



VOLUME ONE - EQUESTRIAN STATE FACILITY PLAN

FINAL REPORT

SEPTEMBER 2017

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1. Acknowledgements

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The assistance provided throughout the project by the Project Reference Group headed by Equestrian Victoria Chair, Ingrid Green, Project Manager Suzie Batten, Equestrian Victoria CEO Fiona Baxter, and officers of Sport & Recreation Victoria is gratefully acknowledged.

The Victorian Government, through Sport and Recreation Victoria, provided funding to undertake the project.



2. Executive Summary

1. STUDY PURPOSE

The purpose of this study was to:

“Develop a State Equestrian Facility Plan that provides a strategic direction and guides the planning, investment and development of equestrian facilities in Victoria over the next decade, and

Respond to the identified facility needs of all equestrian disciplines and user groups from grass roots participation through to international competition.”

The State Facility Plan is intended to guide the optimal allocation of resources and ensure that facilities are developed in appropriate locations to service their respective user bases, and that larger facilities are co-ordinated and centralised to ensure maximum benefit to Victoria’s equestrian community.

The project was funded through a partnership between Equestrian Victoria and Sport & Recreation Victoria, through its State Sporting Association Planning Program.

2. STUDY APPROACH

The study process comprised a review of background reports (including the 2006 Werribee Park National Equestrian Centre (WPNEC) Business Development Plan); analysis of the Victorian equestrian industry structure; analysis of participation data in equestrian sport; review of studies on the economic impact of equestrian sport; overview and mapping of principal venues for equestrian sport in Victoria; review of known facility development proposals; and inspection of major equestrian venues.

An extensive consultation process with equestrian organisations and participants was undertaken in order to understand membership trends, facility usage and levels of satisfaction, essential facility needs, and thoughts about WPNEC. This comprised interviews/ discussions with key equestrian organisations; surveys of state/ national equestrian organisations; meetings with venue operators; and a survey of Equestrian Victoria members and WPNEC users which elicited a very high response rate of 1,396 respondents. Regular meetings and discussions with Equestrian Victoria were held throughout the project.

The report has been separated into two volumes:

- Volume One: State Facility Plan
- Volume Two: Detailed Summary of Market Research and Consultation

3. STRATEGIC CONTEXT

The structure of the equestrian industry is very fragmented with numerous disciplines, some of which come under the auspices of Equestrian Victoria, but many others each with separate state and national bodies (refer Figure 2). Nevertheless, the economic impact of equestrian sport in Australasia is substantial. A 2017 community impact study of equestrian sport undertaken for Equestrian Australia has estimated that the total economic contribution of equestrian sport to the Australia economy (excluding all codes of horse racing, polo/ polocrosse, rodeo, western & tent pegging) is over \$1.143 Billion.

4. PARTICIPATION AND TRENDS

There are an estimated 53,246 participants in equestrian sport in Victoria. Of these, the vast majority (79%) are females. The three largest equestrian groups in Victoria are Horse Riding Clubs Association of Victoria (HRCAV), Pony Club Association of Victoria(PCAV), and Equestrian Victoria (EV) which conduct similar activities but cater to different market segments. The disciplines with the highest organised participation are dressage, followed by showjumping, eventing and show horse.



From consultation with equestrian organisations the following participation trends in Victoria are evident:

- Most (not all) organisations have experienced growth in participation in recent years
- Most growth is occurring among females and youth
- There is significant growth in inter-school competitions
- There is an increase in demand for entry level competitions

The latter point is consistent with trends in many other sports where demands for more social forms of competition are evident.

5. FACILITY PROVISION

There is a high level of private sector involvement in equestrian facility provision in Victoria, with some private venues staging high level events (or may do so in the future). While private sector facilities play an important role in the delivery of participation opportunities, their long term continuation cannot be guaranteed.

From information provided by equestrian organisations, fifty-five venues across the state that cater for most equestrian events across the various disciplines were identified (refer Map 1111). These are comprised of a mix of public, private, school and showground facilities. Of these, eleven venues emerged as the most frequently used for events, which are in alphabetical order as follows:

- Albury Wodonga Equestrian Centre (Council land)
- Ayr Hill Equestrian Centre (Private school land)
- Boneo Park Equestrian Centre (Private land)
- Elcho Park Equestrian Centre (Council land)
- Elmore Equestrian Centre (Community owned and managed by NFP organisation)
- Peppercorn (Oaklands Junction) Equestrian Centre (Private land)
- Pony Club of Victoria Equestrian Centre - Gladysdale (Private. Owned by PCEV)
- Tatura Park Equestrian Centre (Council land)
- Tonimbuk Equestrian Centre (Private land)
- Victoria Park Equestrian Centre (Council land)
- Werribee Park National Equestrian Centre (Crown land)

6. KEY ISSUES RAISED IN CONSULTATION

There are differing views among equestrian organisations about current and future facility provision and distribution across the state. Many see the current supply as adequate but are of the view that facility upgrades are required. Some favour a central venue for high level events, while others favour a decentralised model with a number of event facilities located around the state. There was however a consistent theme across equestrian organisations that WPNEC is “tired” and in need of a major upgrade to meet current and future needs and expectations. The main areas of dissatisfaction related to the standard of surfaces in outdoor and indoor arenas, drainage, condition of amenities, general maintenance, stables/ yards, power supply and powered sites, traffic entry/ internal movement and parking, on-site accommodation, and signage.

The main issues raised by equestrian organisation in relation to other venues related to the number and quality of sand arenas (more with 6 good quality sand arenas); improved access to well-built cross country courses; more venues with large number of stables; better disability access; improved shade; and improved accommodation facilities.

EV members also expressed dissatisfaction with WPNEC, with the main issues being general poor quality (48.9% of respondents); poor horse accommodation ie stables/ yards (41.9%); poor competition facilities (36.7%); inadequate drainage (30.1%); fees and cost of use (28.6%); and poor toilets/ shower amenities (26.0%).



Overwhelmingly, EV members and users of WPNEC would like to see the venue upgraded to support major events, with 87% of the 1,396 survey respondents supporting the proposition that WPNEC be upgraded to accommodate major events in all equestrian disciplines. The main improvements were identified as upgrade stables/ yards; improve shower and toilet areas (cleaner and increased quantity); improve competition surfaces; upgrade drainage of surfaces and yards/work areas; improve surfaces on show jumping sand arena; and better general maintenance.

5. STRATEGIC DIRECTION

The strategic direction is predicated on the upgrading of WPNEC as the premier 'state level facility' to cater for the major disciplines of dressage, showjumping, eventing (and other disciplines excluding stock handling) supported by other venues strategically located across the state that are capable of catering for competitions from local to high level across a range of equestrian sports.

Individual equestrian disciplines have sport specific competition plus support infrastructure requirements for the conduct of events, and unlike many other sports, a traditional hierarchy of facility provision does not suit equestrian sport. Due to the nature of equestrian sport and the large number of disciplines, it is difficult for any single facility to satisfy the high level needs of all disciplines. Therefore, the support facilities throughout the state may specialise in one or more of the equestrian disciplines.

6. KEY RECOMMENDATIONS

Recommendations are outlined at Section 7. Key recommendations include:

1. Retain and upgrade WPNEC as the State Centre for equestrian sport in Victoria (excluding racing, rodeo and stock handling disciplines)
2. Liaise with Sport & Recreation Victoria to emphasise the importance of, and seek funding for, the preparation of a master plan for the redevelopment of WPNEC
3. The Master Plan should:
 - Confirm key development elements (refer Recommendation 2.1)
 - Identify capital cost estimates
 - Confirm staging priorities
 - Identify a funding strategy
4. Seek external funding for the upgrading of WPNEC in accordance with the endorsed Master Plan
5. Establish or upgrade a venue Gippsland and Barwon South West region capable of conducting regional competitions in order to address gaps in facility provision for dressage
6. For the disciplines with largest participation numbers (dressage, showjumping, eventing, show horse) identify a facility in each region (refer Map 1, p 11) that is capable of staging high level or high participation events and meets desired standards. [Focus on Albury Wodonga Equestrian Centre, Elcho Park Equestrian Centre, Elmore Equestrian Centre, Tatura Park Equestrian Centre and Victoria Park Equestrian Centre.]
7. For each of the smaller participation disciplines, identify at least one venue in the state that is capable of meeting the requirements for high level events.
8. Work with the State Government to identify alternative management options (in line with other state facilities) for the ongoing management and operation of WPNEC.
9. Defer negotiations for the lease of WPNEC pending discussions with Sport & Recreation Victoria on a preferred management structure and the development of the master plan for the precinct.



3. Introduction

3.1 Study Aim

The aim of this project was to:

- Develop a State Equestrian Facility Plan that provides a strategic direction and guides the planning, investment and development of equestrian facilities in Victoria over the next decade, and*
- Respond to the identified facility needs of all equestrian disciplines and user groups from grass roots participation through to international competition*

The study responds to a number of concerns, principally:

- A lack of investment in equestrian facilities at state level
- Ad hoc development of large scale facilities
- Uncoordinated development of facilities by local governments and private organisations may lead to a duplication of facilities in some areas and inefficient allocation of funding and other resources
- Aging infrastructure at Werribee Park National Equestrian Centre

The study scope was reviewed and refined with the Project Manager throughout the course of the study. Key elements of the scope include:

- Review of equestrian participation and events
- Provision of an overview of current/ proposed major equestrian facilities
- Identification of the optimal spread of facilities
- Priorities for equestrian facility development, improvement and management
- Performance of Equestrian Victoria and relationships with equestrian organisations
- Suggest how government and the sport might allocate funding across facilities

The study excludes racing (flat, harness, steeplechase), fox hunting, and rodeo (barrel racing, roping, saddle bronc and bareback riding, and steer wrestling).

The State Facility Plan is intended to guide the optimal allocation of resources and ensure that facilities are developed in appropriate locations to service their respective user bases, and that larger facilities are co-ordinated and centralised to ensure maximum benefit to Victoria's equestrian community.

The project was funded through a partnership approach between Equestrian Victoria and Sport & Recreation Victoria, through its State Sporting Association Planning Program.

3.2 Study Approach

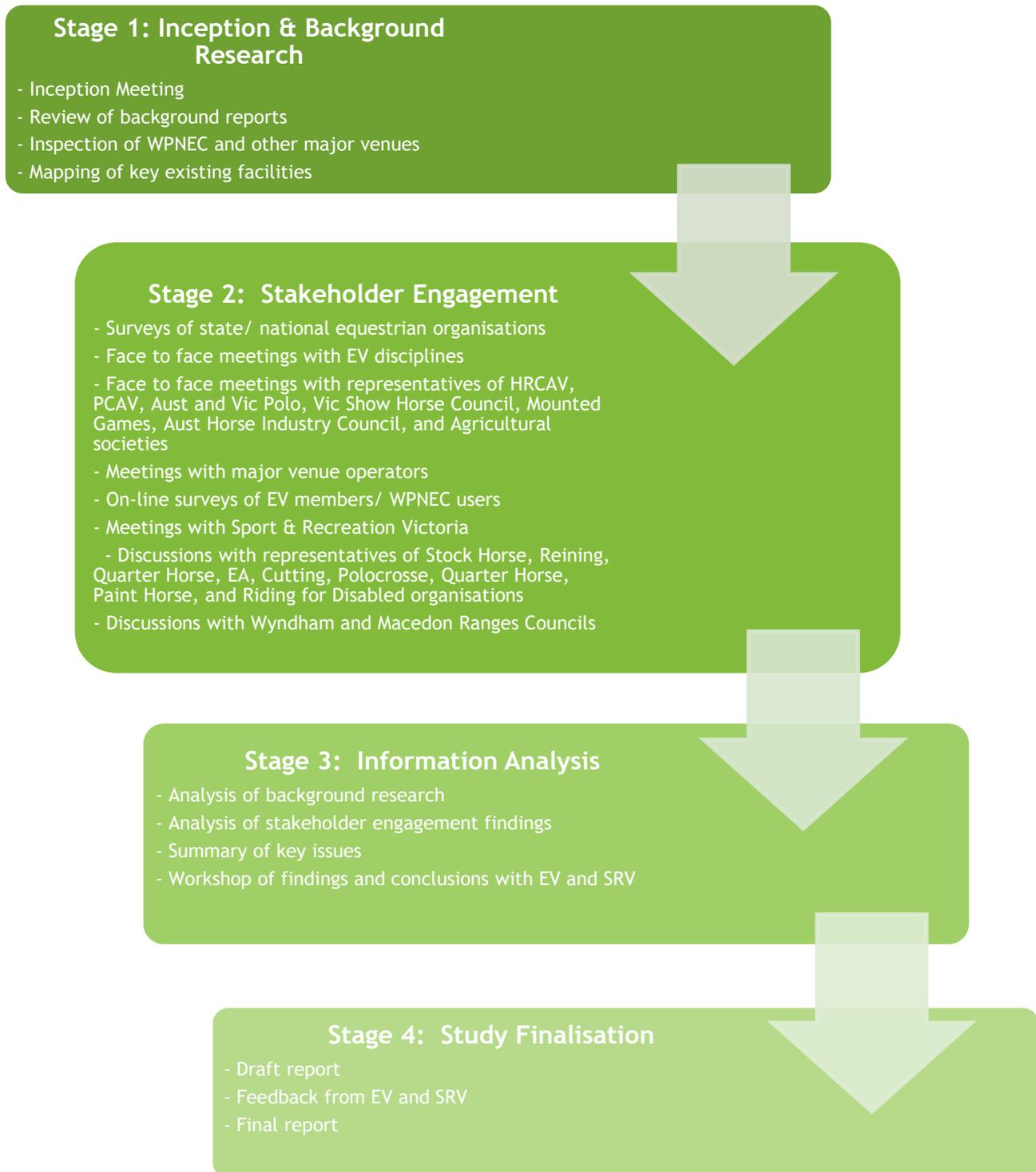
The study approach was adapted and refined in consultation with the Project Manager. Figure 1 summarises the methodology undertaken.

The report has been separated into two volumes:

- Volume One: Equestrian Victoria State Facility Plan
- Volume Two: Summary of Market Research and Consultation



Figure 1: Overview of Study Methodology





4. Equestrian Industry Overview

The Victorian equestrian industry comprises a vast number of participants across a wide range of disciplines.

The structure of the industry is very fragmented. Equestrian Victoria is the state body of Equestrian Australia, the controlling body for horse sports in Australia. Equestrian Victoria oversees the disciplines of:

- Dressage
- Eventing
- Showjumping
- Carriage Driving
- Vaulting
- Show Horse
- Interschool
- Para-Equestrian

However, there are many other equestrian disciplines operating in Victoria outside the auspices of Equestrian Victoria, including:

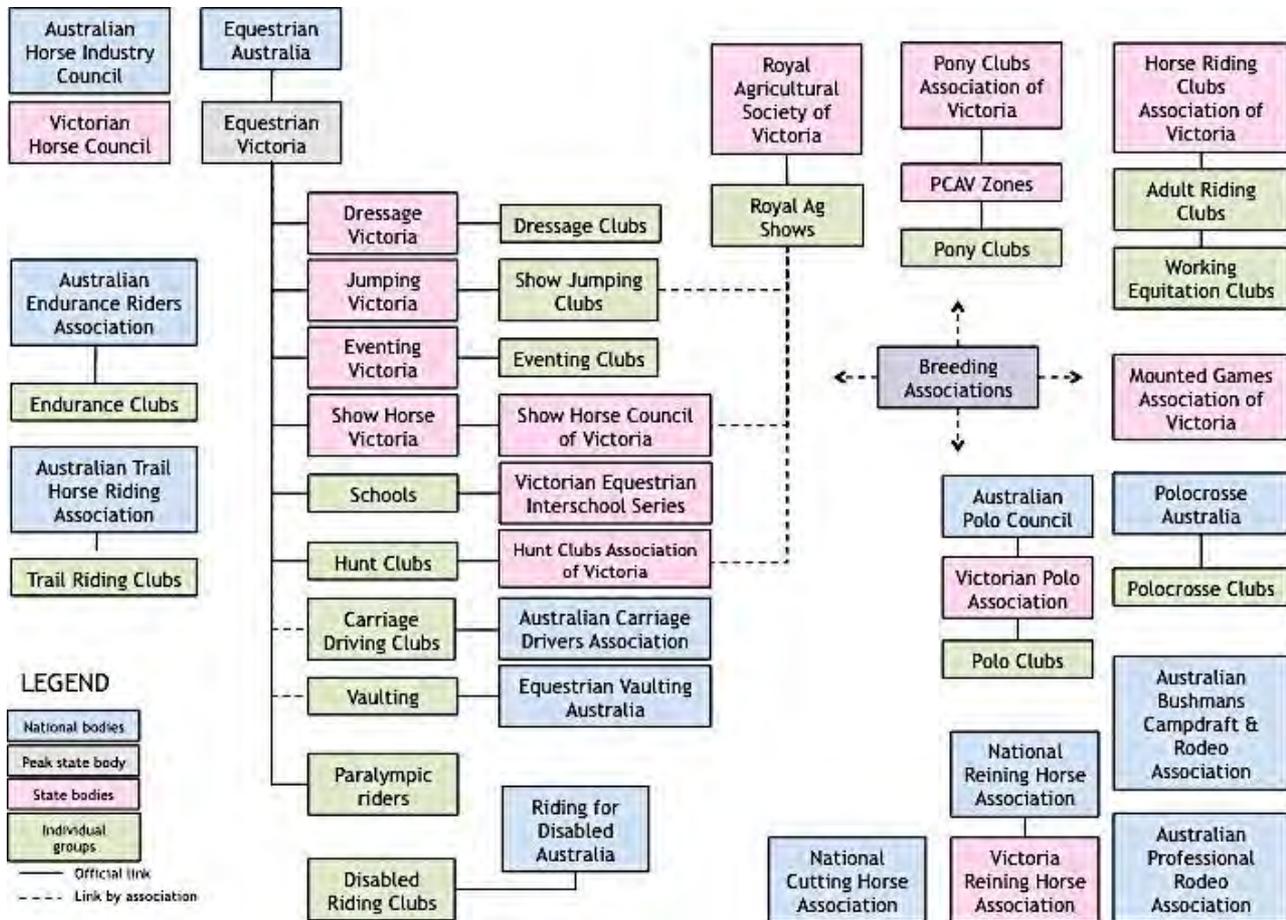
- Adult riding clubs
- Pony clubs
- Livestock/western disciplines (cutting, reining, campdrafting, rodeo, tent pegging, western pleasure)
- Polo and polocrosse
- Agricultural societies and shows
- Mounted games
- Hunting
- Riding for the disabled
- Modern pentathlon
- Endurance and trail riding

Most of these disciplines have separate peak bodies at state and/or national level. In addition, there is several breeding organisations, which participate in breed-related activities relating to the disciplines, outlined above.

Figure 2 illustrates the diverse and fragmented nature of the equestrian industry in Victoria.



Figure 2 Equestrian Victoria Industry Structure



4.1 Equestrian Participation

The 2016 Australian Sports Commission survey data¹ indicates there are an estimated 53,246 participants in equestrian sport in Victoria. Of these, the vast majority (79%) are females. Approximately 17% are under 14 years of age. From previous national surveys of sport, recreation and exercise participation,² which ceased in 2010, it was identified that in relation to equestrian sport:

- Non-organised participation is higher (0.7%) than organised participation (0.5%)³
- National participation trends declined from 1.5% of population in 2001 to 1.0% in 2010. Participation in Victoria experienced a similar decline, particularly between 2005 and 2010.

A 2009 report⁴ by the Australian Bureau of Statistics on children’s participation in leisure activities found that:

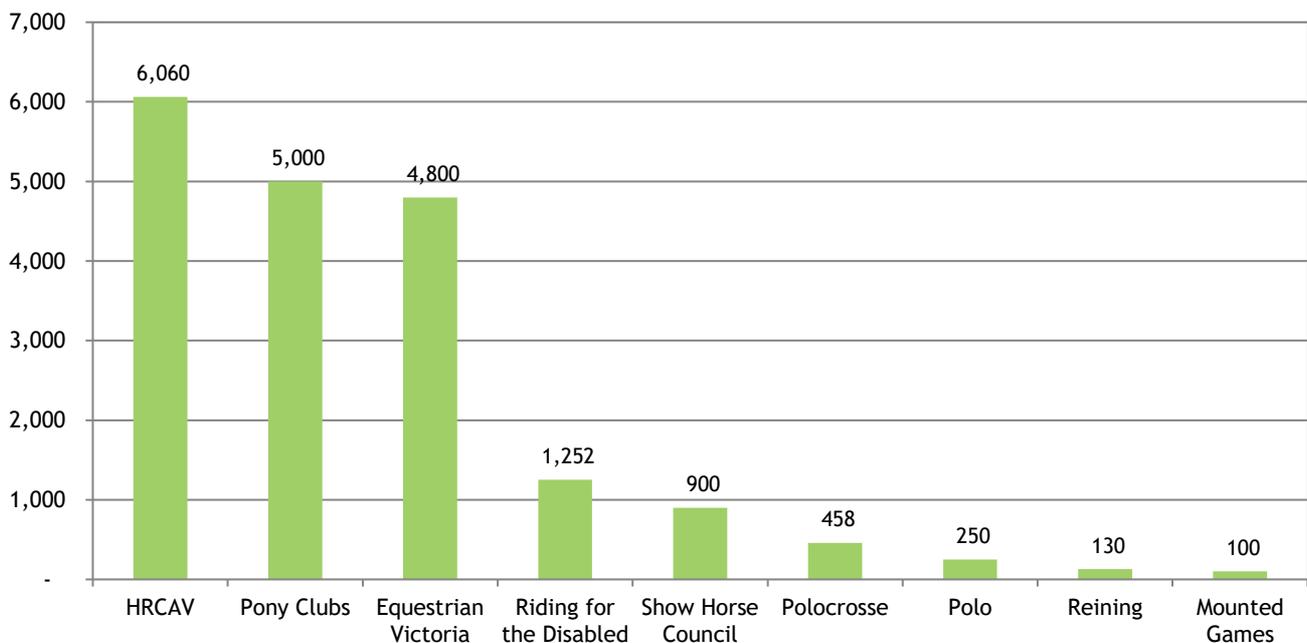
- Approximately 1.3% of children aged 5 to 14 years participate in horse riding and equestrian activities
- Girls have a significantly higher participation rate than boys (2.4% compared to 0.3%)
- Participation declined from 1.5% in 2006 to 1.3% in 2009. No data was recorded in the subsequent 2012 survey report.

¹ Australian Sports Commission. “AusPlay: Participation data for the sport sector”. December 2016
² Participation in Exercise, Recreation and Sport Surveys (ERASS). 2003, 2006 and 2010 survey periods. Funded by the Australian Sports Commission and state and territory government agencies responsible for sport and recreation through the Standing Committee on Recreation and Sport. Surveys are conducted of persons aged 15 and over.
³ It is acknowledged that some respondents participate in both organised and non-organised equestrian activities, resulting in a combined total that is greater than the national participation rate of 1.0%
⁴ Australian Bureau of Statistics. ‘Children’s Participation in Cultural and Leisure Activities’. 2009



Information provided by the various equestrian organisations indicates that, in terms of *organised* participation, the three largest equestrian groups in Victoria are Horse Riding Clubs Association of Victoria, Pony Club Association of Victoria, and Equestrian Victoria with a combined membership of 15,860 (refer Figure 3). It should be noted that some individuals may be members of more than one equestrian organisation and could therefore be counted more than once.

Figure 3: Membership of equestrian organisations in Victoria



Note: Graph illustrates membership information only for organisations that supplied data.

4.2 Economic Impact of Equestrian Sport

The economic impact of equestrian sport in Australasia is substantial. A 2017 community impact study of equestrian sport undertaken for Equestrian Australia⁵ has estimated that the total economic contribution of equestrian sport to the Australia economy (excluding all codes of horse racing, polo/ polocrosse, rodeo, western & tent pegging) is over \$1.143 Billion. This is made up of⁶:

- Equestrian Clubs and Associations \$93.2m
- Club Participants \$676.3m
- Participation in Events \$106.8m
- Horse Breeding \$169.5m
- Equestrian Retailing, Training and Coaching \$84.5m
- Contributions to Physical and Mental Health \$12.7m

A similar study in New Zealand study⁷ examined the economic impact of the equestrian sport horse industry which was defined as comprising “...all horses in New Zealand that are not being used for the purpose of racing or breeding of horses for the purpose of racing.” The study found that the equestrian sport horse industry (excluding racing) contributes over \$1 billion to the New Zealand economy annually; the average total annual spend per horse is \$12,500; and the industry directly sustains the equivalent of 12,000 full time equivalent jobs.

⁵ <http://www.equestrian.org.au/news/equestrian-brings-more-1billion-economy>

⁶ http://www.horsecouncil.org.au/wp-content/uploads/2017/03/Equestrian-Australia_Infographic.jpg

⁷ A. Matheson and M. Akoorie. “Economic Impact Report on the New Zealand Sport Horse Industry”. July 2012



5. Facility Provision

Information provided by equestrian organisations indicated that (refer Volume Two: Summary of Market Research and Consultation, Section 3) there are fifty-five principal venues across the state that caters for a range of equestrian events in a range of disciplines (refer Map 1 over page). These are comprised of a mix of public, private, school and showground facilities.

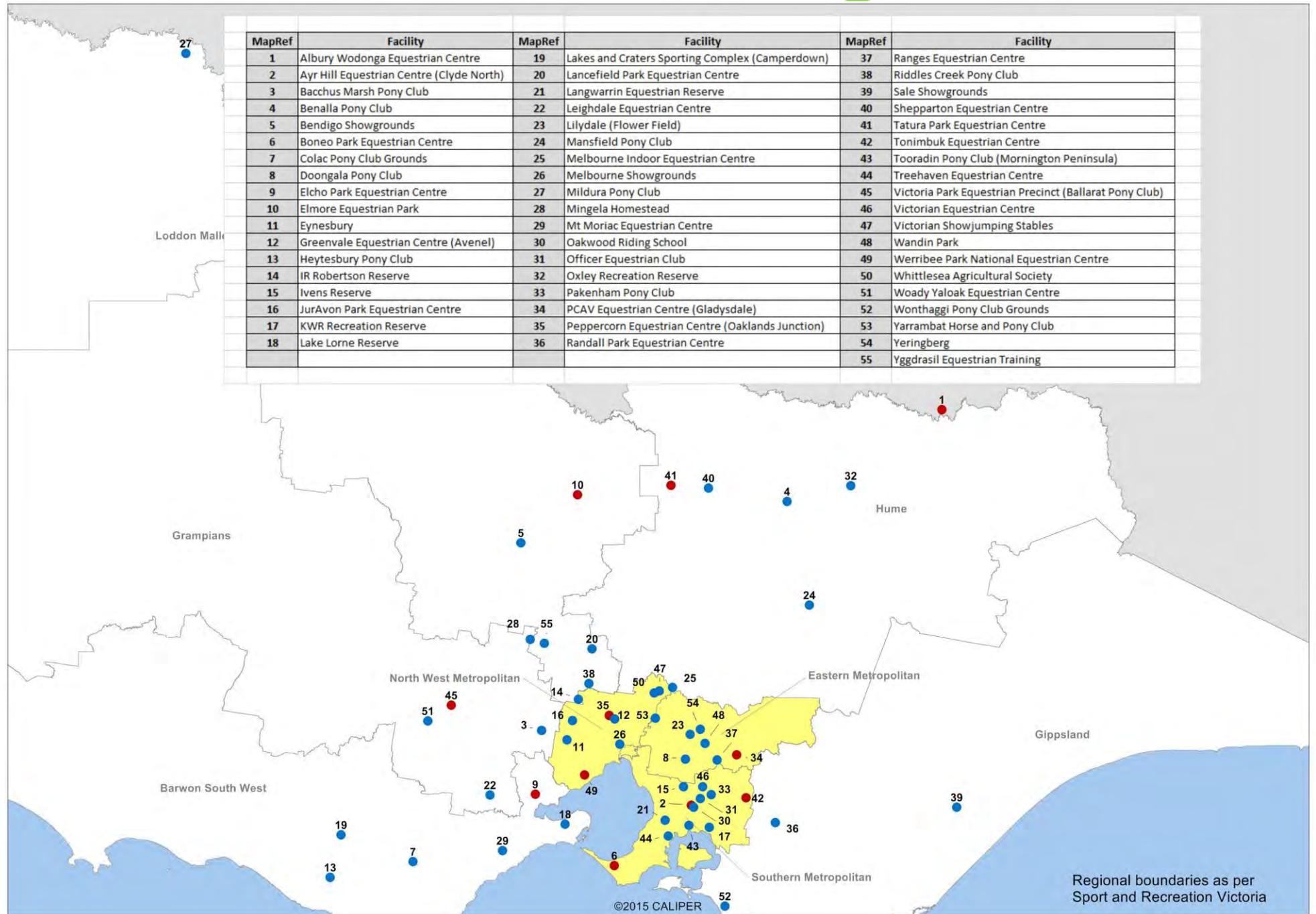
Further details and analysis of these facilities, including comments on venues made by equestrian organisations during the consultation process, are contained in Volume 2.

From information provided by equestrian organisations, of the facilities illustrated at Map 1, there are eleven (11) most frequently used venues. These venues, together with the local government area they are situated in, and land ownership, are outlined below in alphabetical order:

- Albury Wodonga Equestrian Centre (Albury Council)(Council land. Managed by NFP organisation)
- Ayr Hill Equestrian Centre (Casey Council) (Private school land)
- Boneo Park Equestrian Centre (Mornington Peninsula Shire) (Private land)
- Elcho Park Equestrian Centre (Geelong Council) (Council land)
- Elmore Equestrian Centre (Bendigo Council) (Community owned and managed by NFP organisation)
- Peppercorn (Oaklands Junction) Equestrian Centre (Hume Council) (Private land)
- Pony Club of Victoria Equestrian Centre - Gladysdale (Yarra Ranges) (Private. Owned by PCEV)
- Tatura Park Equestrian Centre (Greater Shepparton Council) (Council land)
- Tonimbuk Equestrian Centre (Cardinia Council) (Private land)
- Victoria Park Equestrian Centre (Ballarat Council) (Council land)
- Werribee Park National Equestrian Centre (Werribee Council)(Crown land)

[Werribee Park National Equestrian Centre (WPNEC) is situated is on Crown Land under the auspices of Parks Victoria and is leased to WPNEC - an incorporated body with a Board of Management comprising 50% Equestrian Victoria and 50% Victorian Polo Association representation. Centre management staff are employed by the Board including a General Manager. Equestrian Victoria is based at WPNEC].

Map 1: Principal Venues for Equestrian Events in Victoria





5.1 Facility Hierarchy

Most sports can identify a hierarchy of facilities from local to regional to state/national standard. However, in equestrian sport, the different facility requirements in each discipline means that one venue may have a different hierarchy for different equestrian disciplines. Individual disciplines have sport specific competition requirements (refer Table 1) plus support infrastructure such as stables/ yards, truck/ float parking, powered sites, toilet/ shower block(s), car parking, wash bays, catering areas, administration areas etc.

Table 1: General competition area requirements of equestrian disciplines

DISCIPLINE	GENERAL FACILITY REQUIREMENTS
Dressage	Multiple good quality arenas 60m x 20m plus 10m safety zone (6 sand arenas preferred) Indoor arena for high level events
Show jumping	2 x jumping arenas with smooth flat surface (min 4,000m ²) Indoor arena for high level events
Eventing	Land area for 6.2 kilometre cross country course Show jumping arena(s) Area for multiple grass/ sand dressage arenas (60m x 20m) Indoor arena for high level events
Show horse	Flat surface. 150m x 150m
Reining	Competition sand arena min 60m x 25m (80m x 40m for major competitions plus warm up arena 50m x 25m) Indoor arena for high level events
Cutting	Earth or sand arena 45m - 80m long x 24m - 36m wide, plus area capable of holding cattle.
Western Pleasure	Flat surface arena approx 60m-90m long x 30m-45m wide
Carriage Driving	Area for up to 22km for carriage driving
Vaulting	Soft surface area min 18m diameter plus safety zone. Min 2 warm up arenas.
Campdrafting	Flat surface and cattle yards. Arena size 27.4m long (plus 6m taper on front of yard and 6m opening) x 13.7m wide
Polocrosse	146.5m x 55m flat grassed area
Polo	329m x 164m (includes runoff) flat well groomed turf

Like sports/ activities such as gymnastics, squash, tennis and dance, there is a high level of private sector involvement in equestrian facility provision. Some of these private facilities currently stage high-level events (or may do so in the future).

The implications of different competition requirements of individual equestrian disciplines and private sector involvement in provision are that:

- A traditional hierarchy of facility provision does not suit equestrian sport, and
- While private sector facilities play an important role in the delivery of participation opportunities, their long-term continuation cannot be guaranteed. Moreover it is unlikely that government funding would be provided to upgrade/extend private facilities.

5.2 Future Provision

The privately owned Boneo Park Equestrian Centre is planning to develop a 3 star cross country course and covered 1,000 seat spectator arena in the near future to supplement the existing array of facilities at this venue.

The Pony Club Association of Victoria (PCAV) has recently acquired its own venue at Gladysdale known as the Pony Club Victoria Equestrian Centre (PCVEC). It will host future PCAV events and will also be capable of staging EA events. The PCAV plans to progressively upgrade infrastructure at the venue including cross country course, power and amenities. The facility will be capable of servicing the Yarra Ranges, Casey and Cardinia Council areas and beyond.



Elmore Equestrian Park (part of Elmore Events Centre) also plans to progressively upgrade its facility in future years including additional stables, shade, possible show jumping arena, and cross country course.

Albury City Council has recently allocated funding to assist in the preparation of a master plan for the Albury Wodonga Equestrian Centre to enable a strategic approach to future improvements at the venue.

Macedon Ranges Shire Council had plans to develop a full Business Case for a (up to) \$40M Equine Event and Training Facility. Subsequently, at its meeting on 22nd February 2017, Council adopted a 10 point resolution which withdrew its support for any further work on business case development; and sought to "...remove the Equine Strategy 2012-2016 as a reference document from local, state and federal government policy development, including from the Macedon Ranges Planning Scheme and any policy statements that support the implementation of that strategy."



6. Stakeholder Consultation

The following consultation was undertaken for this study.

Meetings with EV/ Project Management Group

Several meetings were held with Equestrian Victoria throughout the course of the study. Meetings were also conducted with the Project Management Group which included a representative of Sport & Recreation Victoria.

Interviews with Key Equestrian Organisations

Meetings and discussions were conducted with a range of state and national equestrian organisations. These included Eventing Victoria, Pony Club Association of Victoria, Horse Riding Clubs Association of Victoria, Dressage Victoria, Victorian/ Australian Polo Federation, Show Horse Council of Victoria, Victoria Reining Horse Association, Riding for Disabled Victoria and Australia, Victorian Horse Council, Mounted Games Victoria, Australian Stock Horse Society, Paint Horse Association of Australia, Polocrosse Association of Australia (PAA), National Reining Horse Association, National Cutting Horse Association and Victorian Agricultural Society Ltd.

The purpose of these interviews was to discuss membership trends, facility usage and levels of satisfaction, essential facility needs, thoughts about Werribee Park National Equestrian Centre, and to seek their views on their Association's relationship with Equestrian Victoria.

Surveys of Equestrian Organisations

Surveys were sent to 52 equestrian organisations asking a range of questions relating to the activities they conduct, their membership trends, facility usage and levels of satisfaction, essential facility upgrades required, thoughts about the Werribee Park National Equestrian Centre and to seek their views on their Associations relationship with Equestrian Victoria. Ten responses were received.

Equestrian Victoria Members/ WPNEC Users Survey

A survey was circulated to Equestrian Victoria members and users of WPNEC via email, the Equestrian Victoria Facebook page, and Equestrian Victoria website homepage from September through to October 2016. A total of 1,396 surveys were completed which is a very high response rate for research of this nature and suggests a great deal of interest in WPNEC. Surveys provided information on:

- Profile of respondents
- Type and frequency of use of WPNEC
- Levels of satisfaction with WPNEC
- Improvements required at WPNEC
- Performance of Equestrian Victoria

A synopsis of key consultation outcomes is outlined below. A detailed summary of consultation responses is reported in **Volume 2**.

6.1 Equestrian Organisation Feedback

6.1.1 Participation Trends

From surveys of equestrian organisations for this study the following participation trends are evident:

- Most (not all) organisations have experienced participation growth in recent years
- Most growth is occurring in females and youth
- There is significant growth in inter-school competitions
- There has been an increase in demand for entry level competitions



6.1.2 Facility Provision

There are differing views among equestrian organisations about current and future facility provision and distribution, with opinions ranging from:

- Current supply and distribution of facilities is adequate
- Current supply is adequate but facility upgrades are required
- Centralised model - a central venue(s) for major events is needed
- Decentralised model - there is a need for a number of event facilities located around the state.

6.1.3 Werribee National Equestrian Centre

There was a consistent theme across equestrian organisations that Werribee Park National Equestrian Centre was “tired” and in need of major upgrade to meet current and future needs and expectations. The main issues raised were:

- Inadequate all-weather surfaces in outdoor and indoor arenas
- Poor drainage, especially in the stables area. Often waterlogged.
- Poor condition of toilets and showers
- Basic maintenance and cleanliness is inadequate
- Stables in only moderate condition and insufficient in number. Yards also need upgrading.
- Outdated seating in indoor arena
- Lack of covered walkways to, and within, stables
- Power throughout the site is inadequate and needs upgrading.
- Insufficient powered sites
- Poor signage of driveways/ parking areas
- No on-site accommodation
- Infrastructure for irrigation needs improving
- Major traffic issues when concurrent events are in place
- Lighting and PA system in indoor arena is inadequate
- Entrance, circulation and parking needs upgrading

6.1.4 Other Facilities

The main gaps in venue provision elsewhere in the state identified by equestrian organisations are in the east (dressage and reining) and west (dressage). There is a view that there is a need to upgrade and raise the standard of existing facilities generally. The main priorities identified were:

- More venues with 6 good quality sand arenas
- Better quality of sand arenas within existing venues
- Improved access to well-built cross country courses
- More venues with large number of stables (300+)
- Better disability access (paths, amenities, ramps, stables, parking)
- Improved shade
- Improved accommodation facilities



6.2 Feedback from EV Members/ Users of WPNEC

6.2.1 Survey Sample

Of the 1,396 surveys received, the vast majority (90.7%) were from females. At first glance it would appear that this would skew results because of the low response from males. However, approximately 79% of equestrian participants are females (refer section 4.1) so the female response rate is not massively disproportionate to their participation levels. Most respondents (28.3%) were aged 40-49 years, closely followed by those aged 50-59 years (27.4%). Respondents aged 30-39 years accounted for 15.5% of responses, and those aged 20-29 years accounted for 14.4%.

Most respondents were dressage riders 64.9%, followed by eventing (41.4%), showjumping (36.8%) and show horse (26.1%). This is not too dissimilar to participation levels in organised equestrian sport.⁸ Most respondents used WPNEC monthly (43.6%) or annually (37.3%). A further 10.6% used the venue less than annually. Only a small proportion used WPNEC on a weekly or fortnightly basis (0.6% and 2.1% respectively).

Detailed analysis of the EV member survey is contained in Volume 2.

6.2.2 Satisfaction with WPNEC

48% of survey respondents were dissatisfied or very dissatisfied with WPNEC, with a further 27% rating their satisfaction as neutral. The main areas of dissatisfaction were:

- General poor quality (48.9% of respondents)
- Poor horse accommodation ie stables/ yards (41.9%)
- Poor competition facilities (36.7%)
- Inadequate drainage (30.1%)
- Fees and cost of use (28.6%)
- Poor toilets/ shower amenities (26.0%)
- Safety for horses and/ or people (10.5%)

Males (50.9%) were much more likely to indicate dissatisfaction with competition facilities compared to females (34.6%). Conversely, females were almost twice as likely (27.1%) to cite dissatisfaction with toilet/ shower amenities compared to males (16.4%). People over 60 years of age were much less likely to identify toilet/ shower amenities as a reason for dissatisfaction (9.1%) compared to all age groups combined (26.0%). Younger people under 20 years of age were almost twice as likely (60%) to cite dissatisfaction with competition facilities compared to all age groups (36.7%) and had much higher levels of dissatisfaction with parking/ roads than all other groups.

Overwhelmingly, EV members and users of WPNEC would like to see the venue upgraded to support major events. 87% of the 1,396 survey responses received for this study supported the proposition that WPNEC be upgraded to accommodate major events in all equestrian disciplines with only 5% disagreeing. Members and WPNEC users identified the main improvements required as:

- Upgrade stables/ yards
- Improve shower and toilet areas (cleaner and increased quantity)
- Improve competition surfaces
- Drainage of competition surfaces
- Improve drainage of yards/work areas
- Improve surfaces on show jumping sand arena
- General maintenance

⁸ Survey participants could be engaged in more than one category.



6.2.3 Management and Governance Issues

The survey asked respondents to rate the performance of Equestrian Victoria in terms of:

- Overall performance
- Providing service to members
- Running events
- Management of WPNEC
- Acting as the peak body representing equestrian sports in Victoria

81% of respondents rated EV's performance in running events as very good, good or satisfactory while the overall performance of EV was rated as very good, good or satisfactory by 69.1% of respondents. About two thirds of respondents rated EV's provision of services to members and performance as the peak body representing equestrian sports in Victoria as very good, good or satisfactory with about one third rating it as poor or very poor.

The management of WPNEC was by far the poorest ranked of Equestrian Victoria performance with 45.5% of respondents rating it as poor or very poor, and 48.3% rating it as very good, good or satisfactory.⁹ The main themes identified by respondents were:

1) Poor Maintenance

Respondents identified poor maintenance of WPNEC especially evident for toilets and event grounds. Poor maintenance focused on the lack of preparation of the venue prior to and during events and the level of care taken by maintenance staff. While acknowledging that EV do not manage the facility directly, the members' perception is that EV are responsible for the management and operation of the facility.

2) Poor Standard of Facilities

The standard of facilities provided at Werribee was also a concern. It was believed by respondents that the facilities were run down and out of date. It was also a theme that the facilities were not to the standard of a State/ National Equestrian Centre.

3) Management/ Customer Service

This theme emerged with more generalised comments relating to the overall management of Centre. A concern was expressed about the inconsistent level of customer service including, lack of information, booking cancellations and poor management practices.

4) Level of Fees and Charges

A number of survey respondents indicated that the cost to hire the Centre was high particularly given the decreasing quality of the facilities provided. A number of respondents felt that management were not reinvesting fees into areas requiring upgrading.

⁹ It should be noted that the final approved EV member/ WPNEC user survey did not explain that WPNEC is managed by a separate entity comprising EV and Victorian Polo Federation.



7. Strategic Direction and Recommendations

This section of the report consolidates the findings from the research and consultation to provide a framework for the State Facility Plan.

The strategic direction is predicated on the upgrading of WPNEC as the premier 'state level facility' to cater for the major disciplines of dressage, show jumping, eventing (and other disciplines excluding stock handling) supported by a range of other venues strategically located across the state that are capable of catering for competitions from local to high level across a range of equestrian sports. Due to the nature of equestrian sport and the large number of disciplines, it is difficult for any single facility to satisfy the high level needs of all disciplines. Therefore, the support facilities throughout the state may specialise in one or more of the equestrian disciplines.

In order to avoid duplication, the network of supporting venues needs to recognise the role that private facilities play in the delivery of facilities. This is a challenge as the future of these facilities cannot be guaranteed and the Plan will need to be regularly updated.

The study findings indicate Equestrian Victoria is at a significant cross road in its development and this is directly linked to its dual role as the advocate for equestrian sports and the role it plays in governance, management and operation of the Werribee Park National Equestrian Centre. The management arrangements at WPNEC should be reviewed to enable EV to focus on its core role as a peak body and advocate for equestrian sport.

The recommended strategies are presented under the following priority areas:

1. State Equestrian Centre
2. Redevelopment of Werribee Park National Equestrian Centre
3. Future Facility Distribution and Provision
4. WPNEC Management and Governance
5. Communication

Recommendations are classified as:

- Immediate (within next 12 months)
- Short term (1-3 years)
- Medium term (4-6 years)
- Long term (7-10 years)

In implementing the recommendations of the State Facility Plan, Equestrian Victoria will need to seek support from local/ state/ federal government agencies.



Table 2: Implementation Plan 2017 to 2027

PRIORITY ITEM	STRATEGY	RECOMMENDED ACTION/ DETAILS	TIMELINE
1.State Equestrian Centre	<p>1.1 Ensure the ongoing provision of a premier facility for equestrian sport in order to position equestrian sports in Victoria to bid for and conduct state, national and/ or international events.</p> <p>[While WPNEC has historically been regarded as the state facility for equestrian sport in Victoria, the current condition of the centre is not in keeping with the standard required of a State level facility.]</p>	<ol style="list-style-type: none"> 1. Retain and upgrade Werribee Park National Equestrian Centre as the State Centre for equestrian sport in Victoria (excluding racing, rodeo and stock handling disciplines). 2. Liaise with Sport & Recreation Victoria to emphasise the importance of, and seek funding for, the preparation of a master plan for WPNEC (refer Strategy 2 below) 	Immediate
2.Redevlopment of Werribee Park National Equestrian Centre	<p>2.1 In line with retaining WPNEC as the state equestrian centre prepare a master plan for the full redevelopment of the facility.</p> <p>2.2 The Master Plan should:</p> <ul style="list-style-type: none"> • Confirm key development elements • Identify capital cost estimates • Confirm staging priorities • Identify a funding strategy 	<p>The Master Plan for upgrading WPNEC should incorporate the following elements:</p> <ul style="list-style-type: none"> • Outdoor Arenas <ul style="list-style-type: none"> ○ Replace the 5 existing outdoor dressage arenas with international standard all-weather surface ○ Consider converting outdoor arenas into a single large arena ○ Improve drainage • Stables/ Yards <ul style="list-style-type: none"> ○ Improve drainage ○ Install covered walkways between stables ○ Additional stables to provide a min of 300 in total ○ Convert stable walkways and connecting paths to hard surface ○ Ensure yards are appropriate height ○ Install bulk bedding storage area ○ Consider establishing yards (80+) and adjacent truck parking off Main Dve if this can be done without interfering with the cross country course • Toilet/ Shower Amenities <ul style="list-style-type: none"> ○ Replace existing amenities with contemporary facilities ○ Install additional amenities eg near stables ○ Include additional gender neutral amenities and disabled access amenities ○ Consider installing laundry facility and central kitchen • Indoor Arenas <ul style="list-style-type: none"> ○ Replace indoor arenas with new facility incorporating good ventilation, contemporary seating, lighting and PA system 	Immediate



PRIORITY ITEM	STRATEGY	RECOMMENDED ACTION/ DETAILS	TIMELINE
Redevelopment of Werribee Park National Equestrian Centre (Cont'd)		<ul style="list-style-type: none"> • Disability Access <ul style="list-style-type: none"> ○ Improve access for riders with a disability (eg indoor arena, outdoor disability mounting ramp, internal pathways) • Services <ul style="list-style-type: none"> ○ Improve water capture and storage for irrigation to reduce \$60k per annum water bill ○ Consider expanding dam beside existing indoor arena ○ Ensure adequate provision of water to all main usage areas ○ Upgrade power throughout the site and install additional powered sites • Wash bays <ul style="list-style-type: none"> ○ Install additional wash bays • Signage <ul style="list-style-type: none"> ○ Improve numbering and signage of powered sites ○ Improve internal signage • Accommodation <ul style="list-style-type: none"> ○ Consider some on-site accommodation (eg cabins) to service officials/ visitors • Road Access <ul style="list-style-type: none"> ○ Upgrade main entry ○ Seal internal driveways ○ Seal access to parking and camping areas ○ Examine opportunities to reduce pressure on main entry during events 	
	2.3 Utilise the master plan to maximise opportunities for external funding of capital upgrades, maximise operational viability, and position WPNEC to bid for and host a range of state, national and international events.	Seek external funding for the upgrading of WPNEC in accordance with the endorsed Master Plan.	Short to Medium term
	2.4 Respond to immediate concerns of EV members and users of WPNEC by addressing maintenance items.	Implement a revised maintenance regime paying particular attention to: <ul style="list-style-type: none"> • Cleaning of toilets/ showers • Cleaning and sanitising of stables/ yards • Painting • Pest control 	Immediate



PRIORITY ITEM	STRATEGY	RECOMMENDED ACTION/ DETAILS	TIMELINE	
3.Future Facility Provision and Distribution	3.1 Address gaps in facility provision.	1. In association with Dressage Victoria, Victorian Reining Horse Association and their affiliated clubs in the region, liaise with Councils in Gippsland to establish or upgrade a venue capable of conducting regional competitions.	Medium term	
		2. In association with Dressage Victoria and their affiliated clubs in the region, liaise with Councils in Barwon South West region to establish or upgrade a venue capable of conducting regional competitions.	Short term	
		3. Investigate the suitability of the new PCAV venue at Gladysdale to service potential demand in the eastern growth region, in particular the LGA's of Yarra Ranges, Casey and Cardinia. If determined to be suitable, support the PCAV in their endeavours to seek Council support for upgrading the facility.	Medium term	
	3.2 Ensure each region has a venue(s) of an appropriate standard to conduct events in the high participation disciplines.	3.2 Ensure each region has a venue(s) of an appropriate standard to conduct events in the high participation disciplines.	1. For the disciplines with largest participation numbers (dressage, showjumping, eventing, show horse) identify a facility in each region (refer Map 1) that is capable of staging high level or high participation events and meets desired standards in terms of: <ul style="list-style-type: none"> • Number and quality of sand arenas (min 6) • Adequate no of stables/ yards • Adequate support facilities (amenities, event parking, power sites etc) 	Short term
			2. Focus on high use, publicly owned venues - Albury Wodonga Equestrian Centre, Elcho Park Equestrian Centre, Elmore Equestrian Centre, Tatura Park Equestrian Centre and Victoria Park Equestrian Centre.	Short term
			3. Liaise with associations and clubs in the four major disciplines to determine essential upgrading requirements at each identified facility.	Short term
			4. In conjunction with associations and local clubs, liaise with the appropriate local governments in each region to seek their support for upgrading facilities.	Short term
			5. Seek external funding to progressively upgrade these venues	Medium to Long Ongoing
			6. Ensure that upgrading of regional venues does not duplicate the upgrading of Werribee Park Equestrian Centre.	Medium to Long Ongoing
3.3 Ensure there is a suitable venue in the state for staging high level events in each of the smaller participation and stock handling disciplines.	3.3 Ensure there is a suitable venue in the state for staging high level events in each of the smaller participation and stock handling disciplines.	1. For each of the smaller participation disciplines, identify at least one venue in the state that is capable of meeting the requirements for high level events (this venue could be WPNEC).	Short term	
		2. Liaise with associations to identify upgrading requirements at each facility.	Short term	
		3. In conjunction with relevant associations, liaise with the local government in which the venue is located to seek their support for upgrading facilities.	Short term	
		4. Seek external funding to progressively upgrade these venues	Medium to Long term	



PRIORITY ITEM	STRATEGY	RECOMMENDED ACTION/ DETAILS	TIMELINE
4.WPNEC Management and Governance	4.1 Review the future management arrangements of WPNEC to enable EV to focus on its core business as a peak body and advocate for equestrian sport, and maximise the viability of the venue. [Equestrian Victoria currently has a dual role in the governance of the sport as well as being a 50% stakeholder in the management and operations of WPNEC in conjunction with Victorian Polo Association (50%).]	It is recommended that: <ol style="list-style-type: none"> EV identify opportunities to separate its role as an advocate for equestrian sport and the management of WPNEC in order to focus on its role as the State Body for equestrian sport advocating for the development and growth of the sport across the state. EV work with the State Government to identify alternative management options (in line with other state facilities) for the ongoing management and operation of WPNEC. This would not preclude EV members sitting on a management board for the facility, but would provide the opportunity for an organisation or state government agency, with the necessary skills and expertise to manage and operate the facility. 	Short term Short term
	4.2 Ensure that future tenure arrangements at WPNEC are reflective of any revision of ongoing management structure. [The lease of WPNEC with Parks Victoria is currently in over holding mode.]	It is recommended that: <ol style="list-style-type: none"> Parks Victoria be advised of the potential development of a master plan for WPNEC in collaboration with Sport & Recreation Victoria. The negotiations for the lease of WPNEC be deferred pending discussions with Sport & Recreation Victoria on a preferred management structure and the development of the master plan for the precinct. 	Immediate Short term
	4.3 Collaborate more formally with Wyndham City Council to maximise the economic benefits of equestrian events at WPNEC [The study has identified the economic benefit of the equestrian sport industry and there are substantial economic benefits to Wyndham City Council from events conducted throughout the year at WPNEC.]	It is recommended that EV liaise on a regular basis with Wyndham City Council in relation to: <ul style="list-style-type: none"> Promotion of events through their media outlets, Marketing Provision of in-kind and or funding support for events, Infrastructure improvements. 	Short term
5.Communication	5.1 Engage with EV members and stakeholders in implementing the State Facility Plan. [Communication with members and organisational leadership/ direction were identified by some EV members during the consultation process as issues that need to be addressed.]	It is recommended that EV develop a communication and engagement plan to ensure members are regularly informed and have the opportunity to provide input into the implementation of the State Facility Plan and other EV matters.	Ongoing



8. Warranties and Disclaimers

The information contained in this report is provided in good faith. While Otium Planning Group has applied their own experience to the task, they have relied upon information supplied to them by other persons and organisations.

We have not conducted an audit of the information provided by others but have accepted it in good faith. Some of the information may have been provided 'commercial in confidence' and as such these venues or sources of information are not specifically identified. Readers should be aware that the preparation of this report may have necessitated projections of the future that are inherently uncertain and that our opinion is based on the underlying representations, assumptions and projections detailed in this report.

There will be differences between projected and actual results, because events and circumstances frequently do not occur as expected and those differences may be material. We do not express an opinion as to whether actual results will approximate projected results, nor can we confirm, underwrite or guarantee the achievability of the projections as it is not possible to substantiate assumptions which are based on future events.

Accordingly, neither Otium Planning Group, nor any member or employee of Otium Planning Group, undertakes responsibility arising in any way whatsoever to any persons other than client in respect of this report, for any errors or omissions herein, arising through negligence or otherwise however caused.