

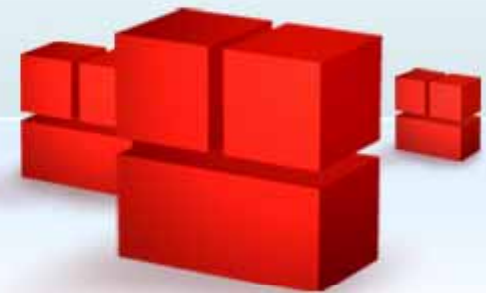
# Summary of Findings

28<sup>th</sup> November, 2008

Therese Cunningham, Aimee Taylor, Andy Sadler, Kim Mettam

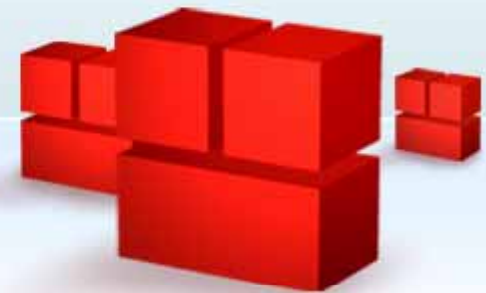
# Overview

- Method
- Results
  - Focus groups
  - Survey
- Discussion



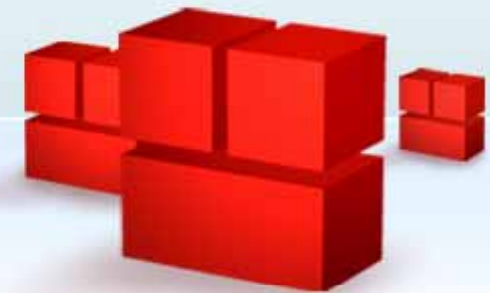
# Method

- Initial meetings between CM and RWWA Steering Group
- CM embedding within the Thoroughbred Racing Industry
- Focus groups conducted with Trainers, Track Work Riders, and Apprentice Jockeys
- Survey of Track Work Riders, Jockeys, Apprentice Jockeys, and Trainers
- Strategic workshops with RWWA and CM
- Report and recommendations
- Communication sessions to industry



# Results of Focus Groups

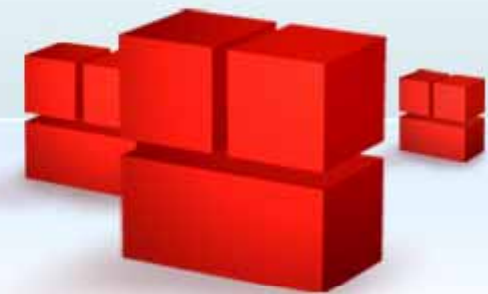
- **Money** – wages, workers' compensation, insurance
- **Risk** – horse education and behaviour, safety, track conditions, and facilities
- **Personal Values / Industry Tradition** – career appeal and education
- **Structure** – hours, conditions, and lack of communication
- **Competitive Market** – overseas visa issues, WA resources “boom”
- **Resources** – lack of people and horses



# Survey Results - Trainers

- A representative sample of 153 trainers responded to the survey
- Ages ranged between 21 and 77 years

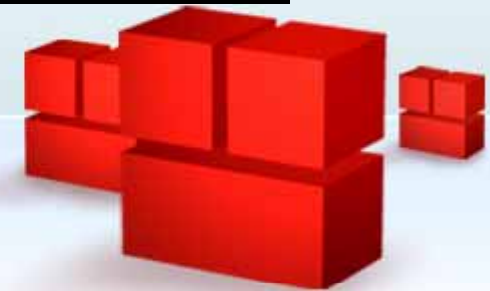
	Sample	Population
Mean age	50.83	53.12
Males	75.84%	80.06%
Females	24.16%	19.94%



# Survey Results – Track Work Riders

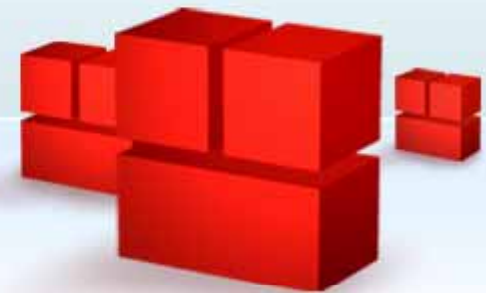
- A representative sample of 59 riders responded to the survey
- Ages ranged between 15 and 58 years
- 76 percent were licensed Track Work Riders, 19 percent were Jockeys, and 5 percent were Apprentice Jockeys

	Sample	Population
Mean age	29.79	29.90
Males	37.22%	37.28%
Females	62.78%	62.71%



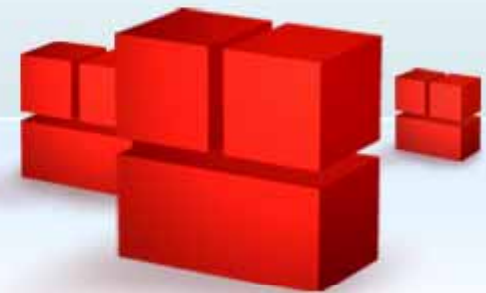
# Survey – Summary of Key Findings

- Trainers and Track Work Riders appear to be committed to the industry, as the majority indicated that they intended to stay for several years.
- On average, Trainers said they would like just over two additional horses in training.
- On average, Riders said they would like to be doing an additional 10 to 11 rides per week.
- The data suggests a number of reasons for why these additional rides may not be occurring.



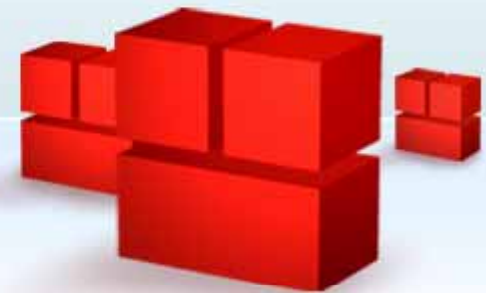
# Possible Explanations

- Rider Selectivity (pages 13 – 15)
  - Safety
  - Honesty and Trust
  - Organisation and Efficiency
- Trainer Selectivity (pages 15 - 17)
  - Riding Speed
  - Experience and Horsemanship
  - Rider Attributes
  - Insurance
- Pay
- Opening Hours (page 17)



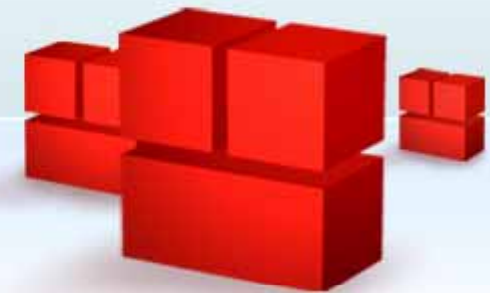
# Discussion

- Workplace dis-satisfiers or '**Hygiene Factors**' are affecting employees, specifically: **Salary/Pay, Insurance and Safety**
- **Attraction** to Track Work (including Training, Perceived Risk, Career Development Opportunities, Industry Image/Branding and Employee Recognition) is not strategic within the current WA market
- In some cases, there is a lack of **structure** around Track Work



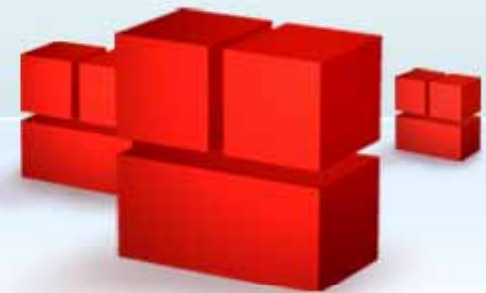
# Discussion – Hygiene Strategies

- Salary/Pay Strategies
- Insurance Strategies
- Safety Strategies



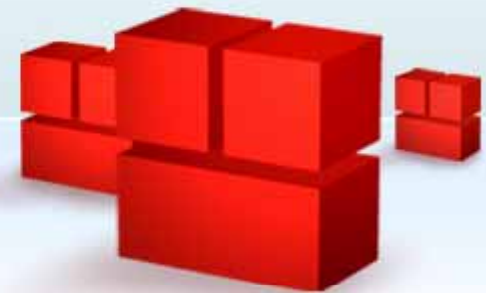
# Discussion - Attraction Strategies

- Career and training opportunities
- Culture
- Promoting the industry



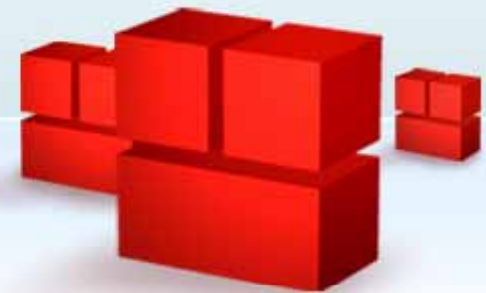
# Discussion – Structure Strategies

- Organisation
- Opening hours



# Summary of Survey Data

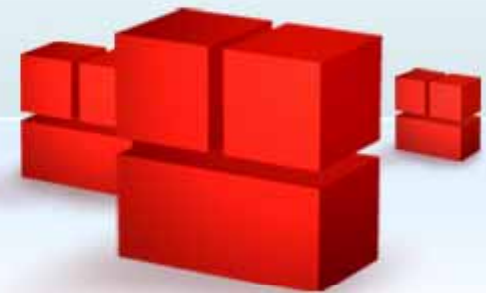
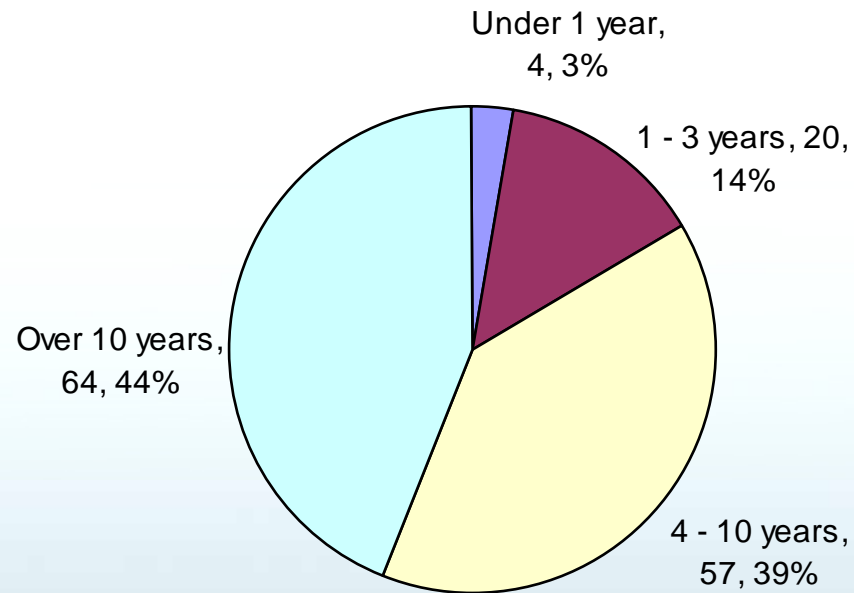
- The following slides present survey data in relation to the following areas:
  - Intention to stay (pages 7 – 9)
  - Actual vs desired activity (pages 9 – 11)
  - Track Work Rider selectivity (pages 13 – 15)
  - Trainer selectivity (pages 15 – 17)
  - Opening hours (page 17)



# Intention to Stay - Trainers

How many years into the future do you think you will continue training?

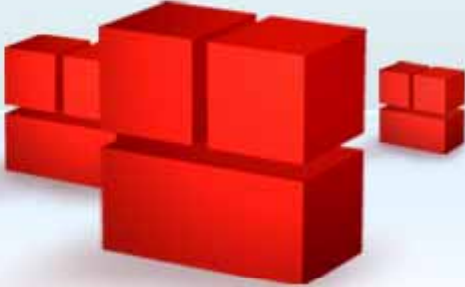
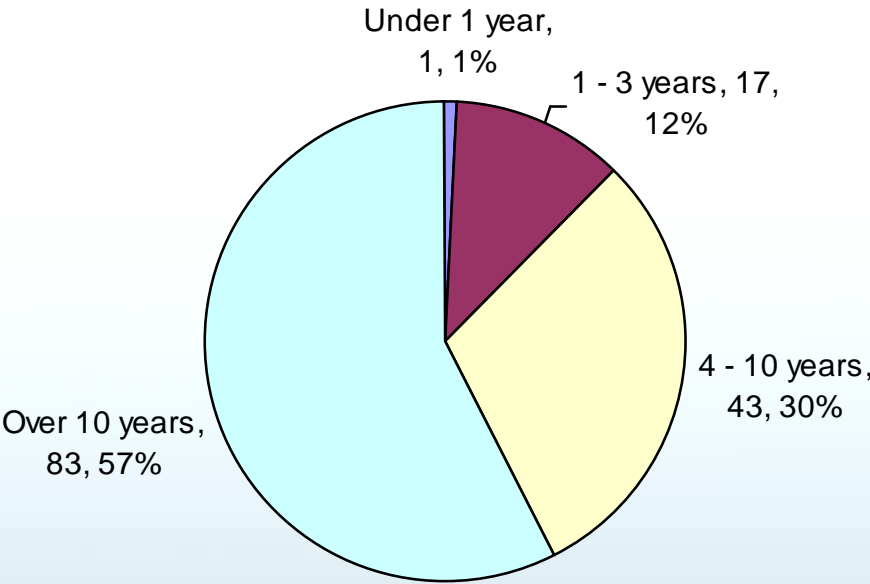
(n= 153, Total valid responses = 145)



# Intention to Stay - Trainers

How many years into the future do you think you will continue within the industry?

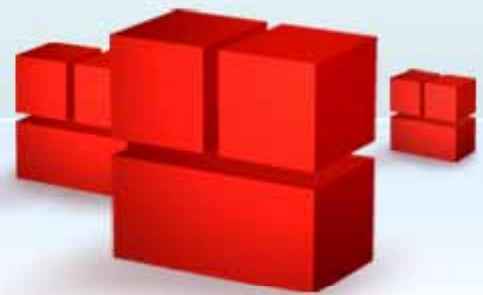
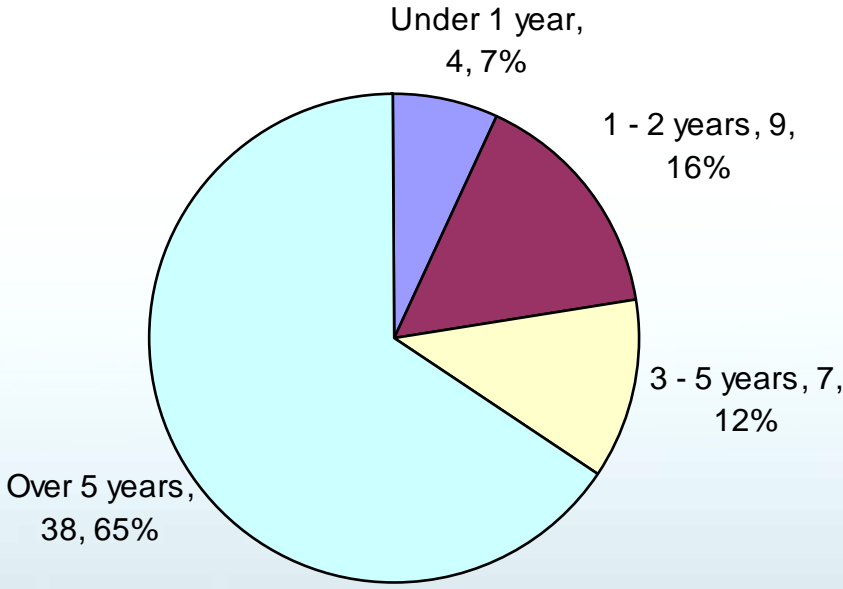
(n= 153, Total valid responses = 144)



# Intention to Stay - Riders

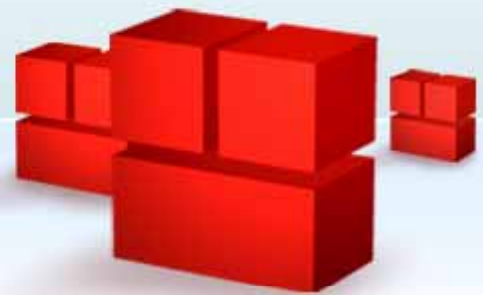
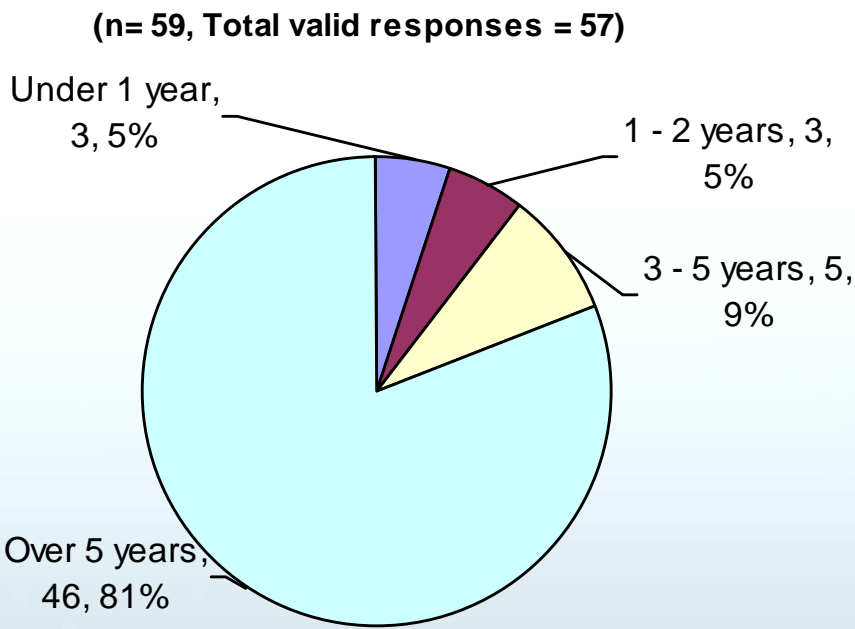
How many years into the future do you think you will continue track riding?

(n= 59, Total valid responses = 58)

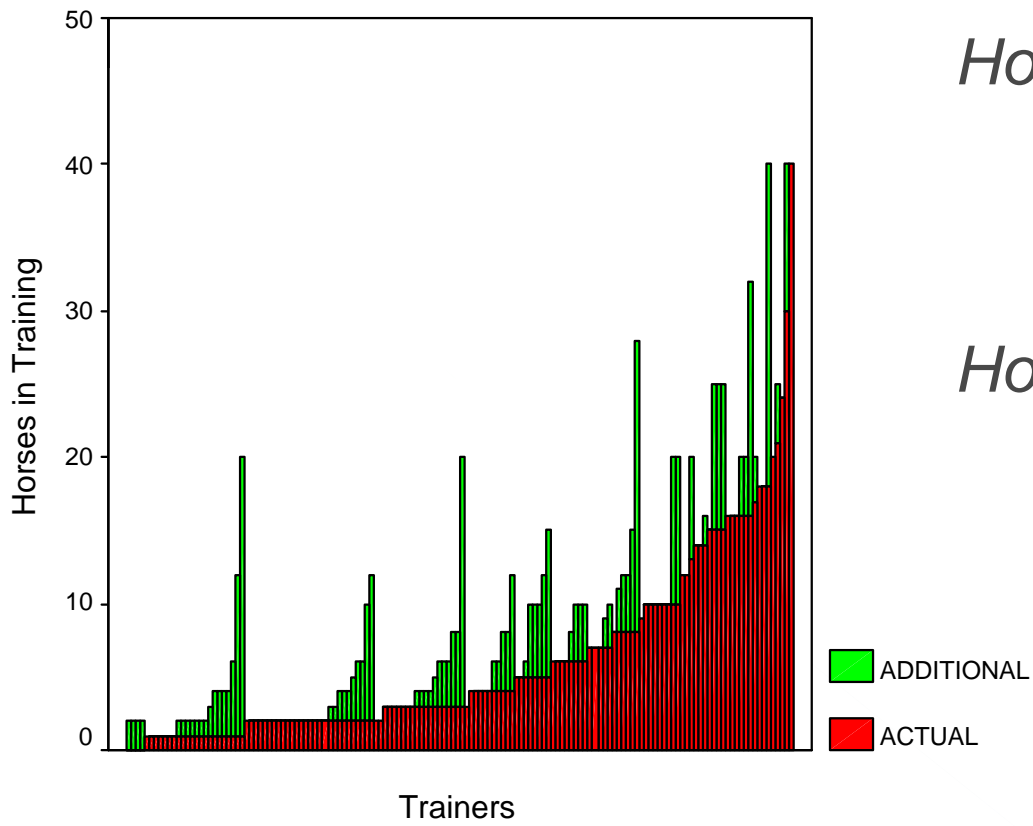


# Intention to Stay - Riders

How many years into the future do you think you will continue within the industry?

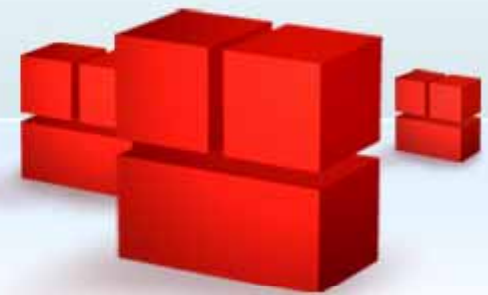


# Trainers - Actual vs Desired Activity

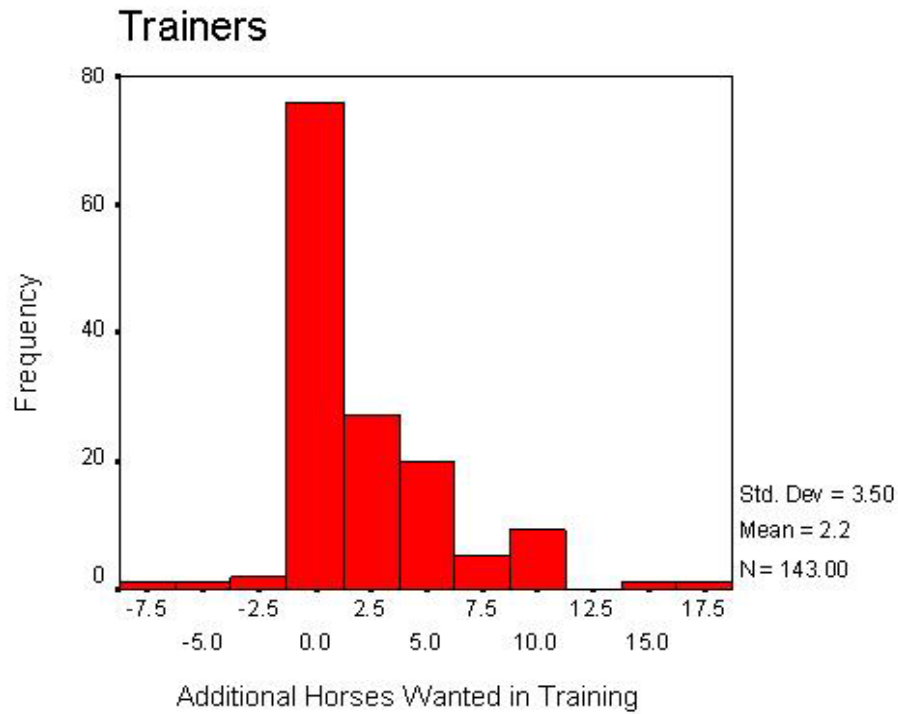


*How many horses do you currently have in training?*

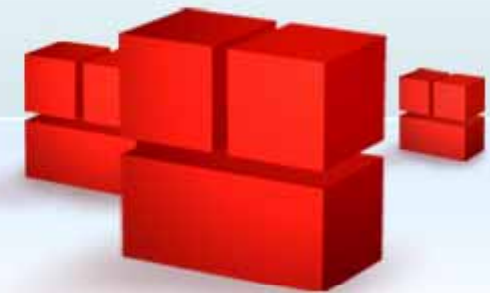
*How many horses would you like to have in training?*



# Trainers - Actual vs Desired Activity

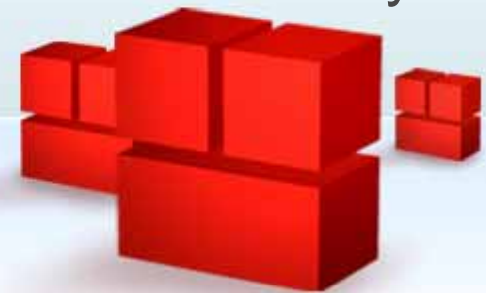


Trainers would like 2.2 additional horses in training

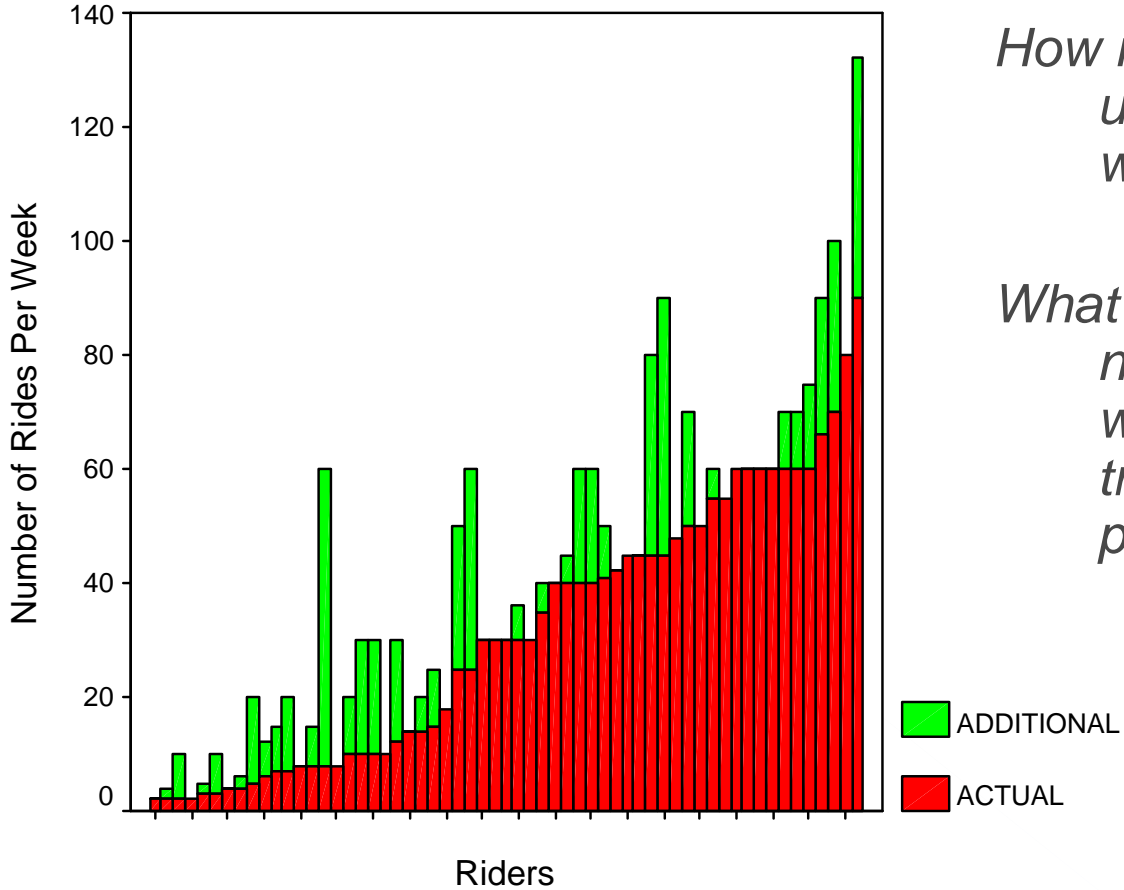


# Summary – Trainers' Actual vs Desired Activity

- On average, trainers would like to have just over 2 additional horses in training
- There are many possible reasons for why trainers are not operating at their desired capacity
  - Financial resources
  - Availability of horses / stables
  - Owner selectivity
- Rider availability may be one reason, but not necessarily the main reason

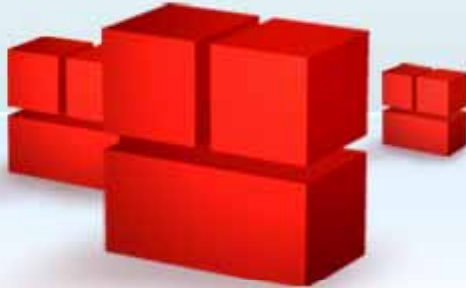


# Riders - Actual vs Desired Activity

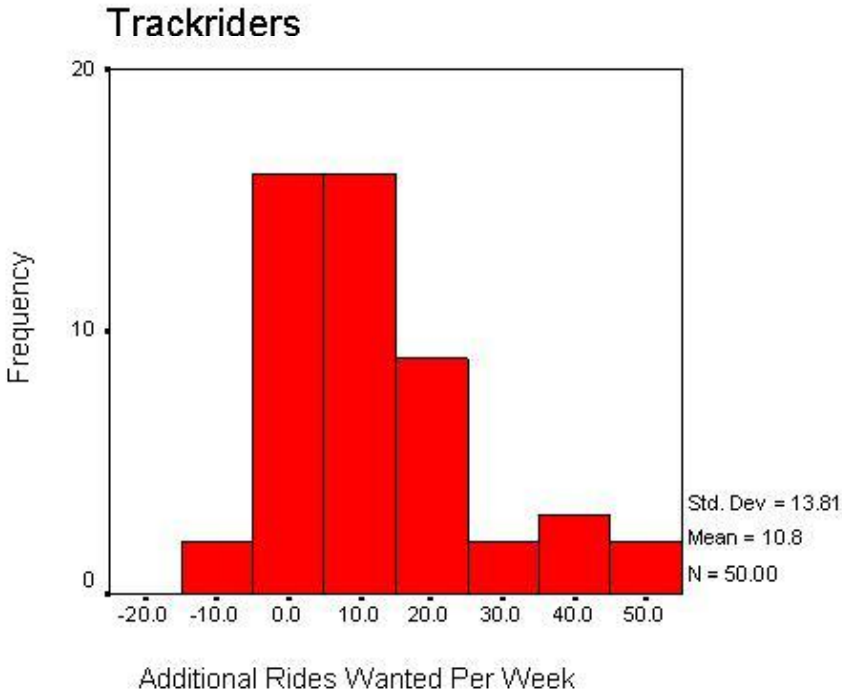


*How many horses do you usually ride for track work per week?*

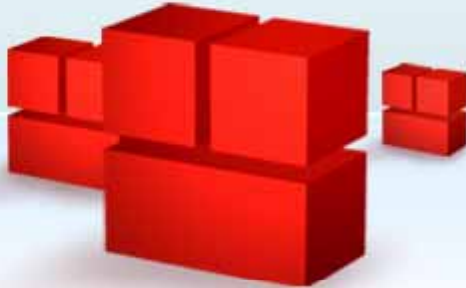
*What is the maximum number of horses you would like to ride for track work if you could per week?*



# Riders - Actual vs Desired Activity

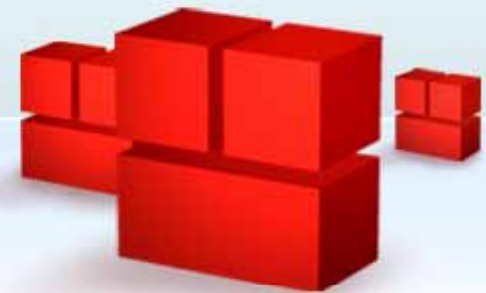


Riders said they would like to be doing an additional 10.8 rides per week



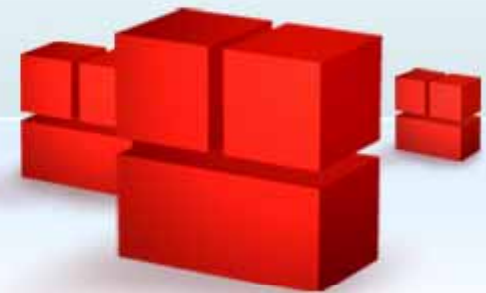
# Summary – Riders' Actual vs Desired Activity

- On average, Track Work Riders would like to be doing an additional 10 to 11 rides per week
- Trainers have expressed concerns that they are having difficulty getting all of their horses worked each day
- *Data suggests that current group of Track Work Riders is being under utilised*



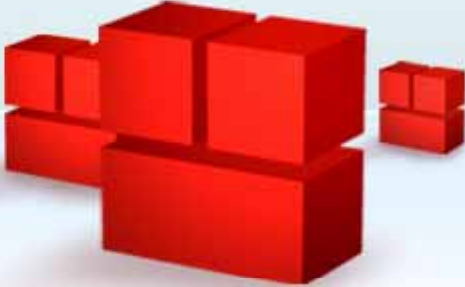
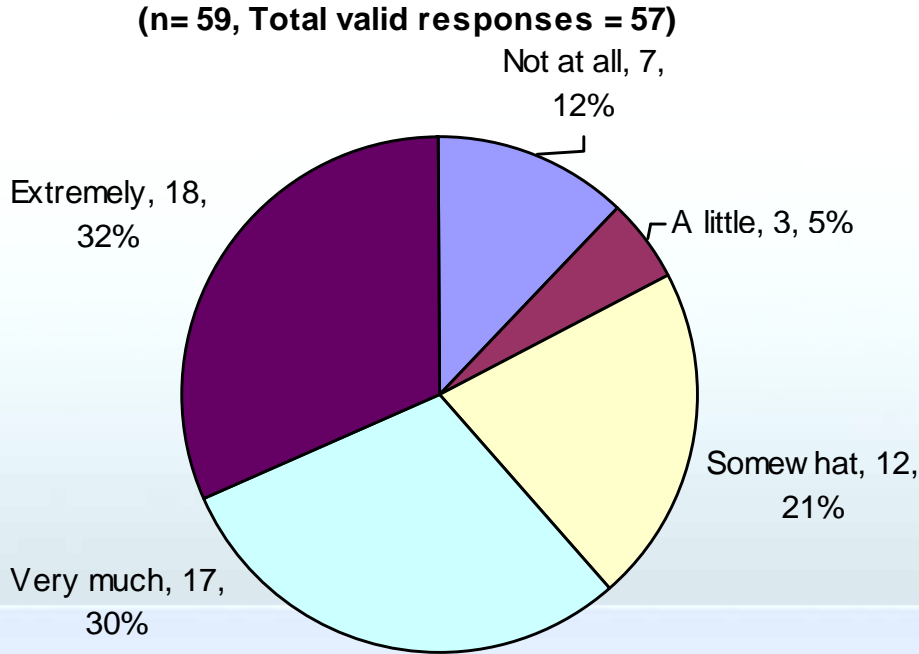
# Survey Results (Cont'd)

- The findings of the survey have suggested four possible reasons for why the current group of riders are not operating at their full capacity
  - Track Work Rider selectivity (in choosing who to ride for)
  - Trainer selectivity (in choosing which riders to employ)
  - Pay
  - Opening hours



# Rider Selectivity - Safety

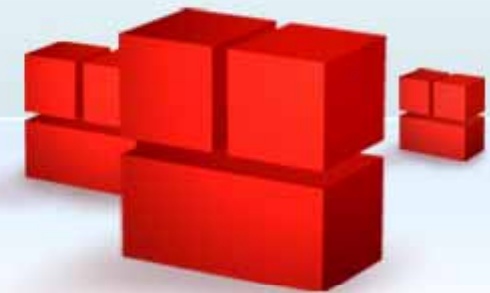
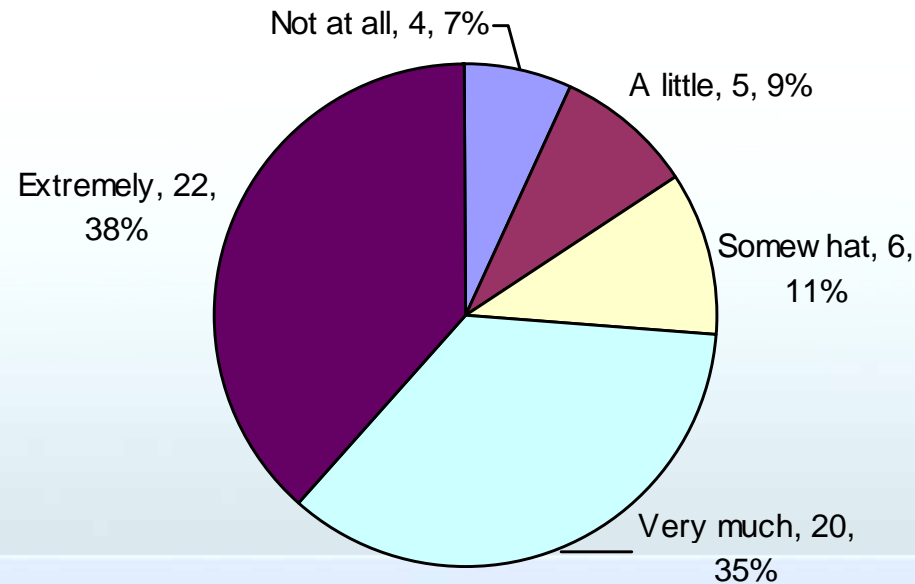
How much does knowing the temperament/ level of education of a horse influence your decision to ride or not to ride a horse?



# Rider Selectivity – Safety (Cont'd)

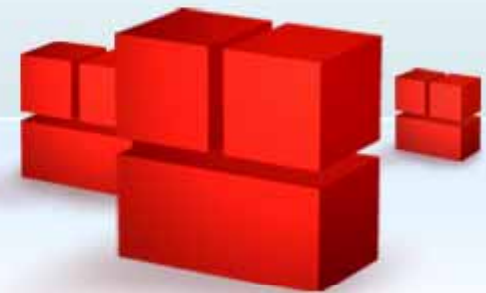
How much does knowing the trainer and how his/her horses usually behave influence your decision to ride for them?

(n= 59, Total valid responses = 57)



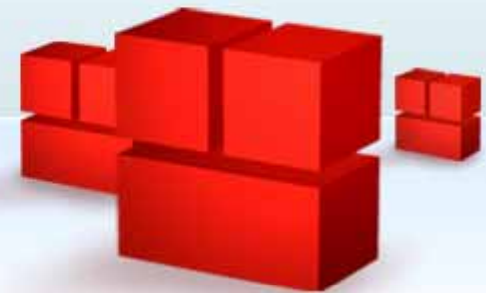
# Rider Selectivity – Honesty and Trust

- Trainers and Track Work Riders were asked the following question:
  - *To what degree do you believe that the relationship between trainers and track riders is based on trust, honesty and respect?*
- 84 percent of Trainers said this was very much the case
- Only 58 percent of Riders said this was very much the case



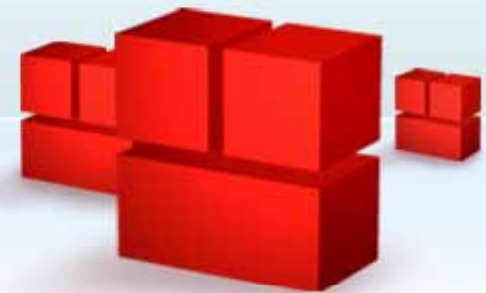
# Rider Selectivity – Honesty and Trust

- Track Work Riders were also asked to state how confident they were in the information given to them by Trainers
  - Most said they were very confident (64 percent)
  - However, some appeared to lack confidence, with 21 percent saying “somewhat,” 5 percent saying “a little,” and 12 percent saying “not at all”
  - *Riders may not ride for certain trainers due to a lack of trust*



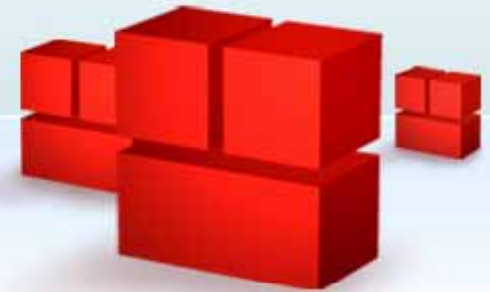
# Rider Selectivity – Organisation and Efficiency

- Track Work Riders were asked to comment on how they thought Trainers' organisation of track work could be improved (note: open-ended question)
- Common responses included:
  - Structure (23 percent)
  - Readiness to start riding (17 percent)
  - Being on time (11 percent)
  - Payments made on time (9 percent)
- *Some Track Work Riders may not want to ride for particular Trainers because they are seen to be disorganised or unreliable*



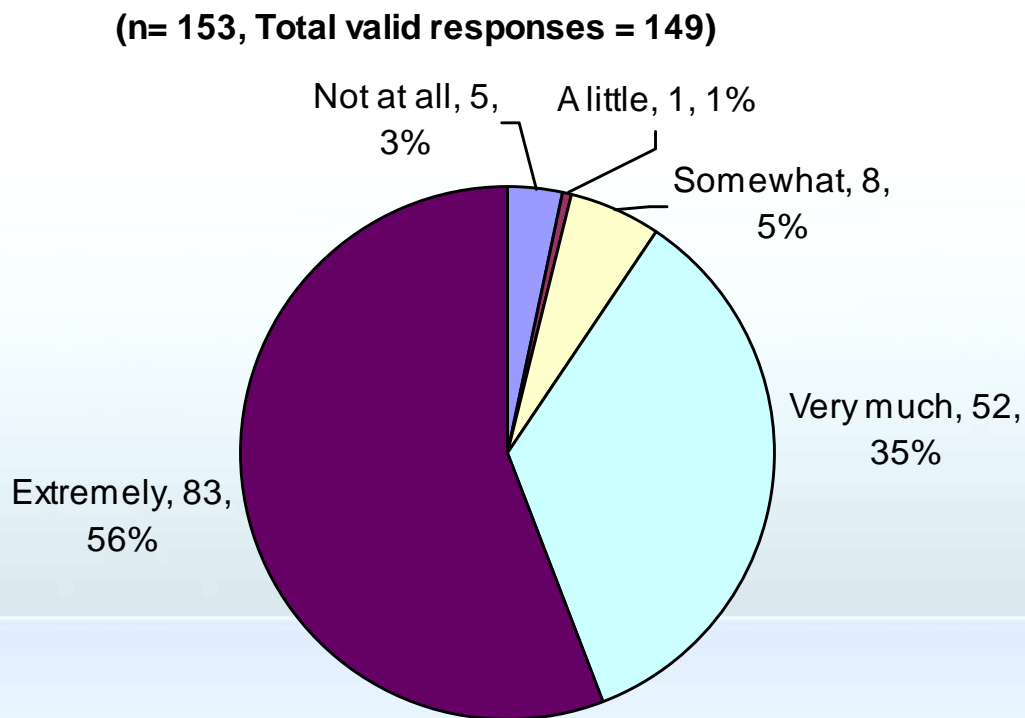
# Trainer Selectivity – Riding Speed

- 54 percent of Trainers said they used Jockeys and Apprentices for fast work.
- 77 percent of Trainers said they used Track Work Riders for slow work.

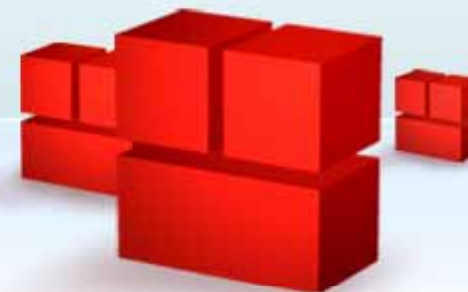


# Trainer Selectivity – Riders' Experience and Horsemanship

1. How much does knowing the temperament/ education of a horse affect your selection of a particular track rider to ride that horse?

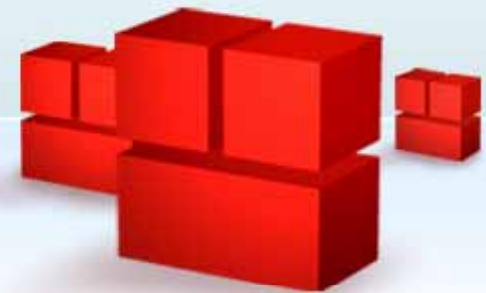


Data suggests Trainers select riders depending on their view of the rider's ability to handle a particular horse



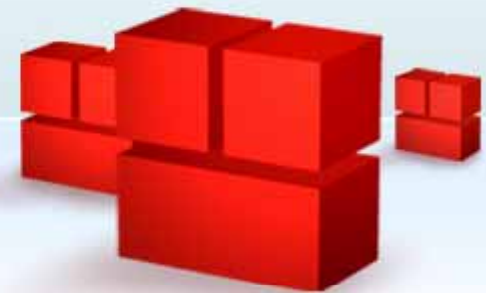
# Trainer Selectivity – Rider Attributes

- Trainers said they look for the following attributes in a Track Work Rider:
  - Reliability (identified by one in two Trainers)
  - Knowledge of horses (identified by 1 in 4)
  - Ability to listen and follow instructions (identified by 1 in 4)
  - Temperament (identified by 1 in 5)
  - Natural ability (identified by 1 in 5)



# Insurance

- 70 percent of Trainers said they required Freelance Riders to have Personal Accident Insurance before allowing them to ride
- 27.3 percent of Freelance Riders (22 responded to the survey) said they did not have Personal Accident Insurance



# Opening Hours

- Trainers were asked:
  - *How do you think the organisation at the public track that you use can be improved to assist Trainers with getting horses worked each day?* (note: open-ended question)
  - 20 percent said the tracks should be open for longer
- A number of Track Work Riders shared this view – “Have tracks open longer so more horses can get worked – less time limits how many horses I can ride.”

