

JUMPS RACING REVIEW PANEL RECOMMENDATIONS REPORT

NOVEMBER 2024





Executive Summary

This report has been authored by the Jumps Racing Review Panel (The Panel) to provide recommendations to the New Zealand Thoroughbred Racing (NZTR) Board regarding the future of jumps racing in New Zealand.

The scope of the review is to evaluate the future of jumps racing by examining scenarios in which it either continues or is discontinued.

The Panel has applied the pillars and key considerations of the NZTR Strategic Plan 2024-2028 to their decision making and recommendation to ensure these align with the objectives of the wider industry. In forming its conclusions, the Panel has drawn on the views of submitters and data provided by NZTR and Entain.

The Panel has resolved to recommend that jumps racing in New Zealand should continue but that continuation will need to be supported by several initiatives to ensure the success of the industry, both in the short and long term.

Additionally, it is recommended that NZTR develop Key Performance Indicators (KPIs) to monitor the performance of jumps racing. These KPIs should be reviewed as part of an annual evaluation at the end of each jumps racing season and published for public access. A comprehensive review of jumps racing is also recommended to occur every three seasons.

"The panel have taken a comprehensive review of Jumps Racing in NZ and whilst the recommendation is for the continuation it is not for jumps racing to continue status quo, changes do need to be made to give it the best chance to thrive."

Darin Balcombe – Chair, Jumps Racing Review Panel, NZTR Chief Operating Officer



Establishment of Panel and Scope of Review

Establishment of the Panel

In early August 2024 New Zealand Thoroughbred Racing (NZTR) invited feedback on a consultation document on the future of jumps racing in New Zealand. There was a significant response to the document, with 256 submissions received including 3 petitions of approximately 1,970 signatures.

At the conclusion of the submission period in early September, NZTR elected to establish a Jumps Racing Review Panel (The Panel). The Panel would be responsible for reviewing the current state of jumps racing and putting forward a recommendation to the NZTR Board, aligned to a decision-making framework.

The Panel comprised six members chaired by NZTR Chief Operating Officer Darin Balcombe. The panel members have a range of broad industry knowledge and experience. The full list of panel members is as follows:

- Darin Balcombe (Chair)
- Mark Chitty
- Regan Donnison
- Jessica Brosnan
- Brad Taylor
- Tim Mills

To ensure the integrity and robustness of the process Alan Galbraith KC is providing legal overview and endorsement of the decision-making framework.

Scope of Review and Recommendations

The scope of the jumps racing review was provided to the Panel by NZTR as:

- Reviewing submissions from stakeholders to ensure a balanced perspective.
- Reviewing historical data where available.
- Considering international approaches to jumps racing and the implications of adopting similar or alternative models.
- Considering the revamped future state of jumps racing should continuation be recommended.
- Or if the recommendation is to cease jumps racing, consider an appropriate timeframe and process for this to wind down and look at alternate races that could replace the events.

Decision Framework & Conduct of Review

Decision Framework - NZTR Strategic Plan

NZTR's key strategic document is the [Strategic Plan 2024-2028](#). It outlines NZTR's overarching vision to reinvigorate and ensure the sustainable success of Thoroughbred racing in New Zealand. The Strategic Plan is underpinned by four pillars of success; Growing, Supporting, Enhancing, and Engaging. In turn these pillars support NZTR's four strategic priorities; Revenue, Welfare of Horse and Human, Infrastructure, and Communities.

The Panel was requested by NZTR to consider the future of jumps racing in the context of these four key pillars and strategic priorities of the Strategic Plan 2024-2028.

The Decision Framework identified considerations linked to each pillar and priority, as outlined

NZTR STRATEGIC PRIORITIES	CONSIDERATIONS
GROWING REVENUE	Sustainable Revenue Growth
	Maximise Wagering Outcomes
SUPPORTING WELFARE OF HORSE AND HUMAN	Participant Well being
	Horse Welfare
	Safety
ENHANCING INFRASTRUCTURE	Investment
	Venues
ENGAGING COMMUNITIES	Involvement in Racing
	Public Perception
	History

1. Growing Revenue – Consider the impact of continuing or ceasing jumps racing with respect to both sustainable revenue growth and maximising wagering outcomes. As noted in the consultation document, despite an injection in prizemoney to jumps racing from the 2021/22 season there has been no significant turnaround in key metrics for jumps racing.



Decision Framework & Conduct of Review

2. Supporting Welfare of Horse and Human – Any changes to jumps racing must consider the impact on the participants, many of whom play important roles across various aspects of the industry outside of jumps racing, as well as the safety of and impact on horses currently or potentially involved in jumps racing in the future.
3. Enhancing Infrastructure – Consideration should be given to any additional investment required, as well as the impact on any changes to venues that hold jumps races.
4. Engaging Communities – The wider racing community’s involvement in jumps racing, as well as public perception and the history of jumps racing are all key considerations.

Conduct of the Review

The Panel received 256 submissions from a range of stakeholders, both via Survey Monkey and email. These included three petitions with a total of approximately 1,970 signatures supportive of continuing jumps racing. Submissions were from a wide range of stakeholders including owners, trainers, breeders, punters and administrators. The Panel had access to review each submission individually and was provided with a summary of the submissions.

The Panel met on two occasions to work through the decision framework and consider options for the future of jumps racing. Following the first meeting NZTR provided additional data to the Panel, which is included as Appendix 1. The Panel also met once to finalise this report.

The Panel met with Entain to better understand jumps racing from a wagering perspective. The Panel Chair met with Racing Victoria to discuss their review of jumps racing in Victoria, and to get a better understanding of their drivers for a review and considerations for deciding on the future of jumps racing.

Assessment Against Decision Framework

This section provides the Panel's assessment of the key considerations in the decision framework.

NZTR STRATEGIC PRIORITIES	CONSIDERATIONS	DISCUSSION
GROWING REVENUE	Sustainable Revenue Growth	<p>Data suggests that jumps racing, as it is currently run, does not support sustainable revenue growth or positive wagering outcomes. In terms of NZTR revenue and budgets, jumps racing has not performed from a wagering revenue viewpoint. A significant contributing factor has been the need to split races and double overall stakes due a lack of jumps jockeys. If jockey numbers improved, average field size would improve and NZTR could more sustainably budget for jumps racing each season.</p>
	Maximise Wagering Outcomes	<p>Entain's analysis indicates that wagering turnover on jumps races is lower than flat races, even compared to maiden rating 65 winter races. Therefore, continuing with jumps racing results in an opportunity cost, with less wagering revenue returning to the industry.</p> <p>Given these challenges, the Panel acknowledged that if growing revenue was the only priority, it would be difficult to justify the continuation of jumps racing. However, as discussed below, the benefits of jumps racing suggested that NZTR should consider changes (calendar, racedays, timing of races, jockey initiatives etc) that may alleviate these challenges and provide opportunities for jumps racing to at least sustain itself financially, if not grow.</p>

Assessment Against Decision Framework

NZTR STRATEGIC PRIORITIES	CONSIDERATIONS	DISCUSSION
SUPPORTING WELFARE OF HORSE AND HUMAN	Participant Well-being	<p>The Panel was cognisant that many jumps racing participants play other vital roles in the racing industry (trainers, track work riders, starting gates staff etc), and that discontinuing jumps racing would have a negative effect on their well being, and as discussed below their ability to sustain a full-time career in the industry.</p>
	Horse Welfare	<p>Jumps racing provides a viable racing career for many horses that would otherwise need to find second careers through rehoming. The downside of discontinuing jumps racing would be an increased demand placed on our rehoming network, which already faces challenges. Horses that have had a jumping career are also at an advantage when it comes to rehoming.</p>
	Safety	<p>It is well documented that jumps racing carries higher risks than flat racing, to both horses and jockeys. The figures however did not suggest to the Panel that jumps racing should be discontinued, but the Panel did agree that any additional safety measures should be identified and implemented.</p> <p>The Panel also identified potential rule changes that could improve horse welfare, as well as avoiding firm track conditions early in the jumps season. Even those who supported the continuation of jumps identified a concern about use of the whip during the races, especially at the end of the races after the last jump.</p>

Assessment Against Decision Framework

NZTR STRATEGIC PRIORITIES	CONSIDERATIONS	DISCUSSION
ENHANCING INFRASTRUCTURE	Investment	<p>It was acknowledged by the Panel that historically there has been a lack of investment in jumping infrastructure and venues, although this is also true of flat racing and reflects the financial reality of the industry over many years. The opportunity brought with the Entain strategic partnership is for more focused, strategic investment in core infrastructure and venues.</p>
	Venues	<p>In the view of the Panel the status of jumps racing neither undermine nor support this priority. It was, however, recognised that if jumps continued, investment would need to be made in the venues and infrastructure, but this would not be so significant that it could not be budgeted for.</p> <p>The Panel heard from Entain that efficiencies could be made by focusing jumps racing, and therefore investment in a concentrated pool of venues. NZTR also advised that moving jumps infrastructure from one venue to another was inefficient, carried a great deal of cost and created risk to the successful delivery of race days.</p>

Assessment Against Decision Framework

NZTR STRATEGIC PRIORITIES	CONSIDERATIONS	DISCUSSION
ENGAGING COMMUNITIES	Involvement in Racing	<p>The most frequent reason given in support of retaining jumps racing was the history, the community, and level of industry participation in jumps racing. The strong message received was of the importance of jumps racing to the overall success of the racing community. As discussed in the consultation report, there does need to be a focus on succession planning for jumps trainers to ensure the community can continue to sustain itself, along with initiatives to increase jockey numbers.</p>
	Public Perception	<p>As set out above, many participants in the jumps racing community are actively involved in the wider industry. Information from Racing Victoria indicated a similar theme, with jumps trainers having a more attractive offering for jumps jockeys to be trackwork riders throughout the season, with lucrative salaries being offered.</p>
	History	<p>Despite an open and widely publicised consultation process, the Panel received very few submissions asking that jumps racing be shut down for animal welfare reasons. There is no evidence to suggest that continuing jumps racing puts the industry's social licence at significant risk.</p> <p>While jumps racing has a lower wagering return, the Panel acknowledged the importance of the jumps racing audience and potential for jumps carnivals to celebrate and enhance jumping history.</p>



Decision and Recommendations

Under its Terms of Reference, the Panel was established to investigate and report on jumps racing in New Zealand, assessing whether it should continue and recommending any necessary changes if it does continue or is discontinued.

After careful consideration of the submissions and evidence before it the Panel has resolved to recommend that jumps racing in New Zealand should continue.

The Panel notes that there was significant support from submitters for the continuation of jumps racing, but that many submitters agreed that the status quo approach is unlikely to be effective and would likely lead to further decline of the industry.

The Panel agrees that significant changes and innovations will be required to ensure the success of the industry, both in the short and long term. Accordingly, the Panel recommends NZTR implement several initiatives designed to improve jumps racing. These recommendations have been aligned to the four strategic priorities of the NZTR Strategic Plan.

The recommendations will require further development by NZTR. They should not preclude NZTR from undertaking further initiatives.

Additionally, it is recommended that NZTR develop Key Performance Indicators (KPIs) to monitor the performance of jumps racing. These KPIs should be reviewed as part of an annual evaluation at the end of each jumps racing season and published for public access. A comprehensive review of jumps racing is recommended to occur every three seasons.

Priority Area 1: Supporting, Mentoring and Attracting Jumps Jockeys

Feedback from multiple submitters highlighted the importance of investing in local jockey development and enhancing efforts to attract international jockeys to New Zealand. In addition to riding raceday jockeys are vital to the schooling and preparation of horses for the jumps season and play an important role in schooling flat horses, many of which benefit from the variation in training and schooling over the jumps can provide. Enhancing educational opportunities for jockeys is therefore an investment in their overall wellbeing. Recent increases to jumps riding fees to \$400 have generated interest for some domestic jockeys to return riding and have increased interest from UK riders. This demonstrates there is some latent capacity in the jockey ranks should incentive structures encourage them to return riding.



Decision and Recommendations

Jockeys are a key touch point for the public to engage with through post-race interviews and other promotional material. Providing jumps jockeys with the skills to be effective in this area will benefit the professionalism of the sport and provide development opportunities for these riders. This will have flow on benefits to the public perception of the sport in the wider community.

Building a robust talent pool and increasing the number of riders locally is also expected to positively impact wagering outcomes as smaller field sizes typically result in reduced wagering revenue.

Recommendations:

1. Integrate jumps jockeys into the Elite Jockey Programme. This will provide apprentices with the tools needed to enter the industry in a professional manner, setting them up for success. It also establishes becoming a jumps jockey as a viable and positive career path for riders that may not suit the flat riding system.
2. Explore enhancements to mentorship and training for jumps jockeys to ensure senior jumps jockeys are afforded similar learning and mentorship opportunities to flat riders.
3. Review and refine criteria for maintaining a highweight license to uphold skill and safety standards.
4. Create a targeted recruitment strategy to attract and retain jumps riders within New Zealand.
5. Investigate a “self-insurance” option to cover overseas jockeys who are not eligible for ACC income protection payments if injured in New Zealand, in particular for Australian based riders riding in New Zealand for whom this insurance roadblock is most notable.
6. Develop a recruitment and licensing program to streamline the readiness of UK riders for racing in New Zealand.



Decision and Recommendations

Priority Area 2: Reviewing and Optimizing the Jumps Racing Calendar

Ensuring that the racing season is appropriately timed and that races are held at optimal locations provides the best opportunities for trainers and owners and the best opportunity to increase wagering turnover (including on same day flat races). Based on the recommendations below, significant changes to the jumps season are not expected. These changes are anticipated to have positive impacts on the welfare of the horses involved and improve outcomes in terms of the wagering and public experience. A review of venues will ensure that any investment required is optimised and that racing occurs in the best locations.

Another key aspect is aligning the New Zealand jumps racing calendar with Victoria's season. If jumps racing continues in Victoria, having complementary calendars will increase the likelihood that Australian jumps jockeys consider riding in New Zealand, enabling an increase in average field sizes and increasing interest. In addition to aligning the calendar with Victoria the Panel noted there are wider benefits in collaborating more closely with the jurisdiction on strategic matters going forward.

Recommendations:

1. Delay the jumps racing season start to avoid firm track conditions.
2. Establish a two-day carnival at Te Aroha, which can be developed into a season finale.
3. Schedule the season to conclude after Victoria's season to attract their jockeys to ride the final race meetings in New Zealand.
4. Continue to collaborate more closely with Racing Victoria on future initiatives, for example a trans-Tasman jockey challenge.
5. Reduce and streamline the number of jumps venues to ensure consistency and maintain the quality of jumps racing throughout the season.



Decision and Recommendations

Priority Area 3: Enhancing Race Programming for Consistency and Competition

Effective race programming is essential for strong wagering outcomes. Feedback from Entain highlights that customers value consistency; therefore, programming changes to improve this, such as grouping jumps races on the racecard or hosting dedicated jumps-only racedays, are recommended to benefit wagering.

Programming should also ensure opportunities for all horses. The Panel identified a gap for horses with multiple wins but not yet ready for Open class competition. It recommends creating more race options for this group, alongside efforts to increase starter numbers to sustain a competitive pool in this category.

The Panel also suggests adjustments to feature race programming to encourage top horses to compete against each other more frequently

The Panel has identified a need for more staying flat races over longer distances. These races can serve as a stepping stone to jumps racing for horses with the potential to transition to jumping. Additionally, running these races as highweights would create extra riding opportunities for jumps jockeys.

While the Panel notes that many recommendations included in this report should improve wagering outcomes, it recommends NZTR work with Entain directly to explore other enhancements such as innovative betting products, and other initiatives that grow wagering on jumps racing.

Recommendations:

1. Where feasible, schedule jumps races together rather than spacing them out across the card.
2. Develop a bonus series to provide additional incentives for novice jumpers.
3. Adjust feature races to increase the likelihood of top-level horses competing against each other.
4. Consistency of day of the week for jumps racing – e.g. Sundays.
5. Consider options to programme more staying flat races over longer distance. This could be developed into a series.
6. Work with Entain to develop innovations to enhance wagering on jumps racing.



Decision and Recommendations

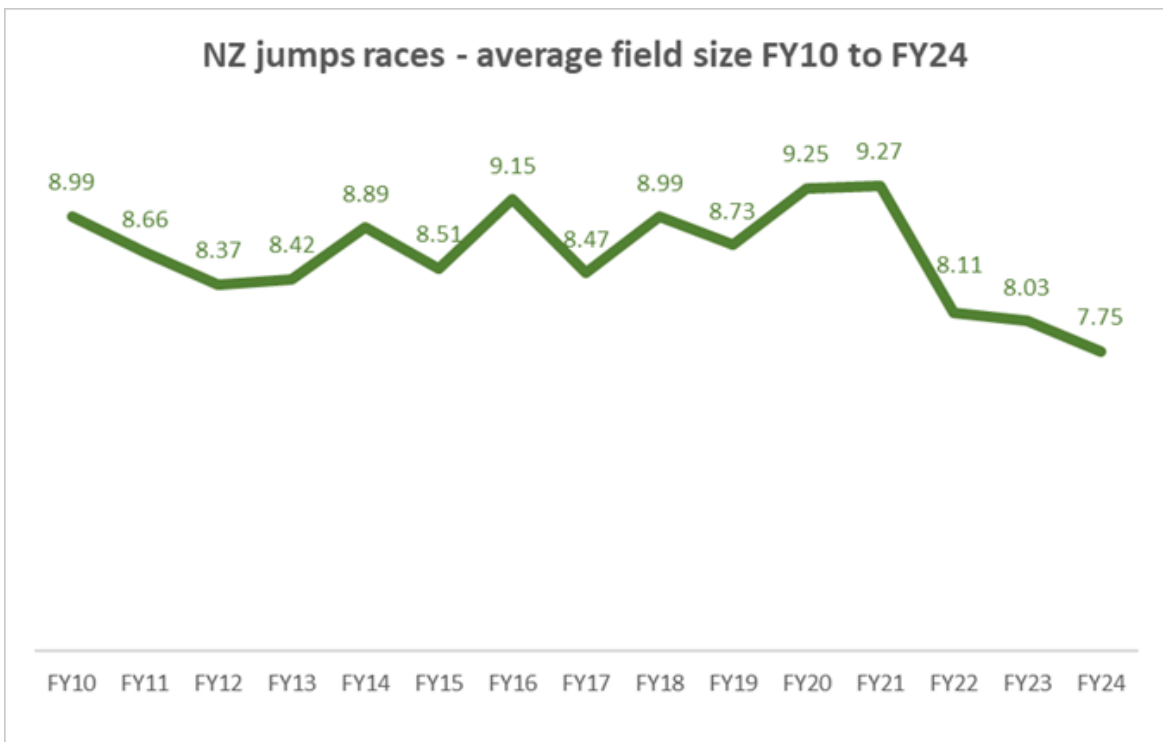
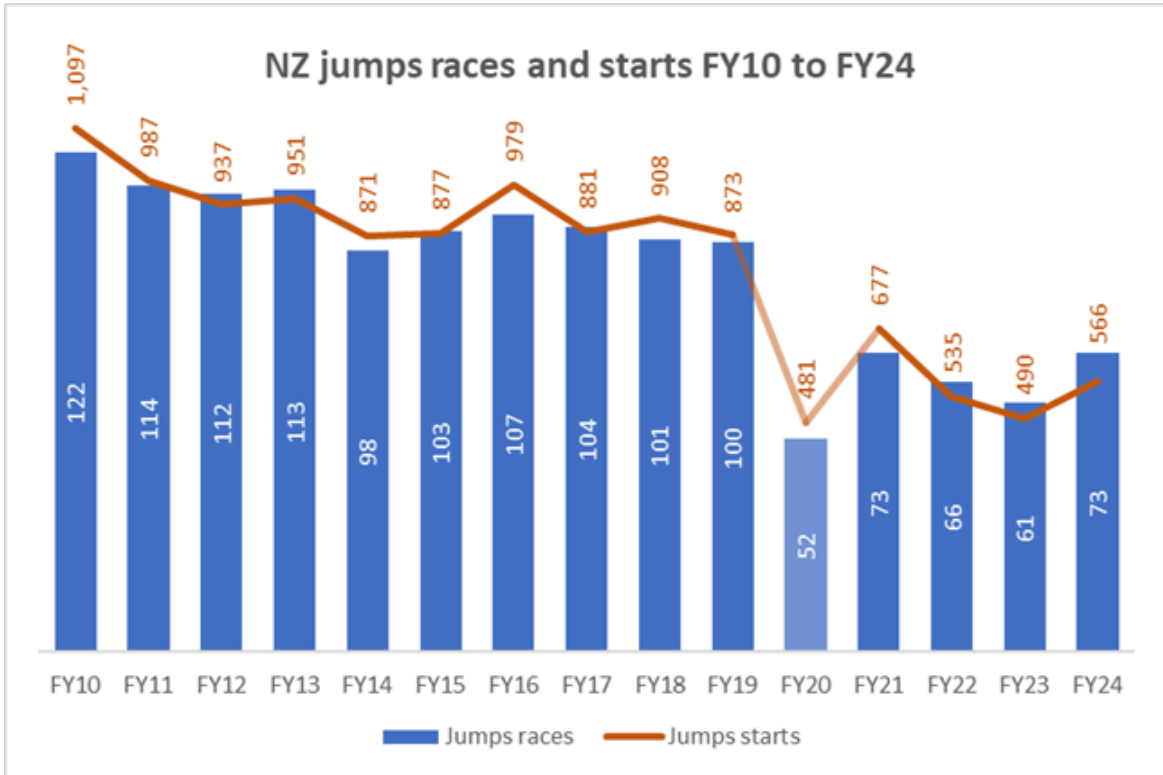
Priority Area 4: Ensuring Fit-for-Purpose Infrastructure and Rules

Enhancing and optimising infrastructure at key locations for jumps racing will support consistency in wagering, focus investment for any new equipment, and improve race quality. Additionally, aligning certain rules, such as the whip rule, more closely with flat racing can enhance regulatory consistency. The whip was consistently referred to as a negative by supporters of jumps racing through the submissions, especially over the final 100m of races when horses are tired

Recommendations:

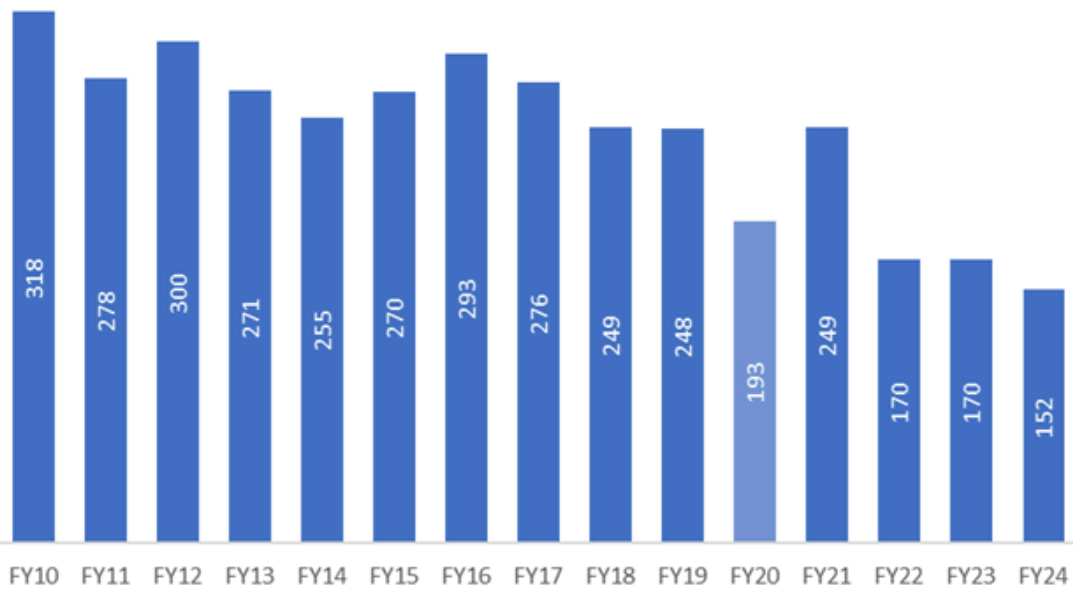
1. Consider modifying the whip rule, especially for the final 100 meters, to align more closely with flat racing standards.
2. Conduct a comprehensive review of jumps infrastructure as part of the broader venue optimization plan.

NZTR Data

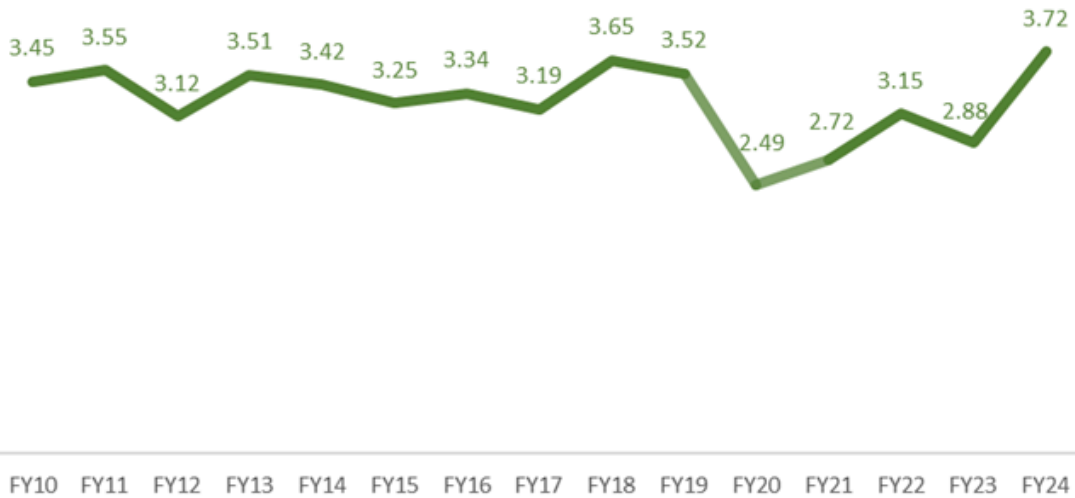


NZTR Data

NZ jumps races - individual starters FY10 to FY24

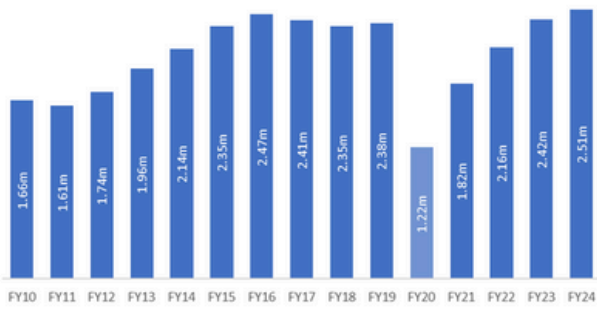


NZ jumps races - starts per starter FY10 to FY24

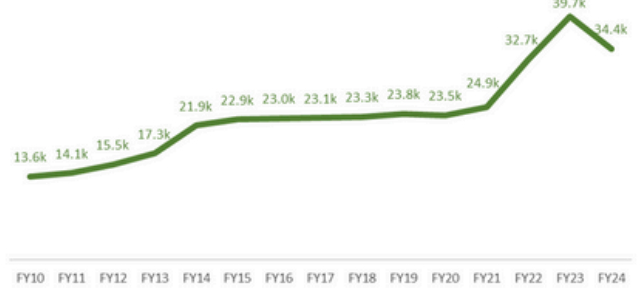


NZTR Data

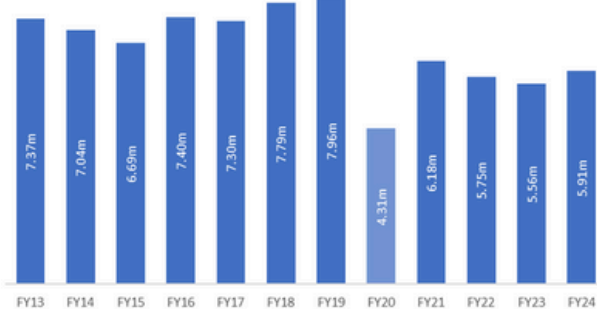
NZ jumps races - total prizemoney FY10 to FY24



NZ jumps races - prizemoney per race FY10 to FY24



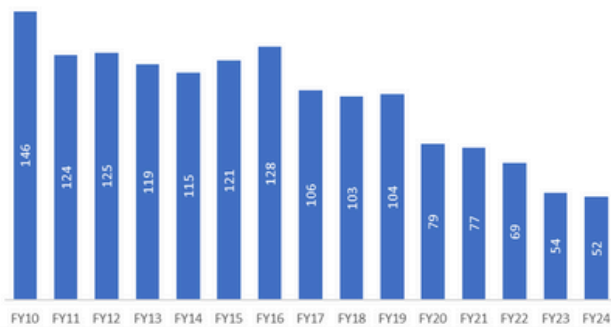
NZ jumps races - NZ turnover FY13 to FY24



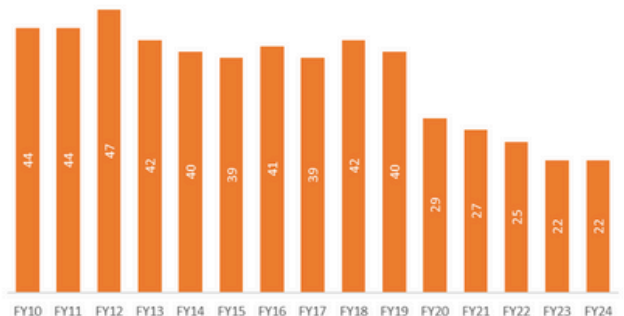
NZ jumps races - turnover per race FY13 to FY24



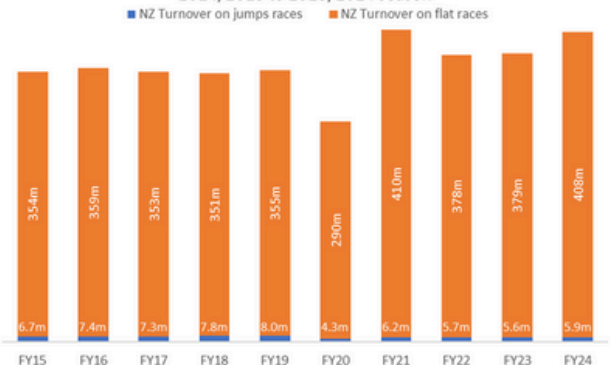
NZ jumps races - individual trainers FY10 to FY24



NZ jumps races - individual riders FY10 to FY24



Turnover (excl. multi-race) - NZ Jumps v Flat races
2014/2015 to 2023/2024 season



Turnover per race - NZ Jumps v Flat races
2014/2015 to 2023/2024 season

