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Gaming & Lotteries Industry

Labour Market Profile & Change Drivers Report June 2016

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CONTENTS

LIST OF EXHIBITS

GAMING AND LOTTERIES SUB-SECTOR

1. INTRODUCTION

The gambling and lotteries industry in South Africa is vibrant and exciting, while at the same time facing the challenge of a changing regulatory environment and the impact of reduced consumer spending during an economic downturn.

The industry is often associated with glamour, high rollers, opulent settings and the trappings of wealth. As a business, however, the margins are low, a large portion of the costs are fixed, regulatory compliance is stringent and profitability depends on volume.

South Africa has a mature market, and is expected to grow 5% compound annual increase in gross gambling revenue to R20.9 billion in 2017.[1] The industry in South Africa continues to contribute significant tax revenues to provincial and national government. It has furthermore created jobs and contributes to social and infrastructure spending in the areas in which it operates.

The outlook for the industry in South Africa remains positive, and the further rollout of limited payout machines (LPMs) and bingo machines and the possible introduction of online gambling will further contribute to an expected growth.[2]

[1] pwc. 2013. Betting on Africa: Gambling Outlook 2015-2019. 4th edition. www.pwc.co.za/gambling
[2] pwc. 2013. Betting on Africa: Gambling Outlook 2013-2017. 2nd edition. www.pwc.co.za/gambling

2. SCOPE OF INDUSTRY COVERAGE

The Gaming and Lotteries sub-sector in South Africa covers two Standard Industrial Classification (SIC) codes.[3]

Exhibit 1: Standard Industrial Classification (SIC) Codes

SIC CODE	DESCRIPTION
96419	Operation and management of Horse Racing Events and Clubs and Academies.
96494	Gambling, licensed Casinos & the National Lottery and but not limited to Bookmakers, Totalisators, Casinos, Bingo Operators.

Source: Standard Industrial Classification Codes (UNO)

The sub-sector consists of gambling, licensed casinos, the National Lottery, operation and management of horse racing events, clubs and academies, totalisators, bookmakers, limited pay-out machines (LPMs) and bingo operators.

CASINOS: Of all the gambling activities, casinos are the biggest creators of jobs. The National Gambling Act permits 40 licenced casinos in South Africa. A total of 38 are currently licenced, of which 37 are in operation. Tsogo Sun Group, Sun International and Peermont Global Group are the leading casino companies in South Africa, together accounting for 35 of the 38 licenced casinos. Casino gambling is concentrated in Gauteng, KwaZulu-Natal and the Western Cape provinces. Gauteng has seven casinos and KwaZulu-Natal and the Western Cape both have five, in each case the maximum permitted. No other province has more than four casinos.

Gauteng was the leading province in gross gambling revenues comprising 44.7% of the total. KwaZulu-Natal and the Western Cape contribute 18.2% and 16.1% respectively. These three provinces accounted for 79% of total gross gambling revenues for casinos.[4]

LIMITED PAYOUT MACHINES: Limited payout machines (LMPs) are monitored by the Central Electronic Monitoring System (CEMS) and are licenced to route operators who manage and operate LPMs in conjunction with site operators. The rollout of LPMs has been slower than expected. Consequently, the number of machines in place represents only about 20% of those authorised or currently licenced.

NATIONAL LOTTERY: The national lottery was established in 2000 and by 2012 had generated R4.5 billion in Lotto and Powerball ticket in 2015 sales. Lotto is the more popular category, but Powerball with its high pay-outs has been the faster-growing in recent years. The National

[3] SIC codes are designed for the classification of establishments according to economic activity. It provides a standardised framework for the collection, tabulation, analysis and presentation of statistical data on establishments. This enables benchmarking across sectors within and across countries.

[4] National Gambling Board. 2015. Research Bulleting, August, Issue 5. Pretoria.

Lottery is operated on behalf of the government by an appointed licensee for a term of seven years.

The national lottery is different from other gambling categories in that it is operated with the goal of generating funds for charitable, sports, arts and other worthy causes rather than as an entity focused on maximising returns for shareholders, employees and other stakeholders. A percentage of revenue, agreed between the operator and the government as part of the licence terms, is paid to the National Lottery Distribution Trust Fund (NLDTF).

Contributions are made from revenue to the NLDTF, which allocates funding to arts, culture, national heritage, charities, child welfare, and religious, medical, sports and recreation entities. Eligible organisations seeking funding must apply to the NLDTF. As the national lottery is operated by the government with the specific purpose of distributing funds to needy causes, a significant portion of gross revenue (73.0% in 2012) goes to the NLDTF.[5]

SPORTS BETTING: Sports betting is a fast-growing category in gross gambling revenues, expected to rise from 27.9 billion to R43 billion between 2015 and 2030. The proliferation of sports-betting shops and online wagering is driving this component of the market. Live betting on ABSA Premiership matches is proving to be a great attraction as well. It is expected that sports betting will surpass horseracing within the next five years.[6]

HORSE RACING: Horse racing is a self-regulated activity under the auspices of the South Africa Horse Racing Authority (HRA). It is responsible for licensing horse owners, trainers and monitor all race meetings. Phumelela and Gold Circle (operating in Western Cape and KZN) own the tracks and conduct race meetings. They own a large share on betting on horses through their jointly owned tote betting operator.

In general, horse racing has been facing competition from a wide and growing variety of other forms of entertainment and wagering. The consequence of this is that there are fewer industry participants and less interest from younger members of society.

[5] National Lotteries Commission. 2015. Annual Report 2014-2015. NLC: Pretoria.

[6] National Gambling Board. 2015. Research Bulleting, August, Issue 5. Pretoria.

3. KEY INDUSTRY ROLE-PLAYERS

The key industry role-players include, but are not limited to:

ORGANISED BUSINESS	
• Casino Association of South Africa (CASA) • Limited Pay-out Machine Association of South Africa (LPMASA) • Jockey Association of South Africa • Horse Racing Association of South Africa • National Horse Racing Authority • Horse racing, associations, clubs and academies • Bookmakers, Totalisators, Bingo Operators • Traditional Horse Riding Association • Thoroughbred Horse Racing Trust • National Gambling Board (NGB) of South Africa • National Gambling Policy Council • Gambling Review Commission (GRC) • National Lotteries Commission	• South African Responsible Gambling Foundation • Sun International • Tsogo Sun • Peermont Group • Phumelela Gaming and Leisure Limited • Gold Circle • Ithuba • Department of Trade and Industry • National Lotteries Commission • National Lotteries Board
GOVERNMENTAL DEPARTMENTS	
• The Department of Trade and Industry • The National Gambling Board and Provincial Gambling Boards	• The Department of Environmental Affairs and Tourism (DEAT)

Source: Gaming Chamber Guide

4. KEY LAWS, STRATEGIES AND PLANS

The following key documents govern the industry:

- National Gambling Policy
- Gambling Policy Review Report
- National Gambling Act 07 of 2004
- National Responsible Gambling Programme (NRGP)
- National Gambling Board Annual Report
- National Lotteries Commission Annual Report
- Lotteries Act 32 of 2013
- Gambling Standards Association's White Paper Report on Online Gambling (September 2012)
- National Lotteries Board Strategic Plan (2014-2019)

5. ECONOMIC PERFORMANCE

South Africa has by far the largest overall gambling market in Africa. In South Africa, gross casino gambling revenues totalled R17.2 billion in 2014 compared with R497 million in Nigeria and R218 million in Kenya.[7]

The gambling industry makes a significant contribution to the economy in terms of tax paid and job creation. A total of over R2 billion was collected in taxes and levies from gambling in 2013.[8]

The outlook for the industry is as follows:

Exhibit 2: Gambling and National Lottery turnover in SA (R millions)

	2015	2016	2017	2018	2019
Casino gambling	253 500	256 000	261 000	270 000	281 000
% change	*0.4*	*1.0*	*2.0*	*3.4*	*4.1*
Limited payout machines	28 700	32 400	35 500	37 900	39 900
% change	*17.0*	*12.9*	*9.6*	*6.8*	*5.3*
Bingo	17 780	22 225	25 550	28 750	31 500
% change	*35.0*	*25.0*	*15.0*	*12.5*	*9.6*
Sports betting	29 750	31 800	35 000	42 000	43 000
% change	*0.5*	*6.9*	*10.1*	*20.0*	*2.4*
Total gambling	**329 730**	**342 425**	**357 050**	**378 650**	**395 400**
% change	*3.1*	*3.9*	*4.3*	*6.0*	*4.4*
National Lottery	4 559	4 550	4 565	4 590	4 620
% change	*-0.2*	*0.3*	*0.5*	*0.7*	*0.8*

Source: National Gambling Board of South Africa, National Lottery Board of South Africa, PWC

Gambling turnover as a whole will rise from R329.7 billion in 2015 to a projected R395.4 billion in 2019. This means that the sector is expected to show resilient performance.

The National Lottery will remain a slow-growing category with turnover rising by only R61 million on a compound annual basis.

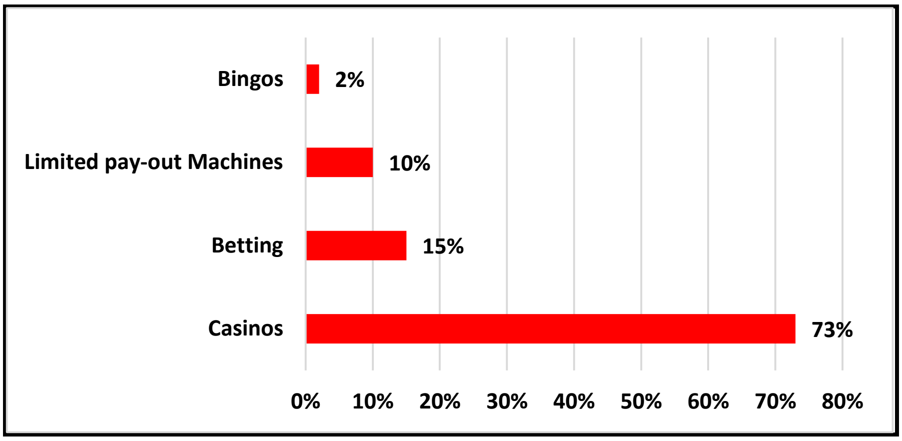
Bingo is the only category where we expect larger aggregate growth in turnover over the next five years. The projected R31.5 billion cumulative increase in bingo turnover over the next five years from R17 780 million in 2015.[9]

However, one should not lose sight of the fact that interest rate increases, higher inflation and slow job creation in South Africa will no doubt affect the disposable income of the consumer.

[7] PWC. 2013. Betting on Africa: Gambling Outlook 2013-2017. 2nd edition. www.pwc.co.za/gambling
[8] Ibid.
[9] Ibid.

Casinos dominate in terms of taxes collected. This is followed by betting (horses and bookmakers), limited bingo terminals, and electronic bingo terminals lagging behind.

Exhibit 3: Contribution to the Gaming Industry

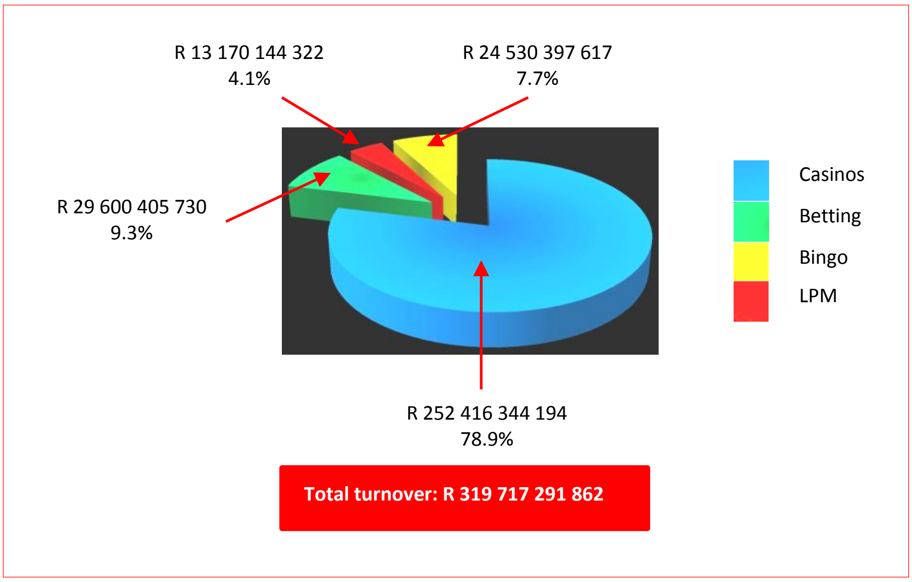


Source: National Gambling Board 2013/14 Statistics

Gauteng is the dominant province in terms of taxes collected, followed by KZN and Western Cape respectively.

Industry turnover for 2015:

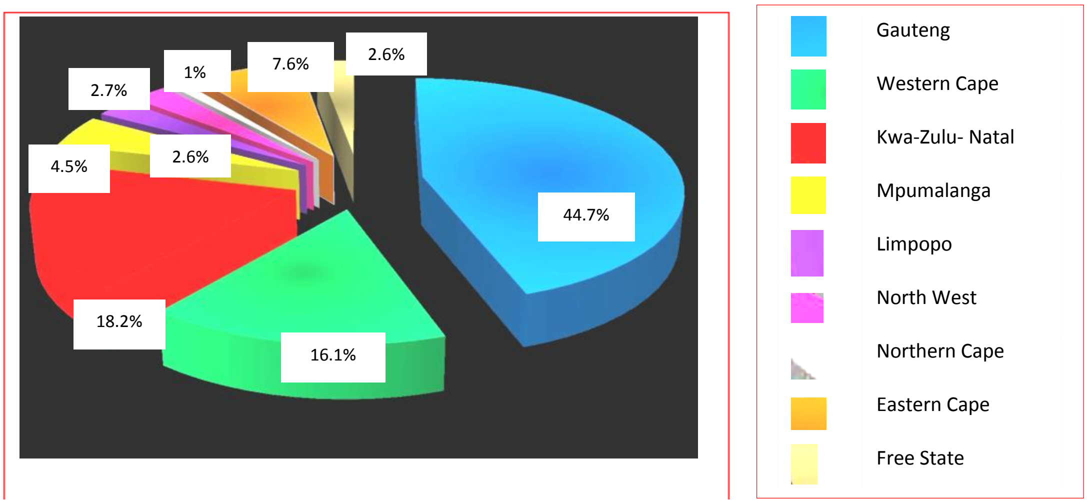
Exhibit 4:Gambling turnover (R millions)



Source: National Gambling Board (2015)

Provincial turnover for 2015:

Exhibit 5: Provincial Gambling turnover (R millions)

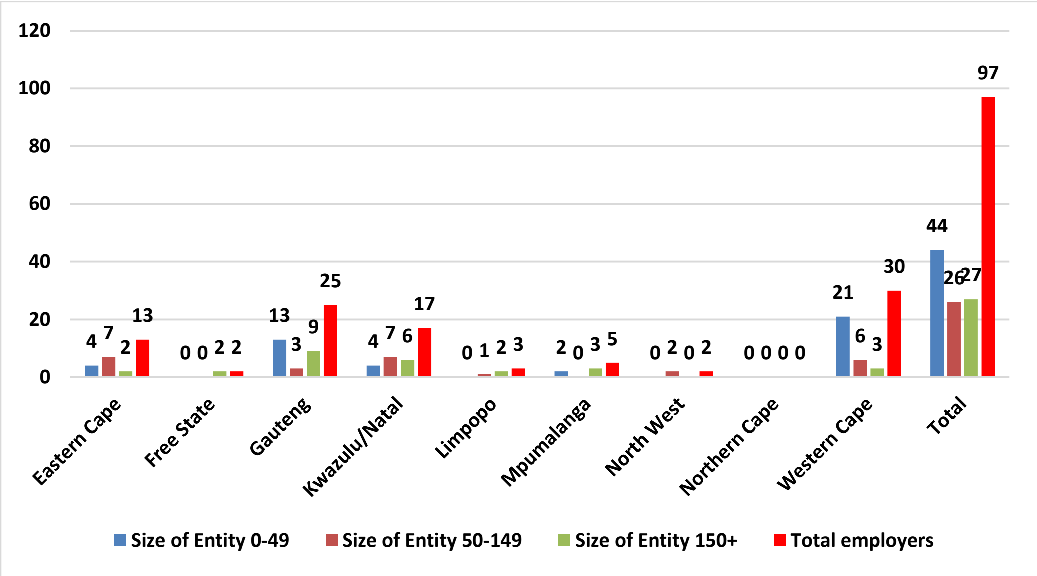


Source: National Gambling Board (2015)

6. LABOUR MARKET PROFILE

Employer Profile: The employer profile by firm size and provincial spread for gaming ad lotteries is as follows:

Exhibit 6: Employer Profile by Firm Size and Provincial Spread (2016)



Source: CATHSSETA (2016)

The number of skills levy-paying firms is a mere 97. This is a highly regulated sector.

Employee Profile: The employee profile for gaming and lotteries by firm size and province is as follows:

Exhibit 7: Employee Profile by Firm Size and Province (2016)

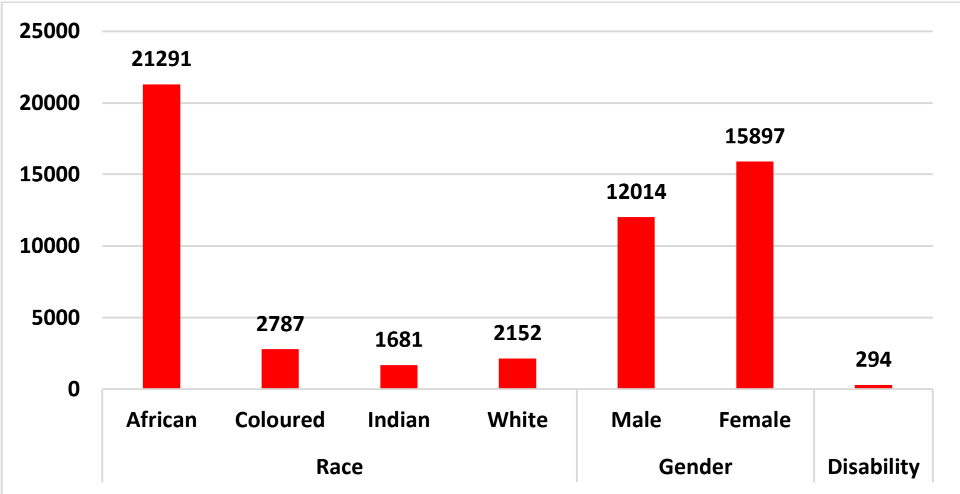
Provinces	Size of Entity 0-49	50-149	150+	Total number of employees
Eastern Cape	134	572	465	1171
Free State	0	0	342	342
Gauteng	336	192	15295	15823
Kwazulu-Natal	132	713	6429	7274
Limpopo	0	54	397	451
Mpumalanga	39	0	764	803
North West	0	200	0	200
Northern Cape	0	0	0	0
Western Cape	359	560	1086	2005
Grand Total	**1000**	**2291**	**24778**	**28069**

Source: CATHSSETA (2016)

The majority of levy-paying firms are in Gauteng and KZN.

The employee profile by race, gender, and disability is as follows:

Exhibit 8: Number of Employees by Race, Gender and Disability



Source: CATHSSETA (2016)

Interestingly, there are more females than males in the sub-sector. The sector has the potential to absorb more people with disabilities.

The employee profile by occupational level is as follows:

Exhibit 9: Employees by Occupational Level

OCCUPATIONAL LEVEL	TOTAL
Managers	**2881**
Professionals	**1387**
Technicians & Associate Professionals	**2595**
Service & Sales Workers	**5259**
Skilled Craft & Related Trades Workers	**399**
Clerical Support Workers	**12966**
Plant, Machine Operators & Assemblers	**193**
Elementary Occupations	**2231**
Total	**27911**

Source: CATHSSETA (2016)

The majority of the employees in this sub-sector are in clerical support. They make up 46% of the labour force in this sector.
Services and sales workers constitute 19% of the employed in this sub-sector and is the second highest. This is in keeping with this industry which involves a lot of service tasks.

The education levels of employees are as follows:

Exhibit 10: Employee Education Level by Sub-Sector

Education level	Percentage
ABET/AET	1.8%
NQF 1,2	8.2%
NQF 3,4,5,6	84.4%
NQF 7,8,9,10	5.7%
Total	**100**

Source: CATHSSETA (2016)

The sector is relatively well-educated with the majority between NQF bands 3 to 6.

7. MAJOR CHANGE DRIVERS

Instead of discussing a multiplicity of change drivers, we have identified major change drivers with direct implications for skills development. These should be read in conjunction with national strategies and plans for gaming and lotteries.

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
1. Problem Gambling is a Challenge		
▪ Problem gambling remains a challenge in SA. There is a need to deal effectively with illegal gambling. ▪ The National Gambling Act of 2004 requires that minors and other vulnerable persons are protected from the negative effects of gambling and that a broad-based public education programme about the risks and socio-economic impact of gambling is provided. ▪ South Africa's National Responsible Gambling Programme (NRGP) is the global pacesetter for effectively promoting a responsible attitude to gambling despite the fact that other countries, including Britain, New Zealand and Canada, spend more on their programmes. The NRGP is acknowledged internationally to be exceptionally cost-effective and among the most comprehensive in the world.	▪ Implement education and awareness programmes for responsible gambling. ▪ Revamp national Responsibility Gambling Programme (NRGP). ▪ Since 2008 the NRGP has been developing and piloting a programme called *Taking Risks Wisely (TRW*), as part of the life skills orientation syllabus in schools. It has been very well received by the participating teachers and learners at five schools where it is applicable, thus far. ▪ Programme oversees the following initiatives: o Treatment and counselling; o Training for regulators and industry employees; o Research; o Public awareness and prevention; o National Schools Programme (a life skills programme for schools, Grades 7 – 12). ▪ Ensuring that children are taught about gambling as part of the life skills curriculum that addresses gambling issues.	▪ Support the NRGP programme.
2. Need for Research and Impact Assessments		
Industry requires constant research to support evidenced-based policy-making and planning.	▪ Research is required in the following: o impact assessments, especially with respect to problem gambling; understanding of excessive and compulsive	▪ Open funding windows for research.

<table>
<tr><th>Skills-Related Change Drivers</th><th>Implications for Skills Development</th><th>Implications for CATHSSETA</th></tr>
<tr><td></td><td>gambling and associated problems; licensing; zoning; consumer behaviour; programme development; market research; and law enforcement.
○ The uncertainty of online gambling in terms of size, scope, legal basis, current and future impacts.</td><td></td></tr>
<tr><td colspan="3">3. Rise of Online Gambling</td></tr>
<tr><td>▪ Capacity to regulate online gambling is inadequate.
▪ Even though online gambling is not yet legalised in South Africa, online gambling is happening across the world, whether lawmakers like it or not.
▪ Being always online has changed the way we do everything, including how people gamble.
▪ Gamblers need to have safe access to online gambling.
▪ Despite the fact that this is currently illegal in South Africa, pressure from new gambling modes is a concern, as the gambling industry approaches mature status.</td><td>▪ Training needs include:
○ IT technology;
○ Legislation and creating a regulatory framework;
○ Policy-making and regulations; and
○ Monitoring and evaluation.
▪ Millennials embrace the introduction of technology, especially when it entails convenience, customised orders and loyalty programmes linked to their gameplay. Sophisticated technologies can heighten the customer experience, increase per-guest revenue and earn the ultimate gift from a guest – loyalty.
▪ Require skills to identify and be able to combat illegal online gambling, and also come up with interesting offerings for the industry, as the industry approaches mature status.</td><td>▪ Support training initiatives in online gambling.</td></tr>
<tr><td colspan="3">4. Skills Needs of Regulators</td></tr>
<tr><td>▪ Skills development for regulators in the gambling environment is critical for effective and efficient functioning.
▪ Moreover, skills training should align to the Human Resource Development Strategy for South Africa, the National Skills Development Strategy and the Skills development legislation.
▪ A collaborative approach should take into consideration key local and international training and</td><td>▪ Regulators require skills training in:
○ policy and strategy development, monitoring coherence and policy co-ordination;
○ conducting research;
○ Developing and implementing education and awareness programmes;
○ Administrative, managerial and technical training;
○ Risk management;
○ Knowledge management;
○ IT;</td><td>▪ Accommodate the skills development needs of regulators in the industry.
▪ Develop learnerships for regulators.</td></tr>
</table>

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
education for stakeholders to drive the skills development agenda in the gambling environment. ▪ Technological advancements on existing forms of gambling and new forms of gambling have emerged and have created challenges for policy-makers and regulators.	○ Stakeholder management and communication; and ○ Public relations.	
5. Convergence of Gambling, Hospitality and Tourism		
▪ The South African gambling market has evolved over the past ten years into a more complete lifestyle experience destination, with hotel, entertainment, retail and fine dining becoming increasingly important revenue drivers. ▪ The mature and stable casino environment heightens the need to offer fully fledged lifestyle experiences to the wider market in order to increase non-gambling revenue. ▪ The advancement in the convergence of retail, restaurant and gambling sectors is clear. Over the last two years alone, South Africa has seen the approval of a R3 billion Sun International casino destination in Menlyn, Pretoria as well as the significant expansion of the Suncoast Casino and Entertainment World in Durban to include a retail mall, expanded restaurant area, rooftop swimming pools, multi-purpose venue and expansions of the casino floor.	▪ The demand for wider guest-centric services, especially in the food and beverage sector, is changing the way that casinos approach their branding. In the past, casino food service was more about large buffets or free meals for VIP gamblers. Today, however, menu innovation and healthy meal options are key to casino restaurants, whose offering now ranges from quality fine dining to quick and convenient fast foods. ▪ The overall goal is to keep patrons entertained for as long as possible, whether it be on or off the gambling floor, and diverse restaurant choices and other entertainment offerings have been a major reason for successfully accomplishing this. ▪ Furthermore, guest-centric technologies can change the way restaurants operate and play an important role in maximising non-gambling revenue. Restaurants can introduce mobile apps and ordering kiosks and they can make tablets available to place orders and attract patrons from the gambling floor. ▪ The following guest-centric solutions can assist in achieving this: ○ Re-engineer business processes and initiatives to improve process efficiencies; ○ Improve resource productivity; ○ Introduce organisation-wide technological improvements; and ○ Improve distribution to reach areas that were previously untapped.	▪ There should be convergence in the development and delivery of qualifications in gaming, hospitality and tourism. ▪ There should be revision of career pathways. ▪ These changes have resulted in a demand for graduates who are not only competent in their fields of study but also entrepreneurial in their thinking and demonstrating technological savvy.

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
	▪ The profile of skills now required by businesses, taking into consideration the progression of technology, includes those of web development and online marketing.	
6. Speed up Transformation		
▪ The Casino Survey of 2013 and reports of Phumelela and Gold Circle indicate the industry has achieved a Level 2 Broad Based Black Economic Empowerment (BB-BEE) status. ▪ Representation has not been achieved for previously disadvantages persons and females. ▪ There also needs to be further progress on employment in senior management positions.	▪ Transformation relating to ownership and management control by previously disadvantaged persons is a matter of concern. ▪ The matter needs a concerted action by the owners of casinos and adherence to government priorities on transformation. ▪ There is a need for a management development programmes, succession planning, coaching and mentoring in companies.	▪ Support management development programmes, succession planning, coaching and mentoring in companies.
7. Growth of Electronic Bingo Terminals (EBT)		
▪ There is growth in demand for *Electronic Bingo Terminals (EBT).* Casinos are facing growing competition from legal electronic bingo terminals (these operate as stand-alone sites and are sometimes referred to as mini-casinos), limited payout machines (LPMs), and sports betting shops that are proliferating in the catchment area of casinos.	▪ Skills need to develop in order to remain current within the industry, and also to be able to respond to changing market conditions and international trends.	▪ Develop programmes for EBTs and LPMs.
8. Modernise Horse-Racing		
▪ Need for *horseracing industry to modernise* to appeal to younger generation. This may require modernising existing venues/race formats and development of new business models more closely integrated with other forms of gambling. ▪ Support for *Traditional Horse Racing*[10]	▪ Need for industry to embrace online technology more holistically. ▪ Will require information and knowledge on how to reignite the horse-racing market. ▪ Need for training in: ○ channel marketing; ○ social media;	▪ Need for training in: ○ channel marketing; ○ social media; ○ advertising; and ○ communication.

[10] THR is a cultural and traditional practice or sport, with distinctive training methods, riding styles, rules of the sport and horse care methods. It has been developed over the past one and a half centuries by the people of the Eastern Cape.

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
	○ advertising; and ○ communication.	

8. OCCUPATIONS WITH MOST JOBS

The occupations with the most number of jobs in the sub-sector gives an indication of where job opportunities are likely to be found. These occupations have higher job absorptive capacity than others.

It should be noted that occupations with the most jobs does not necessarily indicate a skills shortage[11] or occupations in high demand[12] or pivotal skills[13]. It simply indicates where are the jobs in the sub-sector.

There are 24 788 employees in the sub-sector, covering 329 different occupations. The mean is therefore 75. The occupations below are above the mean:

NO	OCCUPATION	EMPLOYED
1	Gaming Worker	6 193
2	Betting Agency Counter Clerk	2 540
3	Bookmaker's Clerk	1 326
4	Office Cashier	1 138
5	Security Officer	762
6	Gaming Manager	643
7	Vending Machine Attendant	598
8	Accounts Clerk	472
9	Betting Agency Manager	465
10	Commercial Cleaner	415
11	Telephone Betting Clerk	406
12	General Clerk	394
13	Chef	366
14	Handyperson	354
15	Caretaker/Cleaner	267
16	Gardener	247
17	Café (Licensed) or Restaurant Manager	238
18	Marketing Coordinator	215
19	Computer Network and Systems Engineer	196
20	Receptionist	259
21	Bar Attendant	192
22	Commercial Housekeeper	191
23	Hotel Service Manager	170
24	Waiter	164
25	Security Services Manager	139
26	Electronic Engineering Technician	138

[11] Scarce Skills refer to those occupations where there is a scarcity of qualified and experienced people, currently or anticipated in the future, either because skilled people are not available (absolute scarcity); or they are available but do not meet employment criteria (relative scarcity).

[12] Occupations showing the highest employment growth.

[13] PIVOTAL Programmes means professional, vocational, technical and academic learning programmes that result in occupational qualifications and may include a knowledge component that is normally delivered at a further education and training college or a university as well as a structured learning in an accredited training centre or an approved workplace.

NO	OCCUPATION	EMPLOYED
27	Electrical Engineering Technician	135
28	Checkout Operator	135
29	Gaming Operations Compliance Officer	133
30	Human Resources Clerk	128
31	Accountant (General)	126
32	Luggage Porter	122
33	Communication Coordinator	119
34	Corporate General Manager	119
35	Finance Manager	108
36	Delivery Driver	106
37	Agricultural Mobile Plant (Equipment) Operator	104
38	Child Care Worker	102
39	Computer Network Technician	100
40	Human Resource Advisor	100
41	Cook	92
42	Kitchenhand	90
43	Marketing Practitioner	90
44	Office Supervisor	83
45	Enquiry Clerk	82
46	Call or Contact Centre Agent	80
47	Office Manager	80
48	Secretary (General)	78
49	Director (Enterprise / Organisation)	76
50	Internal Auditor	75

9. SOME CAREER LADDERS

A career ladder illustrates a possible career path. In the gaming industry there are no fixed rules. Advancement may occur in almost any manner. In some situations, advancements may be achieved by entering a completely different career area than the one in which the employee is working in. Below are some common career ladders:

Casino Manager Pathway
General Manager
Casino Manager (Large Casino)
Casino Manager
Shift Boss

Table Games Manager Pathway
General Manager
Table Games Manager (Large Casino)
Table Games Manager
Shift Manager

Credit Manager Pathway
Credit Manager
Assistant Credit Manager
Credit Shift Manager
Credit Clerk

Pit Manager Pathway
Pit Manager or Shift Manager (large Casino)
Pit Manager or Shift Manager
Pit Clerk
Dealer

Executive Host Pathway
Relationship Manager
Executive Host
Host
Entry Level Employee

Security Manager Pathway
Security Surveillance Manager
Security Shift Manager
Security Supervisor
Security Official

Slots Manager Pathway	Dealer Pathway
Slots Manager	Manager
Assistant Slots Manager	Assistant Manager
Shift Manager	Dealer Supervisor
Slots Supervisor	Dealer Inspector
Slots Floor Person	Dealer

Career Pathways in Horse Racing

Racing Manager Pathway	Tote Manager Pathway
Racing Manager	Commercial Support Manager
Trainer	Outlet Support Manager
Assistant Trainer	Operations Manager
Jockey	Outlet Support Manager
Work Rider	Supervisor

Lottery Manager Pathway
Commercial Manager
Regional Manager
Territory Manager
Regional Sales Manager
Winners Services Manager