



# Summary

## About the survey

This report summarises the main findings of a survey that Skills Impact conducted, on behalf of the [Animal Care and Management Industry Reference Committee](#)<sup>1</sup> (ACM IRC), to find out more about individuals and organisations who own horses and are responsible for engaging services relating to their care, health and wellbeing. The aim was to determine the types of horse care services that are undertaken, who is carrying out this work and how, and the skills and knowledge workers and owners possess and, perhaps, develop (whether through formal qualifications or on-the-job experience). Results of the survey are intended to build upon content that has already been identified for, and covered in, qualifications within the Racing and Breeding RGR Training Package (but is inclusive of respondents who race and breed horses). There were 546 survey respondents.

The survey was not designed to be reflective of all people who own/care for horses, but to gain insights *illustrative* of the resources, services, challenges and opportunities many are encountering as they work. To maximise the potential range of feedback on equine sectors and job roles, drafts of the survey were piloted with key stakeholders to seek guidance on the types of work that are being undertaken within the industry and to ensure the appropriateness of questions.

To encourage a higher response rate, not all questions were compulsory (hence some participants did not answer all the questions). The survey was conducted online on SurveyMonkey and used a 'snowballing' method, which resulted in numerous existing contacts further disseminating the survey through their networks on behalf of Skills Impact.

The ACM IRC will consider the survey results alongside previously collected data and intelligence, which will inform its work relating to the equine industries (other than racing and breeding).

## Key findings

- The highest-use services are provided by equine dentists, farriers, chiropractors, massage therapists, saddle-fitters, nutritional advisors, physical therapists and clippers (not including veterinary appointments or equine dentists).
  - External providers carry out 88% of these services.
  - There may be an emerging sector in Emmett/Bowen Therapy.
  - Service providers are generally selected based on personal recommendations (including word of mouth) and their credentials (including qualifications).
  - There is a significant concern over the quality of service providers and the nature of their credentials (e.g. whether obtained through a short course or from a full program of study).
- Almost all horse carers/owners make appointments with equine dentists.
  - Most equine dentistry services are carried out by equine dental technicians, but veterinarians also provide related services (either solo or in conjunction with technicians).
  - Most equine dentistry involves the use of manual tools only.
  - Approximately 27% of equine dentistry involves the use of motorised tools, usually with the horse being sedated.

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<sup>1</sup> Australian Industry and Skills Committee, 2020, *Animal Care and Management Industry Reference Committee*, viewed March 2020 <<https://www.aisc.net.au/content/animal-care-and-management-industry-reference-committee>>

- It remains unclear how often sedation is administered by someone who is not a veterinarian.
- All services are significantly more difficult to identify and arrange in regional, rural and remote (RRR) areas, and many are of questionable quality.
- There are urgent skills needs in equine-related industries, especially for horse care and welfare.
- There continue to be specific labour force shortages, especially regarding farriers and track riders. These shortages are sometimes addressed by unqualified service providers, who are of varying quality.

Read the full report below.

# Introduction

## Background and purpose

The [Animal Care and Management Industry Reference Committee](#) (ACM IRC) is responsible for overseeing the Animal Care and Management Training Package. Over the last three years, the Racing and Breeding (RGR) and ACM IRCs have agreed to transfer several qualifications relating to the equine industries into the RGR Training Package, with the approval of the Australian Industry and Skills Committee (AISC).

There remain, however, several qualifications that specifically cater to the equine industry within the ACM Training Package<sup>2</sup>:

- Certificate II in Horse Care
- Certificate III in Equine Hoof Care
- Certificate III in Performance Horse
- Certificate IV in Equine Dentistry
- Certificate IV in Farriery
- Diploma of Performance Horse Management

As part of its responsibilities to this sector, the ACM IRC has commenced research to evaluate the impact of recent Training Package changes on the industry, particularly relating to safety and the introduction of pre-requisites (*ACMEQU202 Handle horses safely* and *ACMEQU205 Apply knowledge of horse behaviour*) to many of the equine units.

The ACM IRC has previously examined feedback regarding equine dentistry and is aware of issues relating to the scope of professional practices in this area. These matters were reported in the ACM Industry Skills Forecast 2019–2022<sup>3</sup>.

On a broader level, there are clear indications that the scope of work being undertaken with horses is expanding, especially in the field of health care. A key concern for the ACM IRC is to determine the methods being used for routine tasks across various job roles (rather than resting on the assumption that the recommendations of various interested parties always translate to work in the field).

The ACM IRC requested that Skills Impact undertake consultations, including an extensive survey of individuals and organisations who own or care for horses. The aim was to determine the types of horse care services that are undertaken, who is carrying out this work and how, and the skills and knowledge workers and owners possess and, perhaps, develop (whether through formal qualifications or on-the-job experience).

Results of the survey are intended to build upon content that has already been identified for, and covered in, qualifications within the RGR Training Package (but is inclusive of respondents who race and breed horses). Together with the priority skills identified by industry, survey results will inform the program of work to be undertaken by the ACM IRC and, potentially, the design of new or updated qualifications or units of competency to be released on training.gov.au (after a consultation and endorsement process is completed).

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<sup>2</sup> training.gov.au, 2020, *Training package details: ACM - Animal Care and Management Training Package (Release 3.0)*, viewed March 2020 <<https://training.gov.au/Training/Details/ACM>>

<sup>3</sup> Skills Impact, 2019, *Animal Care and Management Industry Sector Industry Skills Forecast and Schedule of Work 2019–2022* <[https://www.skillsimpact.com.au/site/skilliampactmedia/uploads/2019/05/ISF.ACM\\_IRCSkillsForecast.2019-2022.Final\\_.pdf](https://www.skillsimpact.com.au/site/skilliampactmedia/uploads/2019/05/ISF.ACM_IRCSkillsForecast.2019-2022.Final_.pdf)>

## Survey design and sample

The survey was developed after initial consultation with ACM IRC members and industry participants who have been involved with previous work carried out by Skills Impact in relation to training in the equine industries. To maximise the potential range of feedback on equine sectors and job roles, drafts of the survey were piloted with key stakeholders to seek guidance on the types of work that are being undertaken within the industry and to ensure the appropriateness of questions prior to a final version being approved.

The survey was conducted online on SurveyMonkey and used a 'snowballing' method. The starting point was the existing network of contacts developed for the ACM IRC and held by Skills Impact. These contacts had been developed through previous consultations, identification by IRC members and through work with relevant industry associations. These existing contacts then further disseminated the survey through their networks on behalf of Skills Impact. It is unknown how many people were invited to participate and therefore a response rate cannot be determined.

The findings are not intended to be statistically representative of horse-owning individuals and organisations, but *illustrative* of the resources, services, challenges and opportunities many are encountering as they work. As the survey was conducted online, the results may be more reflective of individuals who participate in internet-based communities.

To encourage responses, not all questions were compulsory, hence some participants did not answer all the questions. The survey was also designed to direct participants only to questions relevant to them (based upon their previous answers).

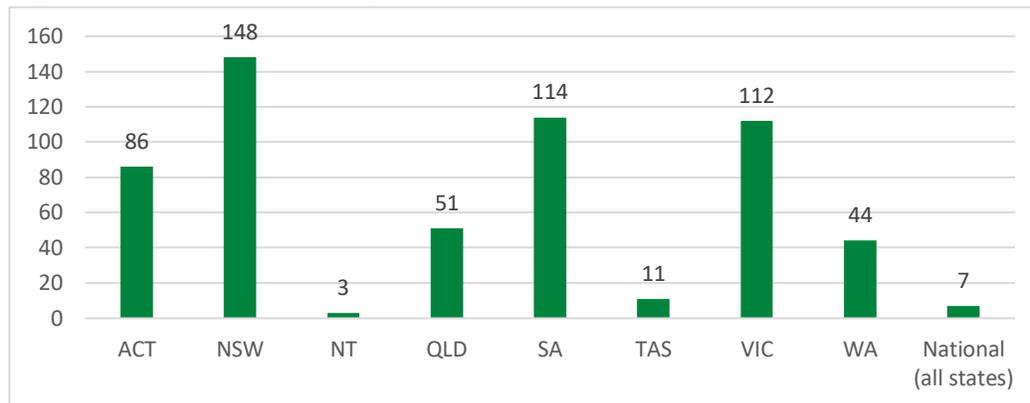
All quotations included here are verbatim. There are some incomplete sentences, but these should be read as responding to the question or issue that is contextualised in the commentary above it.

## Profile of respondents

### Location

There were 546 respondents in total. The greatest number of participants owns/cares for horses in New South Wales (27%), followed by South Australia (21%) and Victoria (21%). Around 94% (513) of respondents' equine activities occur only in one state only, while 4% (23) work across two states. Seven respondents' (1%) operations are national.

**Figure 1: States in which respondents care for/own horses**

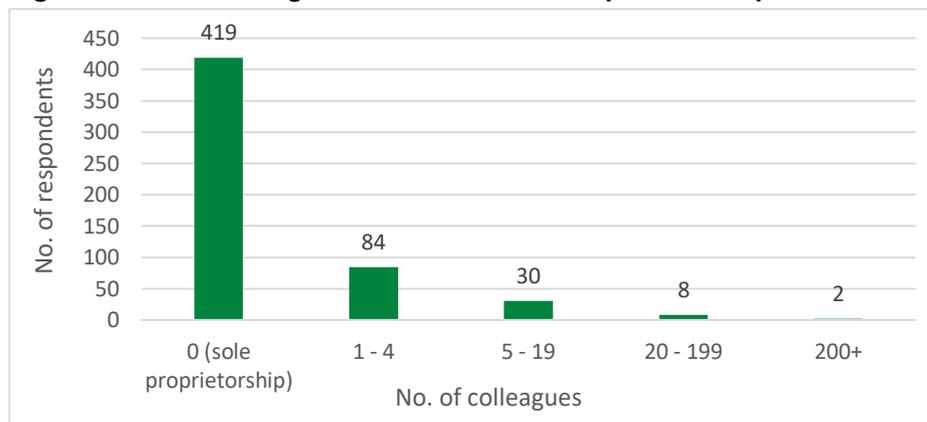


The geographic distribution of respondents' horses shown in Figure 1 does not correlate with Smyth and Dagley's<sup>4</sup> study, which found that the distribution of horse ownership mirrors the proportions of population at state-level. As such, Australian Capital Territory and South Australian operators are likely over-represented here, perhaps due to the networks through which the survey was shared.

### Business/ownership structure and sector

Most respondents (77%) do not directly work with or employ any other people (sole proprietorship).

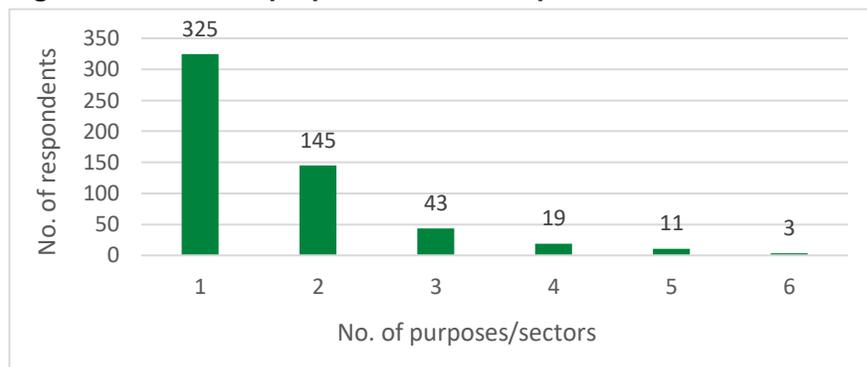
**Figure 2: No. of colleagues/staff involved in respondents' operations**



Around 60% (325) of respondents indicated that the horse(s) they care for/own are for a single purpose/sector. Three people indicated that their equine operations cover six sectors.

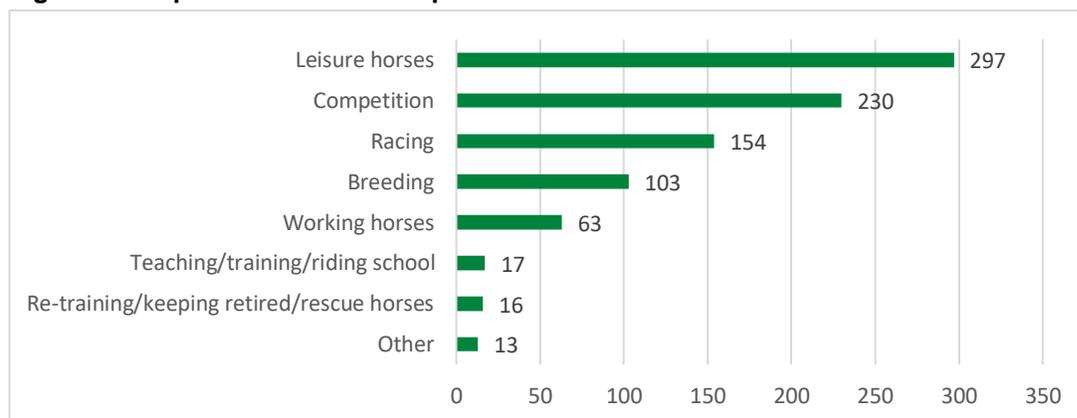
<sup>4</sup> G.B. Smyth & K. Dagley, 2016, Demographics of Australian horses: results from an internet-based survey, *Australian Veterinary Journal*, 93(12):433-438.

**Figure 3: Number of purposes/sectors respondents' horses are for**



The horse(s) cared for/owned by respondents are most commonly used for the leisure sector, followed by the competition and racing sectors.

**Figure 4: Purposes/sectors of respondents' horses<sup>5</sup>**



## Horse care services

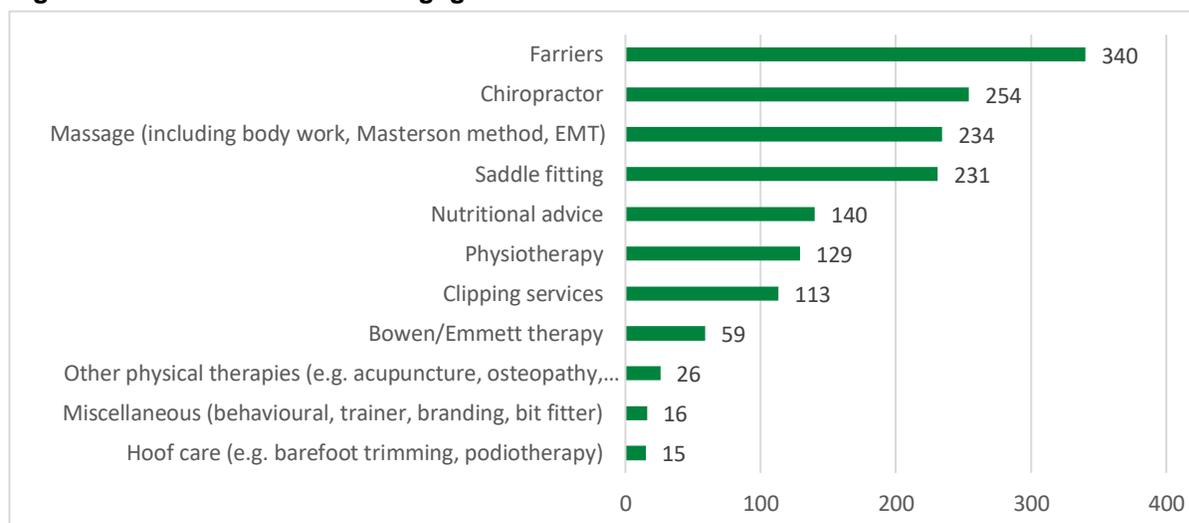
### Services engaged

The survey asked about the types of care services<sup>6</sup> people engage, whether regular or as needs arise (excluding [Equine dental care](#), which is covered below, and ad hoc veterinary appointments). Figure 5 below shows farriers to be the most commonly engaged service, followed by chiropractic, massage therapy and saddle fitting services.

<sup>5</sup> The “leisure” sector encompasses horses used for activities such as riding, trekking and tourism. “Competition” horses compete in events such as polo, dressage and show jumping. “Racing” covers flat, jump, harness and endurance racing. “Breeding” includes thoroughbred and standardbred horses. “Working horses” include stock horses used in agriculture. “Other” purposes include horse care services such as agistment.

<sup>6</sup> The titles of each service/provider reflect the terminologies used by survey participants. These may differ from the technical definitions of job roles; for example, workers who carry out physical therapies on horses are often referred to as “physiotherapists” (as in Figure 5), but businesses offering equine physiotherapy services are not regulated and are hence not bound by the same legislation as human physiotherapists (who require a bachelor degree). While this is an important caveat, we here use language to reflect that of the workforce.

**Figure 5: Horse care services engaged**



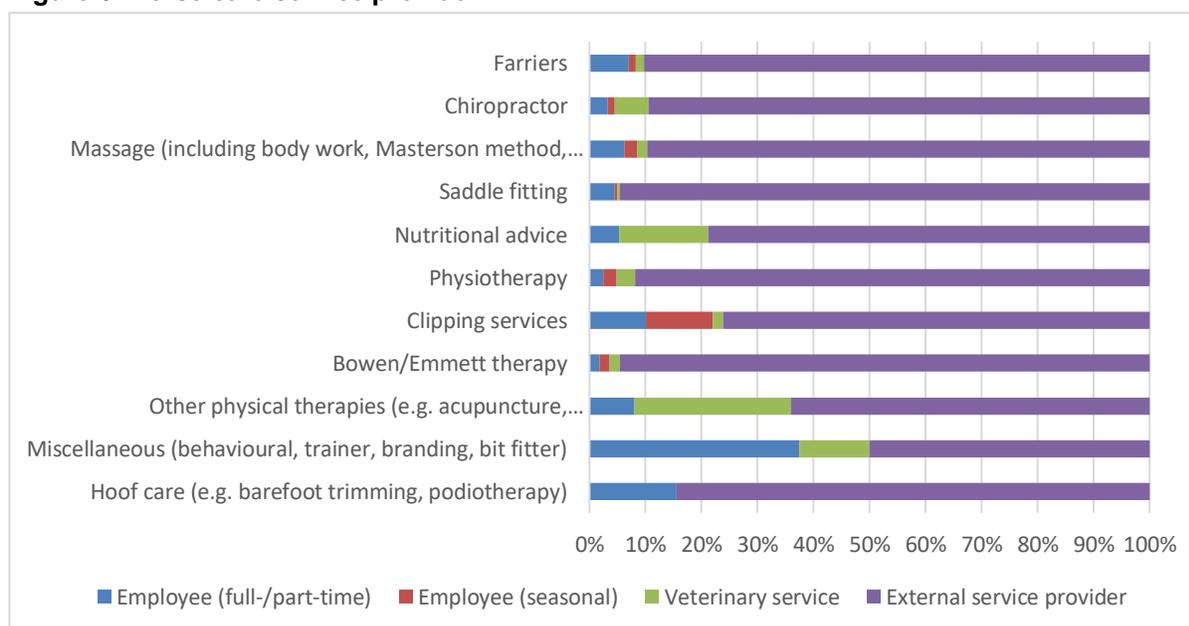
## Services providers

External service providers are engaged for 88% of horse care services (see Figure 6 below). “Saddle fitting” and “Bowen/Emmett therapy” are both outsourced to external providers by 95% of respondents who use these services.

Veterinary service providers are more involved in “Other physical therapies (e.g. acupuncture, osteopathy, biomechanical)”, providing 28% of the services engaged, and “Nutritional advice” (16%).

Employees, who work full- or part-time in the respondent’s organisation, fulfil 38% of “Miscellaneous (behavioural, trainer, branding, bit fitter)” services, and 15% of “Hoof care (e.g. barefoot trimming, podiotherapy)”. Seasonal employee involvement is greatest in “Clipping services” (12%).

**Figure 6: Horse care service provider**



Numerous respondents who engage external providers for specific services also detail that they, or their colleagues, fulfil many of the other expert (depending on experience and training) and 'small' jobs themselves. They are holistically involved with the care of their horses, often having developed 'owner expertise'. In some cases, owners may regularly engage a service (e.g. once per year) but, between visits, perform routine maintenance themselves.

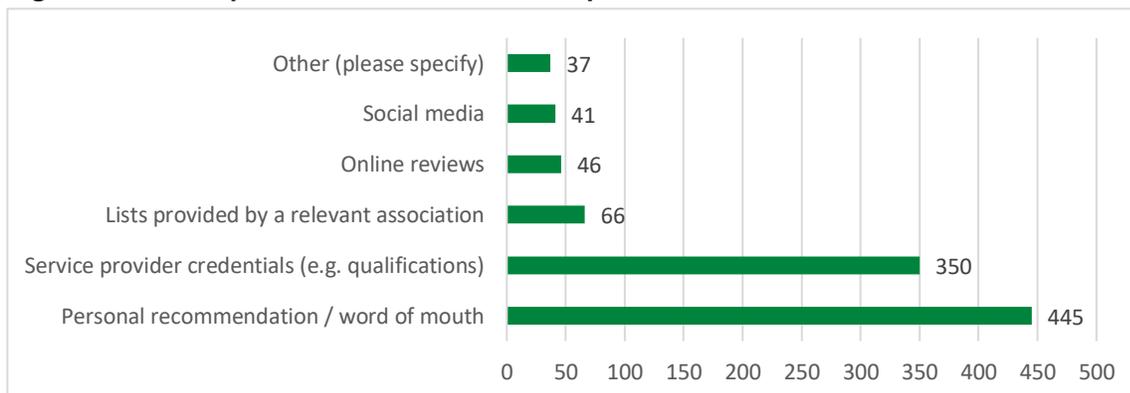
### Respondent examples

- One participant, who is a sole proprietor involved in the breeding, competition, working horse and campdrafting sectors, who engages a veterinarian for equine dental care and an external chiropractic service provider, states that “We do our own farriery and clip our own manes etc.”
- A respondent, who works at an equestrian centre with between 5-19 staff, engages external service providers for Bowen/Emmett therapy, farriery and massage, and veterinarians for physiotherapy and chiropractic services, also has staff who perform services because they “hold qualifications in saddle fitting, nutrition and hoof trimming.”
- Another respondent, who generally engages external service providers for care of their leisure horses, “chose to become qualified in saddle fitting due to the poor advice I have been given in the past.”
- One person, who engages an external farrier, supplements this work: “trimming is sometimes carried out between farrier visits.” Similarly, another participant asserts that “People need the confidence to pick up a rasp and basically trim a hoof rather than let it get really long and bad while waiting for an unavailable farrier to visit.”

## Choice of service provider

Most respondents choose which service providers to engage based on more than one consideration. Foremost amongst these are “Personal recommendation/word of mouth” (a factor for 88% of respondents) and “Service provider credentials (e.g. qualifications)” (a concern for 69%).

**Figure 7: How respondents decide on service providers**



Regarding “Service provider credentials (e.g. qualifications)”, participants elaborated that their service provider must:

"[Be] appropriately qualified i.e. university degree for physio and vet, and providers [must] have professional indemnity and public liability insurance."

"[Provide] documentation confirming actual abilities. Sadly there are too many "qualified" individuals across many fields who quite frankly shouldn't work on a dead horse"

Credentials are especially important to people due to concerns over the quality and ethics – and insurance cover – of some service providers:

"Lots of under skilled and under educated providers out there doing it, unfortunately!"

"There are large numbers of people who practice these services that are not qualified who advertise their services for a cost. There are also a lot of them that shouldn't be practicing."

"There seems to be a lot of persons claiming to be qualified / trained but unfortunately there are too many that aren't and cause harm."

"It is unfortunately common for 'coaches' to teach riding lessons without any qualifications and/or insurance. In my opinion this is wrong."

"There is a serious lack of regulation regarding farriers, saddle fitters, massage therapists in the region of Canberra and surrounding areas. There is no recourse for shoddy work and obvious mistakes."

"Very few recognised qualifications are seen for farriers/trimmers [...]. Seems like anyone can advertise as such without being qualified."

"People should be qualified in their field as all professionals and licenced to practice. This should be mandatory for anyone that charges for their services. Also have insurance cover."

"There are too many "cowboys" in the horse industry that put the health and welfare of the horses and the owners in danger because they believe they are experts in a particular field."

Several themes emerged in the "Other" category for how people decide on service providers. The most common was a sense of learning who effective providers are through trial and error, with respondents using their own in-depth knowledge to judge the standard of services by both observing the techniques used and the results they engender.

"Difficulty usually lies in figuring out WHICH service or provider is best qualified. There is a lot of choice, and credentials often don't tell the whole picture. i.e. a veterinarian may have great education in equine issues, but they may not have great horse handling skills. A nutritionist or saddle fitter will often be connected with a sales brand, giving them a conflict of interest. A therapist may have all sorts of qualifications, but they may not have as good a 'natural feel', or even as much experience, as someone else. A farrier may have incredible knowledge of hoof care, but be a rough handler...etc, etc."

"The skills are there, [but the challenge] is sifting through the qualified and not properly qualified "experts"."

Other respondents detailed that they do not have much choice of service providers in regional, rural and remote areas: they may be limited to anyone willing to travel to their location (with reliability a resulting concern):

"We live in a rural area and often have to 'take what we can get'. We often get a new physios who don't have a client base who are willing to drive out this far, and they visit regularly for a couple of

years – by which time they have improved their skills, built a client base closer to their home near the city, and then they stop the long distance travel and we're back to square 1!"

"We have to rely on people who \*might\* be travelling our way or go without."

"I find that in Tasmania there are very few truly experienced and skilled individuals, who are few and far between, making it difficult to gain access to them for rehab, high needs horses"

"In a rural area it can be hard to get good basics like farriers, let alone anything 'more specialised' like Physios, Chiro's and saddle fitters. I do think more people are making use of them in this rural area than say 15-20 years ago. As more people see the benefits of providing that higher level of care to their horses (even if they're 'just' leisure horses rather than racing or competition) hopefully increased demand will make it easier for us to find the practitioners up here!"

Generally, peoples' reasons for choosing (and settling on) particular service providers lies at the *intersection* of variables such as geography, industry networks, personal knowledge and experience, a provider's credentials and results, and provider/client rapport; for example:

"Depends on how close the service providers are and if we like the person/how they do things"

"References from other owners whom I know; also their results when working on my horses."

## Equine dental care

Most respondents (95%) engage service providers for equine dental care. This indicates widespread knowledge of the importance of horses' teeth to their overall health and the on-going demand for services.

The most common reason for *not* engaging service providers is that dental care is provided in-house (although these 12 respondents did not elaborate on the nature of the dental care activities or experience of the provider). In some cases, a lack of local providers, cost and knowledge are barriers to accessing equine dental services; as one participant explained:

"It is something that I would like to do but cost is prohibitive and I wasn't aware that there were dental requirements for horses. My father bred horses all his life and never once got a dentist. So lack of awareness mostly."

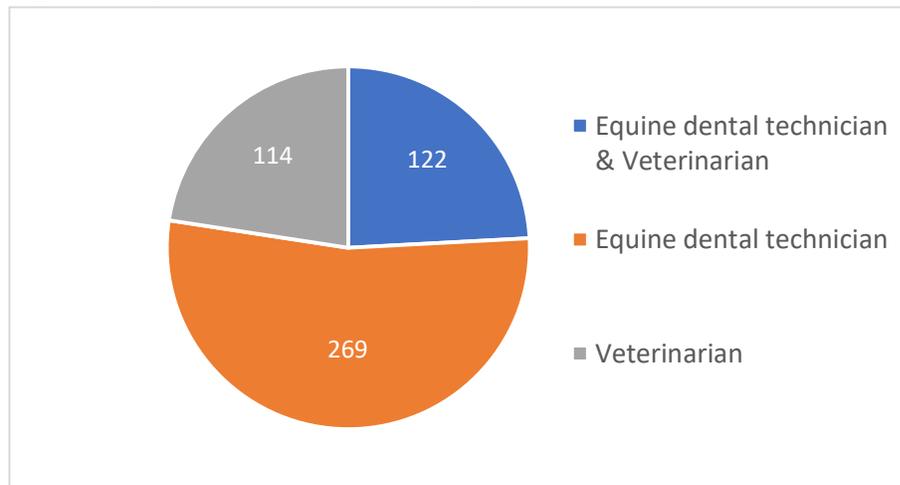
## Service provider

Of the respondents who *do* engage service providers, the majority (53%) select equine dental technicians, while 24% engage both equine dental technicians and veterinarians<sup>7</sup>. Veterinarians are the provider of dental services for 23% of respondents, several of whom noted that their veterinarian specialises in equine dentistry.

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<sup>7</sup> It was not possible to conclude how many respondents are provided services by equine dental technicians and veterinarians simultaneously (i.e. working together) or at different times (as separate dental service providers). Furthermore, it appears that some respondents ticked both 'Veterinarian' and 'Equine dental technician' when the dental technician is also a qualified veterinarian, hence there are ambiguities over the extent to which people who ticked both are receiving services from multiple or a single service provider.

**Figure 8: Equine dental care service providers**

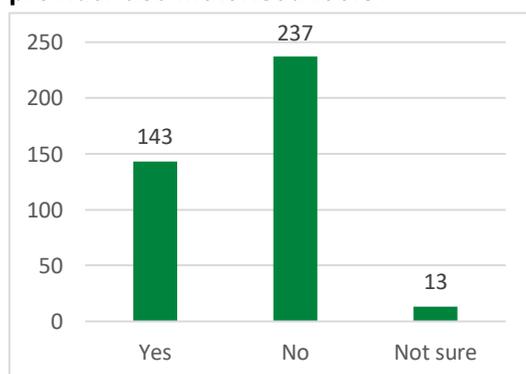


Additional comments provided by two participants were that, while they usually engage service providers, they will occasionally complete equine dental work themselves. Two other participants, who each engage both equine dental technicians and veterinarians, indicated that their farrier provides supplemental dental services.

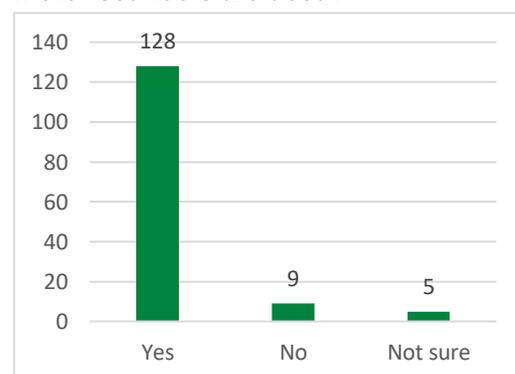
### Motorised tools and sedation

The majority (60%) of respondents' equine dental providers do not practice with motorised tools (see Figure 9). Some participants stated that they specifically seek out such practitioners because of their concern that motorised tools users may administer sedatives unnecessarily, which increases service costs and, they feel, potentially compromises the long-term well-being of the horse.

**Figure 9: Does the equine dental care provider use motorised tools?**

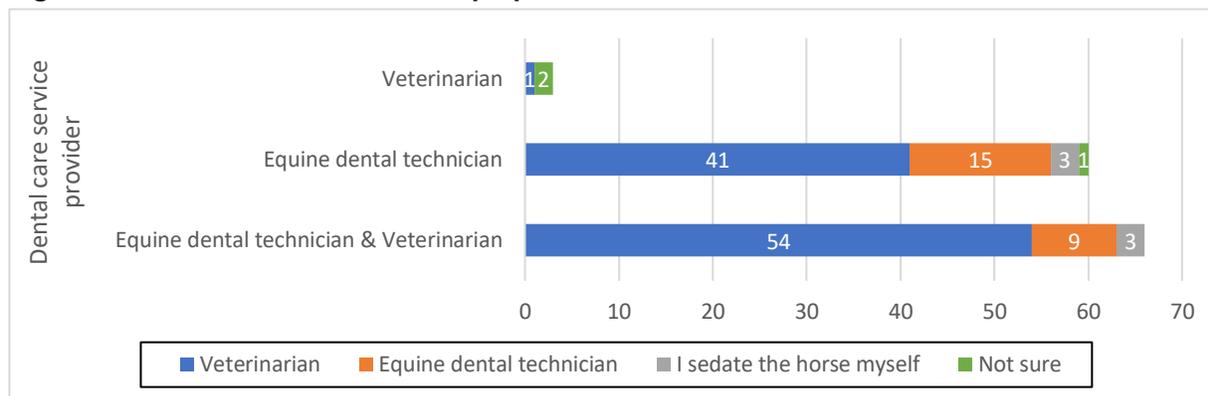


**Figure 10: Is the horse sedated when motorised tools are used?**



Equine dental care *with* motorised tools mostly involves horses being sedated (see Figure 10 above). Largely, sedation is undertaken by a veterinarian (75%), although some equine dentists (19%) and owners/carers (5%) administer the sedatives (see Figure 11).

**Figure 11: Who sedates the horse in preparation for the use of motorised tools**



Sedation prior to dental care procedures using motorised tools is a topic of great concern to many in the equine industries. On a state-level, legislation varies as to which procedures are restricted to registered veterinary surgeons. Western Australia's Veterinary Surgeon's Board requires authorised equine dental technicians to apply for permission to administer sedatives or tranquilisers<sup>8</sup>. New South Wales' Veterinary Practice Regulation 2013 stipulates that an anaesthetic agent (other than a topical anaesthetic) cannot be given to an animal unless under the immediate and direct supervision of a veterinary practitioner<sup>9</sup>. The State of Victoria's<sup>10</sup> regulations are somewhat less prescriptive, specifying that complex dental care, including sedation, "should only be performed by a person [who is] trained and competent".

Most Australian associations concerned with equine welfare advocate for 'acts of veterinary science' to remain under the purview of registered veterinary surgeons. The Equine Dental Association of Australia (EDAA) states that, before using powered dental tools, "Sedation is usually required which can only be administered by a registered veterinarian."<sup>11</sup> The Australian Veterinary Association (AVA) clarify that:

"In some limited circumstances, appropriately trained and licensed paraprofessionals may perform specified acts of veterinary science, but must be under the supervision of a veterinarian who is responsible for their work. Whether this supervision is direct, or indirect, will vary with the relative risk of the procedures to be performed. For example, a veterinarian may directly supervise and provide sedation during a manual rasp and file of a horse's teeth by a Certificate IV level lay equine dental service provider."<sup>12</sup>

Figure 11 (above) demonstrates that veterinarians often administer sedation on behalf of the equine dental technicians that are engaged. Also, there are equine dental technicians who administer sedation, but it is possible that they are supervised by veterinarians or, in Western Australia, have authorisation from the Veterinary Surgeon's Board.

<sup>8</sup> Veterinary Surgeons' Board, 2017, p.4, *Guidelines & Competencies – Equine Dentistry*, viewed January 2020, <<https://www.vsbwa.org.au/common/Uploaded%20files/Authorisation%20Forms/Authorisation%20Guidelines/Guidelines-Equine-Dentistry.pdf>>

<sup>9</sup> NSW Government, 2013, *Veterinary Practice Regulation 2013*, viewed January 2020, <<https://www.legislation.nsw.gov.au/#/view/regulation/2013/490/full>>

<sup>10</sup> The State of Victoria, *Code of Practice for the Welfare of Horses*, Department of Jobs, Precincts and Regions, viewed January 2020, <[http://agriculture.vic.gov.au/\\_\\_data/assets/pdf\\_file/0007/467980/Code-of-Practice-for-the-Welfare-of-Horses.pdf](http://agriculture.vic.gov.au/__data/assets/pdf_file/0007/467980/Code-of-Practice-for-the-Welfare-of-Horses.pdf)>

<sup>11</sup> Equine Dental Association of Australia, *Power Tools and Equine Dentistry*, viewed January 2020 <<http://www.equinedental.com.au/why-do-horses-teeth/power-tools-and-equine-dentistry/>>

<sup>12</sup> Australian Veterinary Association, 2017, *Restricted acts of veterinary science*, viewed January 2020 <<https://www.ava.com.au/policy-advocacy/policies/professional-practices-for-veterinarians/restricted-acts-of-veterinary-science/>>

**It appears that sedation is also administered by individuals who may not be under the supervision of a veterinarian, at least sometimes. Three out of the six respondents who answered “I sedate the horse myself” also stated that a veterinarian is engaged for equine dental care, which could mean that the veterinarian supervises them in sedating the horse or that, at other times, when a veterinarian cannot be present, sedatives are administered without supervision. The other three who answered “I sedate the horse myself” indicated that they engage the service of an equine dental technician only. Two of these respondents’ activities are in New South Wales, where it is mandatory for a veterinarian to supervise the application of anaesthetic (please see Afterword**

The ACM IRC will consider all comments and findings from this survey as part of their responsibilities to maintain and update the Animal Care and Management Training Package. The equine industries are diverse but there are clear messages emerging from peoples’ responses. Equine-related work is founded upon proud traditions of horse skills, but industry is increasingly subject to modernisation, whether informed by horse science or contemporary business practices.

In developing Training Packages, IRCs are tasked with addressing Ministers’ Priorities, including ensuring that:

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

The results here indicate that industry wants more hands-on, perhaps on-the-job, training to improve all aspects of safely handling and riding horses.

There was an overwhelming unanimity that equine safety, behaviour and welfare skills are fundamental to jobs in each sector, whether working with horses for racing, breeding, leisure, competition, riding schools, training or providing allied services. As such, the ACM IRC will be working to embed practical elements within all equine units of competency to facilitate related capabilities. Developing equine safety, behaviour and welfare skills will allow learners to move efficiently between occupations working with horses in different sectors, while industry will benefit from rising welfare standards, thus responding to public demand. for recommendations for future research). Some participants comment on their concern over such practices:

“Local vets happily hand out sedatives for owners to administer despite owners not all being able to successfully get a vein or inject their own horses”

“It’s frustrating that people can say they are dentists when they are not. That some so called dentists sedate horses without a vet present. It’s a minefield!!!”

“It makes no sense that Vets will happily leave controlled drugs with unqualified clients for administration and yet dentists cannot administer basic sedatives.”

There are clearly practical challenges in accessing/providing equine dental care services, especially when sedation is deemed necessary. In a submission to the Education, Employment and Workplace Relations References Committee in 2010, The Australasian Association for Equine Dentistry (AAED) argued that

prevailing inefficiencies in the dental care landscape create the circumstances for further problems to arise<sup>13</sup>:

“The administration of sedation for equine dentistry is currently primarily the responsibility of a veterinarian. This means that a dentist and their client wishing to undertake dentistry on a horse is reliant on the services of a veterinarian who may or may not be in direct competition with the dentists for the services being provided. Vets who are in direct competition with a dentist can refuse to sedate or undercut the dentist on dental services and also provide sedation concurrently. Currently, the public who employ a non-vet dentist are forced to pay for the services of both the dentist and the veterinarian which means higher costs and greater inconvenience. Many clients and dentists are frustrated and annoyed at the monopoly which veterinarians have in this area. We believe that this situation does not serve the interests of the public or equine welfare as horses are not receiving the level of care they should due to the often unworkable nature of this arrangement.”

Thompson and Clarkson’s<sup>14</sup> study found similar issues, with participants commenting on the “difficulties of scheduling sedation at the same time as an equine dentist.” Furthermore, arranging for veterinarians and equine dental technicians to be present together is considered by some to be overly costly, as one respondent here remarks:

“There are issues with non-veterinarian dentistry providers not being able to sedate horses which adds to the cost of having dental care. As one pays for the dentist, plus the vet to be in attendance to sedate horses, when multiple horses are being treated this really adds to the bill as you are also paying for the time that the vet is standing around in-between horses.”

Such challenges are exacerbated by a lack of access to service providers in regional, rural and remote areas:

“there are no farriers or equine dentists or physiotherapists based [in this area]. We work as a group at the regional centre to pay for the services to visit us, if they are willing and able. So far we have been able to get an equine dentist however farriers are very very difficult to come by [in this area].”

“There is shortage i.e. my equine dentist vet has a 6-month wait list”

Numerous participants propose solutions through policy development and the advancement of education and training. This reflects the “topical debate at the time of data collection around nationally recognised training and qualification of equine dental professionals and who is legally capable of administering sedation” mentioned by Thompson and Clarkson<sup>15</sup>. Participants here suggested:

“Equine dentistry qualifications should include sedation as it’s a key part of the service and it’s ridiculous to send a vet out each time a horse needs its teeth done. It’s a waste of veterinary time and more costly than it should be.”

“Equine dentists need to be more thorough in future, so qualifications for using power tools and sedation will be needed.”

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<sup>13</sup> The Australasian Association for Equine Dentistry Incorporated, 2010, p.6, *Re: Submission Number 102 – Australian Veterinary Association (AVA)*, viewed January 2020, <<http://webcache.googleusercontent.com/search?q=cache:MquhvFSFRocJ:www.aph.gov.au/DocumentStore.ashx%3Fid%3Db79bbbfb-d2a2-4416-86ba-dbb51f45d6f3+&cd=1&hl=en&ct=clnk&gl=au>>

<sup>14</sup> K. Thompson and L. Clarkson, 2016, p.42, Issues faced by horse owners in Australia: Implications for vet-client communication, *The Australian Equine Veterinarian*, Vol 36, No 4, pps. 41-47

<sup>15</sup> K. Thompson and L. Clarkson, 2016, p.43, Issues faced by horse owners in Australia: Implications for vet-client communication, *The Australian Equine Veterinarian*, Vol 36, No 4, pps. 41-47

“They need to be independent of veterinarians so they can practice their skills more widely and less cost to the consumer. By this they need to be trained to use basic S4 sedatives to be safe and fully able to practice their trade.”

“[A veterinarian being present] is an unnecessary expense as simple sedation is a skill that can be included in a proper and thorough equine dentistry course as in USA where my equine dentist qualified over 10 years ago.”

“We use a vet for regular dentistry for our ten horses as we prefer the horses to be lightly sedated. I understand equine dentists are not considered to be ‘qualified’ to carry out sedation. This should be rectified as vets are too busy and/or too expensive for many horse owners seeking to address their equine dentistry requirements. The horses suffer as a result. [...] While vets should be able to continue to provide dentistry services, the equine dentist vocation should be nurtured to give horse owners access to more affordable, effective and regular equine dentistry services.”

“The industry/legislative bodies need to provide pathways for education in current techniques and knowledge specifically related to equine dentistry for veterinarians. Concurrently they also need to provide pathways for non-veterinarians to be trained/educated and certified to be legally allowed to prescribe and administer sedatives and medications to horses for the purpose of providing equine dental services as is provided in Western Australia and Arizonian USA.”

## Concerns over equine dental service providers

On a broader level, while numerous people are satisfied with the equine dental service providers they engage, there remain concerns that some dental service providers do not possess the required skills and knowledge:

“There are too many people operating as service providers without proper qualifications such as dentists and chiropractors”

“The whole industry is unregulated so anyone can do anything, dentistry is another example. There are people doing serious damage but nothing can be done as there is no regulation on the industry!”

“I would like to see farriers and dentists more closely regulated.”

“I worry that there are too many unqualified practitioners out there. Very dubious about some dental practitioners”

“I have had very bad experiences with substandard care – particularly dental veterinarians. Caused by lack of qualification and a culture of “we are experts in everything and we can do everything” rather than an emphasis on consultation with others and referral to experts in the field.”

“As an EDP (Equine Dental Provider) that has practiced, learnt and taught advanced equine dental skills worldwide, Australian practitioners, both veterinary and non-veterinary, severely lack knowledge and experience in this field.”

Such concerns are often accompanied by calls for greater access to service providers who have participated in equine dental education and training:

“Equine dental service providers need higher qualification such as a Diploma.”

“[The industry needs] Properly trained dental technicians with recognised, transferable qualifications”

“Bring back apprenticeships to farriers, dentists, etc.”

“I think the equine dental industry is so far behind here in Australia compared to what they are doing in the rest of the world. Horse owners should have more & easier access to the highly trained dental technicians that are out in the field do their work.”

“The EDAA provides an extremely thorough Equine Dental technician training course with practical placement being a core element. Run over the course of 15-18 months, it provides students with the skills, knowledge and experience to set up their own business on completion. A key strength of this course was the required amount of practical days that need to be completed before sitting the final practical exams. Students must also spend time with a minimum number of EDAA members. This ensures the student learns more than one way of doing things and gains exposure to a large number of animals and how different people run their own businesses. I believe there has been another TAFE since providing the same qualification without anywhere near the same amount of experience required or as strict an examination process and at a cheaper cost. This is a real concern to me as a customer and I'm sure also for approximately qualified dental technicians in their bid to safeguard their profession.”

## Performance horse care and management

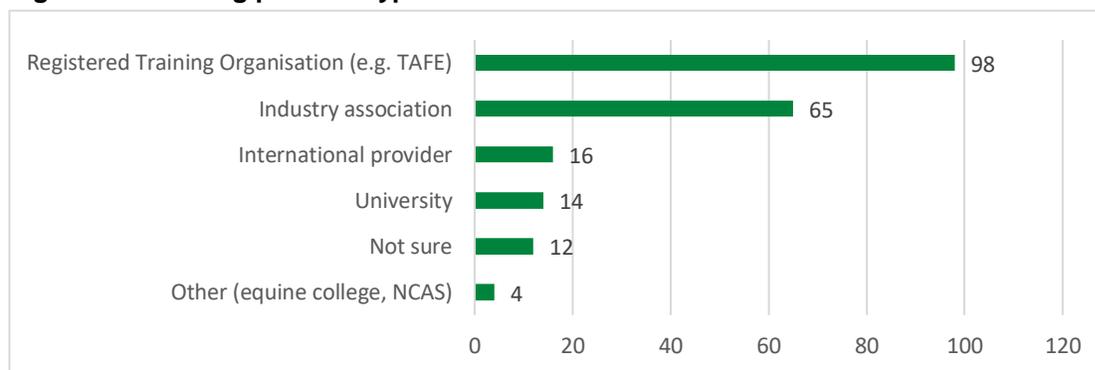
### Education and training participation and providers

Participants were asked about relevant education and training in the performance sector in the context that the Animal Care and Management IRC may soon conduct a review of the Certificate III in Performance Horse qualification.

Around 63% (318) of respondents own or care for performance horses.

Of this cohort, over half (55%) report that they, or people they work with, have formal training in the care/management of performance horses. Most people (74%) have participated through one provider type, and 24% have formal training through two types. Training has most commonly been delivered by Registered Training Organisations (RTOs) and industry associations, such as Equestrian Australia.

**Figure 12: Training provider types**



Participants offered additional comments, including that they have:

“Diploma of horse management. Degree in equine science. Various Statements of Attainments relevant to horse care and management”

“Only a couple of units - not the whole certificate”

“All staff who handle horses must hold qualifications in the care and management of horses”

Some respondents see value in them or colleagues engaging in formal training:

“We are currently looking into courses for everyone attached to dealing with both horses we own in the household so everyone is more aware of their needs and abilities.”

“Presently studying to acquire qualifications”

“I attend a private Horse Uni that is provided by my trainer, including theory and practical”

Several people have acquired their skills through informal or unaccredited training, pony club, and other professional development activities:

“Some lectures, dressage lessons and Liberty course”

“Not formal training, [but] have a lifetime of horse experience, as a rider, instructor, at Pony Club level, breeder of Sport Horses and Thoroughbred horses and now racehorse trainer.”

“50yrs experience - many seminars and short courses, clinics, books, etc”

A number of individuals feel so strongly about the breadth of their experience and peer learning that they consider it a proxy for, or sometimes superior to, formal training:

“We’ve learnt it growing up with horses and use common sense”

“Rely on learned skills & experience over a long period”

“Grew up with horses, and used them for work and pleasure for 60 + years and still learning about them”

“I have owned and worked with horses all of my life. Worked at breeding, racing and dressage farms”

“40 years’ experience might not give you a certificate but certainly gives you skills and knowledge”

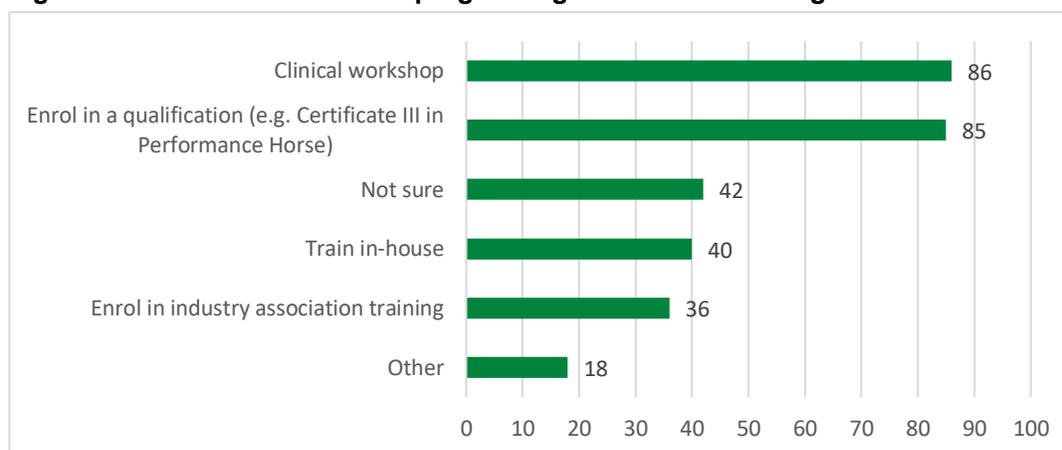
“I trained in many barns around the world – no formal courses but have had horse studies people here on placement (they’re friggin hopeless and appear to learn little on these courses). [...] Too many people come out of these courses and think they’re job ready – they are so far from it!! These courses are introductory for them to then start an apprenticeship with a professional – it’s so scary some of the crazies that come out of training in this country.”

## Approaches to further learning

There was a mix of approaches respondents would take if they wanted to progress their skills and knowledge in the field of performance horse care/management. Participants’ choices would be largely determined by the extent of their training needs and how much time they feel they can afford away from their normal work. As such, clinical workshops (28%), which typically run for between one and three days, and enrolling in a qualification (27%) are of most interest to respondents. Around 14% are unsure as to

what option they would pursue. 'Other' answers included university-based learning, overseas/interstate training and pony clubs.

**Figure 13: Preferred method for progressing skills and knowledge**



Some respondents pointed out that they would choose the most suitable option (and perhaps more than one) based upon their specific needs and contexts, often with the advice of trusted colleagues in the field.

One participant elaborated on their opinion that assessing the available training options can be difficult:

“There are inconsistencies which I believe is based on the ambiguity of an overarching training system of the workforce in Australian performance equine industry. A lot of equine business owners aren't really aware of the VET system and tend to do in-house training or through the Equestrian Federation of Australia. Unlike UK etc which have one system which is well recognised in the performance industry. Therefore the consistency of how someone is trained to manage performance horses can be mixed.”

Several respondents emphasised that they would not choose any formal learning, instead valuing peer and on-the-job coaching:

“Symposiums, lectures (even at Equitana etc) but mostly asking questions and learning from vets and professionals and other riders. Have also worked for radiography specialist vets etc as well – just go and be a lackey doing rounds with them”

“Work for someone respected in the field you're interested in”

“None of above – hands on training not paperwork. [...] We do not need to be given new techniques to give people tickets. All we need is it to be handed back to the old system of the stewards and trainers who are hands on and can pass on lifetime of knowledge and practical skills that you cannot get from sitting in a classroom doing paperwork just to get a ticket.”

## General Comments

The survey finished by asking three open questions so that participants could discuss skills and services in the equine industry, generally or specifically.

## Technical skills of the workforce

On whether “the workforce possesses the required technical skills for your industry” there was a broad range of responses, the greatest proportion (38%) of which were generally positive. Around 31% highlight both positives *and* negatives (or are ambivalent); 23% do *not* think the industry generally has the required technical skills, while 8% of respondents’ answers focus on a specific perceived shortcoming (and so cannot be treated as a general comment).

Comments coded as ‘positive’ include:

“Yes, our crew have real life skills [and] these are enhanced by schools and clinics.”

“The workforce provides a hands-on and realistic approach to training.”

“The equine dentists and veterinarians available are skilled. There are 2 vets and two equine dentists I am happy to use. My farrier services are provided by a skilled team.”

Numerous comments reflect positively on the individuals that are part of the industry, but highlight practical challenges, including workforce and services shortages:

“Yes, the skills are out there but are sometimes difficult to find or access. The ratio of service providers to users is low.”

“The agistment centre I am at has highly trained staff currently but there is a staff shortage”

“There is a huge gap in the numbers of professional barefoot trimmers sought by horse owners and the number currently being trained.”

New entrants are felt by many to lack the practical experience required to work effectively with horses:

“The necessary skills can only come with hands on experience. Observation skills in new employees are not good.”

“The best is working and getting the hands-on base skills required. I find that performance horse people have no idea how to handle horses at all as their environment is different to a professional industry like the Racing industry is.”

“The performance horse (and other industry sectors) workforce are under skilled and low in knowledge. A lot of employees are taken from the street into the work situation without understanding why you do with horses what you do. Often managers lack the underpinning knowledge which then becomes a culture. There are skills shortages in the whole horse industry but in performance horse there are shortages of good stable hands and grooms who are equipped with good sound skills and knowledge relevant to their jobs such as being able to ride, train and help with breeding facets of the business etc.”

According to various participants, this typifies a *generational* decline in basic horse skills, dedication and common sense:

“Young equestrians these days lack skills. We tend to be a lot more cautious with children learning to ride nowadays as opposed to when I was learning hence riders/handlers coming through the ranks now are much less skilled”

“Most young people these days are not up for the hard day’s work that is required to care for top class competition horses”

This is further articulated as a lowering level of *horsemanship* in the industry:

“General horsemanship in regard to thoroughbreds is not being passed on. A lot of the so-called skills are from pony club and are not adapted to a much more highly-strung breed and as a result we see more accidents on the ground”

“The true basic horsemanship and horse husbandry is not available to the younger generation due to the older staff and generation passing on.”

“There is a massive shortage of people with horsemanship skills. The good old basics of how to handle a horse or even ride it. We are screaming for track work riders and grooms. There is an untapped potential of rural kids who genuinely love working with horses.”

“Technical skills are easy to find - common sense and horsemanship is much harder.”

A few respondents feel this is partly due to the *format* of training:

“Insufficient practical skill sets despite qualifications held. With distance & online learning growing in popularity, the practical training is limited to work placements which may not have resources for adequate training. It also disadvantages students who cannot obtain work placement.”

Others feel that it is due to a *dearth* of accessible training:

“There is a need for formal education and recognition of current competencies. Unfortunately, the cost of education is proving to an issue to new and existing workers”

“I’m concerned about the shrinking university opportunities in specific equine based education causing new graduates to not have equine specific skills as they begin their careers.”

“The farrier course is only offered in NSW not ACT this means leaving home and becomes a reason not to take up the craft”

“[We need] greater upskilling overall to create greater availability of qualified and regulated practitioners – particularly in regional areas.”

“There is no entry level vocational training available in WA. Therefore it is hard for new people interested in working with horses, whether Racing, Breeding, Agistment, Riding School, Trail riding or performance horse to enter”

### A theory/practice binary?

While hands-on experience is not necessarily incommensurate with education and training, there is an over-riding tension between those who consider that formal training does not – and *cannot* – prepare people for working with horses (who can be characterised as preferring a ‘traditional’ approach) and people who believe that formal training is key to advancing horse management techniques and welfare (a ‘progressive’ approach). Put crudely, the ‘traditionalists’ are sceptical of industry workers who are not ‘horse people’ and, conversely, ‘progressives’ have concerns over the ‘cowboy’ practices of the ‘traditionalists’. It must be noted, of course, that many ‘traditionalists’ are far from disapproving of formal education but are simply critics of the perceived lack of practical skills and experience facilitated. Likewise, not all people who value education and training believe that this is the only pathway. Nonetheless, there is somewhat of a cultural divide in participants’ responses:

‘Traditional’ approach	‘Progressive’ approach

<p>“Lack of basic horse experience is a serious issue. Lots of fancy diplomas that mean nothing. [...Workers need] the required "balls" to confidently handle horses. It is inbuilt. You cannot teach a person that doesn't have it regardless of their theory/knowledge.”</p> <p>“Farm sense, common sense, animal intuition, horse sense, all the things that can't easily be taught and don't get taught in school/college. [...] Ability to work physically hard in all conditions.”</p> <p>“You cannot learn to take care of horses from a textbook. This is the issue with the ongoing care of horses people do not realise the expense and time involved. Hence horses are placed in paddocks and starve to death.”</p> <p>“Training needs to be done by common sense professionals with horse sense and years of experience in the racing industry. Not a TAFE teacher.”</p> <p>“There is no proper training for people in the racing industry. You CANNOT learn how to handle horses from a textbook!!”</p> <p>“[Workers should be] Learning from true horse people, not books.”</p> <p>“I think this is another attack on the small-time trainer [...] Squeeze out the true horse man that can't read or write and force them to do a course after training for many years.”</p>	<p>“The equestrian industry is highly traditional and resistant to change. I personally continually update my knowledge and skills with accredited training (currently masters degree in equine science – university qualified) but still come across pockets of industry who doubt these credentials and feel they are unnecessary. They seem to believe medals or being a "Good bloke/horseman" are the only qualifications required. Extremely frustrating...”</p> <p>“There is still a big gap in evidenced based knowledge of horse behaviour. Still too big a reliance on tradition or industry practices which are not evidence based. Linkage between evidence-based knowledge of horse behaviour, equine welfare and human safety is frequently missing. Knowledge of equine welfare is also often outdated.”</p> <p>“There are plenty of people who say they are experienced because they have “been working with horses for years” but have no formal qualifications. When asked for references they profess to not need them.”</p> <p>“No [the workforce does not possess the required technical skills], most so-called equine practitioners, and equine coaches have no RTO qualifications.”</p> <p>“A need to branch out from the old old 'traditional' and make some headway into the new research and development out there”</p>
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Several respondents who bemoan the dearth of training also emphasise their opinion that it needs to be the *right* sort. There is a particular suspicion over one- and two-day workshops, leading to calls for greater industry regulation:

“Many in the industry are using outdated methods and do not understand the science and are not willing to change. Particularly difficult to find qualified service providers for farriery, chiro and massage. Too many educators providing short courses that are not approved by any formal education body and are being run by people with no training. Industry needs a good shake up and some regulation around who can operate and work, formalise some of the qualifications to be industry requirements.”

“National accreditation not fly by night weekend courses where they get a certificate of attendance”

“More regulation needed to ensure that only accredited and insured service providers can advertise and provide services.”

“Learning the skills and knowledge necessary to provide sound equine dental services is very similar to learning the skills of a good farrier. The knowledge is very specific to one system of one

species. However all the skills necessary to properly assess and evaluate these systems, as a complete system, are learnt skills, i.e. learnt over time, similar to apprenticeship training. You cannot learn these skills in 3 or 7 day courses. ALL equine dental providers, veterinarian and non-veterinarians, should have their skills and knowledge tested before being allowed to provide service.”

“The horse industry needs regulating to improve the welfare of the animal and ensure its participants are educated and trained appropriately.”

“Firmly believe that all stud masters [and] horse farmworkers should be accredited, licenced and answerable to a regulatory body just as racing has.”

“I see a need to have some sort of overarching level of training and certification for competency for those in pretty much any area of the equine industry, from massage to farriers and dentists. Anyone can get a set of tools or do a 2-day course and call themselves a "whatever" and the vast majority of them are not!!”

While debates over the relative merits of the ‘old ways’ and different educational endeavours are generally polarising, there are some people who see the value in what a broad range of industry participants have to offer (including calls for a greater synthesis between theory and practice):

“Accreditation is fast becoming a "must have" rather than a "nice to have". Social responsibility is driving this change, thank god! Horse owners are becoming more aware of the need to change to more holistic practices that put the horse at the centre of the modality. Yet many unaccredited practitioners are highly skilled individuals who would be a severe loss to the industry if accreditation was mandatory.”

“Modernisation and smarts are needed for the future of the horse industry, although past learnings can't be forgotten. A fusion of old knowledge and latest technology and science needs to be developed and taught”

## Occupational shortages

Skills shortages are mentioned in reference to specific occupations, including saddle fitters and grooms, but especially farriers and track riders.

Farriers	Track riders
<p>“Hard to get farriers and equine dentists”</p> <p>“I can normally get any services I need, farrier services are the most difficult for me over many years”</p> <p>“Farriers need more formal training.”</p> <p>“There is a drastic shortage of skilled farriers”</p> <p>“More properly trained farriers needed.”</p> <p>“There do seem to be less people coming through as farriers, etc. This should be looked at.”</p>	<p>“Definitely a lack of riders coming through. Insurance/liability makes this difficult”</p> <p>“Skills shortage with track work riders and people who have prior experience with horses”</p> <p>“Riding track work is a dying skill. Such a huge shortage.”</p> <p>“There is a lack of experienced and skilled track riders.”</p> <p>“Definite shortage of track work riders. From there you can then define suitability by size, experience and suitability. The need to certify would-be track work riders is a lot of cost for</p>

<p>“Went through lots of ordinary farriers trying to replace my existing aged farrier. Finally found a good one and took over 6 months to fix the problems the farriers in between caused. Don’t get me started on farriers that do teeth with no qualifications.”</p> <p>“Many farriers are not qualified or do not attempt to improve their skills which of course reflects in both their work and charges”</p> <p>“Not enough skilled people e.g. farriers that know what they are doing”</p> <p>“Concerned about long term numbers of farriers.”</p> <p>“Great shortage of good farriers and horse dentists (preferably those that don’t constantly use a machine for filing)”</p> <p>“There are not enough good reliable farriers. It can be hard to engage them as they often already have a full ‘book’ of clients. We have used the same farrier for 23 years as he meets the above criteria.”</p> <p>“There is a shortage of good farriers that look at the horse as a whole and have the knowledge of the horse and its working as well as the hoof and how they all need to work in balance and harmony in order to help their carriage and movement.”</p> <p>“The Farriers Associations are NOT upskilling their Farriers to understand and perform proper Barefoot Trimming. Farriers state to potential clients that yes, they can provide a Trim but they do not Barefoot Trim – they only trim Horses hooves to prepare the hoof for shoeing. Horses therefore are not being treated humanely or efficiently and it’s wasting the customers money and can cripple Horses.”</p>	<p>someone who may not want to proceed beyond one or two days in the industry”</p> <p>“There is a shortage of qualified track riders.”</p> <p>“Track riders probably are the missing link for skills and quantity”</p> <p>“There is a massive shortage of track work riders and grooms.”</p> <p>“There is a shortage of good track riders and a shortage of good horsemanship skills in general i.e. some trainers”</p> <p>“There is a need for track work riders (experienced).”</p> <p>“Trackwork riders are hard to find, my local racing club [...] has no other means for exercising horses, they used to use joggers but aren’t allowed on course anymore and the club would definitely benefit from another form of exercising as it gets quite hard on the track in the warmer months”</p> <p>“Serious shortage of competent track riders.”</p>
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There are also several respondents who believe that more people will be required to care for and manage retired horses:

“As perceptions develop about ex- racehorses, trotters/pacers and working horses of various descriptions (e.g., police horses), there will potentially be increasing work for those who have or can develop the skills to re-train and re-home these horse (the various police forces already do this themselves, with great care).”

“Retirement placing and homes and care for older horses rather than the knackery being the only option.”

## Current and future skills needs

Several respondents, who identify both strengths *and* weaknesses in industry practices, highlight that, while there are generally skilled practitioners, there are shortcomings in the holistic management of horses. They recommend:

“Theory in relation to nutrition, monitoring signs and symptoms of illness and knowledge regarding the unpredictability of horses, how to manage their behaviours and personalities without mistreating them.”

“Health, nutrition and pasture management understanding is generally poor and will become more important as the rural fringe is squeezed out.”

“More qualified horse handlers with particular skills in equine behaviours, management, nutrition, care and breeding skills and better safe handling skills to reduce injury to horse and human.”

“There is overall a lack of good sound basic skills and knowledge [...] So the skills required will include:

- Good horse care which is VITAL to ensure animal welfare requirements are being met.
- The requirement to understand biosecurity and implementation if and when necessary.
- Work Health and Safety – very much lacking in industry, getting better but still lacking. Examples of such are the recent EA eventing accidents and what could have/should have been implemented prior etc. WHS is so important now and for the future.
- Breeding, riding and training skills – the performance horse industry focuses on workplaces that may only breed performance horses or they may only train in-hand horses or train ridden horses. OR more commonly one business will cover all of these with multiple income streams. Hence there is the requirement for skills in all of these areas for someone to do their job on a performance horse establishment.”

The numerous calls for more holistic horse care and management are very often motivated by concerns for welfare. This issue is discussed by Thompson and Clarkson, who suggest that “owner awareness of the interdependence of issues such as horse health with pasture management, fencing, yarding and facilities” can facilitate favourable outcomes<sup>16</sup>. Participants here are concerned for improving overall knowledge and action surrounding such variables as equine biomechanics, behaviour, nutrition, biosecurity and general safety:

“At a very basic level: horse behaviour, safety around horses, equine welfare.”

“Basic horse health and needs related to performance horse care and horse husbandry”

“Same type of quals for horse welfare, husbandry, nutrition (together), horse handling, first aid.”

“More understanding of facial pain markers and alternative natural holistic options”

“The understanding of the muscles or bio metrics of the horse should be addressed to further the students understanding of limbs, injuries and recovery”

“A greater understanding of the musco-skeletal system. More emphasis on proper nutrition (less reliance on processed foodstuffs). The importance of feeding relevant to training regimes.”

“Nutrition, Fitness, Health, Biosecurity, Business Management, Safe working methods, which leads back to the traditional horse husband”

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<sup>16</sup> K. Thompson and L. Clarkson, 2016, p.47, Issues faced by horse owners in Australia: Implications for vet-client communication, *The Australian Equine Veterinarian*, Vol 36, No 4, pps. 41-47

“I believe the understanding of Biosecurity, safety working with horses and health and welfare are in need throughout the performance horse industry.”

“Infection control. Recognising swellings, signs of fatigue (long term and short term). Long term i.e. when a horse has been in work and racing for too long”

“Comprehensive knowledge of podiatry, nutrition, illness/disease and injury management are significantly lacking.”

“Qualifications in saddle fitting, in depth understanding of anatomy. Understanding of equine behaviour. Changes to horse training to ensure it is humane. The list is very long as we are a long way behind...”

“In general people start horse businesses or enter the horse industry with minimal knowledge, particularly in the areas of horse behaviour, safety around horses and equine welfare.”

“Greater proficiency in safe horse handling management. Improved knowledge of horse welfare in a climate of increasing public scrutiny of animal welfare. Improved knowledge of environmental management, such as pasture management/erosion etc. to adapt to changing climate, altered rainfall patterns etc.”

Such concerns, as the last respondent alludes, are contextualised by recent controversies over horse welfare, especially of retired racehorses<sup>17</sup>. The racing industry in particular is under scrutiny regarding its continuing ‘social license to operate’<sup>18</sup>, whereby the workforce must consistently monitor and adapt to risks, both for horse and rider welfare.

For some, it is simply a return to the ‘basics’ that is required. There is a general impression that foundational skills, notably horsemanship (which many argue leads to better human/horse relationships), are being by-passed too quickly at present and, as such, should be prioritised before an individual develops their career:

“I think Australia could benefit with more courses in line with the Irish national stud and English national stud courses. Courses that provide basic skills, knowledge and an entry point into the industry which are affordable and offer placements.”

“Track riders need to be trained specifically to ride track work, stablehands need training with basic duties such as leading and tying horses, correct grooming, OH&S procedure, basic training for running a stable etc.”

“A will to actually work, general horse safety awareness and basic skills. [...] No one is teaching the very basics, being aware of horse soundness or wellness, knowing how to clean a box properly.”

“Hands on groundwork training with natural horsemanship instructors learning the horses own language of communication with each other is beneficial to all aspiring horse handlers.”

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<sup>17</sup> Queensland Government, 2019, *Queensland racing minister calls out Federal Government on inaction about animal welfare*, Minister for Local Government, Minister for Racing and Minister for Multicultural Affairs The Honourable Stirling Hinchliffe, viewed January 2020 <<http://statements.qld.gov.au/Statement/2019/11/22/queensland-racing-minister-calls-out-federal-government-on-inaction-about-animal-welfare>>

<sup>18</sup> P. McManus & P.D. McGreevy, 2017, *Why horse-racing in Australia needs a social licence to operate*, viewed January 2020, <[https://www.researchgate.net/publication/320809645\\_Why\\_horse-racing\\_in\\_Australia\\_needs\\_a\\_social\\_licence\\_to\\_operate](https://www.researchgate.net/publication/320809645_Why_horse-racing_in_Australia_needs_a_social_licence_to_operate)>

“Where future jobs still require actual handling of horses, the need for understanding of horse behaviour and needs will remain paramount. As each generation of young people tends become further removed from rural/animal husbandry skills, these skills will become harder to acquire.”

Some see opportunities in improving access to, and the quality of, training:

“General skills for stud farm work and racing stable staff seems to be lacking nationally and internationally. Suitable foundation courses and placements are used in different countries to provide a starting point for young people entering or trying to advance within the industry.”

“I would love to see a diploma in equine studies to be available”

“there is very little formal, recognised training available that suits industry needs.”

“Relevance to the tropical environment as there is limited training and trainers that fully understand the northern tropical environment and its impacts to our equine partners.”

“Saddle fitters should receive more robust, thorough training than in the current SOA for saddle fitting. Body workers and chiros should also have to be accredited after completing evidence based training.”

“Specialisations in the areas of nutrition, allied health care services (chiro, massage etc), weaning/breaking/training, retraining, rehabilitation. These need to be higher level qualifications such as found in human care - Diploma, Advanced Diploma, Degree, not Certificate level.”

Digital literacy is seen by many as a core feature of general business improvement but also diagnostic and performance analysis tools:

“The use of tread mills, walkers and digital health equipment is the norm at the high end of the industry e.g. Australia’s top Equestrian yards, Campdrafters and Barrel racers etc. The understanding of this equipment and purpose of use would be imperative for people wanting to be employed in the industry in the future.”

“Farriers equipped with more technology for measuring weight loading, balancing and scanning also seems likely.”

“Portable and instantly transferable data and information to horse owners.”

“More knowledge of smart technology and electronic records, modernisation”

“A minimum of technical ability to be able to work with GPS, sensors and other new tech”

“Biomechanic/gait analysis, farriery based on science (xrays, measuring hoof/leg angles digitally)”

“If there’s going to be a proper all breed-encompassing successful horse database and tracking system horse owners had better lose the attitude of “I’m a horse person not a paperwork person””

“More telemetry, giving instant feedback”

“In time I see it going more the way of human sports with a greater emphasis on the technologies associated with monitoring and improving fitness.”

“Technology can be fantastic and has provided a more effective way to diagnose issues. These skills should also be taught.”

Business and transferable skills are highlighted by several respondents as an area for improvement:

“Service providers need good business skills. Need to understand how to promote themselves, how to behave in a professional manner, how to manage bookings and banking etc. Gone are the days when people tolerate farriers and other service providers not turning up, and not letting you know they have been delayed.”

“Business skills. Communication skills. People skills.”

“Social and communication skills – those that would help service providers educate horse owners, fostering collaboration across different fields and areas of expertise and the ability to work as a team. Every service provider should receive training in these areas too – even if just to navigate the social media landscape.”

“There will surely be an increase in equine industry work which does not involve handling horses and which will require different skills such as data management and analysis, communication skills etc. Having ticked that social media does not affect my decisions [on service providers], in fact I realise that I receive quite a lot of information from social media. Mostly the info is helpful; occasionally it is questionable.”

“New modalities are emerging and these are changing the industry. Practitioners will increasingly need STEM skills to be adequately prepared for the future as well as skills such as customer service, a desire to continually learn and upskill, business skills to run a small business.”

## Afterword

The ACM IRC will consider all comments and findings from this survey as part of their responsibilities to maintain and update the Animal Care and Management Training Package. The equine industries are diverse but there are clear messages emerging from peoples’ responses. Equine-related work is founded upon proud traditions of horse skills, but industry is increasingly subject to modernisation, whether informed by horse science or contemporary business practices.

In developing Training Packages, IRCs are tasked with addressing Ministers’ Priorities, including ensuring that:

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

The results here indicate that industry wants more hands-on, perhaps on-the-job, training to improve all aspects of safely handling and riding horses.

There was an overwhelming unanimity that equine safety, behaviour and welfare skills are fundamental to jobs in each sector, whether working with horses for racing, breeding, leisure, competition, riding schools, training or providing allied services. As such, the ACM IRC will be working to embed practical elements within all equine units of competency to facilitate related capabilities. Developing equine safety, behaviour and welfare skills will allow learners to move efficiently between occupations working with horses in different sectors, while industry will benefit from rising welfare standards, thus responding to public demand.