



Racing NSW

STRATEGIC PLAN

2017/2018/2019



Strategic Plan as at April 2019

Executive Summary

Challenges to Address

1. Reduction in field sizes in Metropolitan and Provincial sectors due to decrease in foal rates and horses exported to Asia
2. The increasing cost to own a horse (Defraying owners costs)
3. Keeping NSW Country Thoroughbred Racing viable and vibrant
4. Trainers viability and cashflow
5. Public perception of horse welfare
6. Improving racecourse infrastructure
7. Continue racing's growth – developing new customers and engaging with younger generations

Solutions to Address Challenges

Improve the size of NSW race fields and in particular for Metropolitan & Provincial racing by:

- a. Defraying Owner's Costs
- b. Increasing the NSW horse population in the short and long term
- c. Better programming and handicapping system
- d. Innovation of new races and improving the raceday experience



Other objectives of the Strategic Plan to address challenges include

- Improve the Financial Viability for Racehorse Trainers
- Improved Racing and Training Infrastructure / Develop NSW's Racehorse Training Capability
- Enhance Integrity and Animal Welfare
- Establish a Racing Training Academy
- Increases in Minimum Prizemoney concentrating on increasing payments for fourth to tenth
- Pay a portion of fourth to tenth prizemoney to trainers as prepayment of the owners account to improve their cashflow and viability
- Increase the Horse Population
- Import of Horses into NSW and Development of Racing Club to purchase these horses
- Increase Stabling Capacity in the Sydney Basin
- Development of Training Centres
- Attracting New Trainers to NSW
- Review BOBS
- Promotion of Racing Careers



Challenges

Reduction in Foal Crops

The horse population in NSW and Australia more broadly, has been impacted by a reducing number of horses being bred over the past fifteen years.

Success in breeding has become progressively concentrated, with the activity of breeding horses becoming more financially marginal for many small-medium breeders.

The chart shows the foal crops for NSW, Victoria, Queensland and the remainder of Australia.

Year	NSW	% Chg. NSW	VIC	% Chg. Vic	QLD	SA	WA	TAS	NT	ACT
2007/08 (EI)	6,526	-	4,340	-	2,737	704	1,960	389	3	34
2008/09	7,309	12.00%	4,210	-3.00%	3,318	681	1,899	332	5	36
2009/10	6,924	-5.30%	3,806	-9.60%	2,879	637	1,818	342	6	33
2010/11	6,892	-0.50%	3,786	-0.50%	2,771	641	1,758	329	1	16
2011/12	6,506	-5.60%	3,698	-2.30%	2,680	483	1,460	257	2	16
2012/13	6,557	0.80%	3,526	-4.70%	2,347	509	1,399	240	2	12
2013/14	6,253	-4.60%	3,385	-4.00%	2,123	523	1,310	253	0	14
2014/15	5,814	-7.00%	3,101	-8.40%	1,983	565	1,234	238	1	9
2015/16	5,789	-0.40%	3,009	-3.00%	2,042	518	1,011	255	2	6
2016/17	5,807	0.30%	2,964	-1.50%	2,040	519	1,005	254	2	6

Indications are that there has been a slight turnaround for 2017/18 in the foal crop figures after a sustained period of decline.

Racing NSW has commenced a significant broodmare bonus as part of the Breeder Owner Bonus Scheme (BOBS) from August 2017. This is expected to have a positive impact on the number of horses bred to race.

However, to overcome the four-year lead time of any increase in breeding of horses, a further direct boost to the number of horses in work could come from directly importing horses from overseas to race in NSW.



Reduction in Racehorse Registrations

As is the case with foal crops, racehorse registrations have been in decline across Australia over recent years.

Even though NSW has had the least reduction as compared to other States, registrations in NSW have fallen by 7.7% compared to 2010/11.

At any given time, the horses racing in NSW will be drawn from several consecutive foal crops. A reduction in 100 horses registered and active in NSW becomes between three and four hundred horses that are active and racing at a given point into the future. The decline in horse registrations since 2010/11 of 300 equates to as many as 1,000 fewer active horses racing in NSW when multiplied over a three year period, with the impact of this being greatest on Metropolitan and Provincial racing.

Year	NSW	% Chg. NSW	VIC	% Chg. Vic	QLD	SA	WA	TAS	NT	ACT
2007/08 (EI)	4,085	-	3,701	-	2,508	757	1,696	378	48	109
2008/09	4,735	15.9%	3,542	-4.3%	2,740	762	1,713	341	53	82
2009/10	3,965	-16.3%	3,465	-2.2%	2,540	685	1,774	385	48	88
2010/11	3,888	-1.9%	3,487	0.6%	2,354	680	1,745	343	52	93
2011/12	4,008	3.1%	3,207	-8.0%	2,361	712	1,803	300	67	103
2012/13	4,059	1.3%	3,114	-2.9%	2,373	652	1,699	327	73	89
2013/14	3,854	-5.1%	3,197	2.7%	2,282	707	1,696	276	58	85
2014/15	3,718	-3.5%	3,028	-5.3%	2,221	572	1,535	248	53	85
2015/16	3,642	-2.0%	3,074	1.5%	2,037	625	1,447	271	34	84
2016/17	3,587	-1.5%	3,080	0.2%	2,008	558	1,329	254	29	83
Change from 2010/11 -	-7.7%		-11.7%		-14.7%	-17.9%	-23.8%	-25.9%	-44.2%	-10.8%
Seven Years										



Horses Exported out of NSW

Exacerbating the decline in the foal rate and registration has been the sale of horses to Asia. The export of horses to Hong Kong and Singapore drains the available horse pool in NSW, especially for Metropolitan and Provincial racing.

Tried horses that are exported from NSW have demonstrated form or potential indicating they're potentially of Metropolitan standard.

When horses leave NSW they are generally young, up to three years of age and in most instances are geldings. These horses therefore typically have three or more seasons of racing remaining in their racing life, with this typically applying to each tried horse exported from NSW.

The table below summarises the adverse impact on NSW racing of these exports.

The cumulative impact of the loss of these horses from NSW over three seasons is a total of almost 2,100 starters including almost 1,000 from Metropolitan races and more than 1,000 starters from Provincial races.

Field sizes for Metropolitan and Provincial racing are affected by more than one starter per race across the entire year, which is significant in terms of field sizes of less than 10 starters per race.

From a wagering viewpoint, the cost to the NSW Thoroughbred Racing Industry of the reduced number of starters is approximately \$10.8 million of income annually.

Sector	Estimated Annual Race Starters 'Exported'	Ave. Number of Starters Lost per Meeting	Ave. Influence of Field Size	Estimated Impact TAB Wagering Turnover \$'m	Estimated Annual Impact Interstate Wagering Turnover \$'m
Metropolitan	975	8.63	1.11	48.29	148.26
Provincial	1015	7.40	1.01	17.87	58.76
Country	88	1.03	0.14	0.76	2.48
Total	2,078	N/A	N/A	66.92	209.50



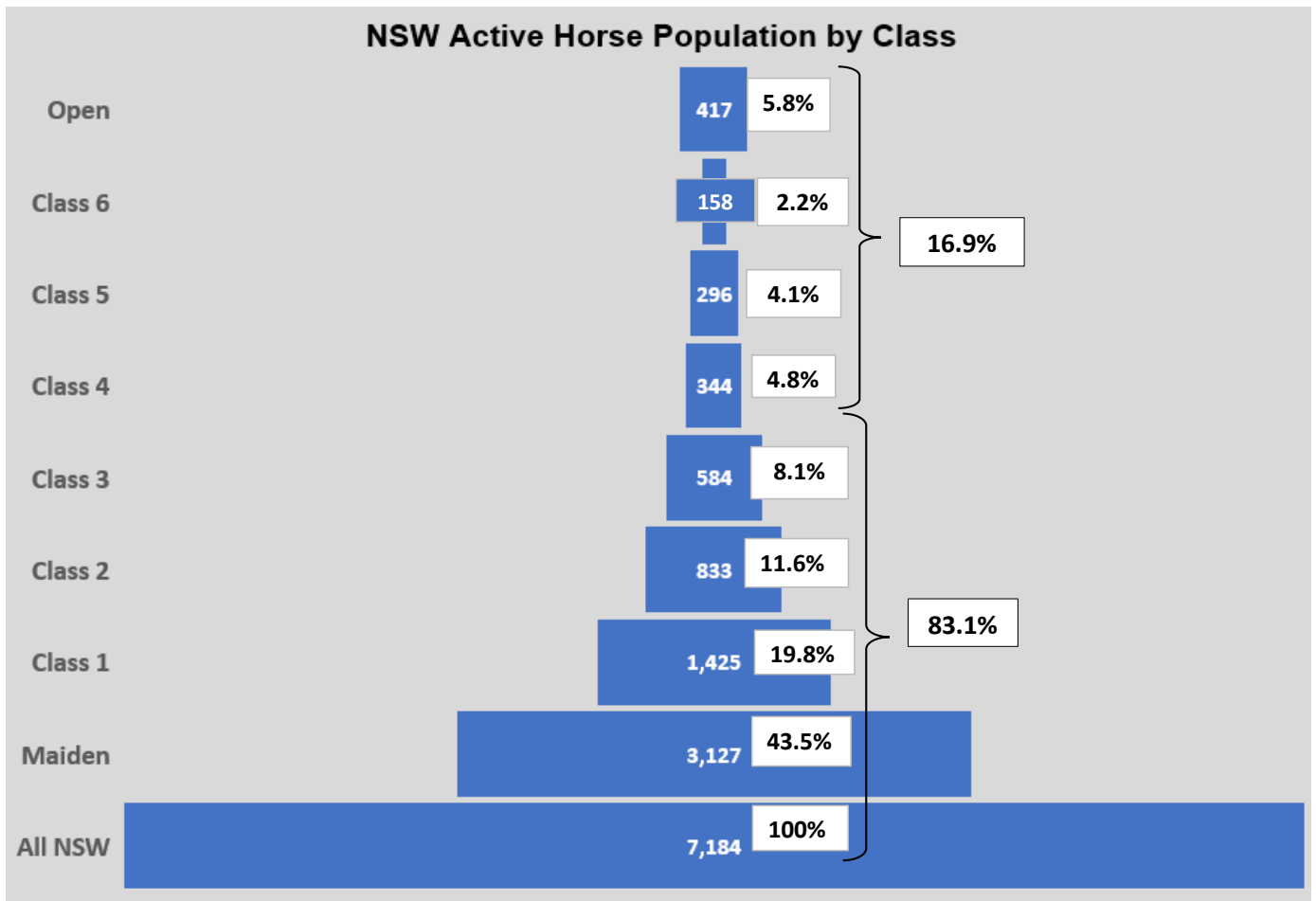
Shortage of Higher Class Horses

The following chart highlights the challenge to maximise field sizes in the Metropolitan and Provincial sectors. In particular Metropolitan Saturday meeting programs for the higher quality horses.

The chart below shows that of the total pool of horses in NSW only 16.9% of the population is available for Saturday Metropolitan programs.

Of the NSW horse population, 83% have won less than three races.

Chart 1 -NSW Active Horse Population by Class



Impact on Field Sizes

With the backdrop of declining foal crops, lower horse registrations and exports out of NSW, race field sizes have come under further pressure in recent years.

The decline in field sizes over the period since the formulation of the 2010 Racing NSW Strategic Plan is summarised in the table below.

Sector	2009 Ave. Strs/Race by Type		
	Non-feature	Group/Listed	Total
Metropolitan (excl. Highway)	9.64	11.27	9.88
Highway	0	0	0
Provincial	10.2	11.69	10.22
Country TAB	11.02	14.4	11.03
TAB Meetings	10.57	11.41	10.6

Sector	2017 Ave. Strs/Race by Type		
	Non-feature	Group/Listed	Total
Metropolitan (excl. Highway)	8.93	10.35	9.17*
Highway	11.04	0	11.04
Provincial	8.17	9.38	8.18
Country TAB	10.47	14.4	10.48
TAB Meetings	9.75	10.38	9.77

Sector	Change 2009 to 2017		
	Non-feature	Group/Listed	Total
Metropolitan (excl. Highway)	-0.71	-0.92	-0.7
Highway	11.04	0	11.04
Provincial	-2.03	-2.31	-2.04
Country TAB	-0.55	0	-0.55
TAB Meetings	-0.83	-1.03	-0.83

*9.4 starters/race including Highway races

The declines in field sizes have a negative impact on the attractiveness of racing to punters and maximising returns from wagering.



Strategic Actions

Increases in Minimum Prizemoney

Improve the size of NSW race fields and in particular for Metropolitan & Provincial racing by:

- a. Defraying Owner's Costs
- b. Increasing the NSW horse population in the short and long term
- c. Better programming and handicapping system

Three key objectives of the Strategic Plan are defraying costs to owners, improving the business model for trainers and improving Metropolitan/Provincial field sizes.

Racing NSW will commence a broad range of increases in prizemoney that are designed to meet a number of objectives of its Strategic Plan.

Total increases in TAB prizemoney are planned to be \$24 million per annum.

The increases in minimum prizemoney are not only significant in their size, but their distribution will include two key elements to help meet the Strategic Plan's objectives:

- The increases will be concentrated on horses finishing between fourth and tenth in races.
- For horses finishing in these positions, a large proportion of the increase belonging to the owner is to be paid in the first instance to the trainer of the horse, effectively as a prepayment of the owner's account.
- The minimum prizemoney increases paid in this manner meet three key objectives of the Strategic Plan – defraying the costs of owners, improving the cash flow of trainers and providing strong incentive to increase the participation in Metropolitan and Provincial races.

These payments to owners for finishing fourth to tenth will significantly defray costs to owners.

Distributing monies in this manner will see the benefit of the prizemoney increases go to a much greater network of owners.

The proportion of the owner's percentage of the increase paid in the first instance, to the account of the racehorse trainer, will better enable trainers to trade effectively by receiving the cash flow from an advance payment.



The amount of these prepayments to trainers where horses finish fourth to tenth will be:

- ◆ \$1,000 for Metropolitan Saturday races
- ◆ \$750 for other non-feature Metropolitan races (Highway, midweek, public holiday races)
- ◆ \$500 for Provincial races
- ◆ \$150 for Country TAB races

Trainers will benefit from an immediate improvement in their cash flows.

It will also provide a strong incentive for trainers to start horses at the highest reasonable level.

The increases in prizemoney will also make it more attractive to racing in NSW, especially in and around the Metropolitan area.

For instance, a Provincial trainer contemplating contesting a race at their home track will generally be financially better off than travelling to a country TAB race meeting.

At present the trainer receives \$40 for running sixth to tenth in the Provincial race and \$30 for a similar finish in a Country TAB race.

Under the new structure, the trainer will receive an additional \$560 in cash for an unplaced finish in the fourth to tenth positions of the Provincial race, against only \$170 in the country TAB races.

Consider the connections of a mature, Country trained horse that is well-performed in its region, contemplating a Metropolitan midweek start. Not only could its connections expect that the horse will be more appropriately weighted with different Metropolitan/Provincial and Country benchmarks in place, the prizemoney payment down to tenth of \$1,250 payable to the owner (including the advance payment to the trainer through Stakes Payments), will more than cover travel costs of the return trip.

The structure of the payments will see an improvement in trainers' cash flows of more than \$13 million annually, with trainers collectively receiving \$2.4 million in additional income as their 10% commission from the prizemoney percentages.

Jockeys will collectively receive an extra \$1.1 million per annum in their prizemoney percentages.



Full details of the prizemoney distribution by finishing position and participant additional earning are summarised below.

Metropolitan Saturday Races

Finish Position	Existing Prizemoney	Proposed Prizemoney	Total Increase	Benefit to Owners	Paid to Trainers Accounts as Pre-payment of Owners Account	Additional 10% Trainers Prizemoney Percentage	Total Additional Cash Flow to Trainers	Additional 5% Jockeys Percentage	Additional 1.5% Strappers Percentage
1	\$53,375	\$58,000	\$4,625	\$3,862	\$0	\$463	\$463	\$231	\$69
2	\$18,800	\$23,000	\$4,200	\$3,507	\$0	\$420	\$420	\$210	\$63
3	\$8,900	\$12,000	\$3,100	\$2,589	\$0	\$310	\$310	\$155	\$47
4	\$4,450	\$6,500	\$2,050	\$1,712	\$1,000	\$205	\$1,205	\$103	\$31
5	\$2,475	\$5,000	\$2,525	\$2,108	\$1,000	\$253	\$1,253	\$126	\$38
6	\$2,000	\$4,000	\$2,000	\$1,670	\$1,000	\$200	\$1,200	\$100	\$30
7	\$2,000	\$3,500	\$1,500	\$1,253	\$1,000	\$150	\$1,150	\$75	\$23
8	\$2,000	\$3,500	\$1,500	\$1,253	\$1,000	\$150	\$1,150	\$75	\$23
9	\$2,000	\$3,500	\$1,500	\$1,253	\$1,000	\$150	\$1,150	\$75	\$23
10	\$2,000	\$3,500	\$1,500	\$1,253	\$1,000	\$150	\$1,150	\$75	\$23
Welf. 2%	\$2,000	\$2,500	\$500	-	-	-	-	-	-
Total	\$100,000	\$125,000	\$25,000	\$20,458	\$7,000	\$2,450	\$9,450	\$1,225	\$368

For horses placed 4th to 10th inclusive, \$1,000 will be paid to the trainer's Stakes Account, which in turn is to be credited against the amount charged by the trainer to the owner(s) of that horse. The total cash flow benefit to trainers is both the \$1,000 prepaid to the trainer and the increase in their respective prizemoney percentages.



Metropolitan Public Holiday Races

Finish Position	Existing Prizemoney	Proposed Prizemoney	Total Increase	Benefit to Owners	Paid to Trainers Accounts as Pre-payment of Owners Account	10% Trainers Prizemoney Percentage	Total Cash Flow to Trainers	5% Jockeys Percentage	1.5% Strappers Percentage
1	\$27,460	\$28,400	\$940	\$785	\$0	\$94	\$94	\$47	\$14
2	\$9,900	\$10,600	\$700	\$585	\$0	\$70	\$70	\$35	\$11
3	\$4,950	\$5,500	\$550	\$459	\$0	\$55	\$55	\$28	\$8
4	\$2,340	\$3,600	\$1,260	\$1,052	\$750	\$126	\$876	\$63	\$19
5	\$1,225	\$2,400	\$1,175	\$981	\$750	\$118	\$868	\$59	\$18
6	\$625	\$1,800	\$1,175	\$981	\$750	\$118	\$868	\$59	\$18
7	\$625	\$1,625	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
8	\$625	\$1,625	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
9	\$625	\$1,625	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
10	\$625	\$1,625	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
EWF	\$500	\$600	\$100	-	-	-	-	-	-
JWF	\$500	\$600	\$100	-	-	-	-	-	-
Total	\$50,000	\$60,000	\$10,000	\$8,183	\$5,250	\$980	\$6,230	\$490	\$147

For horses placed 4th to 10th inclusive, \$750 will be paid to the trainer's Stakes Account, which in turn is to be credited against the amount charged by the trainer to the owner(s) of that horse. The total cash flow benefit to trainers is both the \$750 prepaid to the trainer and the increase in their respective prizemoney percentages.

The benefit to owners is their total prizemoney, including \$750 of the increases prepaid to the trainer where their horse finishes 4th to 10th.



Metropolitan Weekday Races

Finish Position	Existing Prizemoney	Proposed Prizemoney	Total Increase	Benefit to Owners	Paid to Trainers Accounts as Pre-payment of Owners Account	10% Trainers Prizemoney Percentage	Total Cash Flow to Trainers	5% Jockeys Percentage	1.5% Strappers Percentage
1	\$21,970	\$22,000	\$30	\$25	\$0	\$3	\$3	\$2	\$0
2	\$7,920	\$8,950	\$1,030	\$860	\$0	\$103	\$103	\$52	\$15
3	\$3,960	\$5,000	\$1,040	\$868	\$0	\$104	\$104	\$52	\$16
4	\$1,870	\$3,400	\$1,530	\$1,278	\$750	\$153	\$903	\$77	\$23
5	\$980	\$2,000	\$1,020	\$852	\$750	\$102	\$852	\$51	\$15
6	\$500	\$1,650	\$1,150	\$960	\$750	\$115	\$865	\$58	\$17
7	\$500	\$1,500	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
8	\$500	\$1,500	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
9	\$500	\$1,500	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
10	\$500	\$1,500	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
EWf	\$400	\$500	\$100	-	-	-	-	-	-
JWf	\$00	\$500	\$100	-	-	-	-	-	-
Total	\$40,000	\$50,000	\$10,000	\$8,183	\$5,250	\$980	\$6,230	\$490	\$147

For horses placed 4th to 10th inclusive, \$750 will be paid to the trainer's Stakes Account, which in turn is to be credited against the amount charged by the trainer to the owner(s) of that horse. The total cash flow benefit to trainers is both the \$750 prepaid to the trainer and the increase in their respective prizemoney percentages.

The benefit to owners is their total prizemoney, including \$750 of the increases prepaid to the trainer where their horse finishes 4th to 10th.





TAB Highway Races

Finish Position	Existing Prizemoney	Proposed Prizemoney	Total Increase	Benefit to Owners	Paid to Trainers Accounts as Pre-payment of Owners Account	10% Trainers Prizemoney Percentage	Total Cash Flow to Trainers	5% Jockeys Percentage	1.5% Strappers Percentage
1	\$32,950	\$35,250	\$2,300	\$1,921		\$230	\$230	\$115	\$35
2	\$11,875	\$13,750	\$1,875	\$1,566		\$188	\$188	\$94	\$28
3	\$5,940	\$7,750	\$1,810	\$1,511		\$181	\$181	\$91	\$27
4	\$2,815	\$4,500	\$1,685	\$1,407	\$750	\$169	\$919	\$84	\$25
5	\$1,470	\$3,000	\$1,530	\$1,278	\$750	\$153	\$903	\$77	\$23
6	\$750	\$2,250	\$1,500	\$1,253	\$750	\$150	\$900	\$75	\$23
7	\$750	\$1,750	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
8	\$750	\$1,750	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
9	\$750	\$1,750	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
10	\$750	\$1,750	\$1,000	\$835	\$750	\$100	\$850	\$50	\$15
EWf	\$600	\$750	\$150	-	-	-	-	-	-
JWf	\$600	\$750	\$150	-	-	-	-	-	-
Total	\$60,000	\$75,000	\$15,000	\$12,275	\$5,250	\$1,470	\$6,720	\$735	\$221

For horses placed 4th to 10th inclusive, \$750 will be paid to the trainer's Stakes Account, which in turn is to be credited against the amount charged by the trainer to the owner(s) of that horse. The total cash flow benefit to trainers is both the \$750 prepaid to the trainer and the increase in their respective prizemoney percentages.

The benefit to owners is their total prizemoney, including \$750 of the increases prepaid to the trainer where their horse finishes 4th to 10th.



Provincial Races

Finish Position	Existing Prizemoney	Proposed Prizemoney	Total Increase	Benefit to Owners	Paid to Trainers Accounts as Pre-payment of Owners Account	10% Trainers Prizemoney Percentage	Total Cash Flow to Trainers	5% Jockeys Percentage	1.5% Strappers Percentage
1	\$16,630	\$16,740	\$110	\$92	\$0	\$11	\$11	\$6	\$2
2	\$5,790	\$6,000	\$210	\$175	\$0	\$21	\$21	\$11	\$3
3	\$2,920	\$3,200	\$280	\$234	\$0	\$28	\$28	\$14	\$4
4	\$1,380	\$1,980	\$600	\$501	\$500	\$60	\$560	\$30	\$9
5	\$680	\$1,280	\$600	\$501	\$500	\$60	\$560	\$30	\$9
6	\$400	\$1,100	\$700	\$585	\$500	\$70	\$570	\$35	\$11
7	\$400	\$1,000	\$600	\$501	\$500	\$60	\$560	\$30	\$9
8	\$400	\$1,000	\$600	\$501	\$500	\$60	\$560	\$30	\$9
9	\$400	\$1,000	\$600	\$501	\$500	\$60	\$560	\$30	\$9
10	\$400	\$1,000	\$600	\$501	\$500	\$60	\$560	\$30	\$9
EWf	\$300	\$350	\$50	-	-	-	-	-	-
JWF	\$300	\$350	\$50	-	-	-	-	-	-
Total	\$30,000	\$35,000	\$5,000	\$4,092	\$3,500	\$490	\$3,990	\$245	\$74

For horses placed 4th to 10th inclusive, \$500 will be paid to the trainer's Stakes Account, which in turn is to be credited against the amount charged by the trainer to the owner(s) of that horse. The total cash flow benefit to trainers is both the \$500 prepaid to the trainer and the increase in their respective prizemoney percentages.

The benefit to owners is their total prizemoney, including \$500 of the increases prepaid to the trainer where their horse finishes 4th to 10th.



Country TAB Races

Finish Position	Existing Prizemoney	Proposed Prizemoney	Total Increase	Benefit to Owners	Paid to Trainers Accounts as Pre-payment of Owners Account	10% Trainers Prizemoney Percentage	Total Cash Flow to Trainers	5% Jockeys Percentage	1.5% Strappers Percentage
1	\$11,085	\$11,200	\$115	\$96	\$0	\$12	\$12	\$6	\$2
2	\$3,740	\$3,900	\$160	\$134	\$0	\$16	\$16	\$8	\$2
3	\$1,870	\$2,100	\$230	\$192	\$0	\$23	\$23	\$12	\$3
4	\$885	\$1,100	\$215	\$180	\$150	\$22	\$172	\$11	\$3
5	\$520	\$720	\$200	\$167	\$150	\$20	\$170	\$10	\$3
6	\$300	\$540	\$240	\$200	\$150	\$24	\$174	\$12	\$4
7	\$300	\$500	\$200	\$167	\$150	\$20	\$170	\$10	\$3
8	\$300	\$500	\$200	\$167	\$150	\$20	\$170	\$10	\$3
9	\$300	\$500	\$200	\$167	\$150	\$20	\$170	\$10	\$3
10	\$300	\$500	\$200	\$167	\$150	\$20	\$170	\$10	\$3
Welf.2%	\$400	\$440	\$40	-	-	-	-	-	-
Total	\$20,000	\$22,000	\$2,000	\$1,637	\$1,050	\$196	\$1,246	\$98	\$29

For horses placed 4th to 10th inclusive, \$150 will be paid to the trainer's Stakes Account, which in turn is to be credited against the amount charged by the trainer to the owner(s) of that horse. The total cash flow benefit to trainers is both the \$150 prepaid to the trainer and the increase in their respective prizemoney percentages.

The benefit to owners is their total prizemoney, including \$150 of the increases prepaid to the trainer where their horse finishes 4th to 10th.



Country Sky 2 and Non-TAB Prizemoney Increases

In addition to the categories of TAB races discussed above, Racing NSW will increase the levels of prizemoney for Country Sky 2 and Non-TAB races totalling \$1.6 million annually. The minimum prizemoney for these races will increase by \$2,000 per race.

The total prizemoney for this sector has increased by 160% since 2012, the highest percentage increase of any sector in NSW thoroughbred racing.

Consistent with the increases in TAB race meeting prizemoney, the increased prizemoney has been spread across a range of finishing positions.

Country Sky 2 Races

Finish	Existing	Proposed	Increase	Owners	10% Trainers Prizemoney Commission	Extra Jockeys Revenue	Extra Strappers Revenue
1	\$5,250	\$5,850	\$600	\$501	\$60	\$30	\$9
2	\$1,730	\$2,020	\$290	\$242	\$29	\$15	\$4
3	\$865	\$1,010	\$145	\$121	\$15	\$7	\$2
4	\$440	\$580	\$140	\$117	\$14	\$7	\$2
5	\$265	\$425	\$160	\$134	\$16	\$8	\$2
6	\$250	\$375	\$125	\$104	\$13	\$6	\$2
7	\$250	\$375	\$125	\$104	\$13	\$6	\$2
8	\$250	\$375	\$125	\$104	\$13	\$6	\$2
9	\$250	\$375	\$125	\$104	\$13	\$6	\$2
10	\$250	\$375	\$125	\$104	\$13	\$6	\$2
Welf.2%	\$200	\$240	\$40	-	-	-	-
Total	\$10,000	\$12,000	\$2,000	\$1,637	\$196	\$98	\$29



Country Non-TAB Races

Finish	Existing	Proposed	Increase	Owners	10% Trainers Prizemoney Commission	Extra Jockeys Revenue	Extra Strappers Revenue
1	\$3,305	\$4,025	\$720	\$601	\$72	\$36	\$11
2	\$1,000	\$1,300	\$300	\$251	\$30	\$15	\$5
3	\$450	\$665	\$215	\$180	\$22	\$11	\$3
4	\$225	\$450	\$225	\$188	\$23	\$11	\$3
5	\$225	\$350	\$125	\$104	\$13	\$6	\$2
6	\$225	\$350	\$125	\$104	\$13	\$6	\$2
7	\$225	\$350	\$125	\$104	\$13	\$6	\$2
8	\$225	\$350	\$125	\$104	\$13	\$6	\$2
Welf.2%	\$120	\$160	\$40	-	-	-	-
Total	\$6,000	\$8,000	\$2,000	\$1,637	\$196	\$98	\$29

In the case of these races none of the increase in prizemoney down to tenth is being paid to the trainer's stakes account to be credited to the amount charged by the trainer to the owner; the previous model applies here.



Developing New Customers and Engaging with Younger Generations

Strategic Objective : i. Develop Thoroughbred Racing's Customer Base ii. Further Grow Industry Revenues

It is imperative that younger generations are encouraged to engage with and participate in thoroughbred racing and this is a key strategic issue for Racing NSW.

Racing NSW has in recent years implemented a number of strategies to engage with new customers, particularly those in the under 35 demographic. These strategies have involved creating new racing concepts and new ways of disseminating information that is better suited to a digitally focused future customer. Set out below is a summary of these current and future initiatives:

- ◆ Development of The Everest as a disruptive racing event to capture the attention of new customers. The Everest was launched not only as an important racing event, but also as a means of enabling racing to engage with younger audiences. An imperative of building on the initial success of The Everest is to continue using the race and its unique style to attract younger racegoers.

This strategy proved successful in the running of the inaugural Everest in 2017 where it was shown that the race attracted significant new customers to Royal Randwick as evidenced by data collected on the day showing 61% of EFTPOS transactions on-course were from new customers. The Everest will continue to be marketed to the under 35 demographic, providing an opportunity to grab the attention of new customers through this showpiece event.

This is important to generate wider interest in racing for the future. In particular The Everest by its nature has a better chance than more traditional feature racing to capture the imagination of younger people and drawing them to racing as it is an event for them, that they can associate with.

- ◆ Development of The Kosciuszko race and its never before seen sweepstakes model provides for a new way of engaging with the public and an entirely new product to offer potential customers.

Further development of Punter's Intel – a new Racing NSW App – as an information source for punters. Punter's Intel was designed for the younger demographic to provide a new way of viewing races and racing statistics. Through promoting this content across social media and Sky Racing, Racing NSW will increase the visibility of this information to new customers and distinguish NSW thoroughbred racing from other wagering options.

Promoting snippets of information from Punters Intel through social media and other means could be a straight-forward and effective means of providing easy to understand information to prospective customers and fans.

- ◆ Creation of racing tips, previews and commentary to provide easy access to racing information for customers who may not be interested in or have the time to study the form in depth. This information is disseminated via social media and emails to service younger customers to racing in particular those accessing via their mobile phones

Creation of human interest content to tell the story of racing and its participants. Thoroughbred racing has an abundance of characters, both human and equine that have captivating stories which have proven to grab mainstream public attention. Through communicating these stories, Racing NSW has an opportunity to inform and engage potential new customers. In particular, this content provides an opportunity to detail the positive Horse Welfare initiatives being undertaken.

Continued coverage and promotion of NSW thoroughbred racing via free to air television and associated digital outlets is a key avenue to reach new audiences. Included in these arrangements is ensuring that racing is promoted through mass media, including across social media and editorial content to reach a maximum possible audience

Racing NSW has entered into an agreement with Channel 7 and TAB, with a view to expanding mainstream sporting coverage of NSW thoroughbred racing on free to air television.

This is geared at including coverage of Sydney races on Saturday afternoons on free to air television as well as pay TV, presently restricted for coverage by Sky Racing.



Spring Carnival Revitalisation and Golden Eagle

Strategic Objective : **i. Develop Thoroughbred Racing's Customer Base** **ii. Further Grow Industry Revenues**

The creation of The Everest in 2017 has been a resounding success in adding to the focus on Sydney racing and improving engagement of customers, especially under 35s, for that race meeting. Wagering turnover on that race meeting alone has increased by 135% in just two years.

The next stage for Racing NSW and the ATC is expanding the footprint of the Spring Carnival racing in Sydney to further improve the wagering exposure of NSW racing and the oncourse attendances at a time of year when racing is best placed to capture sporting attention and benefit from the interest of both regular and infrequent racegoers and punters.

Racing NSW and the ATC have launched The Golden Eagle, at a distance of 1500m for four-year olds, two weeks after The Everest. Prizemoney for the race is \$7.5 million and will be funded entirely from new revenues, rather than drawing on existing revenues of the NSW Thoroughbred Racing Industry.

While The Everest will remain the highlight race of the Spring, The Golden Eagle will be pivotal in the expansion of the Spring Carnival racing in Sydney by a further three Saturdays.

The Golden Eagle race will also have the unique feature that 10% of prizemoney is to be paid to bona fide charities, selected by the owners of each runner, with the amount of the payment to each charity dependent on the finishing position of the horse.

A programme of races will be developed in support of The Golden Eagle on that race meeting.

The Golden Eagle will also be the third leg of the new Golden Slam at Rosehill, with a \$5 million bonus offered to any horse that can win the Golden Slipper at two, the Golden Rose at three and the Golden Eagle as a four-year-old.

Importantly the Golden Eagle will provide a new highlight race and focal point for spring racing at Rosehill Gardens, both renewing the relationship of racing with people in the west of Sydney and celebrating this important region.

The Golden Gift for two-year-olds will also be run for \$1 million in prizemoney the week following The Golden Eagle, again at Rosehill Gardens. This race provides a focal point for two-year old racing in the Spring, with the prizemoney on offer enough to ensure that the first and second placegetters will gain a berth in the Golden Slipper.

The Bondi Stakes over 1600m for three-year olds has been added as the highlight of the Royal Randwick meeting on the Saturday in between The Everest and the Golden Eagle race meeting. The race provides a new spring target for three-year olds in Sydney and follows on from races such as the Golden Rose and Flight Stakes.



Spring Carnival Revitalisation and Golden Eagle

Following the introduction of these races, the spring in Sydney now features ten Saturdays of Spring Carnival racing across both Royal Randwick and Rosehill Gardens racecourse summarised below.

Date	Venue	Feature Race
7 September 2019	Royal Randwick	Chelmsford Stakes (1600m \$250,000 WFA)
14 September 2019	Rosehill Gardens	Run to the Rose (1200m, \$200,000 three-year olds)
21 September 2019	Royal Randwick	George Main Stakes (1600m, \$500,000 WFA)
28 September 2019	Rosehill Gardens	Golden Rose (1400m, \$1 million three-year olds)
5 October 2019	Royal Randwick	Epsom Hcp (1600m, \$1 million Open Hcp)
12 October 2019	Royal Randwick	Spring Champion Stakes (2000m, \$500,000, three-year olds)
19 October 2019	Royal Randwick	The TAB Everest (1200m, \$14 million, WFA)
26 October 2019	Royal Randwick	Bondi Stakes (1600m, \$1 million, three-year olds)
2 November 2019	Rosehill Gardens	The Golden Eagle (1500m, \$7.5 million, four-year olds)
9 November 2019	Rosehill Gardens	Golden Gift (1100m, \$1 million, two-year olds)

This section will be updated in mid 2019.



Increase the Active Racehorse Population

Import of Horses and Development of Lifestyle Racing Club

- Strategic Objectives:**
- i. Increase metropolitan and provincial field sizes**
 - ii. Develop Thoroughbred Racing's Customer Base**
 - iii. Improve the Viability for Racehorse Trainers**

The horse population in NSW and Australia more broadly, has been impacted by a reducing number of horses being bred over the past fifteen years.

Success in breeding has become progressively concentrated, with the activity of breeding horses becoming more financially marginal for many small-medium breeders.

As outlined earlier, only 16.9% of NSW's active horse population is at Class 4 level or higher and of metropolitan/provincial trained horses, this figure is at 15.3%.

Racing NSW has commenced a significant broodmare bonus as part of the Breeder Owner Bonus Scheme (BOBS) from August 2017. While this is expected to have a positive impact on the number of horses bred to race, there is a four-year lead time of any increase in the breeding of horses.

A further direct boost to the number of horses in work is needed more urgently. This could be provided by directly importing horses from overseas to race in NSW.

The targeted horses could be raced horses in the Northern Hemisphere and New Zealand.

Some Northern Hemisphere markets are seen as attractive as the prizemoney in some countries is substantially less when compared to NSW.

The racing of these horses can be undertaken through a racing lifestyle club discussed below.

In the first instance, it is proposed that the Club acquires up to 100 horses to be raced among metropolitan and provincial trainers. The racing stock could then be augmented by say a further 40 horses each year.

If possible, a rolling renewal of 100 horses could see approximately 300 horses active at any point. This could equate to an additional 1,800 starters every year.

To provide the Racing Club members with an immediate racing experience, the horses will be at an advanced stage and in many cases ready to race.

Other than international markets, horses could be selected as tried horses within Australia.

The acquisition of race mares as the majority of imported horses will also help seed the pool of broodmares in coming years. It is envisaged that the acquisition of mares could be as high as 75-80% of the horses acquired.

Over the longer term there is the potential for horses raced by the Club to be bred from the progeny of horses previously raced by the Club.

The Club concept will enable the racing industry to retain control over the broodmare band following their racing careers.

There may also be the capacity to make multi-use of industry assets such as Racing NSW's Bandanora property at Capertee.

Based on feedback received during the consultative phase of the Strategic Plan, there is considerable industry expertise and assistance available to further develop the model to import horses and provide a short-term boost to the NSW horse population.

It is proposed that a tender system or similar be developed that receives bids from trainers for the business of training the imported horses.

It is proposed that the criteria for allocating horses among trainers include the following elements:

- ◆ Training record of success;
- ◆ Quality of service to owners of the horses;
- ◆ Developing the depth of the NSW training ranks, particularly Sydney and surrounds; and
- ◆ Attracting of new trainers to operate from Sydney and surrounds

Further developing participation in racehorse ownership is critical in ensuring the long-term health of the racing industry.

Aside from the obvious benefit of owners providing horses that race, an ownership base also helps promote and market thoroughbred racing by owners to their network of friends and associates.

At present, there is scope to increase the number of people in NSW involved in racehorse ownership at any level.

This represents a tremendous opportunity for the NSW racing industry to increase the extent of participation in thoroughbred racing by NSW residents.

Racing NSW will launch a two-pronged strategy to improve the participation in racehorse ownership.



Racing Lifestyle Club

The launch of a Racing Lifestyle Club will provide a large number of participants the chance to sample racehorse ownership at a relatively low cost.

The Racing Lifestyle Club will be conducted by a company comprised of race clubs, to racehorses and provide racing lifestyle benefits and experiences to its membership.

The Club could comprise up to 6,000 members, targeting people that presently have only casual interest in racing or those that have not been in racehorse ownership over recent years.

The Racing Lifestyle Club targets providing an ownership experience for thousands of new participants and providing its members with a taste of both racehorse ownership and race day hospitality.

The Club can also provide an entrée into direct ownership at a later point, for club members.

Positive Impact on Field Sizes and Wagering

The import of horses is aimed at directly increasing the number of horses available to race and also the breeding stock into the future.

The increased number of horses in work both in the short term and in the future is aimed at increasing field sizes, especially in Metropolitan and Provincial races. The Club may have the option to race the progeny of the mares imported into NSW after they have gone to stud.

A key benefit of the plan is that in turn, these increases in fields will have a positive impact on the levels of wagering on these races and the income of the NSW Thoroughbred Racing Industry from wagering on Metropolitan and Provincial races.

The uplift from wagering will be both immediate as these horses commence racing and establish their form, as well as into the future with a larger broodmare band producing an increase in the number of race starters and wagering in the future.

Growing the Existing Direct Ownership Base

It is important that the Lifestyle Club generates additional participation in racing and ownership, without substituting itself for existing participation in racing, occurring through racehorse ownership and race club membership.

A key lever to achieve this is with the ownership experience. The ownership base can be developed if the existing ownership experience is superior to that of the Club and indeed better than is presently the case. Retaining and attracting new racehorse owners will benefit from improving the lifestyle elements of the ownership experience.

There are some possible options for a Racing Lifestyle Club. The most obvious is a single club that collectively races all horses.

An alternative is to create some smaller geographically based segments within the club that focuses on horses trained locally or within a certain region. This second option would seek to try and attract members to a smaller club that has a local attachment.

Benefits to Sole, Multiple and Syndicate Owners

To encourage participation in racehorse ownership, Racing NSW will pursue a renewed programme of benefits to owners participating as sole owners, multiple or partnership owners and syndicate members.

Providing a stronger suite of owners' privileges will enhance the ownership experience for NSW racehorse owners, irrespective of the success of their horse. This is a key to encouraging owners from a variety of financial backgrounds and this will assist in the retention of owners and encourage them to remain involved by racing new horses.

Importantly, an improved range of benefits to racehorse owners will be of greatest relative benefit to the owners of racehorses that aren't successful on the track and returning sufficient prizemoney to meet or exceed the costs to owners.

A re-vamped racehorse owners programme could also provide a database of information which will enable Racing NSW to pursue value adds for owners such as discounts or special offers on products and services complimentary to their participation in racing.



Benefits to Sole, Multiple and Syndicate Owners (cont'd)

Possible inclusions when an owner has a horse racing include:

- ◆ Racecourse entry for owner and accompanying person, Discounted ticketing for a further two accompanying people.
- ◆ Members area access for named owner and an accompanying person. Option to purchase two extra discounted tickets to members enclosure.
- ◆ Discounted general admission entry for accompanying people (limit of four)
- ◆ Beverage and food
- ◆ Race programme
- ◆ Priority seating if available

Possible inclusions where an owner does not have a horse racing include:

- ◆ Discounted admission at all NSW TAB race meetings
- ◆ Offers that are exclusive to NSW racehorse owners

Although difficult to quantify, the cost of discounts is likely to be recouped by both:

- ◆ the benefits of underpinning and lifting participation in racehorse ownership;
- ◆ additional on-course expenditure that may accompany increased attendance by racehorse owners and their guests

At present, for many owners the process of obtaining free racecourse admission is unwieldy and inconvenient.

Improved access for owners to NSW racecourses will have the following benefits:

- ◆ Provides a tangible recognition and benefit to owners;
- ◆ Instant recognition of the owner facilitates their ease of entry to a racecourse;
- ◆ Identifies the owner enabling them to claim other privileges; and
- ◆ Reduces the administration for clubs in providing refunds to owners

Racecourse Infrastructure and Funding Allocation

- Strategic Objectives:**
- i Improved Racing and Training Infrastructure/ Develop Racehorse Training Capability**
 - ii. Increase metropolitan and provincial field sizes**
 - iii. Improve the Viability for Racehorse Trainers**
 - iv. Develop Thoroughbred Racing’s Customer Base**

The table below summarises the amounts that have been notionally allocated as part of this plan, towards the funding of racecourse infrastructure and improvements. The allocations are to be funded from the proceeds of the Point of Consumption Tax, commencing from January 2019 through to the end of the 2021/22 financial year.

Category	Amount
Public Facilities	\$30,000,000
Stabling	\$16,000,000
Synthetic Training Tracks	\$5,000,000
Sand Training Tracks	\$3,000,000
Land Acquisition	\$24,000,000
Industry Training Academy	\$6,000,000
Industry Pre-Training Centre	\$4,000,000
Course Proper Improvements	\$8,000,000
Ancillary Training Facilities	\$2,500,000
Total	\$98,500,000

There are various infrastructure improvements to racing and training facilities outlined within this Plan. In addition, there is a need for the creation of quality strategic assets to meet the objectives of this Plan such as an Industry Training Academy, Pre-training Centre and also to improve the standard of public facilities for racegoers.

Improvements to public facilities are needed at Royal Randwick Racecourse with Racing NSW and the Australian Turf Club working collaboratively to improve and expand the capacity of that venue to accommodate the public in comfort. This is especially the case as this Plan seeks to continue developing events and engaging new customers.

The described allocation of funding includes the provision of ancillary training facilities to augment work tracks in the training of horses.



Increase Stabling Capacity in the Sydney Basin and Development of Training Centres

- Strategic Objectives:**
- i Improved Racing and Training Infrastructure/ Develop Racehorse Training Capability**
 - ii. Increase Metropolitan and Provincial field sizes**
 - iii. Improve the Viability for Racehorse Trainers**

Racing NSW has progressively upgraded and added to racing and training facilities at more than 15 tracks throughout NSW, with almost \$90 million spent or committed since 2012. This has increased the capability of tracks to stage attractive racing and provided better training facilities at various venues.

However there remains a need to continue improving these facilities including an upgrade of training capability at centres that are able to readily service Metropolitan and Provincial racing.

At present training facilities and infrastructure are inadequate to service the training of the increased number of race starters targeted by this Strategic Plan.

The development of training centres close to Sydney is an important step in improving the quality of Metropolitan and Provincial racing. Better training facilities will be attractive to potential trainers to relocate into these locations from outside the existing Metropolitan/Provincial region and for existing trainers to expand their operation.

This will close a gap between the Sydney 'basin' and that of Melbourne which benefits from large, well-developed training centres with more than 1,000 and up to 3,000 trained starters each year at the likes of Mornington, Cranbourne, Pakenham, Bendigo, Kyneton, Seymour, Kilmore, Ballarat, Bendigo and Geelong. The Hayes, Hayes & Dabernig private training centre at Euroa and Pinecliff on the Mornington Peninsula are additional to this.

Improving the number of horses in work within approximately two hours south of Sydney will positively develop racing.

There is the potential to add between 500 and 550 stable boxes and ancillary facilities to racecourses in the Sydney basin, facilitating up to 3,000 additional race starters each season.

In many cases, such improvements to training facilities and additional stabling, allied with an increase in the availability of skilled stable staff (discussed below) will enable trainers to expand their existing number of horses in work.

At present there is no dedicated pre-training centre in NSW, with this activity spread out among racecourses and private properties. Identifying and designating a suitable location to establish an industry pre-training centre would more efficiently deliver this activity from an industry standpoint.

This would better enable Provincial and Metropolitan racecourses to be utilised by larger, more focussed trainers with horses in full work, rather than trainers with one or two horses in work and 12-15 horses in pre-training. As such an industry pre-training centre would increase the efficiency of the Metropolitan and larger Provincial tracks for training.



Racehorse Training Establishment

Racing NSW will create a new training centre that is readily accessible to Sydney to improve the number of horses in work.

The training centre will be targeted at trainers seeking to establish themselves in the Metropolitan/ Provincial area or expand their operation at a high-quality venue, located close to relatively affordable accommodation and other amenities for staff.

The vision for this training centre is to have ready access to excellent training facilities including synthetic and turf fast work tracks and ancillary training facilities, with these being at least the equal of those anywhere in NSW.

The training centre will have the ability to accommodate up to 400 horses in training.

Racing NSW will encourage trainers to invest in their own allotment onsite, by acquiring their own block of land and construction of stabling. There is also the opportunity to include onsite residential development to sit alongside stabling, providing trainers an attractive lifestyle option.

An integrated residential/training development would also be attractive for trainers seeking to establish themselves at a high-quality training facility and invest in an asset that will enjoy ongoing demand. Over time, this will better enable trainers to secure their financial future rather than simply renting stabling over a prolonged period.

Guidelines for the development of the site will seek to ensure a degree of uniformity that protects the aesthetics, amenity and privacy of the individual land purchases.

Each parcel of land and stables will have ready access to the racing and training precinct for the convenience and safety of trainers and their staff.

Racing NSW will retain the option to fund the construction of some stabling. However, these would be leased at a premium rental and Racing NSW would retain the ability to have trainers required to meet key performance indicators.

Other Infrastructure Improvements

Having optimum training tracks is vital to ensuring that trainers have the best opportunity to prepare horses for racing. Ensuring that tracks have high level maintenance programs and improving the maintenance of both racing and training tracks is a strategic measure underpinning other elements of this Plan.

Arising from the 2014 Strategic Plan Racing NSW developed a programme of sports turf management apprentices working at racecourses across Provincial and Country NSW.

This series of apprenticeships is an investment in a medium-term process to ensure that appropriately qualified racecourse curators are developed within the NSW Thoroughbred Racing Industry.



The provision of suitable plant and equipment is a further aspect of improving the the presentation of racing and training infrastructure.

Attracting New Racehorse Trainers to NSW

It is important that the Strategic Plan address the variety of elements that may be attractive to trainers looking to establish stables in NSW.

These elements include:

- ◆ Improvements to training facilities and stabling that enables trainers to operate their business without being limited in what they can achieve;
- ◆ Improving the availability of skilled and engaged stable staff;
- ◆ Racing framework that provides opportunities for a range of horses;
- ◆ Maintain and gradually build on prizemoney levels;
- ◆ Natural climatic advantage of Sydney and surrounds, which is relatively mild compared to other major racing centres in Australia.

There are several potential benefits that a new trainer would bring to NSW if drawn from another State, New Zealand or the Northern Hemisphere. These include the new horses, new owners among their client base, but also new ideas and approaches. This would also contribute to reducing the homogeneity of NSW racing.

The placement of some of the horses imported by Racing NSW into the stables of new trainers that commence training from Sydney or surrounds is also an appropriate incentive.

Racing NSW should take a direct role in the recruitment of new trainers to NSW.

Review BOBS

Racing NSW's Breeder Owner Bonus Scheme (BOBS) has been operating for more than fifteen years.

Racing NSW will undertake a review of the scheme which will include:

- ◆ Greater incentives to breed and race in NSW;
- ◆ Review and expand the BOBS system to further entice horses to remain and be raced in NSW (rather than interstate or overseas);
- ◆ Examine the age of eligibility for bonuses;
- ◆ Examine an expansion of the bonus structure; and
- ◆ Possible substitute for future prizemoney increases.



Review Handicapping and Programming Policies

Strategic Objectives: i. Increase Metropolitan and Provincial field sizes

Improving the size of Metropolitan and Provincial field sizes is a key objective of the 2019 Strategic Plan. Enhancements to the handicapping and programming regime that can improve the attractiveness of contesting Metropolitan and Provincial races are also important in improving fields.

Racing NSW has proposed a series of all-inclusive handicapping and programming measures, which will be most effective if coinciding with prizemoney increases. These proposed changes are summarised below.

Metropolitan Saturday Racing

- i. Benchmark level of 60kg (down from 61kg) for Metropolitan Saturday benchmark and open races;**
- ii. Introduction of a true weight allowance of up to 2kg for Metropolitan Saturday benchmark and open races.**

The benchmark weight for Metropolitan Saturday races will be lowered to 60kg, from the existing level of 61kg. This lessens the weight carried by horses in Saturday Metropolitan races compared to midweek Metropolitan races, providing greater incentive for trainers to start horses in Saturday Metropolitan races.

In benchmark races, horses with a benchmark figure above the benchmark level of the race will continue to be allotted a weight above the 60kg benchmark level.

In a further important change, a true weight allowance of up to 1kg in Saturday benchmark and open handicap races is being introduced.

Such an allowance may be claimed where the true weight of a horse taking account of its benchmark and sex, is less than the 53kg limit in a race.

For example, if the true weight of a horse is less than the 53kg limit in a race, the connections have the option of carrying the 53kg, or declaring a rider who is able to claim part or all of the true weight allowance down to the horse's true weight, with a maximum allowance of 1kg.

Apprentice jockeys will be able to claim both the true weight allowance and their apprentice claim in races, where they are able to ride at the lower weight.

Declaration of a rider claiming the true weight allowance must be made at acceptance time for the race.



Discontinue Adjusting Weight at Acceptance Time

With the change to the benchmark level for Saturday Metropolitan races, the practice of reducing the weights of races at acceptance time can be discontinued for meetings from the commencement of these changes.

Separate Benchmark Numbers for Metropolitan/Provincial and Country Races

Racing NSW will allocate two benchmark figures for handicapping horses that race between sectors – one benchmark for Metropolitan/Provincial racing and a separate benchmark for races in country NSW.

The creation of a separate country benchmark will see horses more appropriately handicapped when they move between Metropolitan/Provincial to country racing and vice versa.

Horses will be assessed individually and there may be marked differences between the Metropolitan/Provincial and Country Benchmark between different horses.

Streamlining of Benchmark Programmes

Programming of races across sectors will be streamlined to reduce the number of separate benchmark levels in use at a given time and to clarify the trade-off between the strength of a race and the weight carried.

The changes providing for a lower benchmark weight for Metropolitan Saturday races will also allow a clear progression between the strength of the race and the weight to be carried, from Metropolitan Saturday races, down through Metropolitan Midweek and Provincial races.

Provincial benchmark races will be programmed at Benchmark 64 level, along with Conditional Benchmark 70 races programmed for horses contesting a minimum of four Provincial and country races in the previous twelve months.

The streamlining of the structure of programmes will also be accompanied by adjustments to the maiden win benchmarks from Metropolitan and Provincial races, with these generally to be assessed two points or 1kg lower than is presently the case.

The number of benchmark race levels at Country race meetings has been reduced in order to simplify and broaden race planning options for trainers.

Pivotal to the proposed system is the streamlining of Metropolitan and Provincial benchmark levels to provide better structure from Metropolitan Saturday racing down through to Provincial racing.

This compliments the proposed change to the benchmark level of weights for Metropolitan Saturday races that differentiates Saturdays from midweek racing.

The lessening of benchmark levels and lower benchmark weight for Metropolitan Saturday races provides for cascading strengths of races, with better trade-offs between the strength of the race and the weight to be carried.



A key element of the proposed change is that different benchmarks be formally adopted for country racing, separate to those of Metropolitan and Provincial racing. All horses competing across sectors would have benchmarks that apply to country and Provincial races.

This would both enable country trained horses to be assessed correctly and also underpin the overall structure of racing referred to above, from Metropolitan Saturday races downward.

Establish a Racing Training Academy

Strategic Objectives: i. Building Racing's Workforce

A recurrent issue raised from the extensive consultation undertaken with the industry is the shortage of suitably trained stable staff and trackwork riders. This shortage is experienced across all sectors of racing throughout NSW.

The hours worked by stable staff including the very early starts and split shifts are a significant impediment to expanding racing's workforce.

Notwithstanding the benefit obtained from the 1.5% of prizemoney directed to stablehands, the wages paid to stable staff are also an issue for the industry when these are compared to the broader labour market.

The most important skill required for the racing industry into the future will continue to be riding, being jockeys riding in races or work riders for the conditioning of horses.

Racing NSW will establish a Racing, Riding and Skills Academy providing an excellent means of high level horse riding skills required to be a jockey or a work rider. The mentoring of riders as they develop their skills could be undertaken by full-time staff and also casual assistance from established jockeys.

The Racing, Riding and Skills Academy would be best located onsite at a racecourse providing the trainees the first-hand opportunity to handle horses.

Locating the Academy on an active racecourse will provide readymade hands on access for students to develop and hone their skills.

There is a great immediate need for riders in NSW. A minimum targeted graduation of 25-30 riders per annum would greatly build the skills required by the NSW Thoroughbred Racing Industry.

Trackwork Riders

Racing NSW has a two-part initiative underway to assist trainers with the shortage of track riders, particularly in Regional Areas.

Racing NSW will employ suitable riders, whether local or international riders, and recoup costs (with the help of the clubs) from the trainers, on a user pays system. To be placed predominantly in regional areas, the riders will provide trackwork rides for trainers and some may be upskilled to apprentice jockey or jockey.



Philippines' Rider Supply

Racing NSW has commenced arrangements for up to 40 riders and jockeys from the Philippines to come to NSW under a trainee Visa program. Racing NSW will train and upskill the riders to provide a competent workforce for our trainers. Riders of different levels will be recruited, from track riders starting out to Apprentice Jockeys or experienced Jockeys.

Riders will complete a safety induction two week training course on arrival then be placed in pairs to Regional NSW. Former Jockey Marlon Dolendo (Port Macquarie) will act as Mentor and cultural ambassador for the riders in all aspects of the program. This contact provides a solution to the gap that sometimes occurs when foreign nationals struggle to acclimatise to a new Country. The placement in pairs also helps the riders settle and be comfortable in their new environment. Marlon's father in law is a Trainer in the Philippines and has local knowledge of the available riders and their character. Marlon Dolendo and Racing NSW Head Jockey Coach LeeAnn Olsen will select the riders based on skill, character and background information available.

Training and upskilling will continue throughout their stay, both through practical instruction from Racing NSW Jockey Coaches and on-line learning managed by our Training Academy. The riders will return to their Country as improved athletes, whilst having helped the industry in NSW with their track riding whilst here. Racing NSW is meeting with Department of Immigration Officials to work through the Visa requirements to ensure Government approves the scheme.

Local Rider Supply

The role will also be attractive to some local riders who currently work as casuals for several different trainers and do not receive a regular single weekly income that is reliable. We are advised some local riders who left the industry because of the unreliable pay structure may return.



Selling the Attractiveness of a Racing Career

Strategic Objectives : i. Building Racing's Workforce

The progress by Racing NSW in improving the mainstream recognition of racing through The Everest, could also be beneficial in promoting the attractiveness of racing as a career option.

The following components are suggested as part of the promotion of racing careers:

- ◆ Launch school holiday work experience and eventual part time work, tying in the work experience component with other youth achievement programmes such as the Duke of Edinburgh Award or partnering with other youth programmes. This has the added benefit of selling racing to motivated young people that in turn could become potential advocates of racing in the future.
- ◆ Utilise suitable stable staff as part of the promotion of careers in the racing industry at vocational days, providing an insight into the working life in a stable, selling the intrinsic rewards and highs of being involved in the industry.
- ◆ Arrange 'come and try it' days as part of engaging with school students. Launch a new racing careers website to provide a single destination for potential recruits and link in with social media campaigns to target potential applicants.
- ◆ Incorporate Racing NSW welfare program sites as potential open day locations to both introduce potential recruits to racing careers and to also promote the positive welfare initiatives being undertaken.

Pony Club Initiative – future trackriders, apprentices and jockeys

Racing NSW has partnered with Pony Clubs NSW to deliver a career options message at Pony Club Camps. Racing NSW staff have attended Pony Club camps during the school holidays at Young, Wingham and Camden Haven with more visits planned to include camp draft events where 300-400 competitors attend.

A fun presentation is given with activities for the kids age 8 – 14 yrs riding the equisizer (spring loaded training horse for jockeys) or riding their own ponies in small saddles. Safety is paramount with induction question and answer sessions and video safety examples preceding any practical activity. Career options are explained, and Mums and Dads are often in attendance and ask questions re future pathways.

Racing NSW has also met with TAB and their Virtual Reality suppliers to review options for a Virtual Reality set of videos tailor made to our needs. The system can recreate lifelike race rides, trackwork or jumping from the barriers where the kids have to 'steer' and ride the horse to fit the model and get the horse home safely. The user wears a 360-degree visual headset which is very lifelike and puts them 'on the horse and in the race'. This VR will appeal to the young ones who love their computer games and will compliment the practical parts of the Pony Club visits.



Maintaining Growth in Revenue

Strategic Objective : i. Further Grow Industry Revenues

Race Fields Fees and NSW TAB

Since the introduction of race fields fees, Racing NSW has been able to increase the return from wagering operators through differentiated race meetings and bet types with increased and varying rates applying to these.

It remains important that the industry enjoys underlying growth in its return from wagering, with race fields fee revenue increasing year on year.

Critical to this growth is ensuring that the NSW racing product, especially Metropolitan and Provincial racing, is attractive to punters not only in NSW but also nationally and internationally. A key element of this is the number of starters with the size of race fields to be addressed in greater detail in the Plan and elsewhere in this report.

Stronger race field sizes are more important in growing totalizator wagering than fixed odds wagering.

It is estimated that achieving the field size targets discussed in this report will noticeably boost wagering revenue.

Underpin the Integrity of Racing

Strategic Objective: i. Enhance Integrity and Animal Welfare

- ◆ Ensuring all available technology used for maintenance of the highest level of integrity for both Stewards and Forensic Laboratory
- ◆ Blood Passport for DNA manipulation
- ◆ Continued development of surveillance and intelligence capabilities

The integrity of racing flows across various aspects of racing and is vital to providing an environment in which people have the confidence to breed horses, own horses, train horses and work with horses.

That racing in NSW is run cleanly and seen to be run cleanly, is fundamental to the success of the industry.

Racing NSW will continue to invest in its laboratory to provide the optimal capacity to detect new drugs. An important new development is the creation of equine blood passports to guard against the threat of gene doping and other genetic modifications.

Continued development of surveillance and investigative capability will better enable racing to make timely detection of systematic cheating.

Closely related to the integrity of racing is the matter of animal welfare which is a key part of racing's existence.

Integrity also has a strategic link through to mainstream engagement and commercial returns from wagering through confidence in the sport.



Equine Welfare Management

Strategic Objective: i. Enhance Integrity and Animal Welfare

In 2017 Racing NSW acquired a 1,050 hectare property 'Bandanora' at Capertee, approximately three hours from Sydney.

The property is being developed into a home for the rehabilitation and housing of ex-racehorses. The property will also be used to re-train racehorses, with many able to be re-homed as pleasure horses.

Racing NSW is also developing other satellite racehorse re-homing centres in NSW in partnership with other groups.

Racing NSW's equine welfare commitment is a birth to death tracking and care of thoroughbreds that are bred, race and retire in NSW.

Further to its commitment, Racing NSW has recently developed a comprehensive Code of Practice for Equine Welfare Programmes.





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