.1136/bmjopen-2011000142

The Racing and Breeding IRC acknowledges the ongoing work at all levels of the industry to improve jockey safety and will continue to consider any researched and evidence-based options for vocational training that may address identified issues.

Event attendance

According to ABS statistics, horse racing was the second most attended sport in Australia in 2009-2010, with 11 per cent of the population attending an event during that period, with both harness and greyhound racing featuring in the top 10⁴³; however, the growing prevalence of online and mobile betting platforms has contributed to structural changes in how the public engage with racing⁴⁴.

'A day at the races' remains a fixture for many Australians, who not only watch and bet on races but partake in the wider carnival atmosphere associated with consuming fine food and drink, high-end fashion, and national and international media spectacle. The iconic Myer Fashions on the Field competition, held at Flemington racecourse, offers \$380,000 worth of prizes, as well as offering international media exposure for designers, stylists and sponsors⁴⁵. New concepts are being introduced including Australia's richest race, the Everest which has a bidding system for allocated positions in the field, and the All-Star Mile, which attracted approximately 140,000 votes in an online system to select the starters in the field.

While marquee annual racing events continue to attract large crowds, ticket sales and revenue from regular thoroughbred, harness and greyhound races have declined over the past five years, especially with sports betting expenditure being diffused through websites and apps. This has led to reduced participation and revenue at smaller, regional meetings, which has also impacted on breeding businesses and strategies⁴⁶. For example, declining harness racing activities have reduced demand for standardbred horses, which intensified competition between operators, who are largely owner-trainers.

Worker Attraction and Retention

Attracting, training and retaining workers in key occupations is an enduring challenge. Industry-wide efforts are required to alter negative public perceptions of careers in racing, implement succession planning, attract and retain young talent in the context of an aging workforce, and provide long-term career progression and incentives⁴⁷. These are particularly acute issues considering the reported shortage of people in the occupations of apprentice jockey, harness racing driver, stablehand and trackrider⁴⁸. As such, industry strategies and improved training provisions are vital for filling the numerous employment opportunities available for the next generation of industry participants.

The current patchy, ineffective, expensive and state-focused training delivery options for people to learn skills in this industry is a significant deterrent to safe employment and career development in the industry. The national assessment and associated materials development process is part of a strategy to connect the industry to training resources and RTOs, and to facilitate access to career options within the industry and externally by increasing the availability of training solutions leading to national qualifications.

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.

⁴³ This was the last time sports attendance statistics were collated by ABS: see <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Latestproducts/4174.0Main%20Features52009-10?opendocument&tabname=Summary&prodno=4174.0&issue=2009-10&num=&view=>

⁴⁴ IBISWorld, 2018, R9209 Horse and Sports Betting in Australia Industry Report

⁴⁵ <https://www.flemington.com.au/news/2018-08-15/myer-fashions-on-the-field-competition-enters-digital-age>

⁴⁶ http://www.futurenow.org.au/uploads/2/3/0/4/23042550/fn-workforcepriorities-racing_fariery_and_equine.pdf, p1

⁴⁷ http://www.futurenow.org.au/uploads/2/3/0/4/23042550/fn-workforcepriorities-racing_fariery_and_equine.pdf, p.1

⁴⁸ <http://www.skillsone.com.au/vidgallery/the-perrett-report-oct-30th-brian-wexham-talks-about-skills-in-the-equine-industry/>

Visa Regulations' Impact on Employment & Skills:

In late June 2017, the federal government announced changes to the list of occupations under which employers can hire skilled workers from overseas; after consultations with industry, changes were made reintroducing the categories 'Horse Trainer' and 'Horse Breeder', however there are restrictions on these visas that make them difficult to utilise. In January 2018, the Government announced that the breeding sector would gain access to long-term visas after representations from major industry bodies including Racing Australia and Thoroughbred Breeders Australia.

The ability for industry to meet labour shortages is diminishing under emerging national and state migration reforms. Changes to visa programs and related occupation lists used for skilled migration visas aggravate supply of trained and experienced workers. The Australian horse training and breeding industry participates in the international market place, and there has been regular exchanges of workers between Australian and international operations, which has allowed for shared knowledge, industry improvement and enhanced reputation for the Australian industry. In racing, a major NSW business employs 150 trackriders, half of whom are employed on 457 visas.

Industry Inclusivity

Inclusivity remains an issue that needs to be addressed across racing and breeding, having culturally been a bastion for able-bodied, white male participation in most aspects through most of the 19th and 20th centuries. Within an aging industry with skills shortages, inclusive participation is a welcome expansion of potential workforce prospects.

While racing and breeding is theoretically gender-inclusive, more visible elements of the industry, such as ownership, training, jockeys and drivers, and stewards, remain predominantly male.

Following Michelle Payne becoming the first female jockey to ride a Melbourne Cup winner, female riders were declared 'the future of Australia's horse racing industry'⁴⁹. Some of the increasing participation of female jockeys is due to additional opportunities offered by industry bodies and participants, while the ability to ride horses at lighter weights is also a factor.

Despite improvements, the most prestigious thoroughbred races remain dominated by male jockeys, despite the leading positions of a number of female jockeys on metropolitan jockey tables across Australia. Since Michelle Payne's victory in 2015, only 2 female jockeys have participated in the Melbourne Cup and no female jockey has ever been booked to ride a Melbourne Cup starter in the top 5 chances as determined by race odds. Only six female jockeys, for a total of nine race starts, have ever had a ride in the 'race that stops a nation' since 1979, the year that women jockeys were first allowed to ride in the race. Over the four days of the Flemington Spring Racing Carnival in 2018, women were booked for a total of 17 rides, or less than one ride in every two races.

Women are increasingly prominent in the apprenticeship jockey pool and at regional race meets, however, equality at high-stakes metropolitan events is still some way off. In Western Australia, for example, women represent 80 per cent of apprentice jockeys, but only 21 per cent of professional riders.

While Michelle Payne's Melbourne Cup win highlighted opportunities for women jockeys, Stephen Payne's role as a strapper highlighted opportunities for people with disabilities to work in a high-profile industry. In harness racing, participation of Indigenous and women participants is being driven by successes of current participants and special events, such as the Australian Female Drivers Championship and the JC Caffyn Plate⁵⁰.

⁴⁹ <https://www.abc.net.au/news/2018-07-01/female-riders-start-to-dominate-horseracing/9923946>

⁵⁰ Harness racing undergoes a changing of the guard thanks to Indigenous and women drivers: ABC 10 Nov 2017 <https://www.abc.net.au/news/2017-11-10/harness-racing-undergoes-indigenous-and-female-revitalisation/9127252>

All industry sectors are attempting to engage with more diverse supporters, and to use that support to encourage greater participation. However, progress has been slow, especially at the most visible levels of the industry. Lack of access to training that leads to nationally-recognised qualifications is a significant barrier to encouraging diversity within the industry.

Quarantine issues

Australia has some of the most restrictive quarantine regulations in the world, which has played a key role in protecting biosecurity but has adversely affected Australia's ability to participate in the global racing and breeding market. Thoroughbred Breeders Australia regularly meets with government officials to discuss how to reduce trade barriers, particularly when it comes to quarantine restrictions and trade tariffs paid by Australian exporters⁵¹.

Quarantine conditions can change quickly and unexpectedly, as happened with the equine influenza outbreak in Australia in 2007/2008, and more recently in late 2018 with the federal government decision to stop imports from Hong Kong without 180 days' quarantine in a third country. Thoroughbred Breeders Australia and other bodies have undertaken extensive discussions with the Department of Agriculture and Water Resources as well as the Hong Kong Jockey Club to help resolve the issues that led to this decision.

Maintaining current awareness of quarantine requirements and ensuring workers have the skills to comply with those requirements is an ongoing critical aspect of the racing and breeding training regime. Access to training for this issue is patchy and national materials to support training efforts would help to alleviate this problem.

Social Licence to Operate

The Racing and breeding industry is subject to high-profile examination by regulators, media, interest groups and the public. The industry has always been a regulated industry and integrity issues have been closely scrutinised throughout federated Australian history, including multiple Royal Commissions held since the 1930s in various jurisdictions. All elements of the industry are aware of strong concerns about race integrity, wagering, animal welfare, training techniques, dealing with retired racing animals, criminal and unethical activity, and safety issues across all sectors.

A particular concern over the last few years has been overbreeding and mistreatment of greyhounds. Greyhound racing clubs throughout Australia have set up programs to address overbreeding and encourage adoption of ex-racing dogs as family pets. Greyhounds Australasia announced its endorsement of a National Welfare Strategy in May 2014, and formal training is being developed to support these efforts. As noted earlier, breeding rates have dropped by 39 per cent while adoption rates have increased by 67 per cent.

Harness Racing Australia continued to address retirement of horses through the "There is No Finish Line" program, which included the retraining of a horse from harness racing to Equitana participation digitally documented through social media, attracting significant interest, including sponsorship support.

The recent 2019 events concerning Victoria's biggest thoroughbred trainer, coming on top of enquiries into other leading trainers in the last few years concerning the use of banned performance enhancing substances and methods, highlight the level of scrutiny and the level of public coverage of these aspects of the industry.

The industry is aware of the need to actively identify and address issues that may diminish its social licence to operate, and to meet community expectations while maintaining the safety and welfare of the workers

⁵¹ <http://tbaus.smedia.com.au/digital-magazine/>

and animals in the industry. The IRC will examine any contributions that training can make to assist the industry to get ahead of concerns and resolve potential issues.

Training Package Overview

The *RGR Racing and Breeding Training Package* contains 15 qualifications, 43 skills sets and 127 units of competency. There are currently 16 RTOs with *RGR* components on scope.⁵² Between 2014 and 2017, there were 6,658 enrolments in *RGR* qualifications (further details in <<<insert cross-reference to Appendix 1>>>).

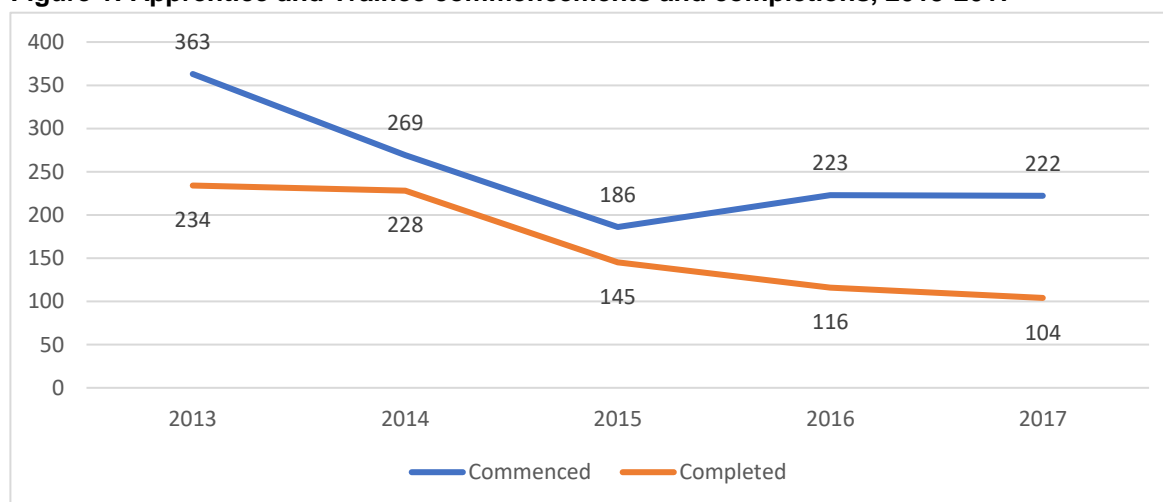
The updated qualifications released in 2018 have been warmly greeted by industry and the IRC expects improved enrolment figures from 2018. Active industry support is also being received, with Thoroughbred Breeders Australia engaging with a number of training providers to ensure the breeding apprentice-level Certificate III in Horse Breeding training course is available in both NSW and Victoria, with a view to the course being offered in other states in 2019⁵³.

The Racing and Breeding IRC is very concerned about the falls in apprenticeships and traineeships since 2013, along with low completion levels. The racing and breeding industry is one that has significant safety risks and has utilised apprenticeship models effectively for many years. Industry-based training and assessment is essential for almost all occupations and job roles.

New South Wales hosted 48 per cent of apprenticeship or traineeship commencements from 2013 (compared to 31 per cent in Victoria). Overall, apprentice/trainee completions have declined; however, after a sharp fall between 2013 and 2015, commencements steadied at over 220 for the two following years (see Figure 1).

A significant barrier to enrolments is the lack of providers offering *RGR Training Package* components due to the expense associated with each RTO developing state-specific training materials. The national assessment and related materials development project, led by the IRC, is part of a strategy to increase training opportunities and enrolment numbers in the industry.

Figure 1: Apprentice and Trainee commencements and completions, 2013-2017



Source: NCVER, SAS Visual Analytics Viewer

⁵² training.gov.au, 2019, *RGR - Racing and Breeding Training Package*, viewed February 2019, <<https://training.gov.au/Training/Details/RGR>>

⁵³ <http://tbaus.smedia.com.au/digital-magazine/>

EMPLOYMENT & SKILLS OUTLOOK

Employment

According to ABS Figures, there were approximately 9,918 people employed in horse and dog racing activities in 2018⁵⁴ (see Table 5). IBISWorld states that 6,866 are employed in horse breeding⁵⁵. The racing industry also supports 418 bookmakers⁵⁶. Overall, industry is a significant employer in regional areas of Australia.

Stakeholder research clearly demonstrates the multitude of individuals who participate in the industry but are not 'employed' in the convention sense, and are therefore excluded from ABS data. Many participants fulfil other roles and positions, which may be listed as their primary occupation in ABS figures. This means that industry figures are only ever partially captured and frequently omit the significant number of participants who are self-employed (e.g. contractors or owners), employed casually, volunteers or who perform roles that, while within the racing and breeding industry, are under broader occupational or industry classifications such as wagering activities, animal care and management (e.g. farriers), biosecurity, administration, workplace health and safety, and small business and event management.

Various stakeholders have released reports demonstrating the lack of holism applied to industry statistics. While IBISWorld state that there are 22,709 employees across 'horse farming (breeding)', 'horse and dog racing' and 'horse and sports betting'⁵⁷, the Victorian Racing Industry (VRI) reports that over 22,000 people are directly employed, with a further 100,000 people volunteering or participating, in Victoria alone⁵⁸. Racing Australia reports that there are 79,100 full-time equivalent jobs supported nationally by economic activity associated with thoroughbred racing⁵⁹. Harness Racing Australia reports that 19,000 are employed (40 per cent of which are in regional areas) and 48,000 participate in their sector⁶⁰. Greyhound Racing Australasia reports that 7,000 people are in direct employment, while tens of thousands are indirectly employed as a result of industry operations⁶¹.

Racing animal owners, of which there are currently around 90,000 (and counting), are a key group not reported in employment statistics (see Table 4). The emergence of syndicated ownership has been a major growth driver, making the expensive involvement in racing ownership more affordable through cost-sharing.

⁵⁴ This ANZSIC group consists of the classes '9121 Horse and Dog Racing Administration and Track Operation' and '9129 Other Horse and Dog Racing Activities', which cover employment in dog/horse race course or track operations, racing authorities or boards, race dog/racehorse training operations, and racing kennel/stable operations.

⁵⁵ IBISWorld, 2018, A0191 Horse Farming in Australia Industry Report, p.26

⁵⁶ Racing Australia Fact Book 2017/18, p.6

⁵⁷ IBISWorld Industry Wizard

⁵⁸ IER, 2018, Size and Scope of the Victorian Racing Industry, Victorian Racing Industry, <https://cdn.racing.com/-/media/rv/2019-rv/about/files/ier-vri-size--scope-report--sep-2018.pdf>

⁵⁹ IER, 2018, Racing Australia: Size & Scope Study, viewed February 2019, <https://ier-study.racingaustralia.horse/thoroughbred-racing-nationally/>

⁶⁰ Harness Racing Australia, 2013, Harness Racing: an industry, a sport, a supporter of regional Australia, https://www.harness.org.au/media-room/news-article/?news_id=20703

⁶¹ Greyhound Racing Australasia Chairman's Message, <http://www.qaltd.org.au/general/chairman%E2%80%99s-message>

Table 4: Racing Industry Participants

Sector		Sources
Thoroughbred Racing		
Jockeys	607	<i>Racing Australia Fact Book 2017/18</i>
Apprentice jockeys	219	
Amateur jockeys	103	
Trainers	3,234	
Race horse owners	82,614	
Harness Racing		
Drivers Licenced	2,247	<i>Harness Racing Australia, State Registration Statistics 2017/2018</i>
Trainers Licenced	3,192	
Greyhound Racing		
Trainers	5,316	<i>Greyhounds Australasia, 2016, Australasian statistics</i>
Owners/trainers	3,058	

Racing Australia has recently published a Size and Scope study which indicates there are 159,000 individuals involved in thoroughbred racing nationally, leading to direct employment of 32,801 full-time equivalent (FTE) positions, with another 39,136 FTE jobs arising indirectly⁶².

The labour force has a generally even distribution of male and female employees (see Table 5). While there is a lower proportion of women in horse and dog racing activities, women comprise the majority (52 per cent) of training program enrolments (see Table 8).

Table 5: Employment by sex and labour force status

Industry of Employment (three-digit ANZSIC)	Sex	Full-time	Part-time	Total
912 Horse and Dog Racing Activities	Female	2,501	2,032	4,533
	Male	3,917	1,467	5,384

Source: Australian Bureau of Statistics - 6291.0.55.003 - EQ06 - Employed persons by Industry group of main job (ANZSIC), Sex, State and Territory, November 1984 onwards

Almost all businesses and occupations related to racing and breeding require licences or registrations that are coordinated through the Principal Racing authorities, State Controlling Bodies and Greyhound Authorities.

Apprentice jockeys are required to complete the Certificate IV in Racing (Jockey) prior to applying for a jockey's licence. However, this requirement is not enshrined within the Australian Rules of Racing. Harness drivers can complete a skill set from the Certificate IV in Racing (Harness Race Driver) prior to being licensed as a B Grade Race Driver.

In all cases, obtaining the qualification is not an automatic guarantee of a licence, as other factors are taken into account.⁶³ As an example, thoroughbred trainers must have a good civil record, ability to train thoroughbreds, satisfactory stabling and training facilities, suitable financial resources, and knowledge of the local and Australian Rules of Racing (for trainers).

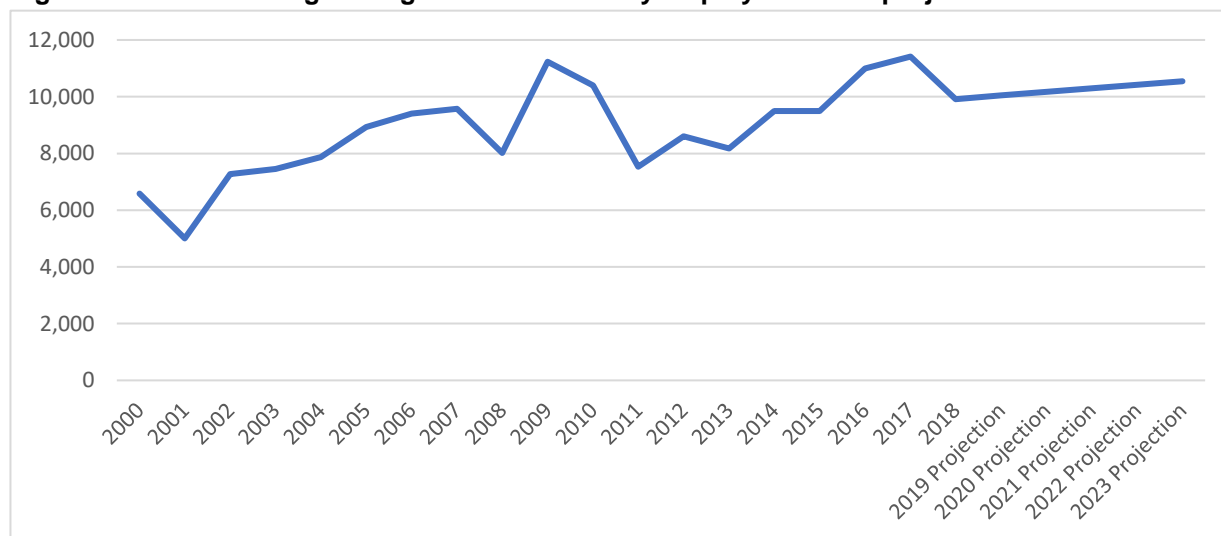
⁶² Racing Australia, Size and Scope Study, <https://ier-study.racingaustralia.horse/full-time-equivalent-employment/>

⁶³ FutureNow – Creative and Leisure Industries Training Council, 2015, *Sport, recreation and racing industries workforce development plan*.

Qualifications related to greyhound racing are being reviewed for use in the licensing process for registered participants within the industry by each state authority.

Employment levels for horse and dog racing activities have fluctuated somewhat since 2000, tied in part to the strength and vibrancy of the Australian economy (which impacts on ownership structures, race day attendances and betting patterns⁶⁴).

Figure 2: Horse and Dog Racing Activities industry employment and projection to 2023



Sources: a) Australian Bureau of Statistics - 6291.0.55.003 - EQ06 - Employed persons by Industry group of main job (ANZSIC), Sex, State and Territory, November 1984 onwards; b) Labour Market Information Portal, 2018 Industry projections - five years to May 2023 (% growth projected)

That employment in horse and dog racing activities is projected to grow by 6.3 per cent up to 2023 (Figure 2) indicates industry resilience in spite of the number of **Businesses** decreasing. This is further highlighted in Racing Australia’s recent media release celebrating that, for the first year since 2008, there has been an increase in foal crops^{65,66}.

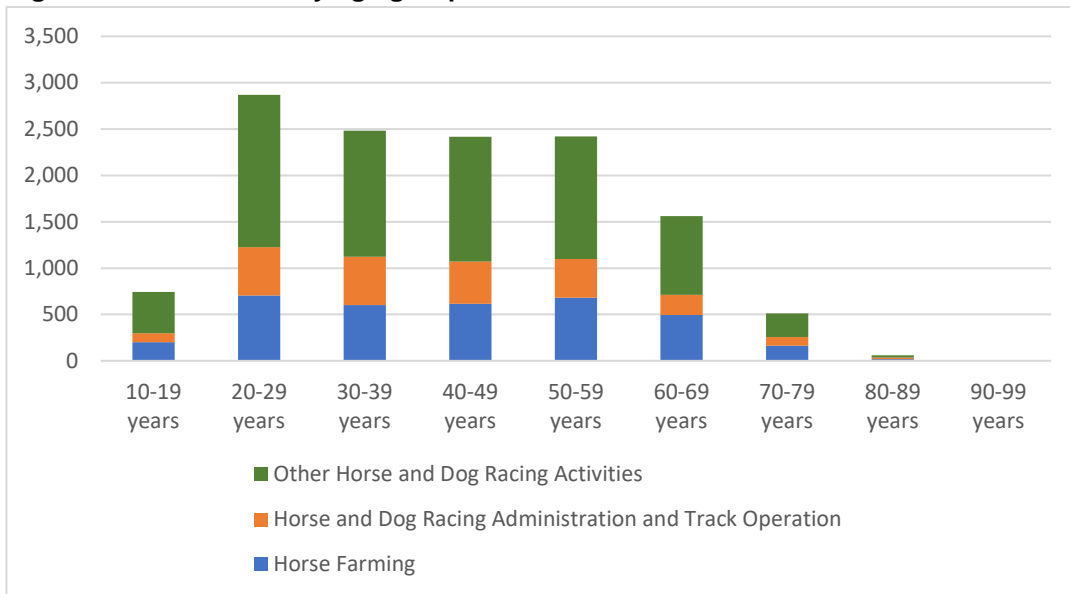
However, due to an aging labour force, of which 35 per cent are over the age of 50 (see Figure 3), industry will face challenges in replacing retirees or facilitating transferable skills for individuals transitioning to new roles.

⁶⁴ Agrifood, 2015, Environmental scan of the Agrifood industry, p.34

⁶⁵ Racing Australia, 2018, *It’s taken a decade, but Foal numbers are on the rise*, viewed February 2019, <<https://www.racingaustralia.horse/uploadimg/media-releases/Media-Release-Foal-Crop-17May2018.pdf> >

⁶⁶ ABS does not publish horse breeding employment projections.

Figure 3: Labour force by age group

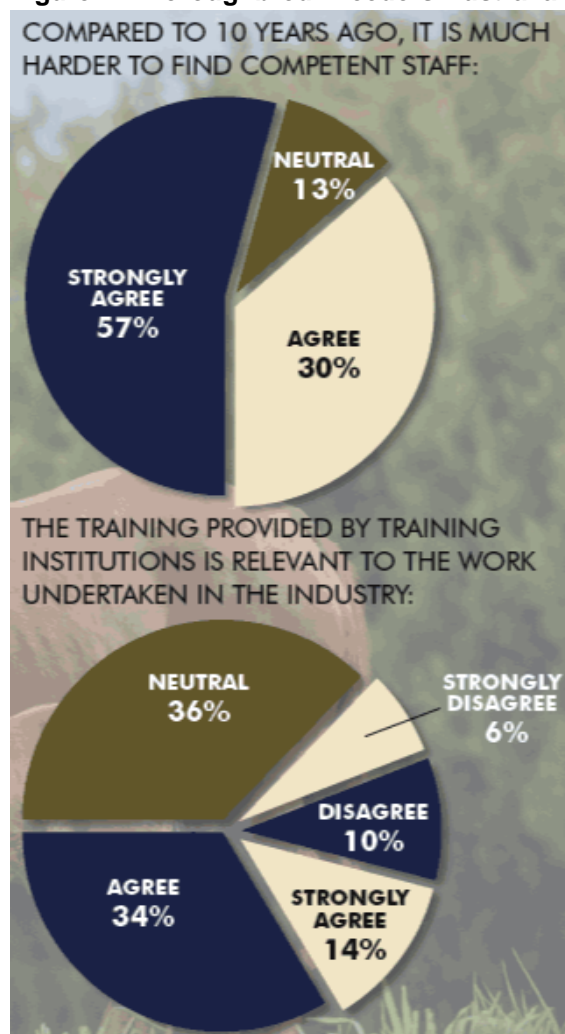


Source: *Census of Population and Housing, 2016, TableBuilder*

Considering forecasted employment growth and an aging workforce, thousands of jobs will be available in the coming years and the *RGR Training Package* will continue to play a pivotal role in ensuring that there is a pool of skilled workers to fill vacancies. However, this will only become a reality if the Training Package is on the scope of RTOs, and RTOs are supported to develop and share resources as part of an industry network.

According to Thoroughbred Breeders Australia, there are around 10,000 people working in the thoroughbred breeding sector, with a significant proportion based in regional areas. They contend that the lack of availability of staff is having a negative impact on the sector. In the second half of 2017, they conducted a national 'staff and skills shortages' survey of breeders. Some results included:

Figure 4: Thoroughbred Breeders Australia survey results



Source: <http://tbaus.smedia.com.au/digital-magazine/>

Skills Outlook

The *RGR Racing and Breeding Training Package* is going through the final stages of review which will result in the whole Training Package having been reviewed between 2017–2019. As a result, the IRC believes that current skills needs have been identified and addressed within the Training Package. Time is now required for implementation and to obtain feedback on delivery and skills improvements or additions. What remains to be addressed is appropriate assessment of the skills through consistent, benchmarked national assessment tools and associated support materials.

The industry is regulated and faces public scrutiny of its social licence to operate. Racing and breeding authorities have sophisticated and standardised systems for ensuring high standards are maintained, new issues can be addressed, and suitable actions and penalties can be applied when behaviour falls short of expectations.

It is important for the cultural cohesion of the industry and for the safety and welfare of the people and animals within the industry, that the same approach is taken to training and assessment. This outcome is best addressed through the development of national assessment tools based on the national skills standards outlined in the updated *RGR Training Package* and implemented via a national network of trainers and RTOs servicing the industry.

KEY DRIVERS FOR CHANGE AND PROPOSED SOLUTIONS

This section will focus on the proposal by the Racing and breeding IRC to undertake project work relating to the development of assessment tools and associated materials.

Table 6: Development of Assessment Tools and Associated Materials

Key Drivers	Proposed Solutions	Stakeholder Impact	Risks of not Proceeding
<p>Major safety issues in Racing and Breeding vocational training were urgently addressed through the Training Package. These safety issues need further support to ensure effective and safe delivery of training and industry participation.</p> <p>Ensure full compliance with new standards relating to training in horse related industries.</p> <p>Improve the ability of RTO to offer training by decreasing overall costs for employers and RTOs.</p> <p>Maintain and support the industry culture of consistent, national approaches to integrity, safety and welfare.</p> <p>Protect the high quality of the Australian industry to support the reputation of the industry.</p> <p>Development of relevant skills that can support rural and local economies</p>	<p>Develop assessment tools benchmarked against skills standards outlined in the updated training package.</p> <p>Work to develop a national network of RTOs and trainers to support the industry's training efforts.</p> <p>The development of associated materials related to training and assessment to support consistent and benchmarked approaches</p>	<p>Improved worker safety</p> <p>Improved safety and welfare of racing animals.</p> <p>Improved accountability of all stakeholders in the vocational training system in racing and breeding, and the establishment of measurable benchmarks.</p> <p>Maintain and grow Australia's reputation for high-quality racing and breeding</p>	<p>Failure to minimise safety risks in a high-risk and regulated industry.</p> <p>Increased questioning of social licence to operate based on potential for harm from industry participation.</p> <p>Difficulties for RTOs to offer viable training and consequential difficulties in industry recruitment.</p> <p>Potential for increasing animal welfare concerns as industry expands.</p> <p>Potential damage to Australia's international market reputation</p>

CONSULTATION UNDERTAKEN

Consultation has been undertaken throughout 2018-2019 and continues. Each IRC member undertakes consultations and networking with industry stakeholders and organisations, training organisations.

The Racing and Breeding IRC has overseen and guided consultations undertaken by Skills Impact both to support the development of the Skills Forecast 2019-2022, and as part of consultations on the completion of current projects within the SFI Training package. Organisations that have been consulted by Skills Impact include:

- Racing Australia
- Racing NSW
- Racing & Wagering WA
- Racing QLD
- Racing Victoria
- Thoroughbred Racing SA
- Tasracing
- QLD Racing & Integrity Commission
- Australian Jockey's Association
- WA Jockeys Association
- Qld Jockeys Association
- Australian Jumping Racing Association
- Australian Trainers Association
- WA Racehorse Trainers Association
- Greyhound Racing NSW
- Greyhound Racing Victoria
- WA Greyhound Racing Association
- Melbourne Polytechnic
- Racing Industry Skills Centre/Harness Racing Training Centre
- Australian Racing and Equine Academy
- Harness Racing Australia
- Harness Racing Victoria
- Harness Racing NSW
- Queensland Mini Trotting Sporting Association
- Gloucester Park Harness Racing
- Horse SA
- FutureNow
- Godolphin
- Goldin Farms P/L
- Saddle On P/L
- AWU
- Skills Alliance
- Skill Invest
- Metropolitan South Institute of TAFE
- TAFE NSW

PROPOSED PROJECT

Project 1: Creation of National Assessment Tools and Associated Resources and Materials

Description

This project aims to support the recent and current reviews and updating of the *RGR Racing and Breeding Training Package* by creating national assessment tools, and associated assessment and training materials. The project will improve the consistency and standards of assessment, improving safety and welfare across the industry. This project will also foster a new network of RTOs delivering services across the industry and offering greater support to enterprises in each jurisdiction.

Key deliverables

- The development and publication of Assessment Tools that meet ASQA requirements, including compliance with the standards for Registered Training Organisations (2015), which are available nationally for all RTOs with qualifications on scope, including:
 - 1) Context and conditions of assessment;
 - 2) Task to be administered to the student;
 - 3) An outline of evidence to be gathered from the candidate;
 - 4) Evidence criteria used to judge the quality of performance;
 - 5) Administration, recording and reporting requirements.
- Detailed provision of guidance on evidence criteria with benchmarks to ensure high quality performance based on the safety and welfare of workers and racing animals, which are accepted and utilised by principal racing and controlling authorities. To be developed as part of a process to build RTO interest, capacity and commitment to servicing this sector.
- Establishment of RTO networks and systems for quality checks to ensure appropriate consistency and benchmarking of assessment and training, using resources and materials developed in the project.

Rationale

Racing and breeding is a fully regulated industry featuring high-risk factors for workers and racing animals. The industry has developed a strong culture of sharing standards and approaches to ensure the highest levels of integrity, safety and welfare.

This cultural and regulatory approach should be established at all levels of the industry, from initial participation to the final days of participation. One aspect of the industry that doesn't meet this methodology is in vocational training and assessment, which have largely been in the control of individual service providers, where every other aspect of the industry has been subject to unified standards and benchmarking.

The *RGR Training Package* has been fully reviewed over three years, with this work to be completed during 2019. The review has established national skills standards by creating performance criteria, evidence standards for performance and knowledge, and assessment conditions.

The racing and breeding industry has difficulties attracting new workers and learners to participate, and this is leading to industry shortages, particularly in regional areas. In part, international visa programs are being used to address recruitment challenges. Australia has a high standard industry with a strong international reputation, and it is important to ensure all workers meet these standards. This can be achieved through the development of assessment tools.

Racing and breeding is dominated by smaller employers unable to support high costs of training. Apprenticeships and traineeships can be difficult to deliver because employers are too small to meet all requirements. Likewise, regulators and industry impose strict guidelines on shared operational responsibilities to uphold integrity, safety and welfare. New safety standards in training relating to horses have made delivery difficult, even for TAFEs across various states. This has added to the cost of delivery.

The development of supporting assessment tools and associated materials and resources will partially ameliorate the costs of delivery of the assessment and training for RTOs and employers.

Changes in job roles, workplace or industry

Changes in job roles have been addressed by previous projects. The Australian racing and breeding industry is now competing more often in the global marketplace, requiring maintenance of high standards, including addressing safety, welfare and biosecurity concerns.

The industry is fully regulated and it is vital that all participants are introduced to the importance of the regulatory approach so that they continue to consider integrity, safety and welfare at each stage of their participation. This is integral to the way that industry operates from the birth of the animals through to their post-retirement lives, and at each level of worker participation.

Assessment and training needs to be consistent with this cultural approach adopted and promoted by industry.

Need for Graduates

Industry growth is not being matched by workforce growth, as the workforce ages and fewer young people are being attracted. There is significant industry concern about current apprenticeship and trainee numbers which have been dropping. The Thoroughbred Breeders Association conducted a survey in 2017 which showed that 57 per cent of employers strongly agreed that it is far harder to recruit competent staff than it was a decade ago, with an overall agreement rate of 87 per cent and no disagreement or strong disagreement (see Figure 4: Thoroughbred Breeders Australia survey results).

The racing and breeding industry relies on small groups of highly-skilled workers to operate, including jockeys and drivers, trainers, stewards, and race-day officials and attendants. While industry participation has been growing – largely through animal ownership – other segments of the industry are struggling to attract and retain workers.

Timeline for Latest changes

The changes being supported by the completion of this project have been endorsed in 2017 and 2018, along with some qualifications expected to be endorsed in 2019.

This project is an extension to previous work, going beyond the training package review to improve overall standards of assessment and training, to improve integrity, safety and welfare.

Low enrolments and New Components

New components have been introduced through work endorsed in 2017 and 2018 (and expected endorsements in 2019), which have also improved standards relating to safety and training requirements for young and inexperienced industry participants.

The IRC expects to see enrolments start to increase from 2018, however this will only continue if the overall costs of assessment and delivery can be reduced for RTOs and employers.

Existing Components and cross-sector approaches

There are no relevant cross-sector approaches available.

Data

The assessment tools and associated resources and materials will be used to support the 15 qualifications, 43 skills sets and 127 units of competency in the *RGR* Training Package, which had 6,658 enrolments in qualifications between 2014 and 2017.

Ministers Priorities Addressed

Obsolete and duplicate qualifications removed from the system

This priority has been addressed in previous projects.

More information about industry's expectations of training delivery is available to training providers to improve their delivery and to consumers to enable more informed choices

The assessment tools and associated resources and materials would be developed in conjunction with and made available to all RTOs with qualifications or skills sets on scope, with the expectation that they would be adopted and applied.

The training system better supports individuals to move more easily between related occupations

Utilising a national standards approach will better inculcate the culture of national compliance in a fully regulated environment.

Improved efficiency of the training system through units that can be owned and used by multiple industry sectors

This priority has been addressed in previous projects.

Foster greater recognition of skill sets

This priority has been addressed in previous projects.

Consultation Plan

The Racing and Breeding IRC will oversee and guide consultation, including identification of relevant experts and stakeholders. As the recommended approach relates to national standards, it will be critical to success to ensure that all principal and controlling authorities approve the final deliverables.

Stakeholders for Consultation

Principal Racing and Controlling Authorities and Bodies

- Racing Australia
- Racing & Wagering WA
- Racing QLD
- QLD Racing & Integrity Commission
- Tasracing
- Northern Territory Treasury Racing Gaming & Licensing
- Racing NSW
- Racing Victoria
- Thoroughbred Racing SA
- Harness Racing Australia
- Harness Racing Victoria
- Harness Racing NSW
- Harness Racing South Australia
- Greyhounds Australasia
- Greyhound Racing Victoria
- Greyhound Welfare & Integrity Commission
- Greyhound Racing NSW
- Greyhound Racing South Australia
- Canberra Greyhound Racing Club

Key Participant Bodies (National bodies listed: State affiliates will also be consulted)

- Australian Jockey's Association
- Australian Trainers Association
- Australian Greyhound Racing Association
- Australian Jumps Racing Association
- Australian Standardbred Breeders Association
- Australian Workers Union
- Thoroughbred Breeders Australia
- Thoroughbred Racehorse Owners' Association

Other bodies

- RTOs with project units of competency on scope
- Industry Training Advisory Bodies
- State/Territory Training Authorities

Scope of Project

Overview

Overall timing: 12 months from commencement

Expected Date for Completion: September 2020

Note: the completed project will not require formal endorsement by the Australian Industry and Skills Committee for updating of a Training Package.

Summary of Components

Key deliverables

- The development and publication of Assessment Tools that meet ASQA requirements, including compliance with the standards for Registered training Organisations (2015) which are available nationally for all RTO with qualifications on scope, including:
 - 1) Context and conditions of assessment
 - 2) Task to be administered to the student
 - 3) An outline of evidence to be gathered from the candidate
 - 4) Evidence criteria used to judge the quality of performance
 - 5) Administration, recording and reporting requirements
- Detailed provision of guidance on evidence criteria with benchmarks to ensure high quality performance on the basis of safety and welfare of workers and racing animals, which are accepted and utilised by principal racing and controlling authorities.
- Establishment of systems for quality checks to ensure appropriate consistency and benchmarking of assessment and training, using resources and materials developed in the project.

IRC SIGN-OFF

This IRC Skills Forecast and Proposed Schedule of Work was agreed as the result of a properly constituted IRC decision.

Signed for and on behalf of the Racing IRC by its appointed Chair,

Geoff Bloom
Date:

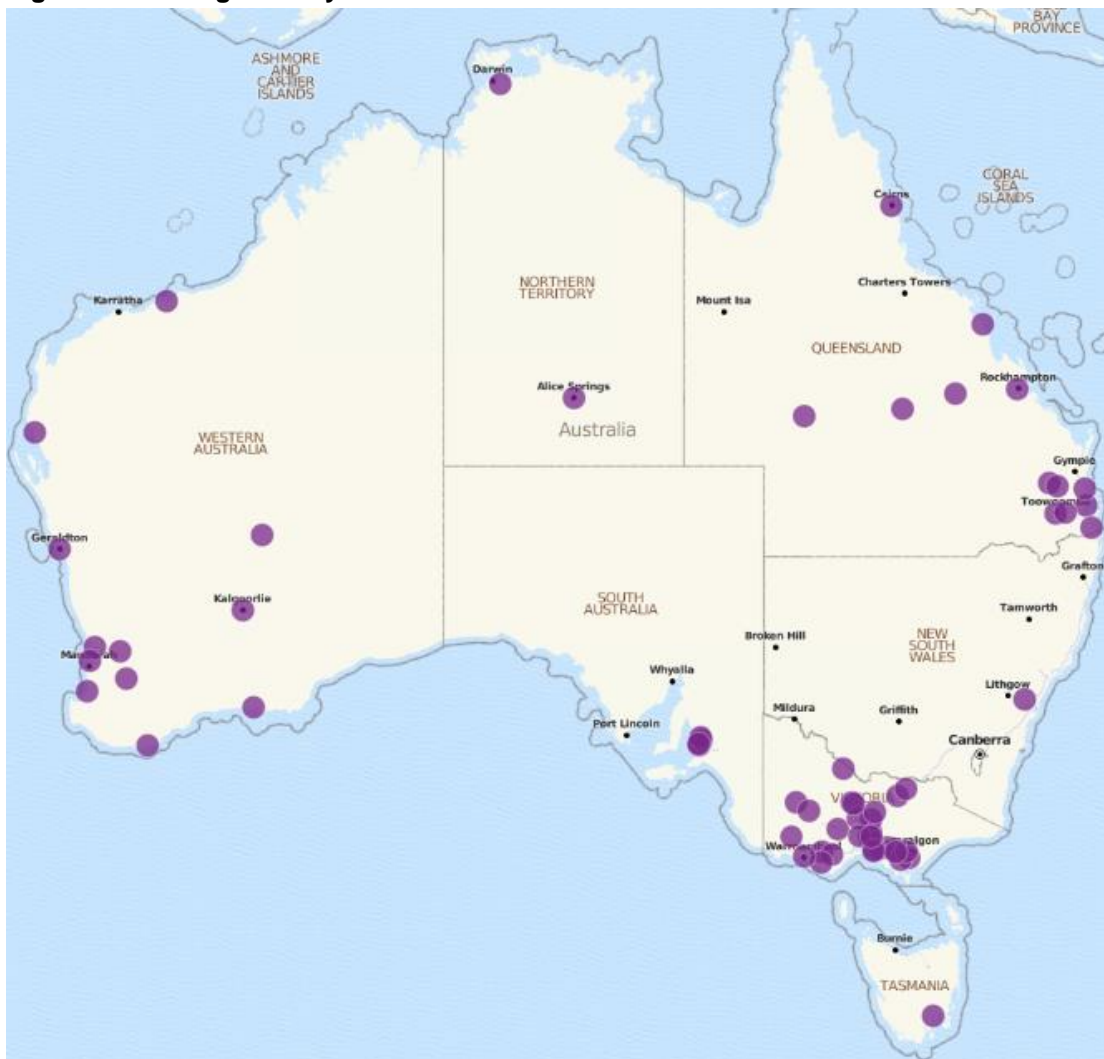
DRAFT

APPENDIX 1: RGR TRAINING PACKAGE INFORMATION

Nationally-recognised training for the racing industry is delivered under the *RGR Racing and Breeding Training Package*. This Training Package comprises 15 qualifications, 43 skill sets and 127 units of competency.

In 2017, there were 1,345 program enrolments (see Table 7Error! Reference source not found.), 334 program completions and 11,740 subject enrolments. Program enrolments increased by 29 per cent (473) between 2014 and 2015, but decreased over the next two years. Completion numbers declined between 2014 and 2015 (from 570 to 370), but were relatively stable between 2015 and 2017. See **Figure 8, below**, displays the training delivery locations of *RGR Training Package* qualifications. Besides the relative geographical proximity of training organisations in Victoria, training opportunities across the rest of Australia are relatively sparse.

Figure 8: Training delivery locations



Source: NCVER, *Atlas of Total VET 2017*

RGR Student Profile for cohort details.

Table 7: RGR program enrolments⁶⁷

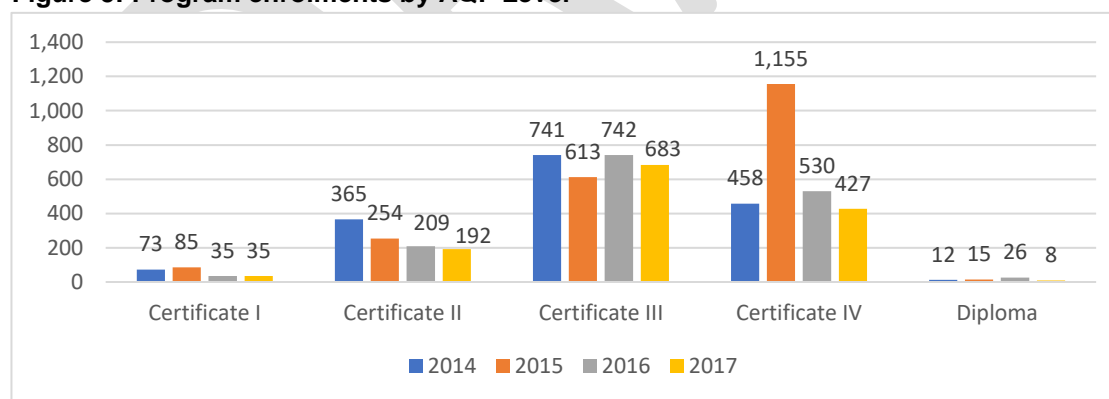
Current Qualification Code	Qualification Name	2014	2015	2016	2017	Total ⁶⁸
RGR10118	Certificate I in Racing (Stablehand)	73	85	35	35	228
RGR20117	Certificate II in Racing (Greyhound)	22	0	0	0	22
RGR20218	Certificate II in Racing Industry	343	254	209	192	998
RGR30117	Certificate III in Racing (Greyhound)	0	0	0	0	0
RGR30218	Certificate III in Racing (Stablehand)	517	447	538	488	1,990
RGR30318	Certificate III in Racing (Driving Stablehand)	0	0	0	0	0
RGR30418	Certificate III in Racing Services	18	22	55	49	144
RGR30518	Certificate III in Racing (Trackwork Rider)	206	144	149	146	645
RGR40418	Certificate IV in Racing (Greyhound Trainer)	0	715	27	0	742
RGR40218	Certificate IV in Racing (Jockey)	205	180	197	152	734
RGR40518	Certificate IV in Racing Integrity	2	4	0	0	6
RGR40118	Certificate IV in Racing (Racehorse Trainer)	224	209	282	271	986
RGR40318	Certificate IV in Racing (Harness Race Driver)	27	47	24	4	102
RGR50218	Diploma of Racing Integrity Management	0	3	0	0	3
RGR50118	Diploma of Racing (Racehorse Trainer)	12	12	26	8	58
		1,649	2,122	1,542	1,345	6,658

NCVER VOCSTATS, TVA program enrolments 2014-2017

The qualification RGR20118 Certificate II in Racing Industry was unintentionally deleted from the Training Package and is currently in the process of being reinstated.

In 2017, around half of enrolments were in Certificate III and one-third Certificate IV qualifications. The most common intended occupations were Horse Trainer, Stablehand, Jockey and Dog Handler or Trainer.

Figure 5: Program enrolments by AQF Level



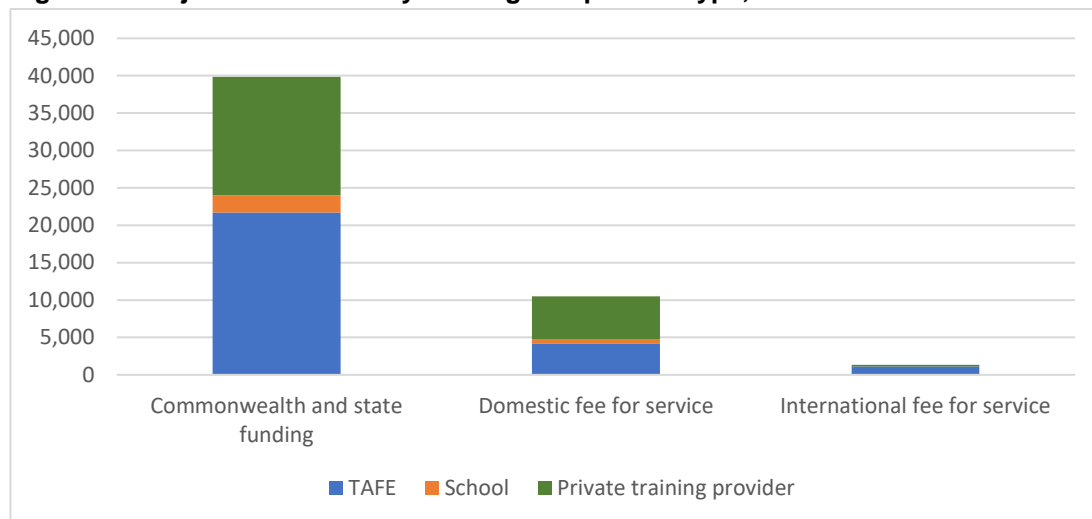
NCVER VOCSTATS, TVA program enrolments 2014-2017

⁶⁷ Data includes enrolments in superseded qualifications that are both equivalent and not equivalent to the current qualification

⁶⁸ There were a further 180 enrolments in now-deleted qualifications in this Training Package between 2014 and 2017.

Between 2014 and 2017, 54 per cent of program training was delivered by RTOs, 41 per cent through TAFEs and six per cent at schools. Over 77 per cent of RGR subject enrolments were government-funded (see Figure 6).

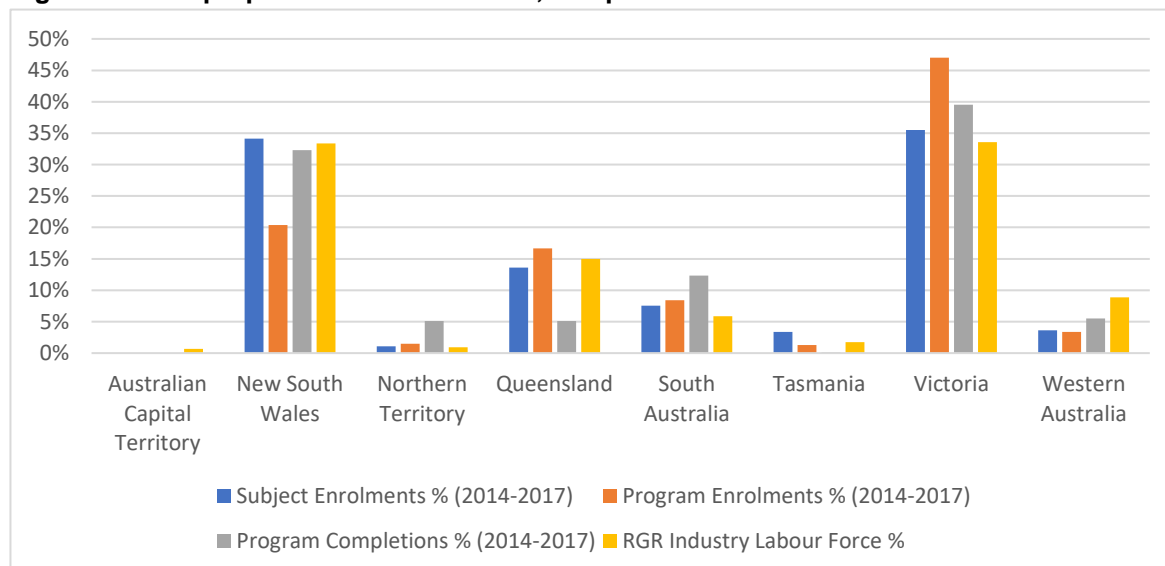
Figure 6: Subject enrolments by funding and provide type, 2014-2017



NCVER VOCSTATS, TVA program enrolments 2014-2017

Commensurate with its proportion of the racing and breeding labour force, Victoria recorded the largest proportions of students who enrolled in programs and subjects, and who completed programs, between 2014 and 2017 (see Figure 7; also **Employment**). New South Wales figures were comparable in all but program enrolments during this period.

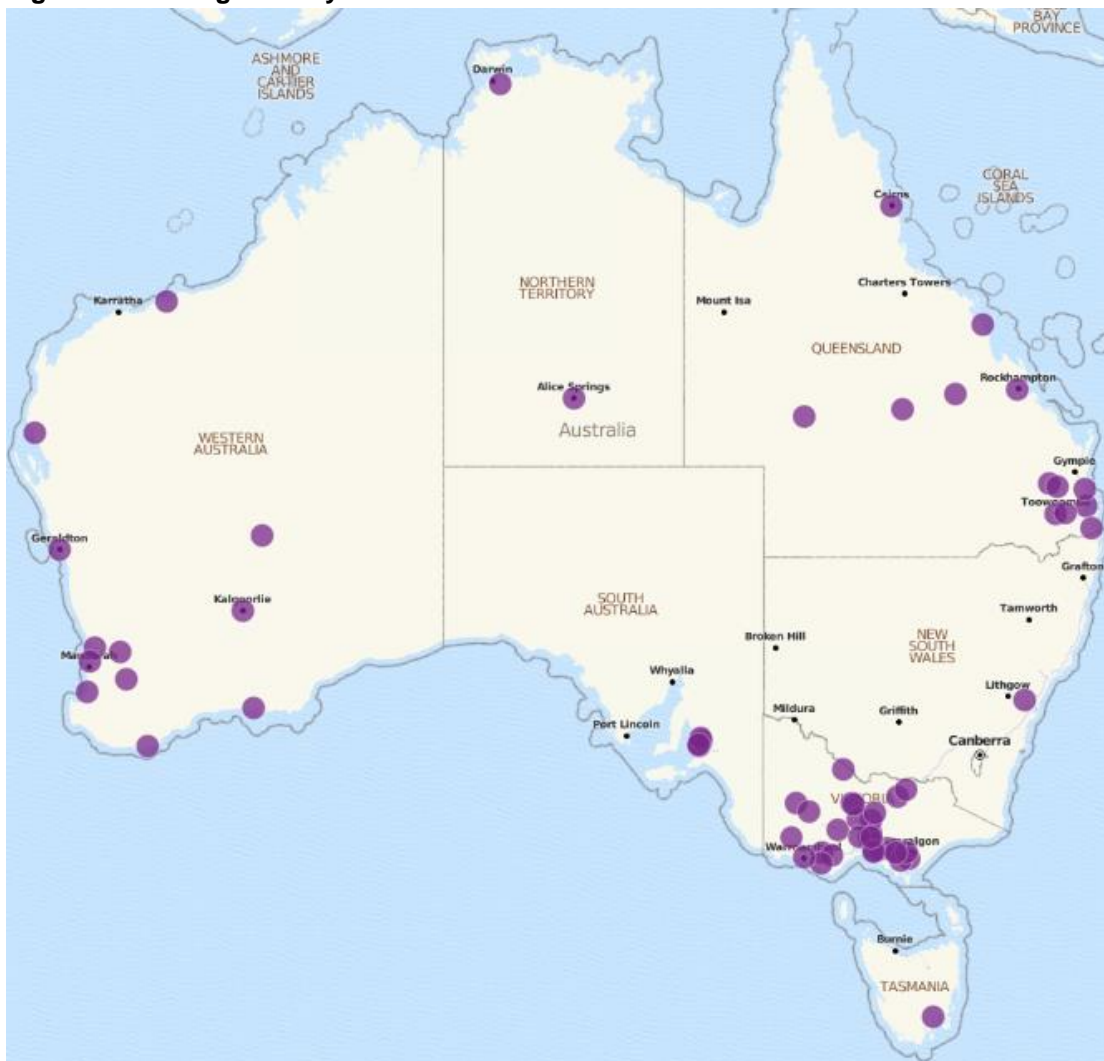
Figure 7: State proportions of enrolments, completions and RGR-related labour force



Sources: a) NCVER VOCSTATS, TVA subject enrolments 2014-2017; b) NCVER VOCSTATS, TVA program enrolments 2014-2017; c) NCVER VOCSTATS, TVA program completions, 2014-2017; d) ABS, 2016 Census of Population and Housing

Figure 8, below, displays the training delivery locations of *RGR Training Package* qualifications. Besides the relative geographical proximity of training organisations in Victoria, training opportunities across the rest of Australia are relatively sparse.

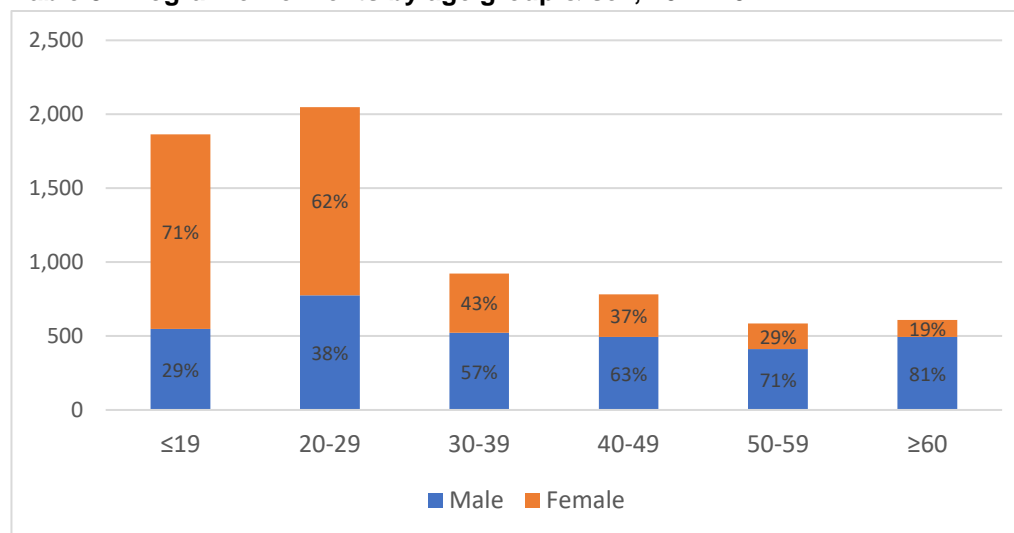
Figure 8: Training delivery locations



Source: NCVER, *Atlas of Total VET 2017*

RGR Student Profile

While there is a lower proportion of women employed in horse and dog racing activities (see Table 5) the majority (52 per cent) of training program enrolments between 2014 and 2017 were by females, including 66 per cent of enrolments by people under the age of 30 years.

Table 8: Program enrolments by age group & sex, 2014-2017

NCVER VOCSTATS, TVA program enrolments 2014-2017

Indigenous people accounted for four per cent of enrolments in 2017 (which is the median for all Training Packages, but just below the average of five per cent). This is an increase from the previous two years, and is occurring in the context of declining overall enrolment figures.

Table 9: Program enrolments by Indigenous status

Indigenous Status	2014	2015	2016	2017	Total
Indigenous	51	39	48	55	193
Non-Indigenous	1,622	1,779	1,531	1,348	6,280

NCVER VOCSTATS, TVA program enrolments 2014-2017

People with disabilities accounted for six per cent of enrolments in 2017 (which is the median for all Training Packages, but just below the average of seven per cent). There was a 26 per cent decline in enrolments by people with disabilities between 2014 and 2017 (in the context of a concurrent 17 per cent drop in overall enrolments).

Table 10: Program enrolments by disability status

Disability Status	2014	2015	2016	2017	Total
With a disability	105	99	87	78	369
Without a disability	1,510	1,292	1,419	1,253	5,474

NCVER VOCSTATS, TVA program enrolments 2014-2017

Skills Sets

- RGRSS00060- Cadet Steward Skill Set
- RGRSS00067- Clerk of Scales for Jockeys Skill Set

- RGRSS00026- Greyhound Attendant Skill Set
- RGRSS00027- Greyhound Breeding Skill Set
- RGRSS00028- Greyhound Catcher Skill Set
- RGRSS00034- Greyhound Clerk of Scales
- RGRSS00035- Greyhound Lure Driver
- RGRSS00059- Greyhound On-track Veterinarian Skill Set
- RGRSS00029- Greyhound Primary Educator Skill Set
- RGRSS00036- Greyhound Race Club Kennel Attendant Skill Set
- RGRSS00037- Greyhound Race Club Parade Official Skill Set
- RGRSS00025- Greyhound Racing Animal Welfare Skill Set
- RGRSS00030- Greyhound Racing Integrity Skill Set
- RGRSS00031- Greyhound Rearing Skill Set
- RGRSS00032- Greyhound Stewarding Skill Set
- RGRSS00038- Greyhound Training Operations Skill Set
- RGRSS00033- Greyhound Whelping Skill Set
- RGRSS00039- Harness Mobile Start Driver Skill Set
- RGRSS00040- Harness or Thoroughbred Clerk of Course Skill Set
- RGRSS00041- Harness or Thoroughbred Racing Handicapper Skill Set
- RGRSS00042- Harness or Thoroughbred Training Operations Skill Set
- RGRSS00043- Harness Race Starter Skill Set
- RGRSS00044- Harness Trackwork Driver Skill Set
- RGRSS00061- Horse Race Day Veterinarian Skill Set
- RGRSS00057- Non-Turf Race Track Curator Skill Set
- RGRSS00063- Race Day Steward Skill Set
- RGRSS00045- Race Meeting Farrier Skill Set
- RGRSS00046- Racing Biological Security Officer Skill Set
- RGRSS00064- Racing Club Administration Skill Set
- RGRSS00062- Racing Investigations Skill Set
- RGRSS00047- Racing Judge Skill Set
- RGRSS00048- Racing Licensing and Registration Clerk Skill Set
- RGRSS00049- Racing Nominations and Acceptances Clerk Skill Set
- RGRSS00050- Racing Photo Finish Operator Skill Set
- RGRSS00065- Racing Stable Administration Skill Set
- RGRSS00051- Racing Swab Attendant Skill Set
- RGRSS00052- Racing Timekeeper Skill Set

- RGRSS00053- Thoroughbred Barrier Attendant Skill Set
- RGRSS00054- Thoroughbred Exercise Rider Skill Set
- RGRSS00055- Thoroughbred Fast Work Rider Skill Set
- RGRSS00056- Thoroughbred Race Starter Skill Set
- RGRSS00066- Trackwork Supervisor Skill Set
- RGRSS00058- Turf Race Track Curator Skill Set

APPENDIX 2: INDUSTRY REGULATIONS AND STANDARDS

The Australian racing and breeding industry is fully regulated. Each state and territory is governed by principal racing authorities, in addition to the national racing control boards for Thoroughbreds – Racing Australia, Harness – Harness Racing Australia and Greyhounds – Greyhounds Australasia.

Australian Rules of Racing and Australasian Rules of Greyhound Racing

The industry is governed by rules approved by the national racing authorities for each sub-sector ([Thoroughbred](#), harness and greyhound racing) to ensure that horse and greyhound racing in [Australia](#) is conducted according to the same general practices, conditions and [integrity](#). They ensure the safety of the participants and manage a well-regarded equine welfare program. All three racing codes have sets of local and Australian Rules of Racing (Thoroughbred and harness racing). Greyhound Racing is regulated by rules in each jurisdiction. Each jurisdiction's rules relate to the rules that are promulgated by Greyhounds Australasia. However, in the event of an inconsistency, the local rules of the state/territory take precedence over the national rules. All registered participants, including trainers and owners, are expected to make themselves familiar with the rules.

In the course of its investigation into equine training programs in Australia, the Australian Skills Quality Authority (ASQA) found that, while there are voluntary codes or guides (including one developed by Safe Work Australia), there is no consistent approach for managing work health and safety risks in horse racing across Australia.⁶⁹ Industry works closely with state-/territory-based work safety authorities, meaning that there are state/territory differences in approaches (as there are with most industries).

Australian Stud Book, Australian Trotting Stud Book and Australian and New Zealand Greyhound Stud Book

Strict industry regulations are applied to ensure the integrity of [Thoroughbred](#) and Standardbred racehorses in Australia, and to provide racing officials with a reliable identification system. Horse identification procedures include DNA testing of mares and foals, branding, microchips and identification cards for foals, and horse records and statistics in the *Australian Stud Book* for Thoroughbreds and the *Australian Trotting Stud Book* for Standardbred horses.

For instance, the *Australian Stud Book* is the official record and publication of Thoroughbred bloodlines for horses born in Australia. Its core responsibility is the maintenance, accuracy, quality and integrity of these records. The *Australian Stud Book* operates under the Rules of the Australian Stud Book and the Australian Rules of Racing and meets international standards. Horses without registered parents cannot be officially named and are not eligible for entry into the *Australian Stud Book*. However, horses may be registered as racehorses in the Register of Racehorses, allowing them to compete in almost all races.

The *Australian and New Zealand Greyhound Stud Book* provides information to owners and breeders regarding the pedigrees of greyhounds in Australia and New Zealand.

Biosecurity Import Conditions

Strict quarantine requirements exist, by law, for imported horses and any people or goods in contact with the horse. Horses brought into Australia must meet all current Biosecurity Import Conditions (BICON) overseen by the Department of Agriculture and Water Resources. Under these conditions, imported horses are required to undergo both pre-export and post-entry quarantine. Before arrival in Australia, horses must undergo [pre-export quarantine](#) for a minimum of 14 days at an approved facility in their home country. On

⁶⁹ Australian Skills Quality Authority (ASQA), 2015, *Training in equine programs in Australia*.

arrival in Australia, horses complete post-entry quarantine for a minimum of 14 days.⁷⁰ Additionally, Western Australia has strict guidelines for any horses coming in from the eastern states.

Racing animals' welfare

Treatment of racing animals before, during and after their racing careers is also regulated by the industry. For example, Harness Racing Australia, Racing Australia, and the state PRAs are working on better recording of racing animal outcomes. For example, under a new Australian Rule of Racing, the managing owner of each thoroughbred horse is required to report on the retirement of their horse, advising the reason for the horse's retirement and plans for the horse beyond its racing career.

In each state and territory, greyhound racing authorities manage adoption programs for greyhounds that have retired from racing. Authorities are also working on improving the recording of greyhound outcomes. Most greyhounds that enter the program undergo a period of foster care prior to adoption. There are also volunteer groups that repatriate greyhounds as pets.

The IRC identified a skills gap within the national training package and the Retraining Horses & Greyhounds to New Environments Project will be finalised by June this year.

Environmental protection measures

The industry is also subject to national and state regulations regarding environmental aspects such as effluent disposal.

Code of practice

SafeWork NSW has released a code of practice: 'Managing risks when new or inexperienced riders or handlers interact with horses in the workplace'.

⁷⁰ Department of Agriculture and Water Resources, 2015, 'Importing horses', <<https://postentryquarantine.govspace.gov.au/2015/07/30/importing-horses/>>.

APPENDIX 3: INDUSTRY PRIORITY FOR GENERIC SKILLS

The Racing and Breeding Industry Reference Committee was consulted on ranking the generic skills priorities for the industry from a list provided by the Department of Education and Training. The table below outlines the advice received.

Table 11: Industry Priority for Generic Skills

Rank	Generic Skill
1	Other generic skills Animal welfare Integrity and ethical conduct
2	Language, Literacy and Numeracy (LLN) skills Foundation skills of literacy and numeracy.
3	Learning agility/Information literacy/Intellectual autonomy and self-management skills Ability to identify a need for information. Ability to identify, locate, evaluate, and effectively use and cite the information. Ability to discriminate and filter information for importance. Ability to do more with less. Ability to quickly develop a working knowledge of new systems to fulfil the expectations of a job. Ability to work without direct leadership and independently.
4	Communication/Collaboration including virtual collaboration/Social intelligence skills Ability to understand and apply the principles of creating more value for customers with fewer resources (lean manufacturing) and collaborative skills. Ability to critically assess and develop content that uses new media forms and leverage these media for persuasive communications. Ability to connect with others deeply and directly, to sense and stimulate reactions and desired interactions.
5	Financial skills Ability to understand and apply core financial literacy concepts and metrics, streamlining processes such as budgeting, forecasting, and reporting, and stepping up compliance. Ability to manage costs and resources, and drive efficiency.
6	Customer service/Marketing skills Ability to interact with another human being, whether helping them find, choose or buy something. Ability to supply customers' wants and needs both via face to face interactions or digital technology. Ability to manage online sales and marketing. Ability to understand and manage digital products.
7	Managerial/Leadership skills Ability to effectively communicate with all functional areas of the organisation. Ability to represent and develop tasks and work processes for desired outcomes. Ability to oversee processes, guide initiatives and steer employees toward achievement of goals.
8	Entrepreneurial skills Ability to take any idea, whether it be a product and service, and turn that concept into reality and not only bring it to market but make it a viable product and/or service. Ability to focus on the very next step to get closer to the ultimate goal. Ability to weather the ups and downs of any business. Ability to sell ideas, products or services to customers, investors or employees etc.
9	Technology use and application skills

	<p>Ability to create and/or use of technical means understand their interrelation with life, society, and the environment.</p> <p>Ability to understand and apply scientific or industrial processes, inventions, methods, etc.</p> <p>Ability to deal with increasing mechanisation and automation and computerisation.</p> <p>Ability to do work from mobile devices rather than from paper.</p>
10	Environmental and sustainability skills
	Ability to focus on problem-solving and the development of applied solutions to environmental issues and resource pressures at local, national and international levels.
11	Data analysis skills
	<p>Ability to translate vast amounts of data into abstract concepts and understand data-based reasoning.</p> <p>Ability to use data effectively to improve programs, processes and business outcomes.</p> <p>Ability to work with large amounts of data: facts, figures, number crunching, analysing results.</p>
12	Design mindset/Thinking critically/System thinking/Solving problems skills
	<p>Ability to adapt products to rapidly shifting consumer tastes and trends.</p> <p>Ability to determine the deeper meaning or significance of what is being expressed via technology.</p> <p>Ability to understand how things that are regarded as systems influence one another within a complete entity, or larger system.</p> <p>Ability to think holistically.</p>
13	Science, Technology, Engineering and Maths (STEM) skills
	Sciences, mathematics and scientific literacy.