

Size and Scope of the

# QUEENSLAND RACING INDUSTRY

PREPARED BY IER | JANUARY 2022







# Contents

<b>KEY FINDINGS</b>	<b>04</b>
<b>INTRODUCTION</b>	<b>08</b>
<b>ECONOMIC IMPACTS</b>	<b>14</b>
<b>EMPLOYMENT AND SUPPLY</b>	<b>18</b>
<b>RACING'S PARTICIPANTS AND ANIMALS</b>	<b>26</b>
<b>THE TRAINING INDUSTRY</b>	<b>38</b>
<b>RACING CLUBS, ASSOCIATIONS AND AUTHORITIES</b>	<b>52</b>
<b>MAJOR EVENT IMPACTS</b>	<b>66</b>
<b>SOCIAL AND COMMUNITY ENGAGEMENT</b>	<b>70</b>
<b>REGIONAL SUMMARIES</b>	<b>80</b>
<b>APPENDIX</b>	<b>110</b>

## KEY FINDINGS

In 2020/21 the Queensland racing industry was responsible for **generating close to \$1.9 billion in value added contribution** to the Queensland economy – **48% of which directly benefits regional economies**

### DIRECT SPENDING IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Direct Expenditure <sup>1</sup>	\$1,191.5m	\$156.1m	\$205.0m	\$1,552.6m

### ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Value Added <sup>2</sup>	\$1,432.5m	\$186.1m	\$244.9m	\$1,863.5m
% of Industry Value Added	76.9%	10.0%	13.1%	
Total Household Income <sup>3</sup>	\$759.9m	\$98.2m	\$131.8m	\$989.9m
Total FTE Employment	10,459	1,352	1,770	13,581

In 2020/21, the Queensland racing industry generated total direct spending of \$1,552.6 million. This expenditure was responsible for creating a direct value added impact (in terms of wages, salaries and profits) of \$649.5 million. However, the flow-on effects linked to this expenditure increase the size of the industry's value added contribution to close to \$1.9 billion.

More than 48% of the total value added impact occurred in regional areas of Queensland, with the Gold Coast (9.7%), Sunshine Coast (5.6%) and Ipswich (5.2%) regions representing the largest regional areas of racing related economic activity.

The economic output generated by the Queensland racing industry was directly responsible for sustaining 6,475 full time equivalent (FTE) jobs across the state. When flow-on employment impacts are considered, the total FTE impact generated by the Queensland racing industry rose to 13,581 jobs. This total represents the employment sustained within the industry, as well as the employment that is sustained in supply industries who meet the demand created by racing industry activity.

<sup>1</sup> Direct expenditure is defined as expenditure associated with producing foals and pups (breeding & rearing), preparing racing horses and greyhounds (training), racing customer expenditure and expenditure by RQ and racing clubs on operating the industry. Direct expenditure is counted at the point at which it leaves the racing industry and reaches the broader economy.

<sup>2</sup> Value added contribution is defined as the value of sales less the value of inputs used in production, i.e. it is equal to the income (wages, salaries and profits) generated in production

<sup>3</sup> Household Income is defined as being wages and salaries (before tax) earned from employment generated by the racing industry





Of the **13,581 FTE jobs sustained** by the Queensland racing industry around **48% are the direct result of the racing industry activity** whilst the remainder support down-the-line industries that **produce and supply goods and services** for racing in Queensland

In 2020/21, close to 675,300 attendances were recorded at thoroughbred, harness and greyhound race meetings in Queensland. More than 73% of these attendances were made at regional racecourses, with the Gold Coast (14.1%), Sunshine Coast (10.7%), Ipswich (8.3%) and Townsville (7.7%) representing the largest regions.

Participants are the lifeblood of the racing industry. They provide the investment, time, skills and passion that underpins horse and greyhound racing in the state. In total, there are more than 43,000 individuals who participate in the Queensland racing industry. Many of these people enjoy gainful employment of their specific skillset where they may find limited opportunities otherwise - particularly in the breeding, training and racing related disciplines. Furthermore, many participants hold more than one role within the industry.

The industry is also supported by more than 8,200 people who volunteer their time and resources. For many of these people, local racing clubs and participants are an important part of their community and provide valuable opportunities to stay active and engage with their community.

There are close to **30 race meetings held in Queensland** every week providing live entertainment to **close to 675,300 attendees**

## AT A GLANCE

### RACING ACTIVITY

#### 128 Racing Clubs

<b>THOROUGHbred</b>	<b>117</b>
<b>HARNESS</b>	<b>5</b>
<b>GREYHOUND</b>	<b>6</b>

#### 1,387 TAB Race Meetings

<b>THOROUGHbred</b>	<b>452</b>
<b>HARNESS</b>	<b>298</b>
<b>GREYHOUND</b>	<b>637</b>

#### 216 Non-TAB Race Meetings

<b>THOROUGHbred</b>	<b>214</b>
<b>HARNESS</b>	<b>1</b>
<b>GREYHOUND</b>	<b>1</b>

#### 14,085 Total Races

<b>THOROUGHbred</b>	<b>4,671</b>
<b>HARNESS</b>	<b>2,744</b>
<b>GREYHOUND</b>	<b>6,670</b>

#### 675,288 Attendances

<b>THOROUGHbred</b>	<b>554,946</b>
<b>HARNESS</b>	<b>61,839</b>
<b>GREYHOUND</b>	<b>58,503</b>

#### 3,549 Live Foals/ Pups Bred

<b>THOROUGHbred</b>	<b>1,774</b>
<b>HARNESS</b>	<b>291</b>
<b>GREYHOUND</b>	<b>1,484</b>

#### 13,017 Horses and Greyhounds in Training

<b>THOROUGHbred</b>	<b>8,211</b>
<b>HARNESS</b>	<b>1,143</b>
<b>GREYHOUND</b>	<b>3,663</b>





## AT A GLANCE

### THE PEOPLE

#### 1,396 Breeders

THOROUGHBRED	994
HARNESS	277
GREYHOUND	125

#### 22,348 Owners

THOROUGHBRED	20,060
HARNESS	949
GREYHOUND	1,339

#### 1,698 Trainers

THOROUGHBRED	1,062
HARNESS	247
GREYHOUND	389

#### 5,224 Racing Club & Industry Staff

THOROUGHBRED	4,506
HARNESS	285
GREYHOUND	433

#### 4,210 Staff employed by participants

THOROUGHBRED	3,326
HARNESS	326
GREYHOUND	558

There are **close to 43,500 individuals** who are involved in the Queensland racing industry as an **employee, participant or volunteer**. Close to **81% of these participants** in racing are in **regional communities**

#### 384 Jockeys & Drivers

THOROUGHBRED	230
HARNESS	154

#### 8,210 Volunteers

THOROUGHBRED	6,400
HARNESS	1,139
GREYHOUND	671

## Historical snapshot

### A SUMMARY OF KEY ECONOMIC INDICATORS COMPARED TO PREVIOUS STUDIES

The following charts illustrate the key economic indicators across previous Queensland Racing size and scope studies since 2015/16 (excluding 2016/17).

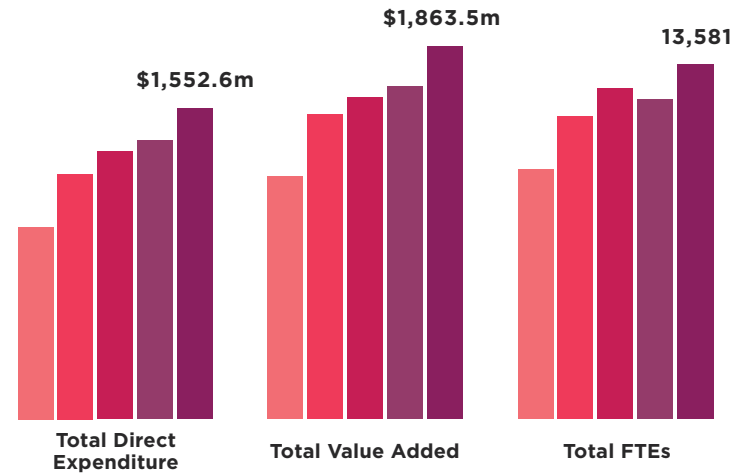
When comparing the overall results for the racing industry in Queensland it is evident that there has been an increase across each of the key economic indicators during this period.

In 2020/21 this pattern was also evident across each of the three codes. During this COVID-19 period, some sectors of the racing industry have been negatively impacted (raceday and non-raceday expenditures), however this has been overcompensated for by increased wagering on the Queensland racing product.

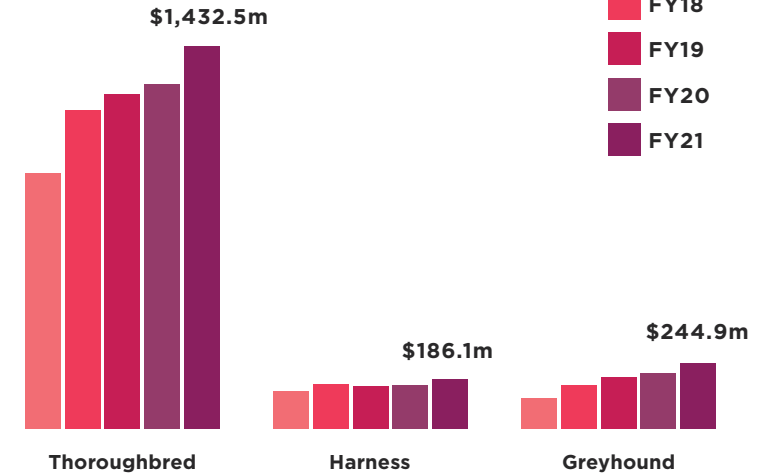
Looking at the total direct expenditure it is evident that there was an increase across all three of the codes in 2020/21. Greyhounds experienced the largest growth in total direct expenditure in 2020/21 increasing by 16.7%, this was followed by Harness (13.6%) and then Thoroughbred (10.5%).

By comparing the year on year analysis across the key economic indicators, trends and benchmarking can be completed in order to assess the performance and health of the racing industry across the codes as well as an aggregate level for Queensland.

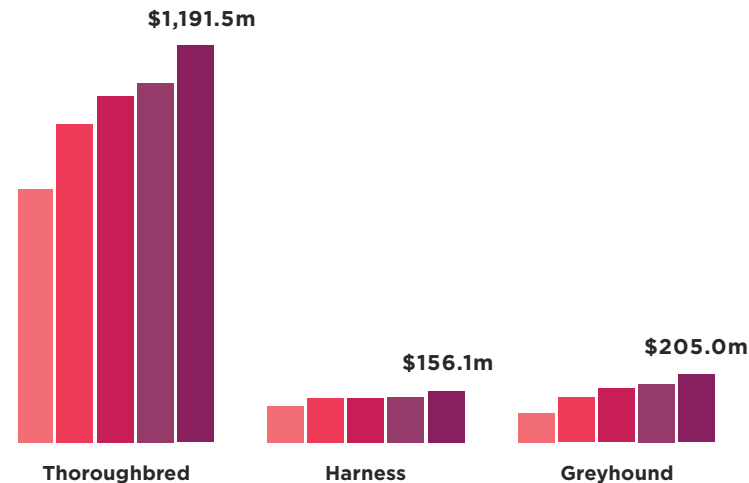
#### AGGREGATE KEY ECONOMIC INDICATORS



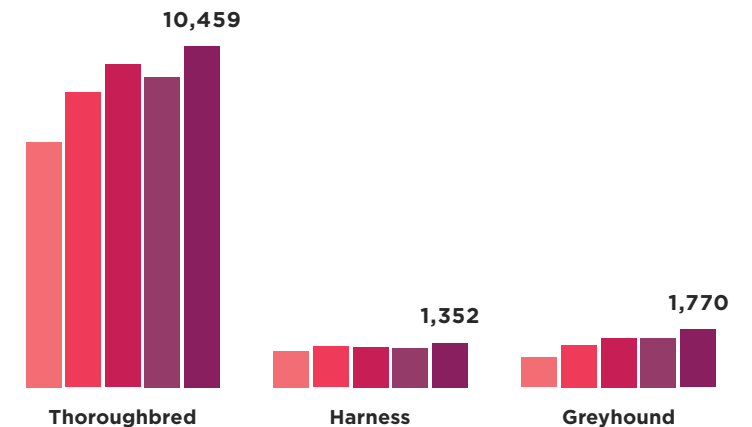
#### TOTAL VALUE ADDED BY CODE



#### TOTAL DIRECT EXPENDITURE BY CODE



#### TOTAL FTE BY CODE







# INTRODUCTION

In July 2021, Racing Queensland commissioned a study into the size and scope of the three codes of racing in Queensland. The last size and scope study was undertaken in 2019/20.

## PURPOSE OF THE STUDY

This study aims to quantify the economic, employment and social contribution that the Queensland racing industry generates within the State of Queensland. The report focuses on the whole of State impacts as well as looking at specific outcomes for regional areas. The key focus of the study is to investigate the following outcomes attributable to the racing industry:

- + The full-time equivalent employment generated by racing industry activities in Queensland
- + The number of participants (i.e. trainers, breeders etc.) in the industry
- + The total direct expenditure contribution that the industry makes, in its current form, to the Queensland economy
- + The value added contribution that the industry generates within the Queensland economy
- + The social and community importance of thoroughbred, harness and greyhound racing – particularly in regional parts of the State

## STUDY METHODOLOGY

In assessing the size and scope of the racing industry, the study will take into account a number of the traditional measures adopted by the racing industry (such as breeding and training activities, attendance and wagering) as well as calculating a number of economic measures.



For the purpose of this study, the racing industry is defined as covering the full spectrum of activities associated with the conduct of thoroughbred, harness and greyhound racing in Queensland. This includes racing activity at both TAB and Non-TAB racing clubs.

The data that underpins this study has been gathered from a number of sources. These are outlined below:

- + Racing Queensland provided financials, wagering data and data related to racing activities
- + Racing clubs provided financial data as well as data relating to their club and raceday operations
- + Queensland Racing Integrity Commission provided details relating to the number and regional breakdown of participants
- + Australian Stud Book, OzChase, Rise Digital and Racing Information Services Enterprise provided breeding related data
- + Racing Australia provided thoroughbred racing and participant data
- + IER also interviewed a number of breeders, trainers and owners in order to build a profile of the cost of production and preparation of racing horses and greyhounds.

Throughout the report, data has been presented at the State and regional level. The regional level analysis is based on fourteen key areas taken from the Australian Statistical Geography Standard (ASGS) SA4 level framework.

It is important to note that whilst this report builds on the study that was completed in

2020, direct comparisons should be made with caution mainly due to changes in the wagering landscape.

This study also provides an estimate of the number of people involved in racing as a licensed participant, volunteer or employee. There is some level of duplication in some of the participation categories resulting from an inability to de-duplicate individual databases. Conversely, it is widely acknowledged that there is a significant cohort of individuals, involved in racing, who are not accounted for in any official database (i.e. members of micro syndicates, members of companies or trusts which have ownership in racing animals). As such, when the report presents a sub-total of the participants in racing, these factors above should be considered.

### ECONOMIC METHODOLOGY

The development of an economic model of the Queensland racing industry requires a strong understanding of the internal and external flows of money. Through the model, duplicate expenditures have been identified within this monetary framework and excluded from the total expenditure calculations. In this regard, the key is to identify the final expenditures - ensuring not to count the same expenditures as they flow between internal racing industry transactions.

This study measures the economic contribution made by the racing industry in Queensland. The final expenditure profile of the racing industry is based on the following key inputs:

- + production (breeding related activities) of racing horses and greyhounds - the

expenditure generated by the breeding sector in maintaining breeding animals and producing pups.

- + preparation (training related activities) of horses and greyhounds for racing the expenditure by owners and trainers on training services as well as other non-training related expenses such as major veterinary, transport etc.
- + racing club and industry expenditure - the expenditure generated by racing clubs and Racing Queensland on running their operations, businesses and events
- + other wagering operator expenditure - the net wagering revenues that flow to the Government (through wagering taxes) as well as expenditure by wagering operators to fund their operations in Queensland
- + racing customer off-track expenditure - expenditure made by racegoers, off-track, as part of their attendance at the races

The economic model used within this study follows three key steps:

**1 Gathering Industry Expenditure** This has been explained in more detail previously; however, this is the most important step as a failure to accurately generate the expenditure profile of the industry only leads to a multiplication of this error throughout the latter parts of the economic methodology.

**2 Categorisation of industry expenditure into ANZSIC classifications** The 'racing industry' does not exist within the Australian and New Zealand Standard Industry Classification (ANZSIC) structure. For modelling purposes, it is necessary to allocate direct expenditures

to the appropriate industry sectors. The majority of expenditures are classified within their relevant ANZSIC codes. A number of horse and greyhound racing activities are contained within ANZSIC classification R - Arts and Recreation Services, specifically within the following sectors:

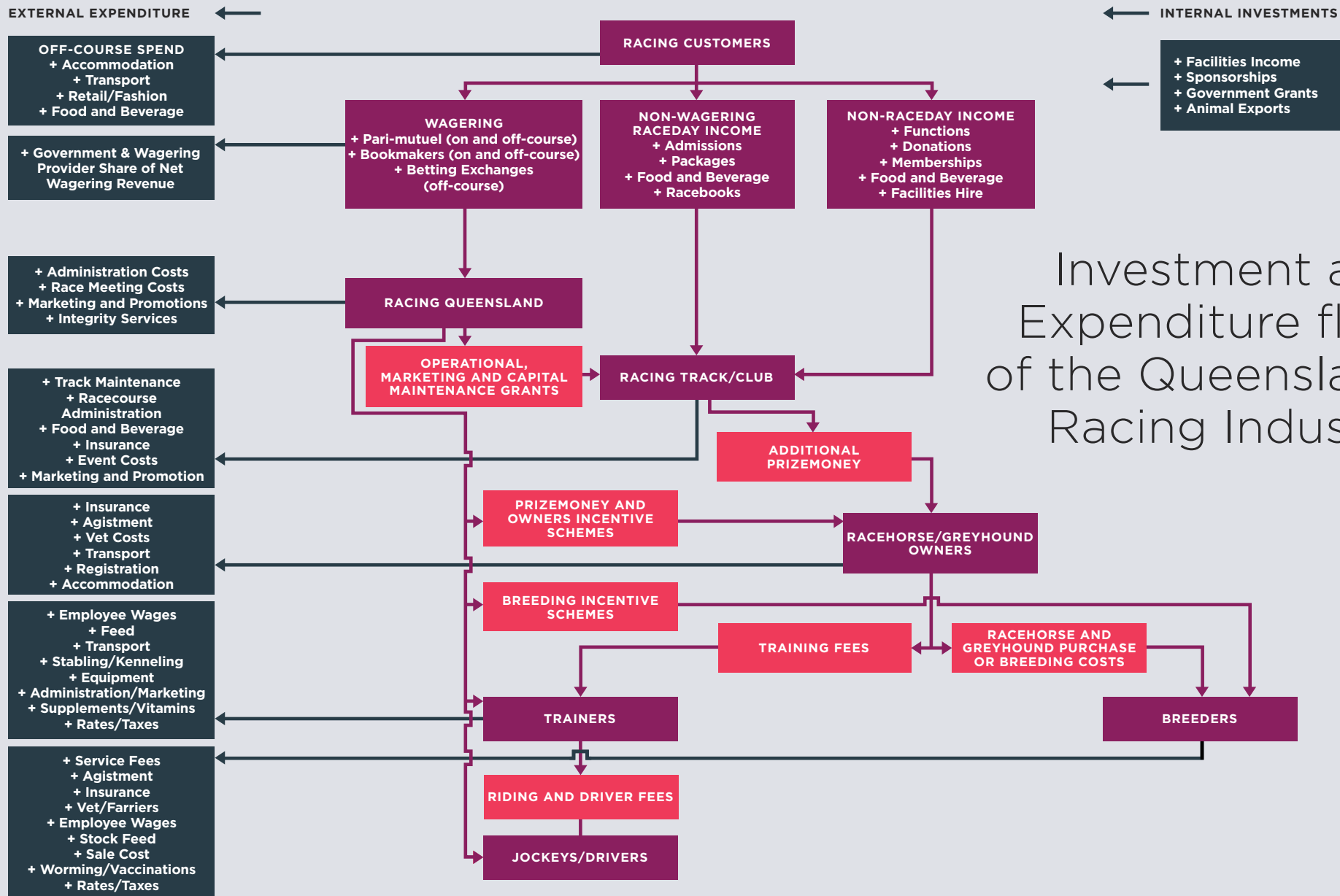
- a.** R9114 - Sport and Physical Recreation Administration,
- b.** R9121 - Horse and Dog Racing Activities,
- c.** R9129 - Training and Racing Activities,
- d.** R9209 - Other Gambling (Racing).

**3 Economic modelling** IER has utilised an input output methodology for the calculation of economic impacts associated with the racing industry in Queensland. The input output model provides direct and indirect impacts in relation to value added, income and employment.

Value added and employment are units of measurement that are based on economic multipliers derived from the national accounts. It is based on the level of value added and employment that is created within specific industry sectors in order to meet final demand expenditure.

In some regions, the report illustrates racing and economic activity despite the fact that one or more codes do not race in that region. This is generally a result of participation (i.e. ownership) and wagering occurring in those regions.

Please note: some tables in this report may not add up due to rounding.



# Investment and Expenditure flow of the Queensland Racing Industry



## ECONOMIC IMPACTS

The Queensland racing industry is responsible for **generating close to \$1.6 billion in expenditure** in Queensland. Close to 65% of this expenditure was **generated in regional parts of the state.**

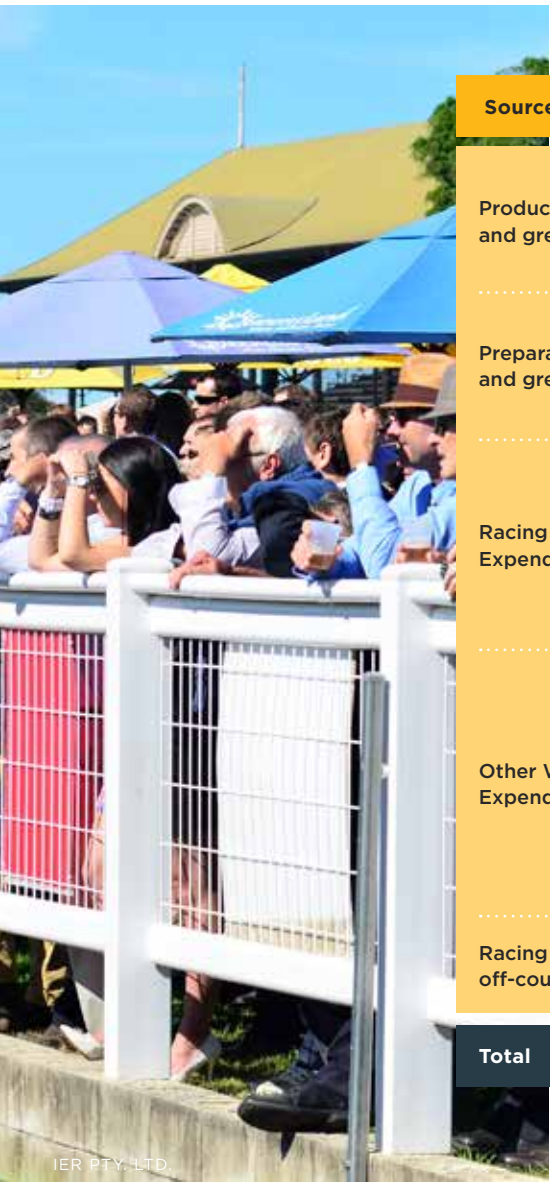
### Direct Spending by the Queensland racing industry

The calculation of economic impacts, as identified in this study, is predicated on determining the extent to which the Queensland racing industry contributes to the state economy. This is achieved by identifying the value of direct (or final) expenditures within the state as well as the subsequent direct and indirect flow-on impacts on the economy.

In 2020/21, the Queensland racing industry generated close to \$1.6 billion in direct expenditure. The calculation of direct expenditure

is based on the final expenditures of the racing industry – or put another way – the point at which the expenditure leaves the internal racing industry and hits the broader economy. For instance, a raceday attendee who spends money at the bar at a racing event is generating expenditure within the racing industry. However, this expenditure is used by the racing club to fund its operations and it is at this level where final expenditures are captured (i.e. the customer funds the racing club's expenditure on wages, marketing and operations).





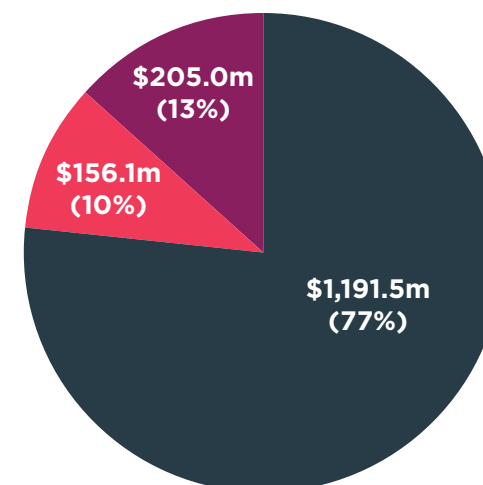
The breakdown of final expenditures is outlined below:

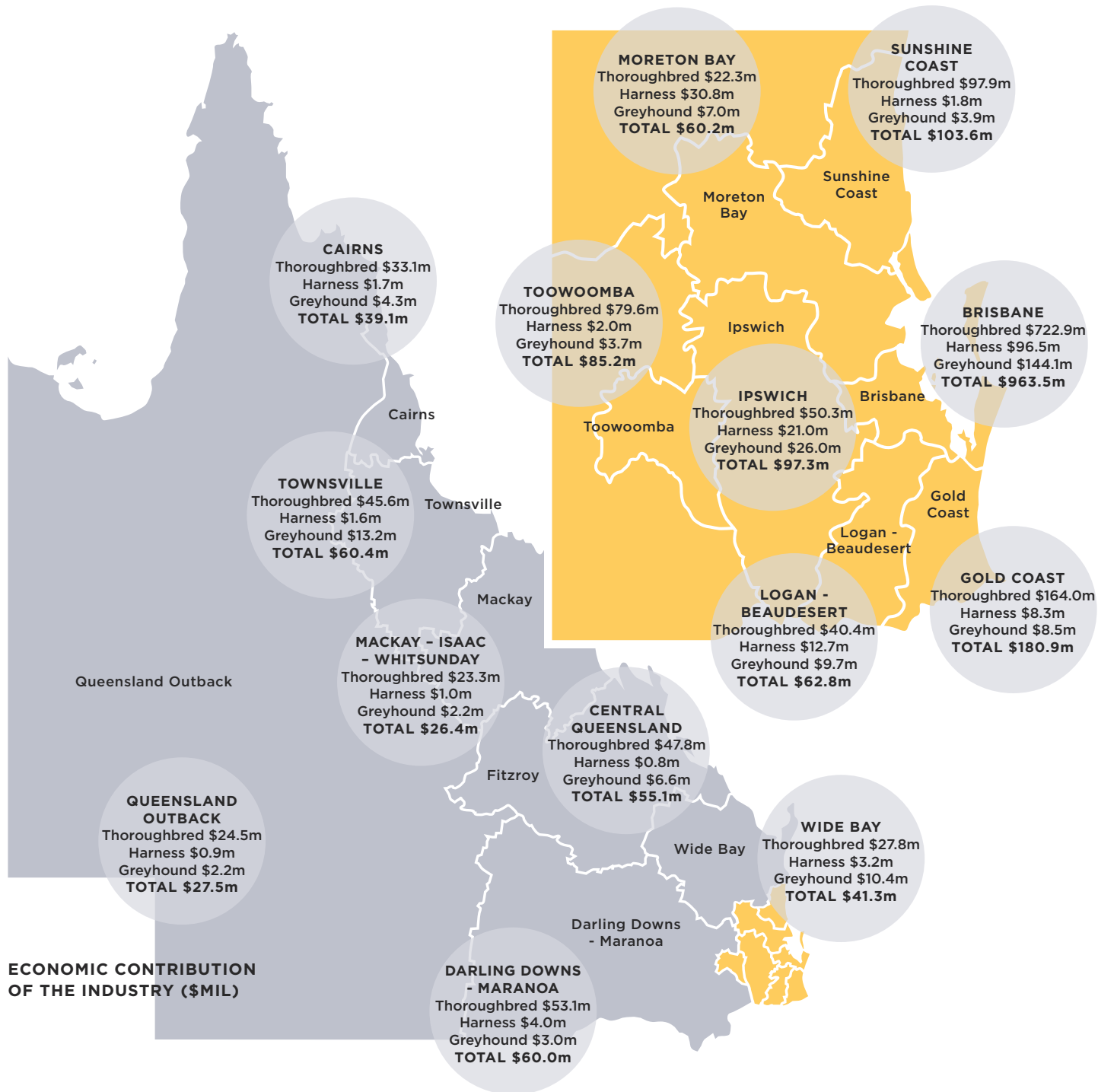
Sources of Final Expenditure	Funded by	Amount	% of Final Expenditure
Production of racing horses and greyhounds (Breeding)	+ Private investment + Service fees revenue + Industry bonuses & incentives	\$115.8m	7.5%
Preparation of racing horses and greyhounds (Training)	+ Private investment + Prizemoney + Industry bonuses & incentives	\$325.1m	20.9%
Racing Club & Industry Expenditure	+ Wagering product fees + Raceday revenues + Sponsorship & membership + Non-raceday revenues + Nominations	\$467.5m	30.1%
Other Wagering Operator Expenditure	+ Taxation on wagering revenue generated by the Racing Queensland product + Wagering operator profits on turnover related to the Racing Queensland product	\$592.4m	38.2%
Racing customer expenditure off-course	+ Private investment	\$51.8m	3.3%
<b>Total</b>		<b>\$1,552.6m</b>	

Thoroughbred racing is responsible for generating close to 77% of the final expenditures. More than 66% of this expenditure was in regional parts of the state. Harness racing is responsible for generating over 10% of the final expenditures. Close to 63% of this expenditure is in regional parts of the state. Greyhound racing is responsible for generating 13% of the final expenditures. Close to 57% of this expenditure is in regional parts of the state.

#### DIRECT SPENDING BY CODE (\$MIL)

- Thoroughbred
- Harness
- Greyhound





**ECONOMIC CONTRIBUTION OF THE INDUSTRY (\$MIL)**

## Economic Contribution of the Industry

The Queensland racing industry is responsible for generating a real gross value added contribution of \$1,863.5 million for the Queensland economy. Real gross value added is the generally accepted measure of the value of production from economic activity. It is the sum of value added by all industries in a region (in this case, all regions of Queensland). In any period of time, the value added contribution in an industry equates to the value of sales less the value of inputs used in production. This means value added is equal to the income (wages, salaries and profits) generated in the course of production.

The real gross value added calculation uses constant prices (prices in a selected year), hence it does not allow for general price level changes (inflation). Also, the calculation makes no allowance for capital used in production (depreciation).





Generally, the level of economic activity will not always proportionally follow the final expenditures, as regional areas generally have higher import penetrations than metropolitan areas – i.e. a lot of the expenditure is on product imported from the metropolitan area. As such, the model takes into consideration these leakages between regions.

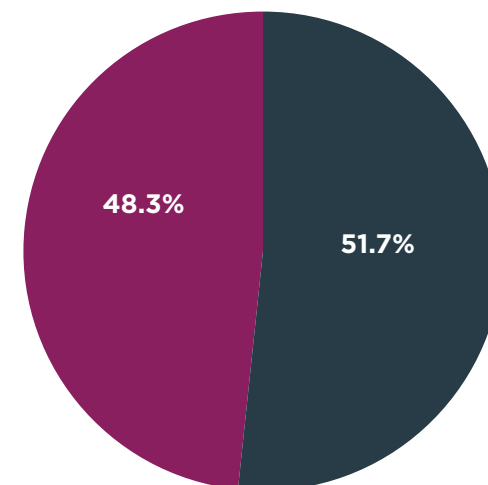
When considering the value added contribution of \$1,864 million generated by the Queensland racing industry, it is important to note that it is made up of:

- + Direct value added (\$649.5 million) - this represents the amount of income included in the direct in scope expenditure. It is the amount of gross wages and salaries in the racing industry and the direct provision of services to racing activity, plus the gross operating surplus (profits, interest payment and direct taxes) directly created in supply these services and product. This is also equal to the direct in scope expenditure less the purchases that the provider of the goods and services makes in providing the goods and services (both supplied from within the region, as well as externally (i.e. imported).
- + Indirect (Induced) value added (\$1,214.1 million) - represents the value added activity (wages, salaries and gross operating surplus) generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this.

The direct value added impacts are calculated using the ratios within each of the relevant ANZIC Industry classification sectors identified within the input output table. The calculation of the indirect (induced) effects, which are allocated to the industry in which the impact occurs, is undertaken by running an impact assessment, and tracing the whole of economy effect of the expenditure patterns linked to the racing industry.

#### QUEENSLAND RACING INDUSTRY ECONOMIC IMPACT BY REGION

- Brisbane
- Regional QLD



## Participants in the Queensland racing industry

The concept of 'participation in racing' is broader than simply considering those employed in the industry. Participants include employees, trainers, breeders, owners, jockeys, drivers, stablehands and volunteers who have varying levels of engagement, from occasional to full-time.

Participants are the lifeblood of the three codes of racing. For the majority of participants, involvement is part business and part hobby. Passion drives many to pursue the challenges and opportunities available in the racing industry. For some participants however, the racing industry is their livelihood - their occupation.

Many of these people find meaningful employment of their specific skillset where they may find it difficult otherwise. This is especially true in relation to the trainers, breeders and those skilled in preparing or caring for racing horses and greyhounds. Additionally, there are many supply businesses for whom the racing industry provides the market for which to sell their goods or services.

Close to 25,400 breeders, owners and trainers provide the capital and the skills to produce and prepare racing horses and greyhounds for racing. These participants drive a chain of activity which leads to the production of a racing product that is consumed by audiences on almost every day of the year.

There are 8,210 individuals who volunteer their time and skills in a variety of roles within the industry. In the participant space, this often includes family members - for many of whom, this family connection goes back many generations.

In total, there are 43,469 individuals who participate in the Queensland racing industry as a participant, employee or volunteer. Close to 81% of these participants are in regional parts of the State.

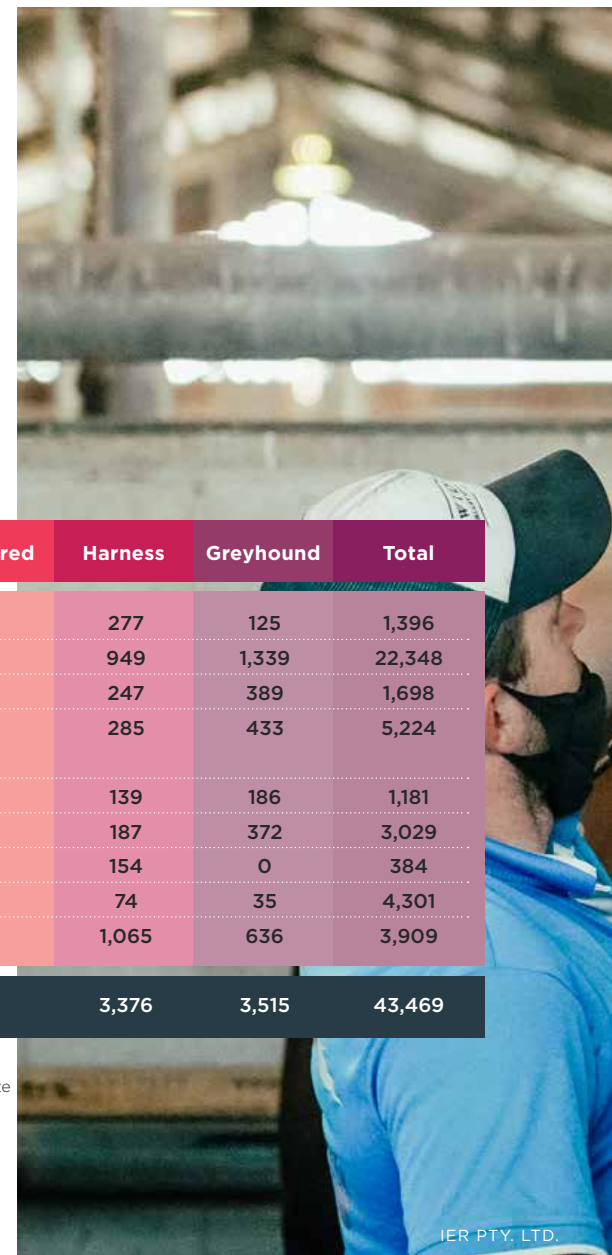
### TOTAL PARTICIPANTS IN RACING

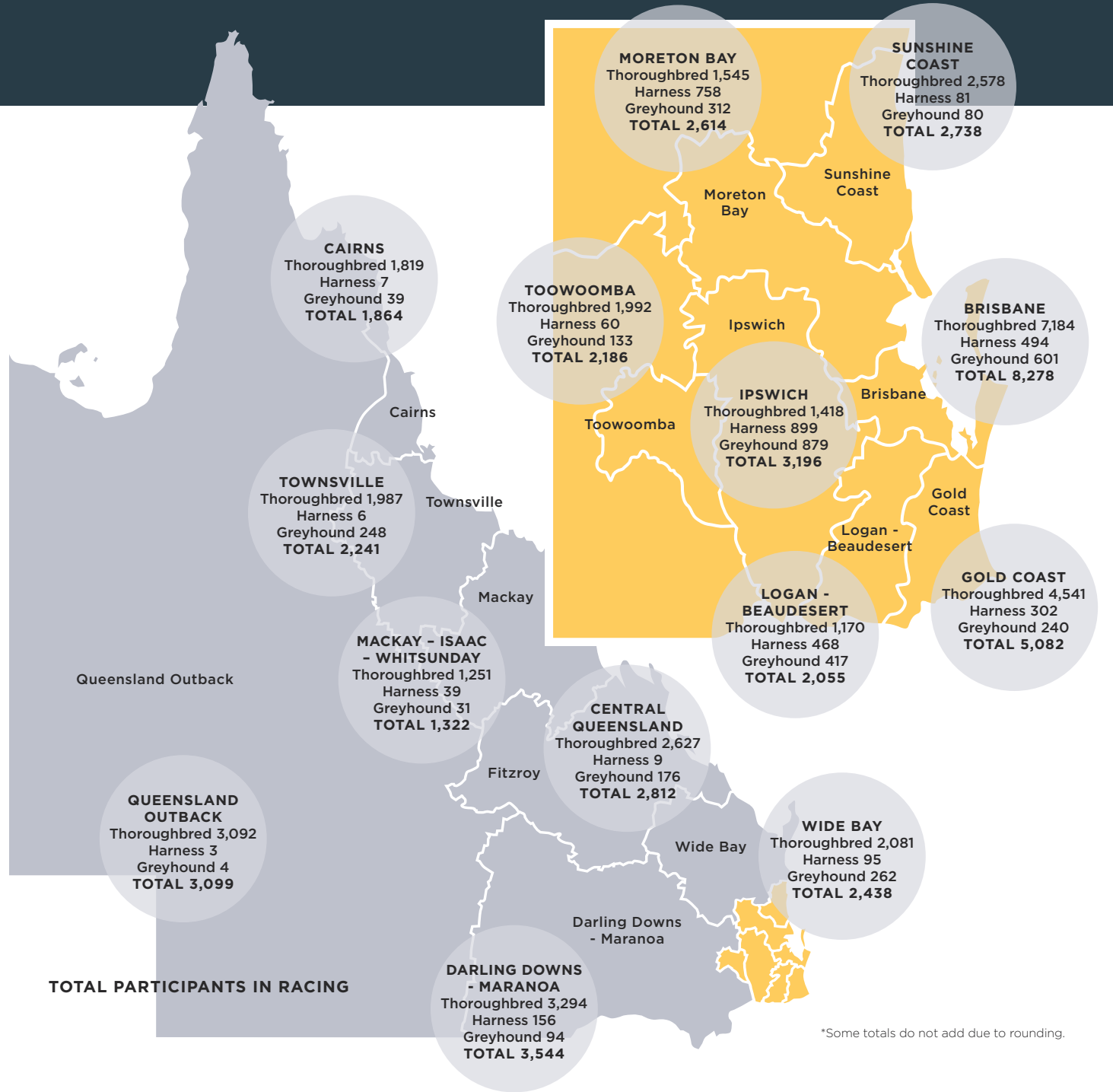
	Thoroughbred	Harness	Greyhound	Total
Breeders	994	277	125	1,396
Owners	20,060	949	1,339	22,348
Trainers	1,062	247	389	1,698
Racing Club & Industry Staff (FT, PT, Casual)	4,506	285	433	5,224
Breeders Staff	856	139	186	1,181
Stable/Kennel Employees	2,470	187	372	3,029
Jockeys & Drivers	230	154	0	384
Racing club volunteers	4,192	74	35	4,301
Volunteers assisting participants	2,208	1,065	636	3,909
<b>Total</b>	<b>36,578</b>	<b>3,376</b>	<b>3,515</b>	<b>43,469</b>

Note: There is some level of duplication in some of the participation categories resulting from an inability to de-duplicate individual databases

\*Racing Club & Industry staff includes:

- Racing club staff distributed by racing club location
- RQ staff distribution provided by location (code distribution based on QTAB turnover)
- TAB staff distributed by QTAB turnover
- QRIC staff distribution provided by location (code distributed based on race meetings)





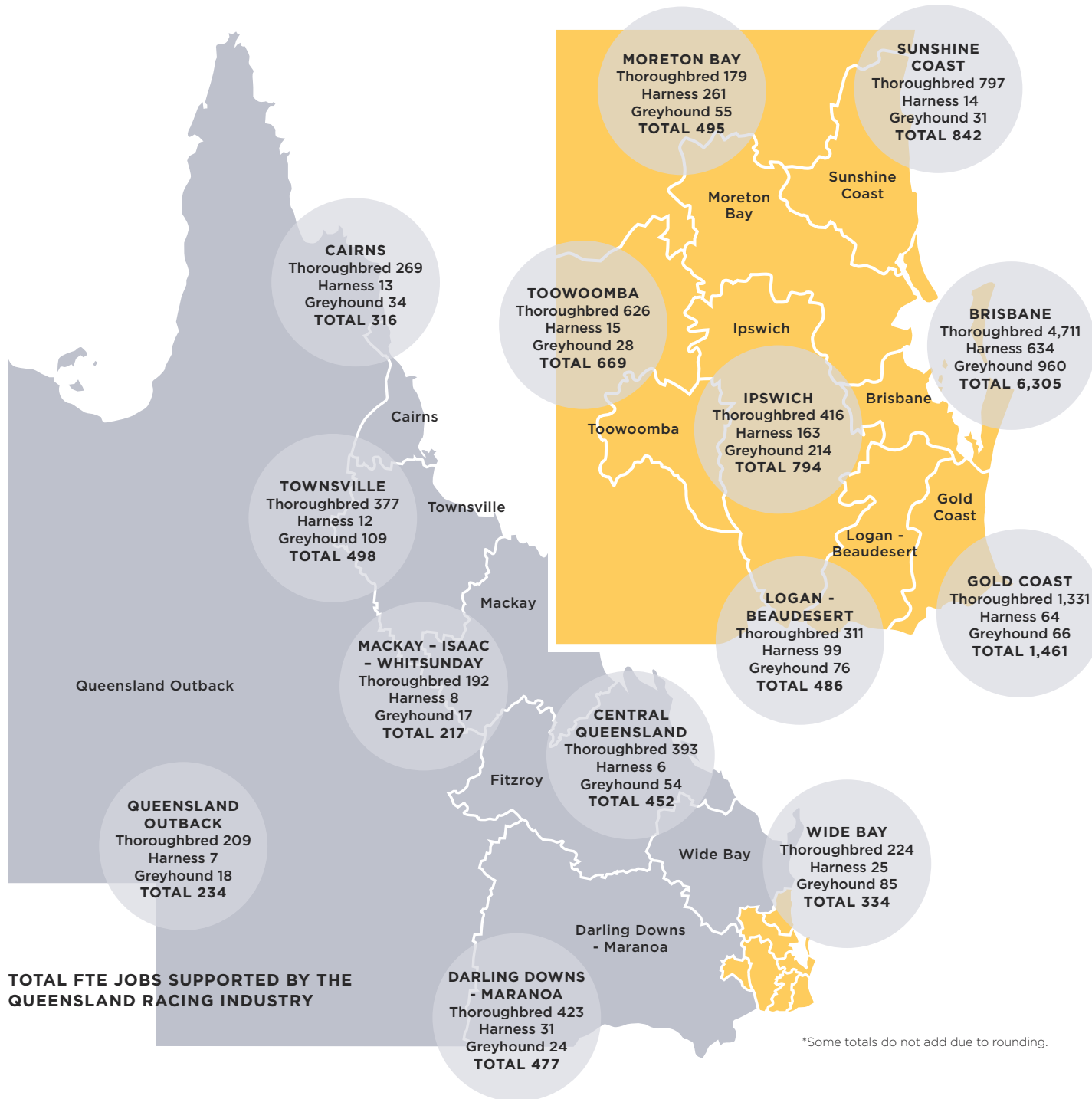


# Employment Generated by Racing in Queensland

There are 9,433 people directly employed in the Queensland racing industry. As outlined earlier, this represents the headcount of full-time, part-time and casual employees of the industry, racing clubs and participants. The Queensland racing industry, like racing industries all over Australia, relies on a large number of part-time and casual roles. As such, the FTE employment is significantly lower than the headcount.

In 2020/21, the economic activity generated by the Queensland racing industry directly sustained 6,475 full-time equivalent positions in Queensland. In addition to the direct employment impact, the activities of the racing industry also help to sustain a further 7,106 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Queensland racing industry was 13,581 FTE jobs.

The FTE positions that are sustained by the Queensland racing industry resulted in close to \$989.9 million in wages and salaries for the people employed directly within the industry as well as those employed in down the-line industries that receive increased demand as a result of racing activity. Some examples of the other industries that are stimulated by racing include; veterinary, feed, retail, tourism, accommodation, transport, manufacturing and construction.



\*Some totals do not add due to rounding.

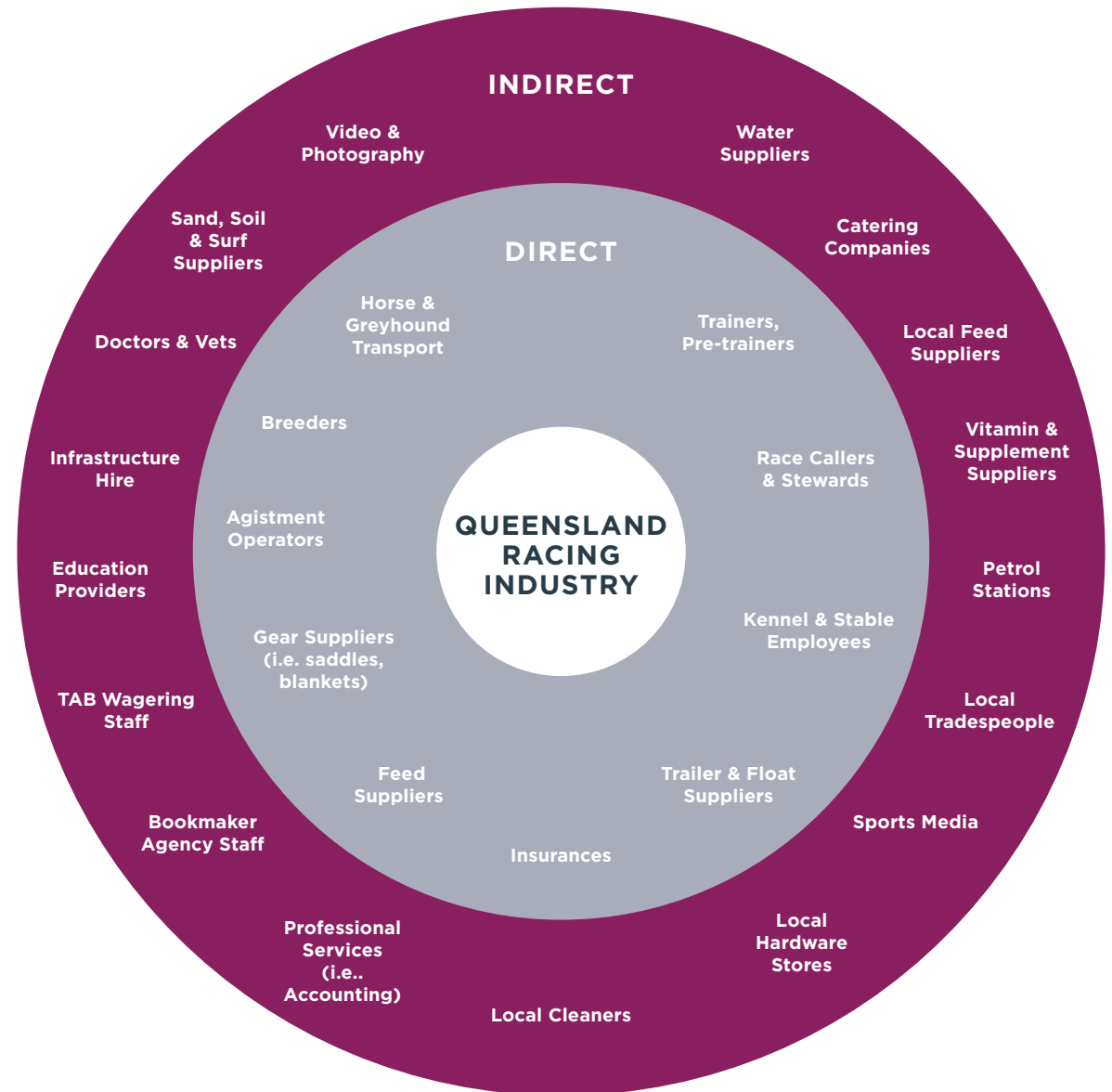
# The Supplier Network

The Queensland racing industry is supported by a large supplier network in a mutually beneficial way. For many suppliers of goods and services, a strong racing industry forms an important part of the critical mass of their client base. Many offer specific skills, and customised products that are relevant only to this industry. The supplier network broadly contains those providing a direct service or product to the industry as well as those down-the-line businesses who provide the raw materials and manufacturing that drive the products on offer.

**The Queensland racing industry generates some of its most significant impacts in the following industry sectors:**

ANZSIC Sector	Key Impacts	Driven by
Professional, Scientific & Technology Services	+ Total value added - \$217.0m + Total FTE jobs - 1,616	+ Veterinary Services + Scientific Research Services + Management & Related Consulting Services
Administrative services	+ Total value added - \$144.2m + Total FTE jobs - 703	+ Taxes used by the Government to support public services
Agriculture, Forestry & Fishing	+ Total value added - \$122.8m + Total FTE jobs - 1,029	+ Horse Farming/ Breeding





## Case study

### IPSWICH TURF CLUB MAJOR TRANSFORMATION

For over 160 years the Ipswich Turf Club, located 30km west of Brisbane, has been at the heart of its community, where the residents of Bundamba and the broader City of Ipswich have gathered to cheer on a winner, catch up with friends and welcome visitors.

To continue and expand its connection with the local community and visitors into the future, the Club undertook a major transformation of its existing hospitality facilities and constructed the Ipswich Events and Entertainment Centre (IEEC) - a contemporary and welcoming function space.

Opened in September 2019, the \$12.4m IEEC was constructed with support from the Racing Infrastructure Fund administered by the State Government, designed to deliver strategic projects that support the growth and sustainability of the Queensland racing industry.

The IEEC enables the Ipswich Turf Club to expand its revenue base by providing one of the largest function spaces to the west of Brisbane City, available for weddings, conferences and corporate functions. The first-floor function

rooms provide spectacular views over the track and on race days with a 'head-on' view of the action down the straight. In addition, spacious outdoor forecourts have been created for event hosting such as a weekly market, expos and outdoor entertaining.

The redevelopment has not forgotten the proud and long history of the Club ensuring that new amenities link with heritage buildings, such as the establishment of the Ipswich Racing Museum within the 1950s tote building.

New green open spaces are also a feature of the redevelopment, transforming an area of dilapidated buildings providing a more modern and attractive environment at the entrance to the Club.

The success of the new facilities coupled with the club's long standing historical position in the community has cemented the venue as one of the go-to choices for the community, provides employment opportunities and enables the Ipswich Turf Club to diversify revenue for a strong and sustainable future.







Ipswich Events & Entertainment Centre

# RACING'S PARTICIPANTS AND ANIMALS

## The Breeding Industry

### NUMBER OF BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	29	1	1	31
Central Queensland	75	0	5	80
Darling Downs - Maranoa	144	16	3	164
Gold Coast	121	24	5	150
Ipswich	61	77	48	187
Logan - Beaudesert	61	40	22	123
Mackay - Isaac - Whitsunday	23	4	0	27
Moreton Bay	56	57	8	122
Queensland - Outback	20	0	0	20
Sunshine Coast	59	12	4	75
Toowoomba	86	3	7	95
Townsville	27	0	5	32
Wide Bay	80	12	10	102
<b>Total Regional Queensland</b>	<b>843</b>	<b>246</b>	<b>118</b>	<b>1,207</b>
Brisbane	151	31	7	189
<b>Total</b>	<b>994</b>	<b>277</b>	<b>125</b>	<b>1,396</b>

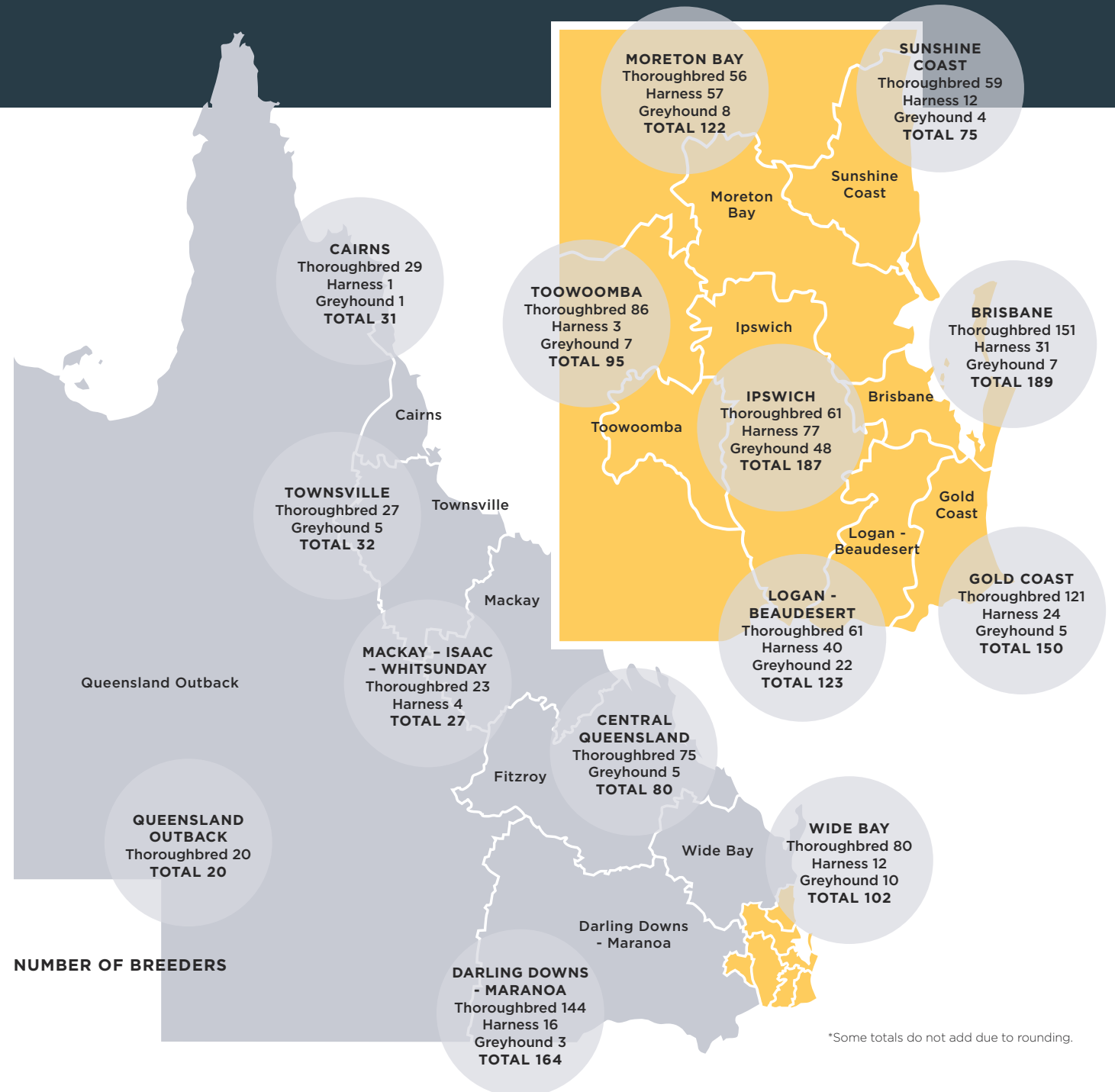
\*Includes part owners of broodmares/breeding females and stallions/sires

### NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	25	1	2	27
Central Queensland	64	0	7	72
Darling Downs - Maranoa	124	8	5	137
Gold Coast	105	12	7	124
Ipswich	52	39	72	163
Logan - Beaudesert	53	20	33	105
Mackay - Isaac - Whitsunday	20	2	0	22
Moreton Bay	49	29	12	89
Queensland - Outback	17	0	0	17
Sunshine Coast	51	6	6	63
Toowoomba	74	1	10	85
Townsville	23	0	7	31
Wide Bay	69	6	14	89
<b>Total Regional Queensland</b>	<b>727</b>	<b>123</b>	<b>176</b>	<b>1,025</b>
Brisbane	130	16	10	156
<b>Total</b>	<b>856</b>	<b>139</b>	<b>186</b>	<b>1,181</b>

\*Some totals do not add due to rounding.

There are **close to 1,400 individuals** who either breed, or have an ownership interest in a broodmare, broodmatron, stallion or sire. They are supported by **more than 1,180 employees and 1,762 volunteers** – meaning that the industry is supported by **more than 4,300 people directly involved in breeding activities** across the three codes



The breeding sector provides and replenishes the racing horses and greyhounds for the Queensland racing industry. There are 1,396 registered breeders in Queensland across the three codes of racing. At the top end of the breeding sector, large stud farms employ many staff and produce large numbers of foals each year. At the other end of the scale, there are a large number of hobby breeders also producing foals and pups.

Breeders include those whose core activity is to manage the breeding process as well as those whose involvement is as an investor (through part ownership of a broodmare, broodmatron, stallion or sire). It is important to note that it is possible that the number of breeders is likely to be understated given that only the syndicate member (of a breeding animal with shared ownership) is recorded as a registered breeder.

Breeders derive the majority of their income from service fees, agistment and the public and private sale of their stock. In the thoroughbred sector, breeders may occasionally also lease shares in their bloodstock. This particular sector of the industry has great potential to generate economic impacts for the state, as breeders often sell their stock to interstate and overseas buyers, at sales events – generating export revenue for the State. A strong racing industry is an important pre-cursor for a strong breeding sector.

#### NUMBER OF VOLUNTEERS ASSISTING BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	23	3	2	28
Central Queensland	60	0	8	68
Darling Downs - Maranoa	115	45	5	166
Gold Coast	97	67	8	172
Ipswich	49	216	79	345
Logan - Beaudesert	49	113	36	198
Mackay - Isaac - Whitsunday	19	11	0	30
Moreton Bay	45	160	14	219
Queensland - Outback	16	0	0	16
Sunshine Coast	48	34	7	88
Toowoomba	69	8	11	87
Townsville	22	0	8	30
Wide Bay	64	32	16	112
<b>Total Regional Queensland</b>	<b>675</b>	<b>688</b>	<b>194</b>	<b>1,557</b>
Brisbane	120	78	7	205
<b>Total</b>	<b>795</b>	<b>766</b>	<b>201</b>	<b>1,762</b>

\*Some totals do not add due to rounding.



# Producing Racing Animals

## NUMBER OF STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Cairns	4	0	0	4
Central Queensland	11	0	0	11
Darling Downs - Maranoa	23	7	0	30
Gold Coast	8	0	2	10
Ipswich	10	5	9	23
Logan - Beaudesert	5	0	4	9
Mackay - Isaac - Whitsunday	3	0	0	3
Moreton Bay	1	1	1	3
Queensland - Outback	0	1	0	1
Sunshine Coast	4	0	1	5
Toowoomba	9	0	0	9
Townsville	1	0	2	3
Wide Bay	8	2	1	11
<b>Total Regional Queensland</b>	<b>86</b>	<b>16</b>	<b>20</b>	<b>122</b>
Brisbane	0	0	0	0
<b>Total</b>	<b>86</b>	<b>16</b>	<b>20</b>	<b>122</b>



## NUMBER OF BROODMARES/BREEDING FEMALES COVERED

	Thoroughbred	Harness	Greyhound	Total
Cairns	23	2	1	26
Central Queensland	104	0	6	110
Darling Downs - Maranoa	768	83	9	859
Gold Coast	287	30	8	325
Ipswich	282	139	85	506
Logan - Beaudesert	455	32	31	517
Mackay - Isaac - Whitsunday	45	5	0	50
Moreton Bay	47	67	7	121
Queensland - Outback	7	0	0	7
Sunshine Coast	87	12	7	107
Toowoomba	498	5	13	516
Townsville	15	0	6	21
Wide Bay	128	13	21	162
Total Regional Queensland	2,746	387	194	3,328
Brisbane	16	62	10	87
<b>Total</b>	<b>2,762</b>	<b>449</b>	<b>204</b>	<b>3,415</b>

## NUMBER OF FOALS/PUPS PRODUCED

	Thoroughbred	Harness	Greyhound	Total
Cairns	15	1	10	26
Central Queensland	67	0	46	113
Darling Downs - Maranoa	493	54	57	604
Gold Coast	184	19	84	287
Ipswich	181	90	608	880
Logan - Beaudesert	292	21	248	561
Mackay - Isaac - Whitsunday	29	3	0	32
Moreton Bay	30	44	74	148
Queensland - Outback	4	0	0	4
Sunshine Coast	56	8	24	88
Toowoomba	320	3	76	399
Townsville	10	0	40	50
Wide Bay	82	8	137	228
Total Regional Queensland	1,764	251	1,405	3,420
Brisbane	10	40	79	129
<b>Total</b>	<b>1,774</b>	<b>291</b>	<b>1,484</b>	<b>3,549</b>

\*Some totals do not add due to rounding.



**COST OF PRODUCING RACEHORSES AND GREYHOUNDS**

	Thoroughbred	Harness	Greyhound	Total
Cairns	\$0.6	\$0.0	\$0.0	\$0.7
Central Queensland	\$2.9	\$0.0	\$0.2	\$3.1
Darling Downs - Maranoa	\$27.4	\$2.5	\$0.3	\$30.1
Gold Coast	\$10.9	\$0.8	\$0.4	\$12.1
Ipswich	\$8.3	\$3.8	\$3.2	\$15.3
Logan - Beaudesert	\$14.6	\$0.9	\$1.3	\$16.7
Mackay - Isaac - Whitsunday	\$1.2	\$0.1	\$0.0	\$1.4
Moreton Bay	\$1.2	\$1.8	\$0.4	\$3.4
Queensland - Outback	\$0.2	\$0.0	\$0.0	\$0.2
Sunshine Coast	\$2.3	\$0.3	\$0.1	\$2.8
Toowoomba	\$21.8	\$0.1	\$0.4	\$22.4
Townsville	\$0.4	\$0.0	\$0.2	\$0.6
Wide Bay	\$3.4	\$0.3	\$0.7	\$4.5
<b>Total Regional Queensland</b>	<b>\$95.2</b>	<b>\$12.5</b>	<b>\$7.3</b>	<b>\$113.3</b>
Brisbane	\$0.4	\$1.7	\$0.4	\$2.5
<b>Total</b>	<b>\$95.6</b>	<b>\$12.5</b>	<b>\$7.7</b>	<b>\$115.8</b>

\*Some totals do not add due to rounding.



# Economic Contribution of the Breeding Industry

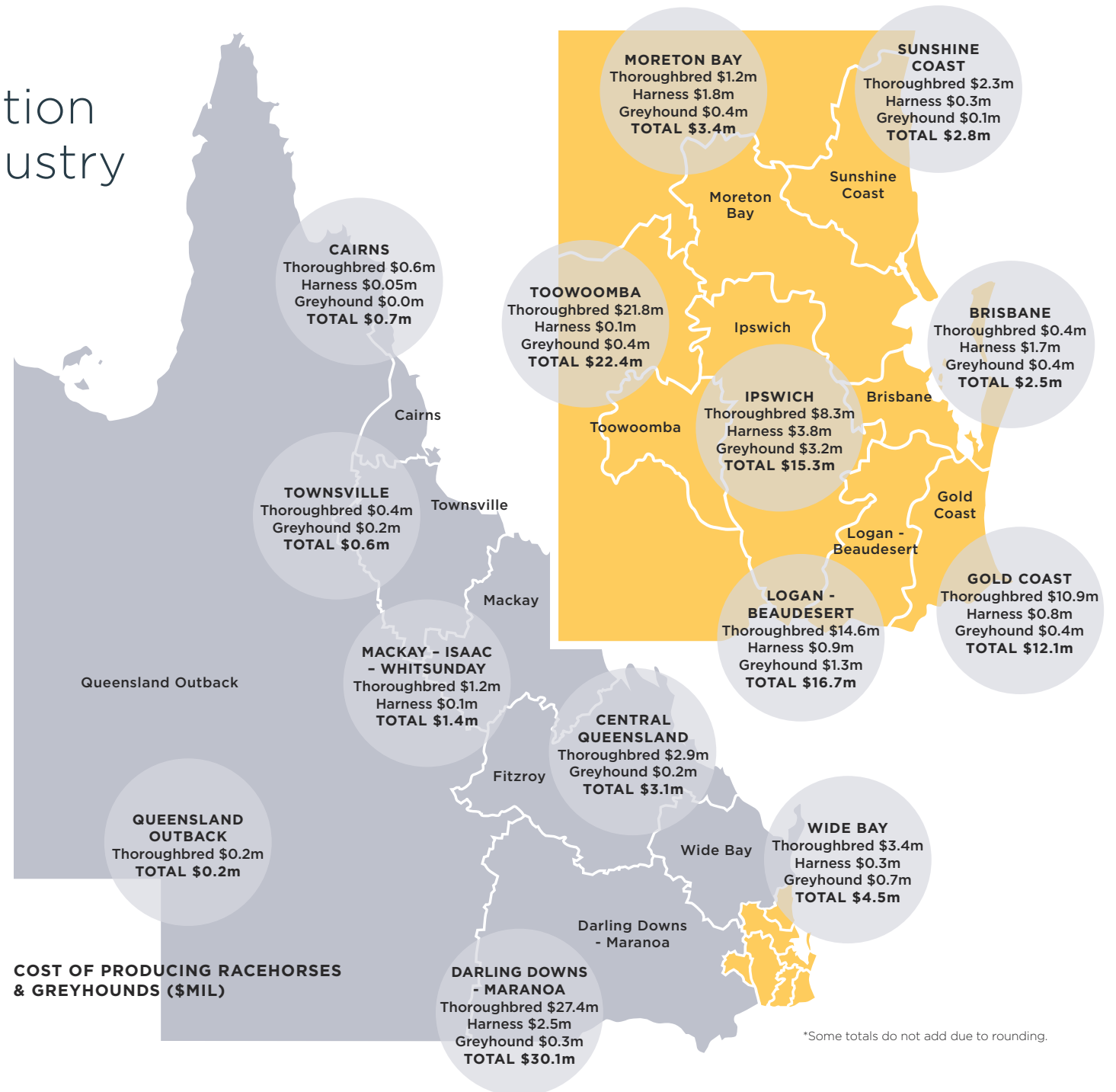
In 2020/21, breeders in the Queensland racing industry spent close to \$116 million on the production of racing stock. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of broodmares, broodmatrons, stallions and sires as well as in the process of breeding and care for foals and pups. In addition to this, breeders also incur costs for:

- + Sales commission on yearlings sold at auction
- + Bloodstock insurance
- + Business related expenditure
- + Sales and marketing related expenditure
- + Infrastructure and maintenance

In some instances, breeders incur all of these expenses themselves, whilst in other situations, breeders may send their foals or pups to professional service providers (such as those who provide whelping, foaling, education and yearling preparation services).

The expenditure figures outlined in this section have been derived through a combination of industry level consultation and primary research amongst breeders in each code across Queensland. For thoroughbreds and standardbreds, the cost of production is assessed for both a private breeder and a commercial farm in recognition of the fact that there are different expenditure profiles associated with both. Additional costs are taken into consideration for horses being prepared for a yearling sale.

From an industry perspective, it is important to acknowledge that there are different costs associated with broodmares and broodmatrons depending on their breeding activity in a given year. For example, mares and broodmatrons that are not bred with in a given year, still incur expenditure despite not producing a foal or pup, and as such need to be included in the assessment.



Close to 73% of all breeding related expenditure occurs in four Queensland regions. The Darling Downs - Maranoa (26.0%), Toowoomba (19.3%), Logan - Beaudesert (14.4%) and the Ipswich (13.2%) regions are the most active breeding areas in the State.

**From a racing code perspective, the most significant amount of breeding related expenditure is incurred in the following regions:**

**THOROUGHBRED RACING**

In 2020/21, there were 2,762 broodmares covered in Queensland, producing 1,774 foals. This thoroughbred breeding activity is responsible for generating close to \$95.6 million in the production and care of racing stock.

Darling Downs - Maranoa	\$27.4m (28.6%)
Toowoomba	\$21.8m (22.8%)
Logan - Beaudesert	\$14.6m (15.2%)

**HARNESS RACING**

In 2020/21 there were 449 broodmares covered in Queensland, producing 291 foals. This standardbred breeding activity is responsible for generating more than \$12.5 million in the production and care of racing stock.

Ipswich	\$3.8m (30.7%)
Darling Downs - Maranoa	\$2.5m (19.6%)
Moreton Bay	\$1.8m (14.8%)

**GREYHOUND RACING**

In 2020/21, there were 204 breeding females covered in Queensland, producing 1,484 pups. This greyhound breeding activity is responsible for generating more than \$7.7 million in the production and care of greyhound racing stock.

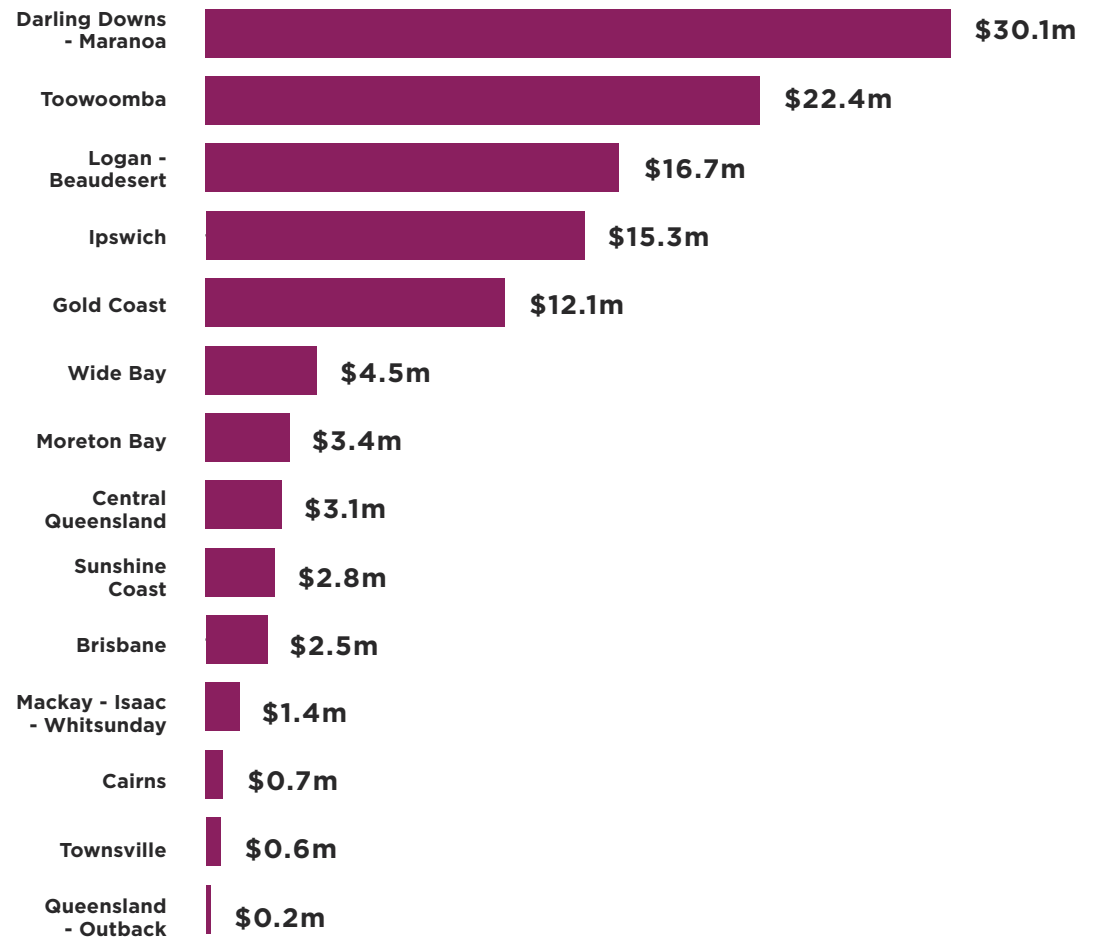
Ipswich	\$3.2m (41.1%)
Logan - Beaudesert	\$1.3m (16.5%)
Wide Bay	\$0.7m (9.4%)





The chart illustrates the total expenditure, by region, on thoroughbred, harness and greyhound breeding activities generated in Queensland.

#### EXPENDITURE BY THE BREEDING SECTOR



## Case study

### RECONCILIATION PLAN - A FIRST FOR THE RACING INDUSTRY

Racing Queensland has a proud history of diversity across the three codes of racing. As an industry, they have encouraged and established relationships with Aboriginal and Torres Strait Islander peoples, particularly in the thoroughbred racing code. Many aboriginal jockeys have become some of Australia's most recognised racing participants, including Australian Hall of Fame inductee Darby McCarthy and Frank Reys. Recent Indigenous trainees and graduates in apprentice riding include Shae Nielson, Dakota Graham, Sarah Daley and Isabella The.

Racing Queensland (RQ) launched its inaugural Reconciliation Action Plan (RAP), which it entitled Reflect, in September 2020, the first racing jurisdiction in Australia to do so.

The Reflect RAP aims to build and strengthen relationships and create opportunities to work together with Aboriginal and Torres Strait Islander peoples and further develop a workplace culture that understands, values and respects the history, diversity, and contributions of our first nations people.

Reflect is an actionable plan with more than 35 deliverables across the key themes of relationships, respect, opportunities and governance and tracking. RQ is proud to have achieved all deliverables over a twelve month period, creating a culture of respect and honesty amongst all team members.

RQ celebrated its first Reflect public event with the presentation of a race for each code during NAIDOC Week in November 2020, which was branded to recognise NAIDOC Week and acknowledge our Aboriginal and Torres Strait Islander peoples and community in Queensland.

The greyhound industry saw the running of the 'RQ NAIDOC Celebration Chase' Ipswich, whilst at the thoroughbreds in Doomben a race was renamed the 'RQ NAIDOC Celebration Race' and on the same night at the harness races at Albion Park the 'RQ NAIDOC Celebration Pace'.

Prior to each race the crowds enjoyed a welcome to country, smoking ceremony and didgeridoo/dance performance. Reflect artwork and NAIDOC branding was featured on the handler's bibs, strappers bibs, saddle cloths, harness helmet covers, harness colours and winner's presentation rugs. The winner of each race was also presented with RQ NAIDOC Week Trophy.

Building on the achievements delivered from Reflect, RQ will move forward to its second year of a Reconciliation Action Plan (RAP) entitled Innovate.





# THE TRAINING INDUSTRY

## The Training Industry

### NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	52	0	8	59
Central Queensland	112	0	19	131
Darling Downs - Maranoa	105	9	7	121
Gold Coast	126	17	18	161
Ipswich	44	89	109	242
Logan - Beaudesert	57	47	62	165
Mackay - Isaac - Whitsunday	32	0	4	36
Moreton Bay	1	59	49	109
Queensland - Outback	82	0	1	83
Sunshine Coast	90	1	7	98
Toowoomba	114	7	13	135
Townsville	82	0	33	114
Wide Bay	59	7	36	103
Total Regional Queensland	956	237	365	1,558
Brisbane	106	10	24	140
<b>Total</b>	<b>1,062</b>	<b>247</b>	<b>389</b>	<b>1,698</b>

### NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Cairns	129	0	3	132
Central Queensland	183	0	23	206
Darling Downs - Maranoa	184	7	7	197
Gold Coast	311	27	27	364
Ipswich	126	30	81	237
Logan - Beaudesert	127	41	46	213
Mackay - Isaac - Whitsunday	105	1	3	109
Moreton Bay	112	53	43	208
Queensland - Outback	110	0	1	111
Sunshine Coast	212	4	7	223
Toowoomba	242	3	20	264
Townsville	176	0	34	210
Wide Bay	92	5	32	129
Total Regional Queensland	2,107	170	326	2,603
Brisbane	363	17	46	426
<b>Total</b>	<b>2,470</b>	<b>187</b>	<b>373</b>	<b>3,029</b>



#### NUMBER OF VOLUNTEERS ASSISTING TRAINERS

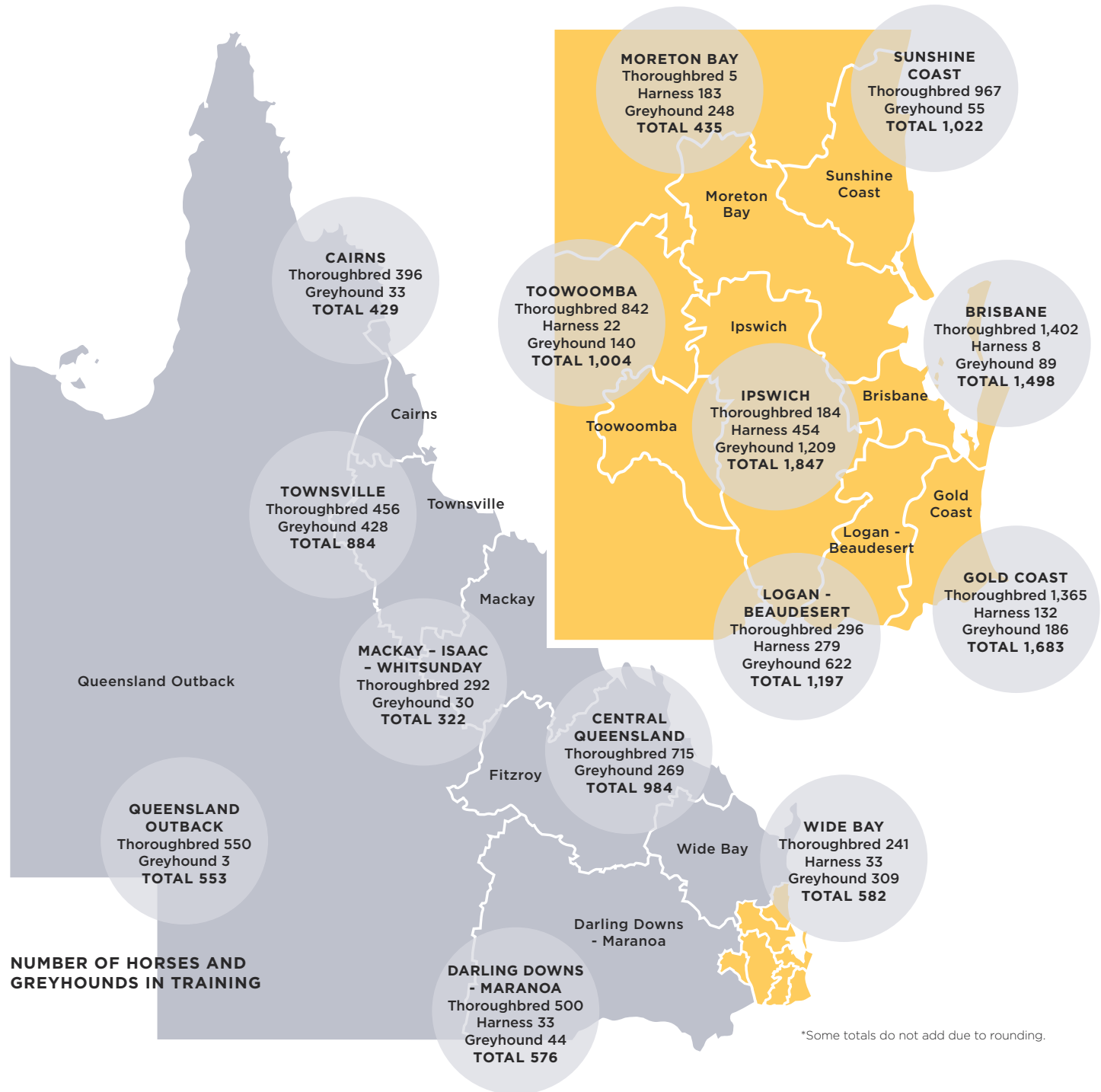
	Thoroughbred	Harness	Greyhound	Total
Cairns	73	0	8	81
Central Queensland	157	0	21	178
Darling Downs - Maranoa	147	11	7	165
Gold Coast	176	21	20	217
Ipswich	61	107	120	288
Logan - Beaudesert	80	56	68	203
Mackay - Isaac - Whitsunday	45	0	4	49
Moreton Bay	1	70	54	126
Queensland - Outback	115	0	1	116
Sunshine Coast	126	1	8	135
Toowoomba	160	9	15	184
Townsville	114	0	36	150
Wide Bay	83	9	40	132
<b>Total Regional Queensland</b>	<b>1,338</b>	<b>283</b>	<b>402</b>	<b>2,023</b>
Brisbane	74	16	33	123
<b>Total</b>	<b>1,413</b>	<b>299</b>	<b>435</b>	<b>2,146</b>

\*Some totals do not add due to rounding.

Trainers play an integral role in the racing 'service' industry. Training services generally incorporate pre-and race training, trailing and raceday management of racing horses and greyhounds. In the majority of cases, owners of racehorses fund the training operations through the payment of a daily training fee. The majority (but not all) of the costs associated with the care and preparation of racehorses is covered by this daily fee. In the greyhound racing code, trainers' income is mostly generated through an agreement which sees them take a 50% share of prizemoney won.

During the 2020/21 racing season, there were close to 1,700 horse and greyhound trainers providing services to owners in Queensland. These trainers were also supported by more 2,100 volunteers. The majority of these trainers operate in regional parts of the State.

Overall, there were more than 13,000 racing horses and greyhounds in training in Queensland in 2020/21. Brisbane (17.1%), the Gold Coast (16.6%) and the Sunshine Coast (11.8%) represent the largest areas of thoroughbred training activity. In the Harness and Greyhound racing industries, Ipswich (34.6%), Logan - Beaudesert (18.7%) and Moreton Bay (9.0%) make up of the training activity.



\*Some totals do not add due to rounding.







# Owners

## OWNERS OF RACING HORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	912	2	16	931
Central Queensland	1,302	9	57	1,368
Darling Downs - Maranoa	1,076	39	59	1,175
Gold Coast	3,186	119	154	3,459
Ipswich	837	218	262	1,317
Logan - Beaudesert	688	119	151	958
Mackay - Isaac - Whitsunday	699	21	20	740
Moreton Bay	1,191	182	132	1,504
Queensland - Outback	557	3	2	561
Sunshine Coast	1,753	23	42	1,818
Toowoomba	956	24	58	1,039
Townsville	1,020	6	79	1,105
Wide Bay	816	21	79	915
<b>Total Regional Queensland</b>	<b>14,993</b>	<b>787</b>	<b>1,110</b>	<b>16,890</b>
Brisbane	5,067	162	229	5,458
<b>Total</b>	<b>20,060</b>	<b>949</b>	<b>1,339</b>	<b>22,348</b>

\*Some totals do not add due to rounding.

## NUMBER OF TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,161	0	0	1,161
Central Queensland	2,788	0	3,364	6,152
Darling Downs - Maranoa	1,324	0	0	1,324
Gold Coast	3,600	0	0	3,600
Ipswich	3,236	1,042	11,862	16,140
Logan - Beaudesert	582	0	0	582
Mackay - Isaac - Whitsunday	1,677	0	0	1,677
Moreton Bay	611	10,278	0	10,889
Queensland - Outback	326	0	0	326
Sunshine Coast	4,518	0	0	4,518
Toowoomba	4,017	0	0	4,017
Townsville	2,679	0	7,919	10,598
Wide Bay	170	0	3,884	4,054
<b>Total Regional Queensland</b>	<b>26,689</b>	<b>11,320</b>	<b>27,029</b>	<b>65,038</b>
Brisbane	6,232	12,783	22,875	41,890
<b>Total</b>	<b>32,921</b>	<b>24,103</b>	<b>49,904</b>	<b>106,928</b>

NUMBER OF NON-TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,008	0	0	1,008
Central Queensland	987	0	0	987
Darling Downs - Maranoa	1,136	0	0	1,136
Gold Coast	0	0	0	0
Ipswich	150	0	0	150
Logan - Beaudesert	0	0	0	0
Mackay - Isaac - Whitsunday	212	0	0	212
Moreton Bay	50	38	0	88
Queensland - Outback	3,166	0	0	3,166
Sunshine Coast	0	0	0	0
Toowoomba	35	0	0	35
Townsville	839	0	0	839
Wide Bay	1,033	0	0	1,033
Total Regional Queensland	8,616	38	0	8,654
Brisbane	0	0	56	56
<b>Total</b>	<b>8,616</b>	<b>38</b>	<b>56</b>	<b>8,710</b>

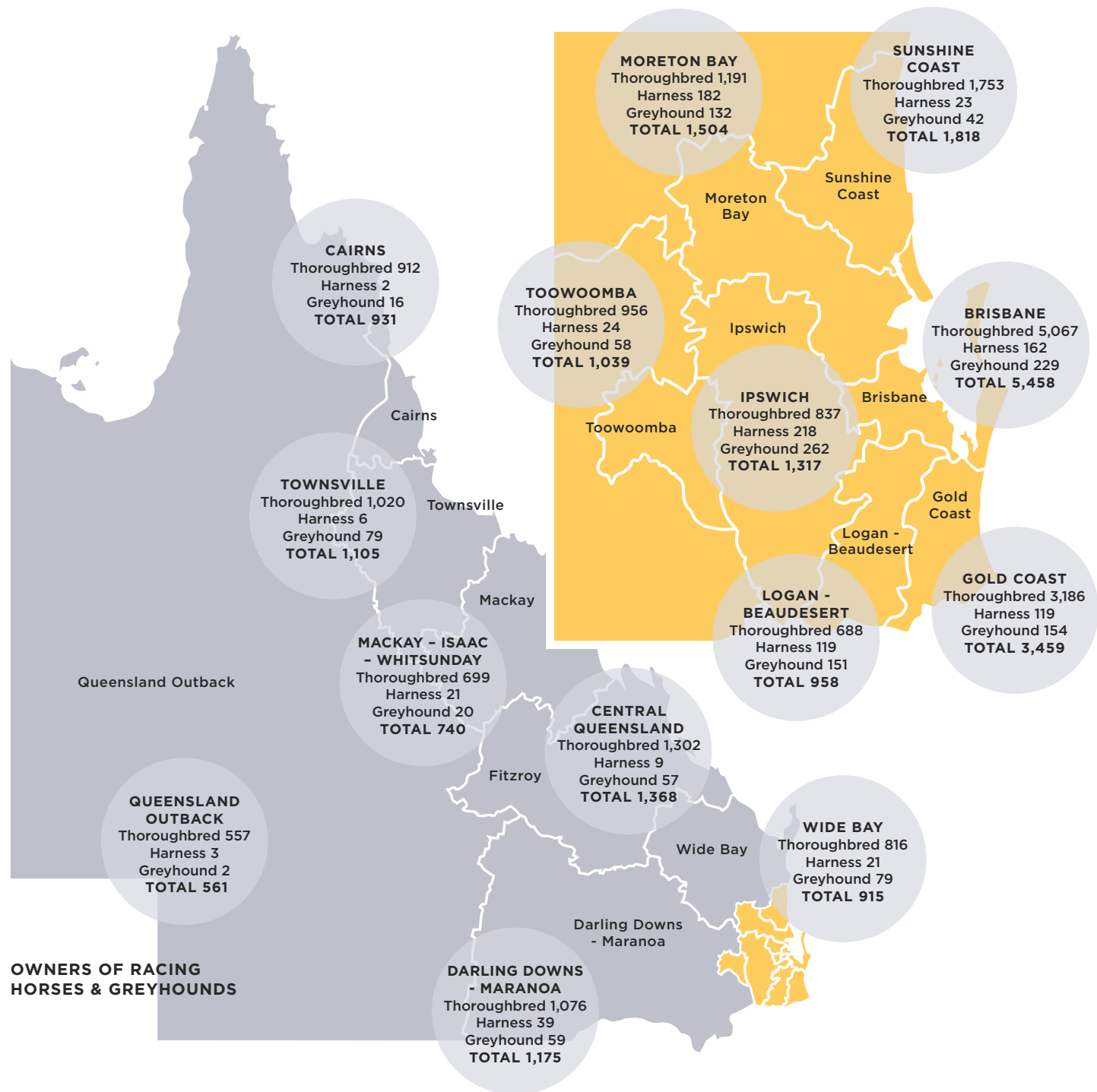
TOTAL RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2,169	0	0	2,169
Central Queensland	3,775	0	3,364	7,139
Darling Downs - Maranoa	2,460	0	0	2,460
Gold Coast	3,600	0	0	3,600
Ipswich	3,386	1,042	11,862	16,290
Logan - Beaudesert	582	0	0	582
Mackay - Isaac - Whitsunday	1,889	0	0	1,889
Moreton Bay	661	1,0316	0	10,977
Queensland - Outback	3,492	0	0	3,492
Sunshine Coast	4,518	0	0	4,518
Toowoomba	4,052	0	0	4,052
Townsville	3,518	0	7,919	11,437
Wide Bay	1,203	0	3,884	5,087
Total Regional Queensland	35,305	11,358	27,029	73,692
Brisbane	6,232	12,783	22,931	41,946
<b>Total</b>	<b>41,537</b>	<b>24,141</b>	<b>49,960</b>	<b>115,638</b>

# Owners race for more than \$193 million in prizemoney and bonuses that is on offer across the three codes

Owners play a significant role in the funding model of the racing industry. They provide much of the capital outlay and day-to-day funding for the purchase and preparation of racing horses and greyhounds. In 2020/21 there were more than 22,000 individuals with an ownership interest in thoroughbred, harness and/or greyhound racing in Queensland. More than 75% of owners reside in regional areas of Queensland, with Brisbane (24.4%) and the Gold Coast (15.5%) home to the most significant portion of owners across the three codes.

The investment by owners provides a critical funding source for breeders and trainers and is critically important to a successful racing industry. It is important, however, to note that it is often not identified as the most important motivation for participation. Many owners are involved in the racing industry, at least in part, as a hobby or leisure pursuit. However, a strong industry provides owners with the opportunity to realise some returns on their investment through the prizemoney on offer.



Queensland owners and trainers spent **in excess of \$325 million** in 2020/21 preparing **racing horses and greyhounds for racing**. The Gold Coast and Brisbane regions account for **more than one-third of this economic activity**.

## Economic Contribution of the Training Industry

In 2020/21, owners of racehorses and greyhounds trained in Queensland spent more than \$325 million on the preparation of their animals for racing. The calculation of expenditure on the preparation of racehorses and greyhounds takes into account the various training and non-training related expenditures incurred by owners and trainers.

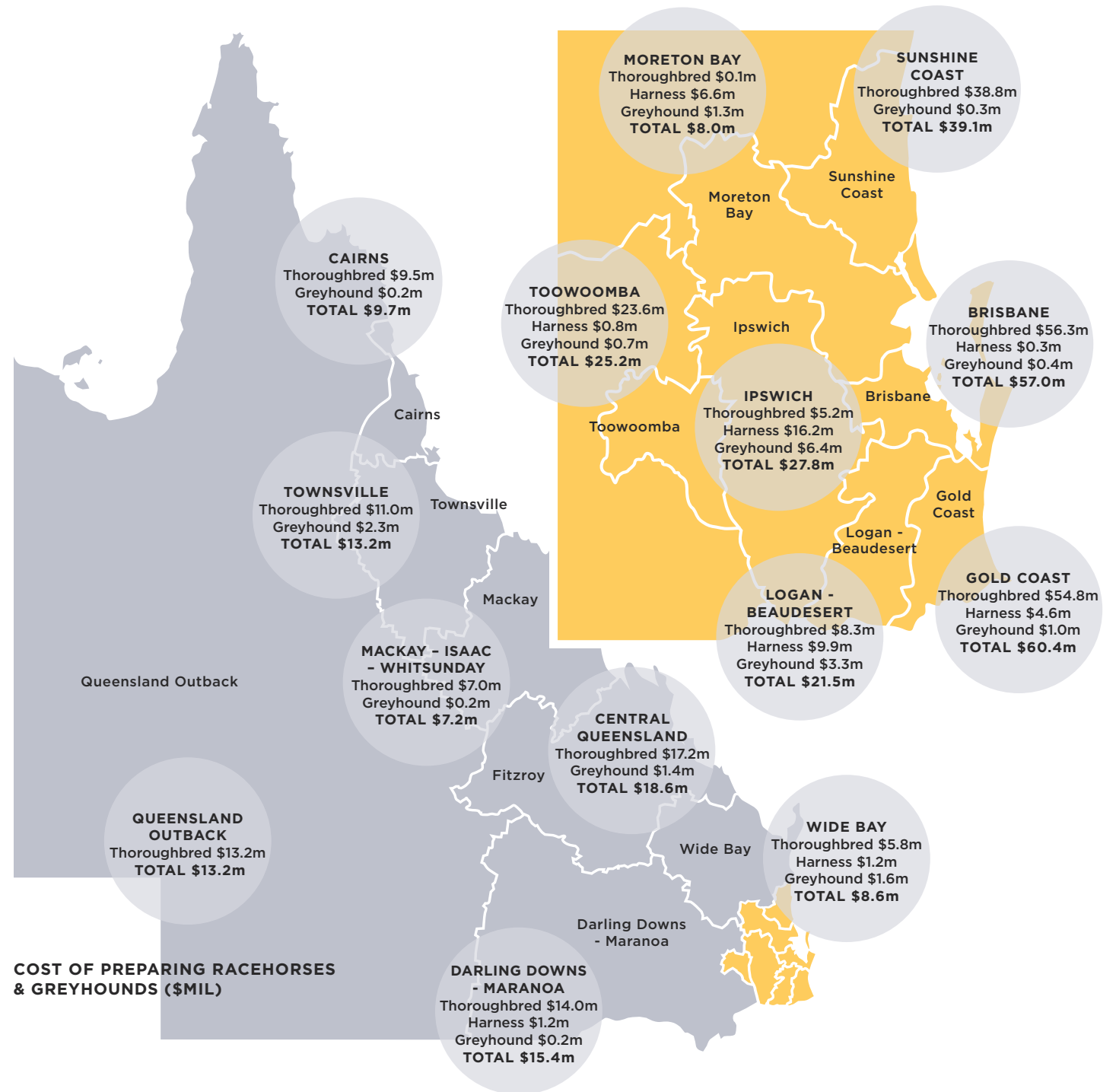
The development of expenditure profiles within each region is based upon the number of racehorses and greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the animal. For instance, expenditure during the education stage of a racehorse is different to expenditure on an established 3-year-old racehorse. It is also important that this assessment takes into consideration

non-Queensland owned racing horses and greyhounds which are trained in the state. Developing expenditure profiles on a 'per horse/ greyhound in training' basis, ensures that they are also included in the assessment.

The expenditure figures outlined in this section have been derived from a combination of industry level consultation and surveying of a sample of owners and trainers in Queensland. The analysis of the expenditure on the preparation of horses/greyhounds includes items such as training fees, insurance, vitamins and supplements, veterinarian fees, gear hire/ purchase and racing/ trialling fees, amongst others. It also picks up expenditure items incurred directly by owners that may not be covered on the trainers' bill.

\* Note - This figure does not cover costs of breeding or acquiring racing animals





Overall, more than 82% of the expenditure on training activities occurs in regional areas of the state. Regionally, Gold Coast (18.6%), Sunshine Coast (12.0%) and Ipswich (8.6%) make up the largest training areas outside of Brisbane (17.5%).

**From a racing code perspective, the most significant amount of training related expenditure is incurred in the following regions:**

**THOROUGHBRED RACING**

Thoroughbred training activity is responsible for generating more than \$264.9 million in expenditure impacts in Queensland.

Brisbane	\$56.3m (21.2%)
Gold Coast	\$54.8m (20.7%)
Sunshine Coast	\$38.8m (14.7%)

**HARNESS RACING**

Standardbred training activity is responsible for generating more than \$40.7 million in expenditure impacts in Queensland.

Ipswich	\$16.2m (39.8%)
Logan-Beaudesert	\$9.9m (24.4%)
Moreton Bay	\$6.6m (16.1%)

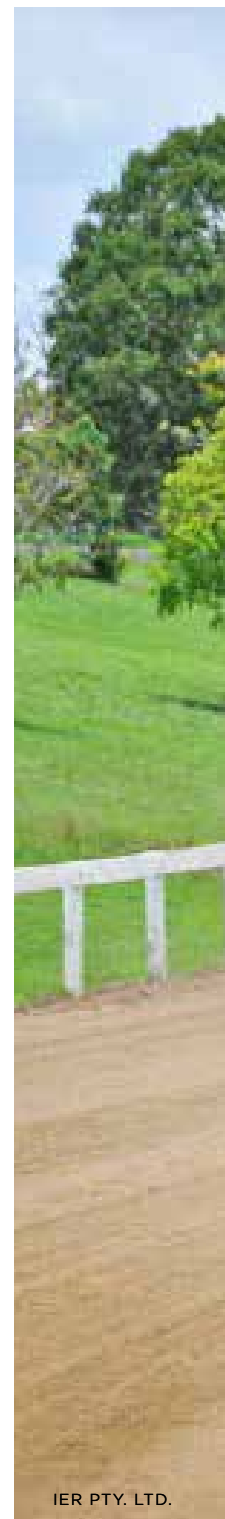
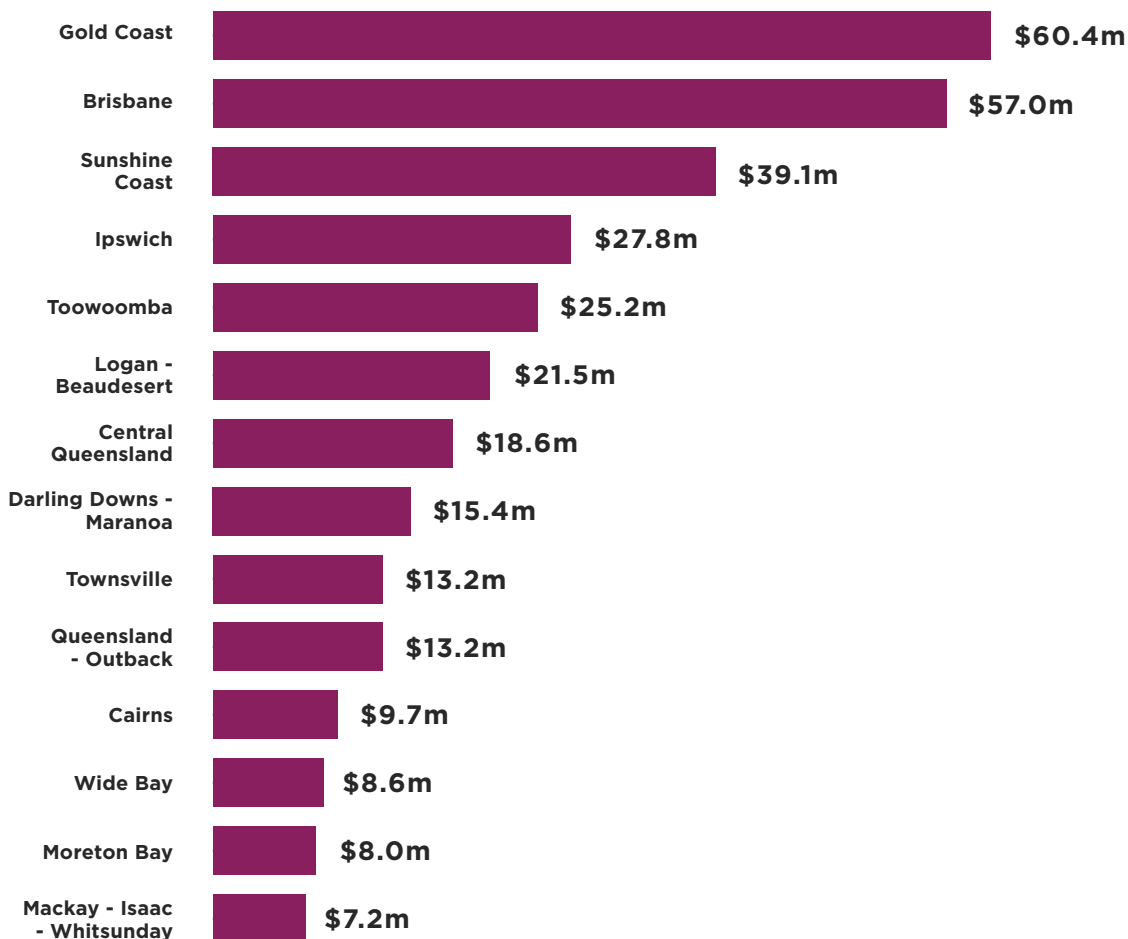
**GREYHOUND RACING**

Greyhound training activity is responsible for generating more than \$19.4 million in expenditure impacts in Queensland.

Ipswich	\$6.4m (33.2%)
Logan-Beaudesert	\$3.3m (17.1%)
Townsville	\$2.3m (11.8%)

The chart illustrates the total expenditure, by region, on thoroughbred, harness and greyhound training activities generated in Queensland.

**EXPENDITURE BY THE TRAINING SECTOR**







## Case study

### **HARD WORK AND DEDICATION PAYS OFF FOR EWAN AMATEUR TURF CLUB**

For the Ewan Amateur Turf Club, reaching their first ever TAB race day in 2021 was a significant milestone for the North Queensland country club, with the event being six years in the making.

The team located 150km inland from Townsville are not settled on racing a TAB race day in 2021 alone, they want to go bigger and better again next year and beyond.

In the middle of 2015 after almost 100 years of grass-fed racing, Ewan officials made the difficult decision, after serious deliberation, to run a corn-fed non-TAB meeting from that year forward, which has since been elevated to a TAB day. Countless hours of work and planning by the committee transitioning from a picnic grass-fed meeting to landing on the TAB stage, from new infrastructure such as jockeys rooms, new public shower and toilet blocks, 16 day stalls



for gallopers, a roof to block the afternoon sun from the horses, upgraded water options, track improvements and raising prize money to \$30,000 for the Ewan Cup, to encourage a better class of horse.

The conduct of a TAB meeting was unheard of for a bush track like Ewan, but with the support and efforts of local council and Racing Queensland it was a success.

While RQ and the local council have contributed to Ewan's growth, the club itself has committed to continue putting their money where their mouth is to become a major player on the North Queensland racing circuit.

The club's committee funded a groundskeeper to prepare the surface in the months leading into race day, believing that top notch facilities

will attract higher standard jockeys, trainers and horses in the coming years. This will be assisted moving forward with Ewan's officials aiming to spend between \$50,000 and \$100,000 on improvements for their facilities every year.

Everyone is looking forward to 2022 for the 100th year of racing in Ewan and a celebration of hard work and dedication.

## Case study

### **RACING, CAMPING AND DANCING AT THE OAK PARK RACE CLUB**

By delivering annual race days to the community in which they operate, smaller country racing clubs can deliver both positive economic and social impacts to the town and the people that live within the area. The value of an annual race day should not be underestimated, and this is the case for Oak Park Race Club. The club delivers an annual racing weekend which supports the community, just like many other smaller racing clubs right across the state of Queensland.

The annual Oak Park Race Club weekend is one most people in the north Queensland racing community circle on their calendar each and every year.

The Oak Park Races are held each year at Oak Park Station, almost 400km west of Townsville in Far North Queensland.



Like many of the once-a-year clubs in North Queensland, it is an annual pilgrimage to the track for many people who love a great day out at the races. Almost 1,500 patrons from all over Australia descend on Oak Park Station, in recent years a few New Zealanders have also found their way to what is one of the region's biggest events for the entire year.

The accommodation is unique and not far from the track, with most attendees camping onsite alongside the Copperfield River with facilities including hot and cold showers and even a dance hall set up by the Club.

Oak Park races over two days in July of each year, with five races each day across Friday and Saturday – the headline act being the famous Lyndhurst Shield worth a massive \$25,000.

At a community level, the weekend is also extremely important. It facilitates an event where families can get together. This is especially important for regional communities, whereby seeing family may only occur a few times a year due to geographic barriers. Some families have had regular bookings at the racedays and use it as a major family social event.

# RACING CLUBS, ASSOCIATIONS AND AUTHORITIES

## NUMBER OF TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2	0	0	2
Central Queensland	3	0	1	4
Darling Downs - Maranoa	3	1	0	4
Gold Coast	1	1	0	2
Ipswich	1	1	1	3
Logan - Beaudesert	2	0	0	2
Mackay - Isaac - Whitsunday	1	0	0	1
Moreton Bay	1	1	0	2
Queensland - Outback	1	0	0	1
Sunshine Coast	1	0	0	1
Toowoomba	2	0	0	2
Townsville	1	0	1	2
Wide Bay	0	0	1	1
Total Regional Queensland	19	3	4	26
Brisbane	2	1	2	5
<b>Total</b>	<b>21</b>	<b>5</b>	<b>6</b>	<b>32</b>

\* Note - A TAB club is classified as holding TAB race meetings throughout the racing season.

## NUMBER OF NON-TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	6	0	0	6
Central Queensland	10	0	0	10
Darling Downs - Maranoa	21	0	0	21
Gold Coast	0	0	0	0
Ipswich	1	0	0	1
Logan - Beaudesert	0	0	0	0
Mackay - Isaac - Whitsunday	5	0	0	5
Moreton Bay	0	0	0	0
Queensland - Outback	36	0	0	36
Sunshine Coast	0	0	0	0
Toowoomba	0	0	0	0
Townsville	7	0	0	7
Wide Bay	10	0	0	10
Total Regional Queensland	96	0	0	96
Brisbane	0	0	0	0
<b>Total</b>	<b>96</b>	<b>0</b>	<b>0</b>	<b>96</b>

# Race Track Locations



Sourced from Racing Queensland 2019

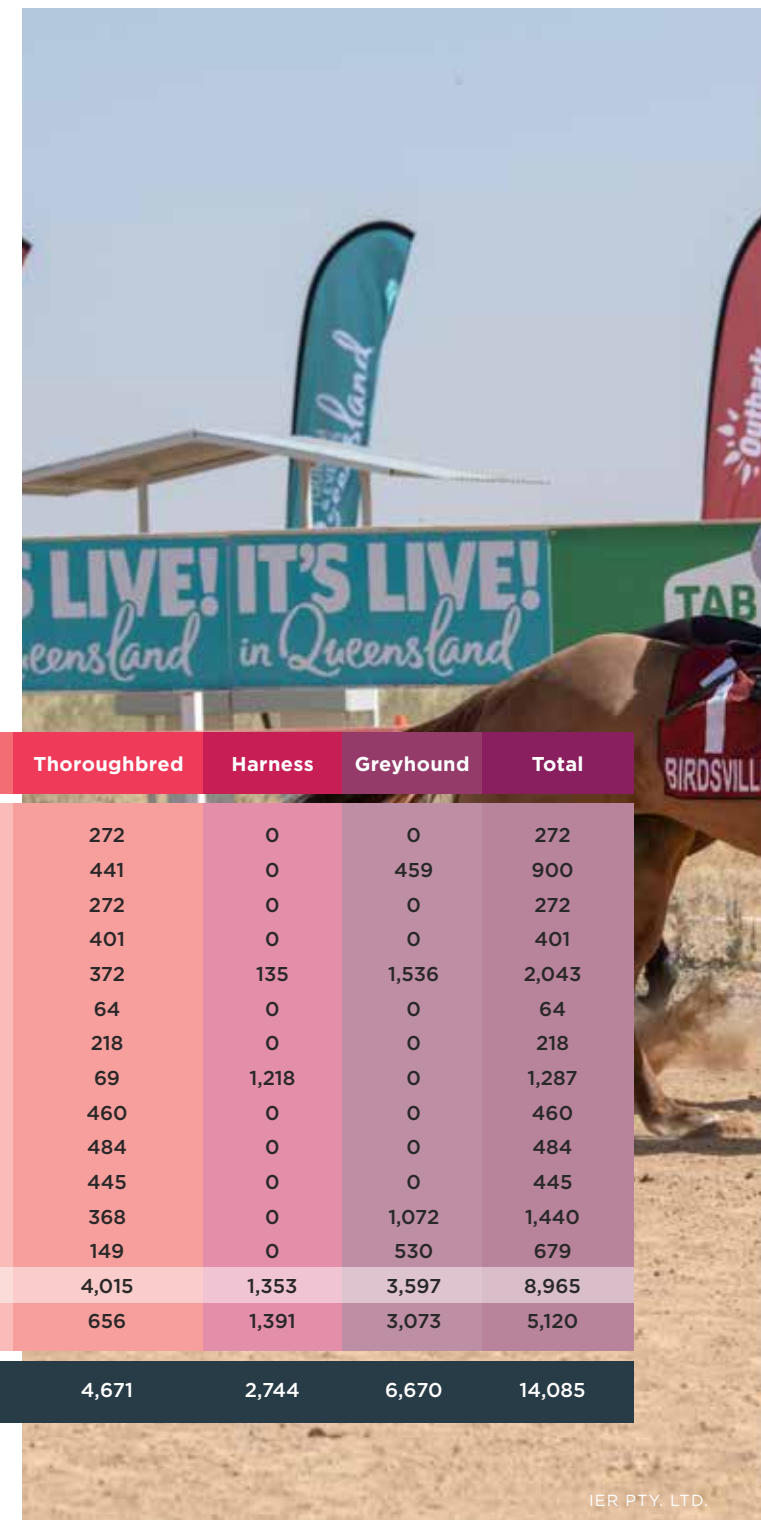


**TOTAL RACE MEETINGS**

	Thoroughbred	Harness	Greyhound	Total
Cairns	44	0	0	44
Central Queensland	69	0	46	115
Darling Downs - Maranoa	45	0	0	45
Gold Coast	50	0	0	50
Ipswich	48	16	154	218
Logan - Beaudesert	9	0	0	9
Mackay - Isaac - Whitsunday	31	0	0	31
Moreton Bay	9	133	0	142
Queensland - Outback	82	0	0	82
Sunshine Coast	62	0	0	62
Toowoomba	58	0	0	58
Townsville	53	0	100	153
Wide Bay	29	0	54	83
<b>Total Regional Queensland</b>	<b>589</b>	<b>149</b>	<b>354</b>	<b>1,092</b>
Brisbane	77	150	284	511
<b>Total</b>	<b>666</b>	<b>299</b>	<b>638</b>	<b>1,603</b>

**TOTAL RACES**

	Thoroughbred	Harness	Greyhound	Total
Cairns	272	0	0	272
Central Queensland	441	0	459	900
Darling Downs - Maranoa	272	0	0	272
Gold Coast	401	0	0	401
Ipswich	372	135	1,536	2,043
Logan - Beaudesert	64	0	0	64
Mackay - Isaac - Whitsunday	218	0	0	218
Moreton Bay	69	1,218	0	1,287
Queensland - Outback	460	0	0	460
Sunshine Coast	484	0	0	484
Toowoomba	445	0	0	445
Townsville	368	0	1,072	1,440
Wide Bay	149	0	530	679
<b>Total Regional Queensland</b>	<b>4,015</b>	<b>1,353</b>	<b>3,597</b>	<b>8,965</b>
Brisbane	656	1,391	3,073	5,120
<b>Total</b>	<b>4,671</b>	<b>2,744</b>	<b>6,670</b>	<b>14,085</b>





#### TOTAL ATTENDANCES

	Thoroughbred	Harness	Greyhound	Total
Cairns	14,442	0	0	14,442
Central Queensland	37,869	0	4,152	42,021
Darling Downs - Maranoa	33,568	168	0	33,736
Gold Coast	95,510	0	0	95,510
Ipswich	39,128	3,500	13,125	55,753
Logan - Beaudesert	4,489	0	0	4,489
Mackay - Isaac - Whitsunday	11,460	0	0	11,460
Moreton Bay	6,865	25,171	0	32,036
Queensland - Outback	27,410	0	0	27,410
Sunshine Coast	72,477	0	0	72,477
Toowoomba	28,350	0	0	28,350
Townsville	44,510	0	7,282	51,792
Wide Bay	19,220	0	5,484	24,704
<b>Total Regional Queensland</b>	<b>435,298</b>	<b>28,839</b>	<b>30,043</b>	<b>494,180</b>
Brisbane	119,648	33,000	28,460	181,108
<b>Total</b>	<b>554,946</b>	<b>61,839</b>	<b>58,503</b>	<b>675,288</b>

\*Some totals do not add due to rounding.



#### NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	642	0	0	642
Central Queensland	948	0	43	991
Darling Downs - Maranoa	1,071	0	0	1,071
Gold Coast	2,169	19	0	2,188
Ipswich	461	29	124	614
Logan - Beaudesert	11	0	0	11
Mackay - Isaac - Whitsunday	189	0	0	189
Moreton Bay	106	126	0	232
Queensland - Outback	3,145	0	0	3,145
Sunshine Coast	2,837	0	0	2,837
Toowoomba	491	0	0	491
Townsville	1,254	0	49	1,303
Wide Bay	1,010	0	72	1,082
<b>Total Regional Queensland</b>	<b>14,334</b>	<b>174</b>	<b>288</b>	<b>14,796</b>
Brisbane	7,951	400	200	8,551
<b>Total</b>	<b>22,285</b>	<b>574</b>	<b>488</b>	<b>23,347</b>



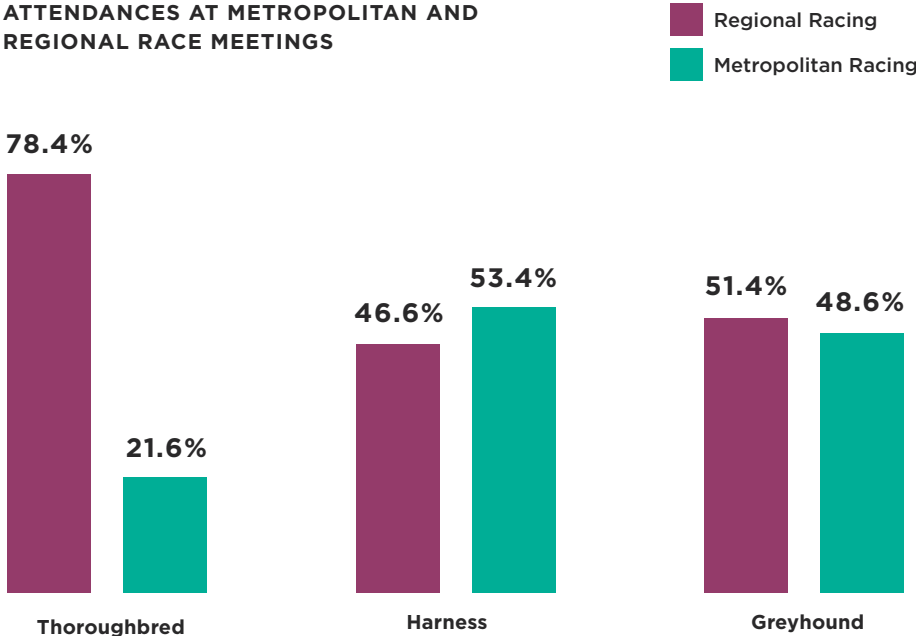
# Racing Clubs

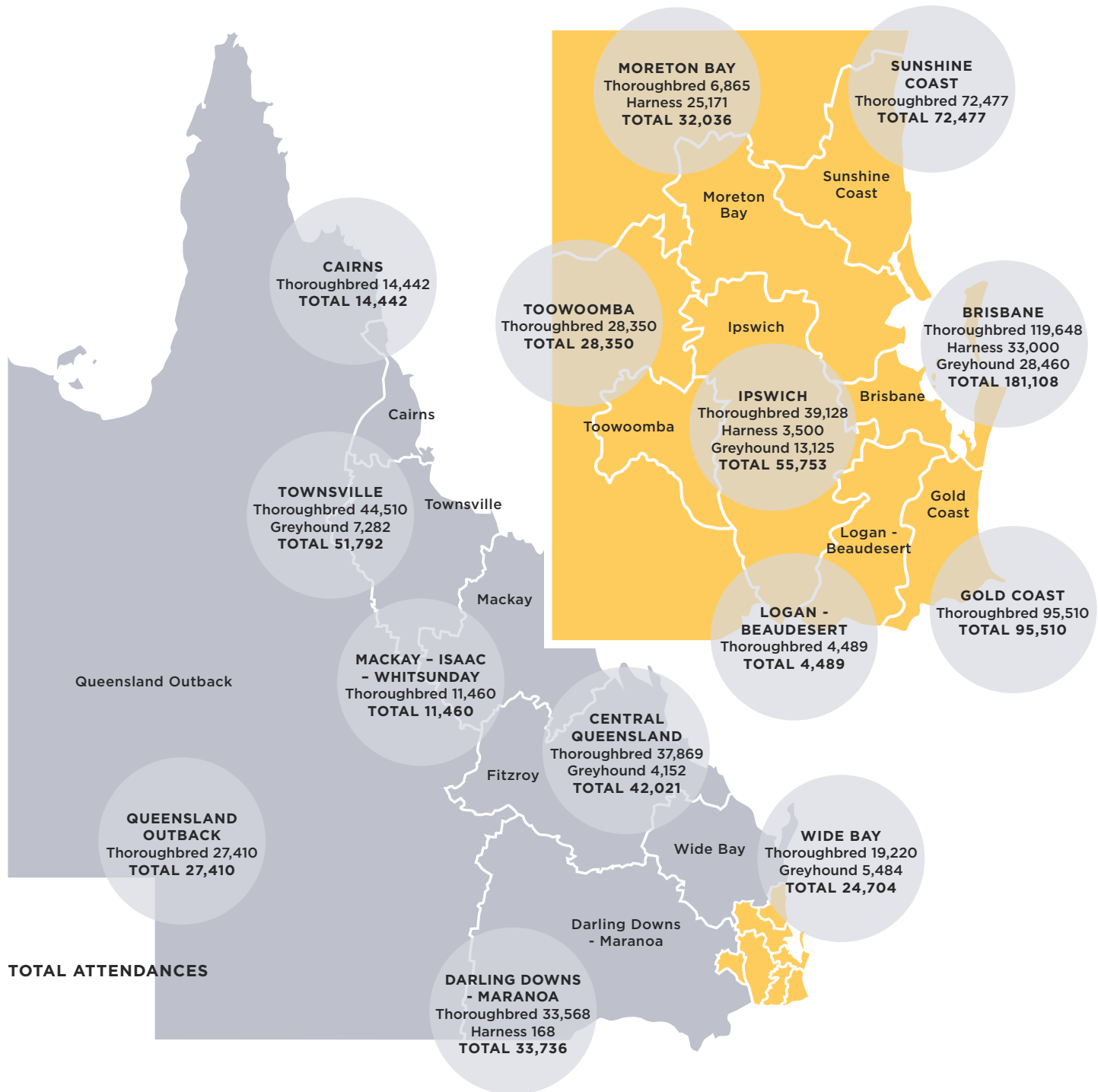
There are 128 racing clubs in Queensland across the three codes of racing. Queensland is unique in the Australian racing landscape with the majority of these racing clubs (96) running primarily non-TAB race meetings. This means that racing at these clubs is not covered by the TAB and instead is driven moreso by community involvement and on-course bookmaker betting.

Racing clubs not only provide the opportunity for participants and spectators to participate in the sport of racing, they also provide an important social destination and in many regions, are an important part of the social fabric of the community.

In 2020/21, there were 1,387 TAB race meetings and a further 216 non-TAB race meetings. These race meetings attracted attendances close to 675,300 – 73% of which were in regional areas. Thoroughbred race meetings, in Queensland, attracted a total of 554,946 attendances. Race meetings in Brisbane (119,648) and the Gold Coast (95,510) were responsible for the largest attendance. Harness race meetings attracted 61,839 attendances with race meetings in Brisbane (33,000) and Moreton Bay (25,171) making up the majority of this amount. Greyhound racing attracted attendance of 58,503 with race meetings in Brisbane (28,460) and Ipswich (13,125) making up more than two-thirds of all attendances.

The following chart illustrates the break-down of attendances at metropolitan and regional race meetings in Queensland







# Customer Expenditure Generated by Racing Clubs and Events

In 2020/21 it is estimated that the total expenditure generated by racing customers was close to \$171.0 million, (excluding wagering on the races). Racing’s customers include attendees, sponsors, members, broadcast providers, community groups and participants. Racing customer expenditure can be broadly segmented into the following categories:

- + On-course raceday expenditure by customers (spending on on-course products, as well as yields from membership and sponsorship)
- + Off-course raceday expenditure by customers (spending incurred by customers as part of their attendance at the races, such as transport, retail, food etc.)
- + Non-raceday related expenditure (spending with racing clubs on non-racedays on items such as hiring arrangements for facility use, fundraising, investments, track fees, etc.)

On-course customer expenditure funds the administration, operation and other costs that racing clubs incur.

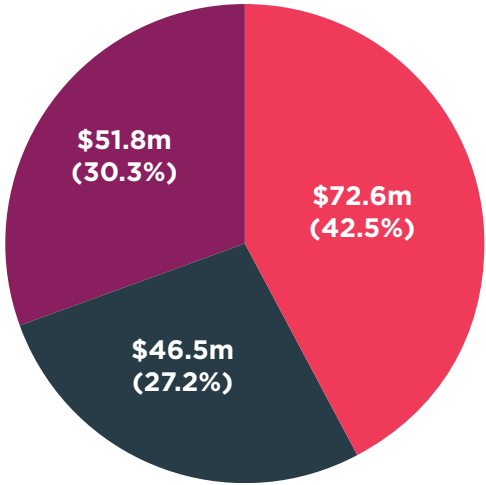
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. Major racing events have long proven their ability to extend the generation of economic stimulus into a broader cross-section of the local economy. It is important to note that on-course expenditure within this section does not include on-course wagering.

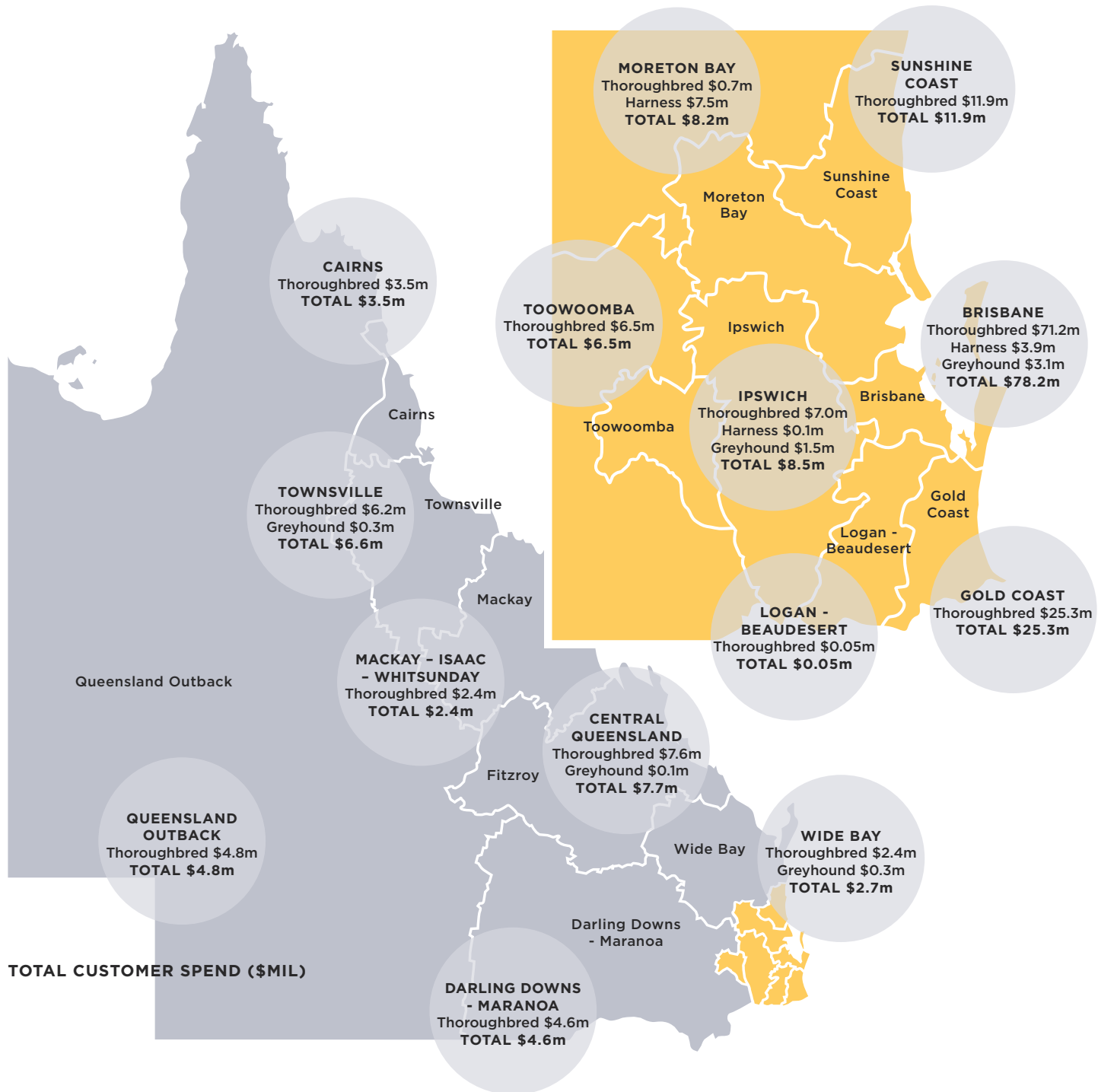
Whilst on-course wagering is the largest component of customer spend, it is analysed in the section relating to wagering.

The following chart illustrates the split of customer expenditure. It shows that for every dollar spent on-course by racing attendees, a further 50 cents is spent off-course. This is more heavily driven by feature race meetings where the links to fashion and retail, as well as larger travel distances for those attending the races, drive spending in the community.

### BREAKDOWN OF RACING CUSTOMER SPENDING

- On-course Raceday
- Off-course Raceday
- Non Raceday







Wagering customers represent one of the key funding sources for the Queensland racing industry. In 2020/21, racing industry funding was generated through the following sources:

- + Wagering on Racing Queensland product through QTAB\* (both on-course and off-course betting)
- + Wagering on Interstate/Overseas racing product through QTAB
- + Wagering on Racing Queensland product through various wagering service providers (WSP) including interstate totalisator operators, corporate bookmakers, betting exchanges and on course bookmakers

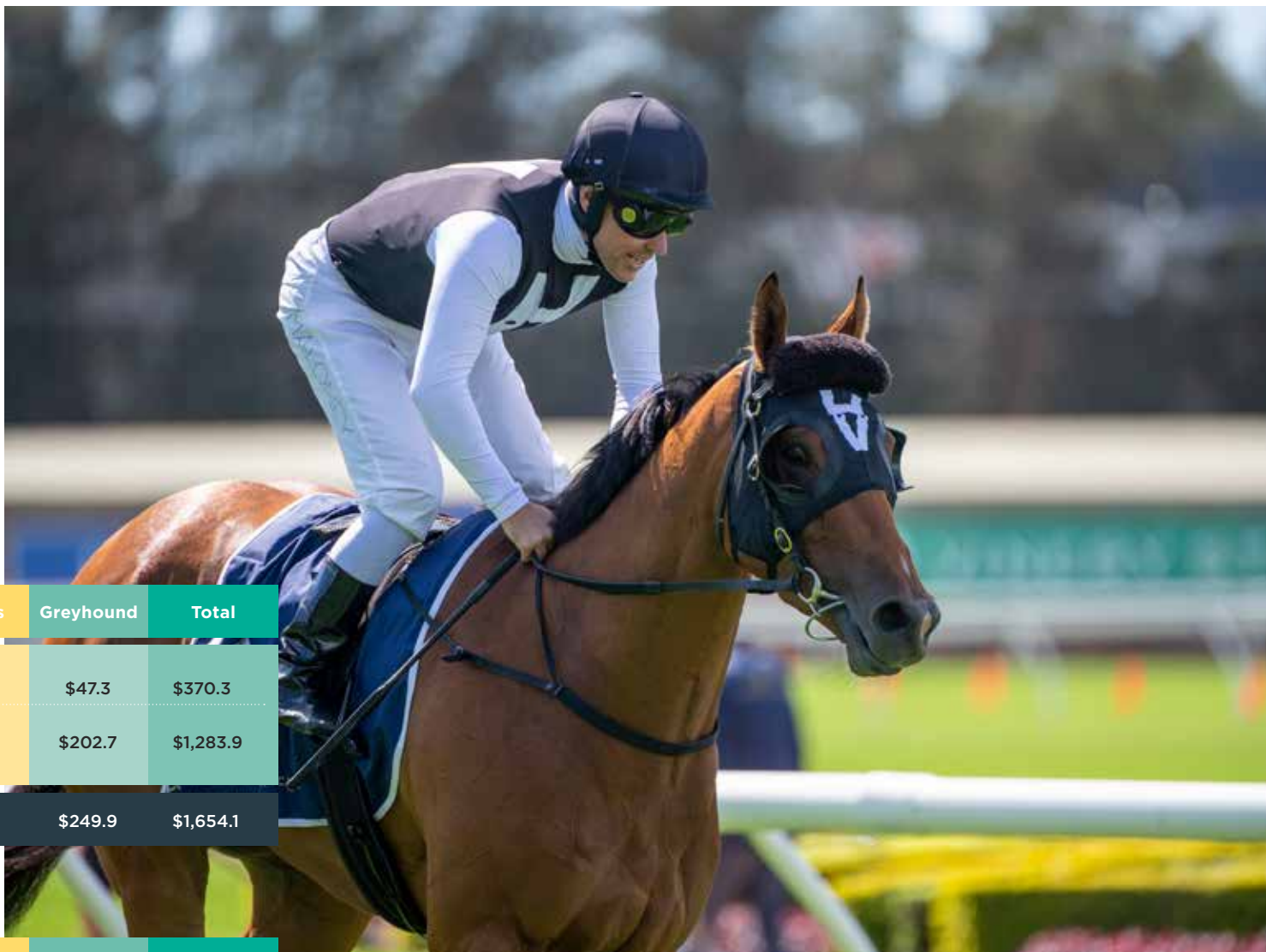
The revenue generated from this wagering activity represents a significant portion of the racing industry's revenue each year.

The following table illustrates the total wagering turnover generated by Queensland residents with QTAB by code:

(\$MIL)	Thoroughbred	Harness	Greyhound	Total
Wagering on QLD racing product with QTAB	\$290.8	\$32.3	\$47.3	\$370.3
Wagering on Interstate/Overseas racing product with QTAB	\$990.2	\$91.0	\$202.7	\$1,283.9
<b>Total</b>	<b>\$1,281.0</b>	<b>\$123.3</b>	<b>\$249.9</b>	<b>\$1,654.1</b>

The following table illustrates the total wagering turnover on Queensland racing product with non-QTAB wagering service providers by code:

(\$MIL)	Thoroughbred	Harness	Greyhound	Total
<b>Total non-QTAB WSP turnover</b>	<b>\$1,130.5</b>	<b>\$202.0</b>	<b>\$366.7</b>	<b>\$1,699.1</b>



**Close to 57% of all betting** on Queensland Racing product is on races held in **regional parts of the State.**

Racing in the Sunshine Coast, Ipswich and Gold Coast regions represent **31.4% of all wagering turnover** on Queensland Racing product.

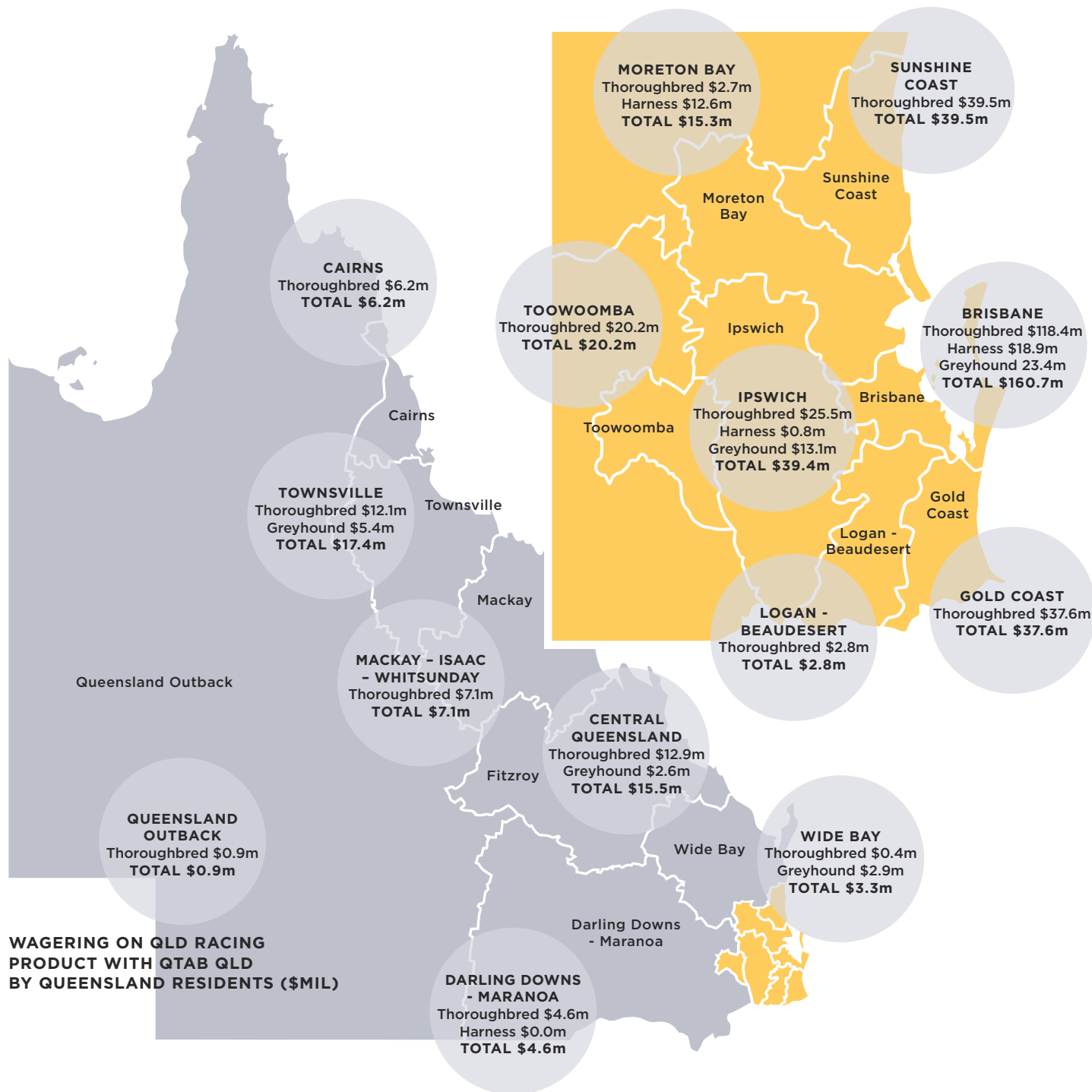
Races held in Queensland generate more than \$370 million in wagering turnover with QTAB QLD by Queensland residents.

Brisbane (40.7%), Sunshine Coast (13.6%) and Gold Coast (12.9%) racing account for just over two-thirds of all thoroughbred wagering on Queensland Racing product with QTAB QLD by Queensland residents. These three regions makes up 33.0% of all thoroughbred race meetings held in Queensland.

In the harness racing sector, Brisbane (58.5%) and the Moreton Bay region (39.0%) represent nearly all of the wagering on Queensland harness racing product with QTAB QLD by Queensland residents.

The majority of QTAB QLD wagering turnover by Queensland residents on Queensland greyhound racing, occurs in Brisbane (49.4%) and Ipswich (27.7%) where 69% of the greyhound racing activity occurs.

\* Note - Turnover is not based on customer location



# Expenditure by the Principal Racing Authority and Clubs

In 2020/21, Racing Queensland and the 127 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of more than \$467 million in Queensland. This represents the expenditure incurred by these organisations in maintaining tracks, running race meetings, administration, marketing, cost of goods and prizemoney.

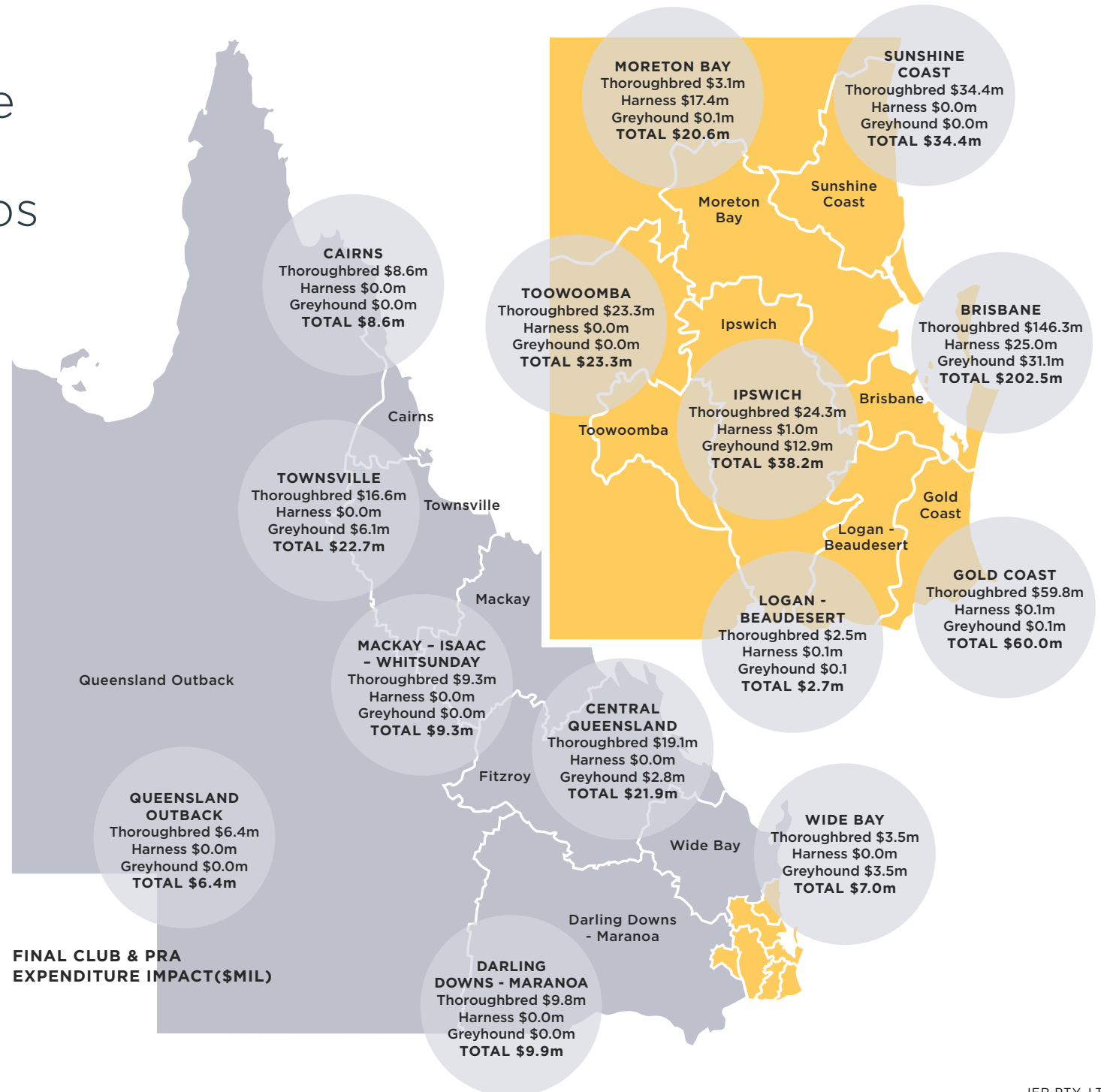
The majority of expenditure generated by the PRA and racing clubs is funded by racing customers. This includes:

- + Spending by customers on-course when attending a racing event
- + Non raceday utilisations of racing industry assets
- + Sponsorship and membership associated with racing clubs
- + Racing industry share of off-course wagering revenue (pari-mutuel, corporate bookmakers & betting exchanges)
- + Government grants which come indirectly from license payments and taxes from wagering operators

The major areas of expenditure, in terms of racing industry operations, include:

- + Track repairs & facilities maintenance
- + Staff & personnel
- + Cost of goods
- + Marketing & promotions
- + Utilities

Just over 43% (\$202.5 million) of this expenditure impact occurred in Brisbane - a result largely driven by the presence of the largest racing clubs (in terms of size and financial impact) as well as the principal racing authority. The Gold Coast (12.8%) generates the next most significant impact with the remainder spread around the State.







# MAJOR EVENT IMPACTS

## Magic Millions Raceday & Sales

### OVERVIEW

The Magic Millions Raceday is one of Australia's richest racedays with more than \$10 million in prizemoney on offer. In 2021, the raceday attracted attendances in excess of 13,460 people.

### KEY TOURISM IMPACTS

In 2021, an economic impact assessment of the Magic Millions Raceday was undertaken. The study found that the event generated \$14 million of direct in-scope expenditure for the Queensland economy. The event was directly responsible for over 2,940 visitors to Queensland – new people

to the Gold Coast and Queensland economies. In addition to the impacts associated with the raceday, the bloodstock sales component of the event has great potential to generate economic impacts within the QLD economy. This is particularly the case when a non-QLD buyer purchases a QLD bred racehorse.

The following tables illustrate the key impacts to the State:

Tourism Impact	2019	2020	2021
In-scope visitors (spectators, sponsors and participants)	5,299	5,977	2,947
In-scope expenditure for the QLD economy	\$15.0m	\$17.3m	\$14.1m
Visitor Nights generated in QLD	26,930	31,528	25,614

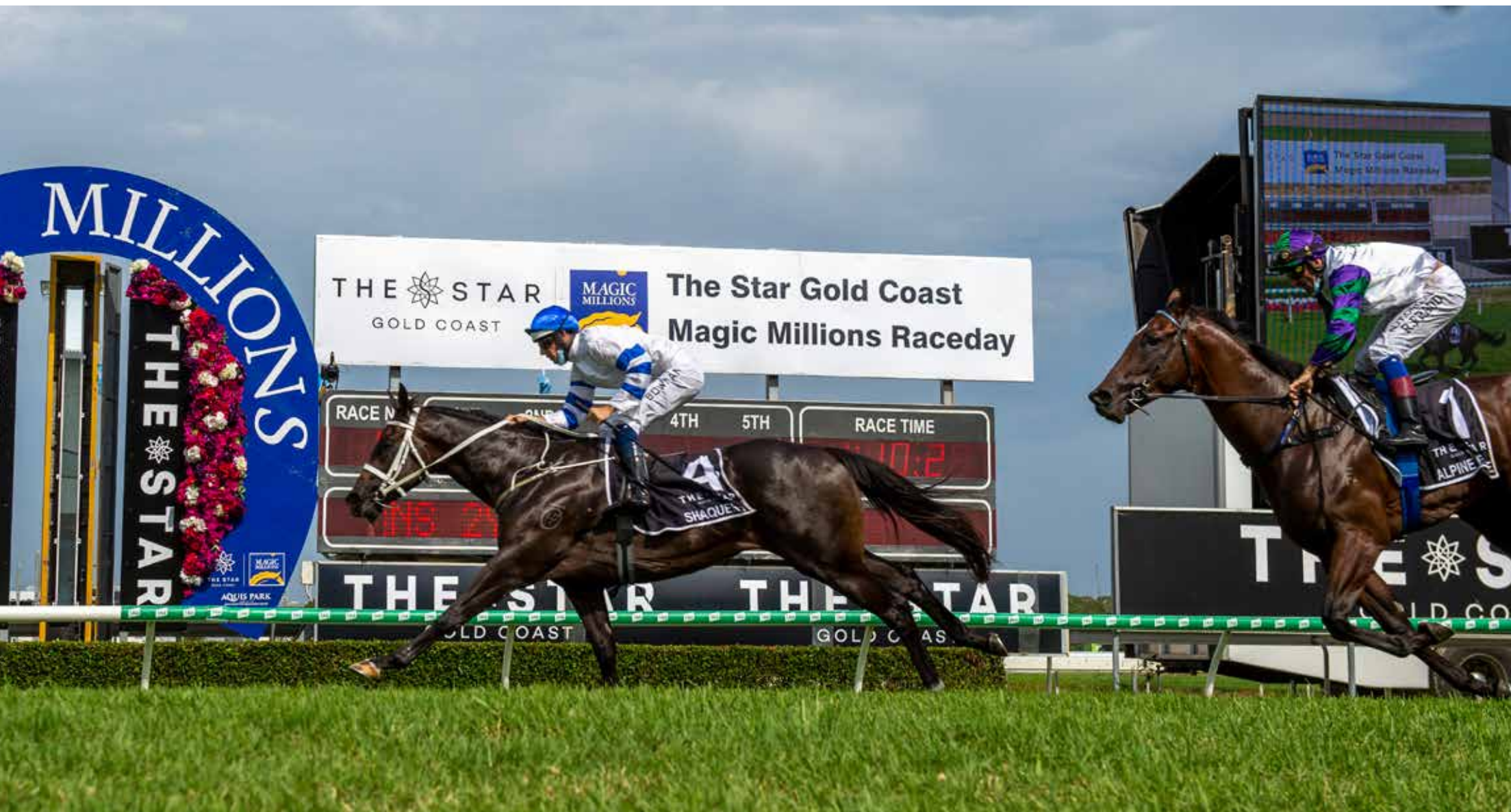
Economic Impact (\$AUD)	2019	2020	2021
Magic Millions Polo	\$2.3m	\$2.9m	-
Magic Millions Raceday	\$17.4m	\$20.0m	\$16.5m
Gold Coast Yearling Sale	\$14.1	\$15.8m	\$14.6m
Gold Coast National Sale	\$16.0m	\$10.7m	\$13.8m
<b>Total Economic Impact</b>	<b>\$49.8m</b>	<b>\$49.4m</b>	<b>\$44.9m</b>

Please note the Magic Millions Polo figures were unavailable as the event did not take place in 2021.

The data presented on this page is prepared by third part researcher, Strategic Facts, on behalf of Tourism & Events Queensland and Magic Millions.

\*2021 results have been affected due to impacts from COVID-19.





## Case study

### QUEENSLAND RACING INDUSTRY - STRONG FEMALE LEADS

The racing industry is one of very few sporting codes where females and males compete and work equally alongside each other. Female participation in many aspects of the Queensland racing industry is well established with females representing 41% of the spectrum of participant roles across the entire racing industry.

Future female participation in the thoroughbred code is extremely encouraging with females representing 73% of all apprentice jockeys. Not only do they represent close to three-quarters of the apprentice cohort, but their performance is also outstanding. In 2020/21, females held four of the top five places in the country apprentice premierships.

The Queensland trainer's cohort across all codes has a 22% female participation rate. Although the proportion of female participation is lower than males compared to other participant roles in the industry, female trainers in Queensland are certainly recognised for their significant achievements. Females topped the 2020/21 trainer's premiership tables in greyhounds as well as thoroughbreds in country Queensland. In harness racing, two of the top five trainers for 2020/21 are women.

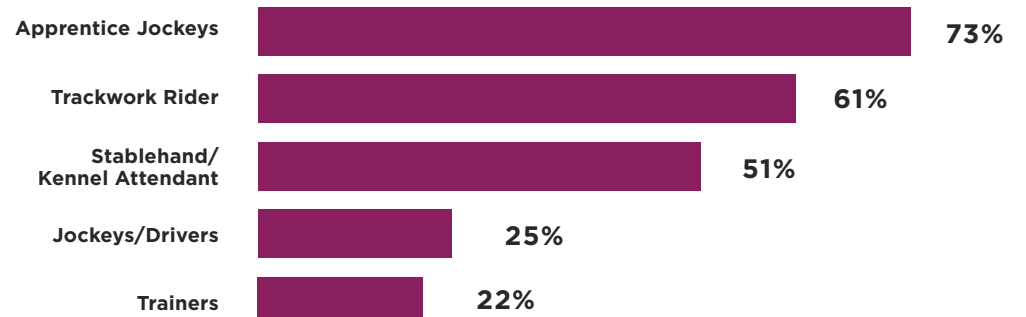
In addition to this, the adjacent chart illustrates that there are more female trackwork riders and stablehand/kennel attendants than their male counterparts. This augers well for future female participation, with many participants using roles such as trackwork riders and stablehand/kennel attendants as stepping stones to professional riding, driving and training.

Encouragement and support of female involvement in the racing industry also extends to owners with the establishment of the Magic Millions Racing Women's Initiative almost ten years ago. The initiative offers a bonus of \$500,000 to the first four all female owned or leased horses in the Magic Millions 2YO Classic and since its inception there have been four winners of the bonus including Away Game in 2020.

The support and promotion of female participation in the industry continues to gain momentum in Queensland. An example of this from recent years is the different initiatives and events organised across the three codes of racing to celebrate International Women's Day.



### FEMALE PARTICIPATION IN THE QUEENSLAND RACING INDUSTRY





## Community and Social Benefits

Thoroughbred, harness and greyhound racing in Queensland play an important role in the development and preservation of social and community benefits throughout the state. The majority of these social impacts are initiated through club activities, both on racedays and non-racedays, as well as the partnerships they form with many community organisations. The contribution to community social benefit enhances both individual and community well-being throughout the regions and towns where racing exists.

The economic activity generated by the Queensland racing industry complements the social impacts, particularly in regional areas where racing events and facilities foster social cohesion and provide benefits for a broad range of individuals and community organisations.

Racing and non-racing events attract community members, independent of socio-economic status, age or gender. This is highlighted within the racing industry throughout Queensland, where racing is a profession, sport, hobby and leisure activity.

The development of social and environmental initiatives also has a positive impact in terms of family socialisation and volunteerism. With this, racing also supports health, education, employment and environmental practices.

However, maintaining and building the trust and respect of the communities in which racing clubs operate is also extremely valuable.

The implementation and communication of social and environmental initiatives play an important role in managing community perceptions and in doing so, protect and enhance racing's image and reputation. This in turn provides the industry with a greater opportunity to foster the support of customers, corporate partners and government, as well as building pride and increased satisfaction with internal stakeholders.

This racing industry study incorporated a social impact survey which was completed by the racing clubs within each code. The information gathered from this survey provided valuable insights in determining the extent of the social and environmental benefits generated by the racing industry.





The evaluation highlighted the racing industry's significant role in the critical areas of:

- + **Community Building** Building inclusive and welcoming communities featuring powerful collaborative partnerships and relationships
- + **Family** Providing opportunities for family participation in racing and assisting in the development of stronger family relationships
- + **Education and Training** Supporting the education, training and development of participants and racing club staff and volunteers
- + **Health** Commitment to policies that support priority community health objectives and providing engagement and a sense of worth for volunteers within the industry
- + **Leisure** Providing enjoyable leisure opportunities for hobby owners, trainers and breeders, raceday/night customers and other racing club event attendees
- + **Employment** Creating a major source of employment and a variety of career opportunities for Queensland residents
- + **Environment** Adoption of many environmentally friendly practices that support government and community expectations relating to the protection of the Queensland environment

### CAPACITY BUILDING

Most racing Clubs hire out on-course facilities for private or corporate use. The hire of these facilities serve events that support their local communities



### CHARITABLE SUPPORT

Close to 600 charitable organisations are supported by the racing industry. These charities receive direct funds, in addition to in-kind support



### HISTORY

Racing in Queensland has a long and celebrated history dating back to the 1840s



### VOLUNTEERISM

Over 8,200 individuals provide their skills, time and support to the racing industry as a volunteer



### FACILITY SHARING

Close to 230 community and not-for-profit organisations share racing club facilities in Queensland



### COMMUNITY

Racing clubs provide an important community for more than 27,600 members and volunteers who are actively engaged in their club. Close to 675,300 attendances are recorded at Queensland race meetings.





## COMMUNITY BUILDING

The three codes of racing in Queensland have each adopted practices that engage with individuals and build strong partnerships with organisations within their communities. This is particularly visible in terms of supporting charitable organisations, engaging volunteers and building community partnerships.

The survey results highlighted the following positive outcomes demonstrated by clubs:

- + Close to 600 community organisations or charities are assisted and supported by racing clubs
- + Close to 230 community organisations share racing club facilities and resources
- + Racing in Queensland currently engage more than 8,200 volunteers who assist in various club, kindred body and industry related roles
- + 23,347 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 8,111 people who provide volunteer time and services to racing clubs. Socially, volunteering is recognised as a means of enhancing the quality of life, particularly among the aged, whilst making an important contribution to the community.

Volunteers in racing assume roles in areas such as:

- + Promotions and fundraising (e.g. Fashions on the Field, decorating, VIP marquee organiser, event management, grant writers, sponsorship, Emcee etc.)
- + Photo finish, clerk of the course, barrier

attendants, starters and judging, betting supervisors

- + Preparing and maintaining the track and grounds
- + Administration and finance duties
- + Gate ticket sellers and parking attendants
- + Operating food and beverage outlets
- + Racing operations (gate attendants etc.)
- + Fundraising
- + Cleaning duties
- + Repairs, maintenance of facilities and gardening
- + Horse check in and distributing saddlecloths
- + Operating trials

IER found that racing clubs financially assist and support 596 organisations and charities.

Club organised functions raise significant funds for community organisations and charities through activities such as raffles and auctions. Furthermore, many clubs engage local community organisations and charities to undertake such activities as supplying food and beverages, operational duties (e.g. gate attendants) and racecourse cleaning – sometimes in exchange for a share of revenues from those activities.

Just some of the charitable organisations supported by racing include:

- + Cancer Charities (e.g. Queensland Cancer Council, Prostate Cancer Awareness, Breast and Ovarian Cancer Awareness, Springsure Cancer Committee)
- + Children's Charities (1200kms for Kids, Brainchild foundation, Starlight Children's Foundation, Harrison's Little Wings Inc, Isolated

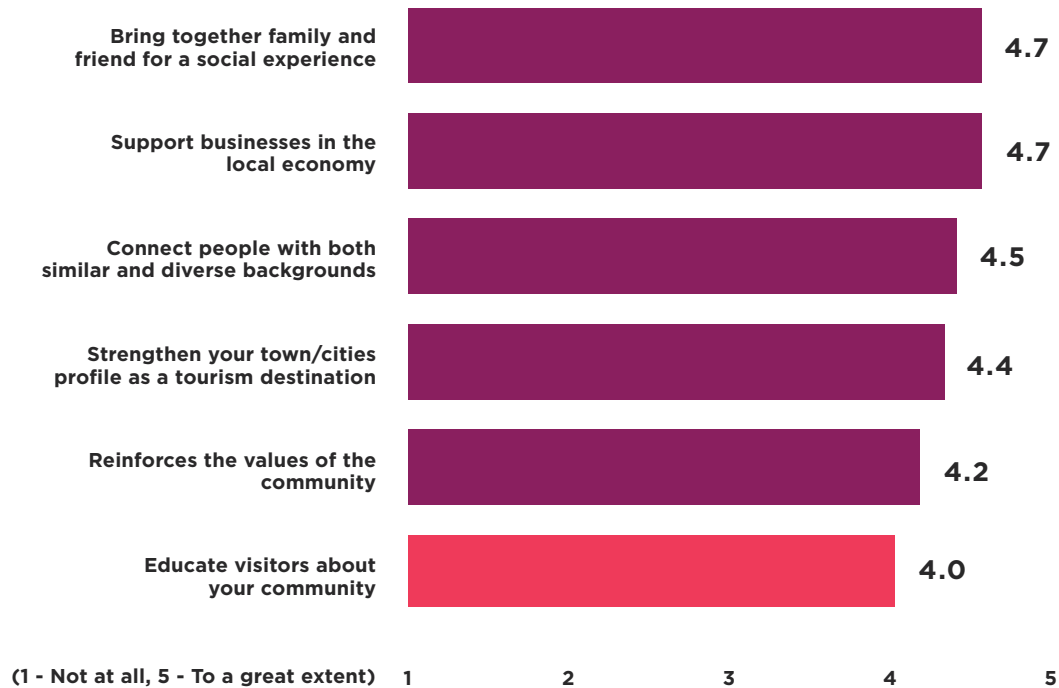


- Children's Parents' Association, YoungCare, Give ME 5 for Kids Charity, Wantok Foundation)
- + Sporting Clubs (e.g. Rugby League, Rowing, Gymnastics, Equestrian Groups, Surf Lifesaving, Netball, Tennis, AFL, Cricket)
- + Schools (Kindergartens, Pre-School, State schools and colleges)
- + Rotary, Lions, Apex, RSL's and Variety Clubs
- + Hospitals and Health Organisations (e.g. Men's Shed)
- + General Charities (Guide Dogs, Water Aid, Allison Baden-Clay Foundation, Arts Groups, Neighbourhood Watch)
- + National Jockeys Trust
- + Emergency Services (e.g., Flying Doctor Service, Life Flight, Care Flight, Rural Fire Service, Queensland Ambulance Service, Drought Support Fund Raising, Crime Stoppers)
- + Scouts and Girl Guides, Rural Show Societies

The economic research in this study clearly demonstrates how racing supports businesses in the local economy, from both the production and preparation of racing animals through to consumer spending. In addition to this, attendee research conducted at many metropolitan and regional racing events supports the racing industry's ability to bring people together for a social experience. The research demonstrates that a key motivation to attending racing events is the chance to socialise with friends and family.

The social impact survey asked clubs how much they believed racing in their town or city has the ability to engage with the community from a social cohesion, education and business perspective. As the chart illustrates, all indicators were positive, particularly significant in the areas of racing's ability to 'bring together family and friends for a social experience' (4.7), to 'support businesses in the local economy' (4.7) and to 'connect people with both similar and diverse backgrounds' (4.5). These indicators illustrate the position that racing clubs see themselves as integral to the fabric of the local community.

### COMMUNITY ENGAGEMENT WITH RACING QUEENSLAND





### SUPPORTING FAMILY RELATIONSHIPS

The three codes of racing in Queensland are very proactive in engaging with families with many cup days and themed events providing a strong link to the community. Many participants in racing (such as owners and trainers) operate within a family business/hobby structure. The survey identified that racing clubs have increasingly developed activities and facilities that enable families to enjoy a social day at the races. Many clubs actively promote services and amenities which are conducive to bringing families together to build stronger relationships.

In regional areas, many of the feature racedays form a venue or 'meeting place' for families and friends to socialise. This is especially prevalent at smaller clubs who host only their annual race meeting on cup day. For many rural populations, these race meetings represent something that is not only part of the region's history, but also part of their own family history. Some of these racedays have an underlying 'back to' theme, where people who once resided in that region make the journey back to see family members and friends. Many of these feature regional race meetings also form part of a broader community festival - such as Julia Creek Dirt'n'Dust and Barcaldine Tree of Knowledge Festival.

Racing clubs themselves have increasingly developed activities and on-course facilities that enable families to enjoy a social day at the races. Many clubs actively promote services and

amenities for families including the provision of parent rooms, baby change tables, kids' clubs, playgrounds and dedicated children's zones. The survey revealed a number of positive initiatives which have been developed by clubs. All clubs offer attractions or services that support attendance by children. The survey revealed that:

- + All clubs have complimentary entry and offer some level of free activities for children.
- + Over 93% of clubs offer events for families and children on special racedays
- + Over 69% of clubs actively involve people from culturally diverse backgrounds

In addition to this, some of the specific raceday initiatives undertaken by racing clubs in Queensland include:

- + Animal farms
- + Jumping castles, water slides and rock climbing
- + Special foot races
- + Christmas and Easter promotions
- + Kid's fashions on the field
- + Permanent play areas
- + Craft activities
- + Tug-o-wars, egg and spoon, three legged races
- + Face painting
- + Children's rides and amusements
- + Horse sports
- + Fancy dress themes for children
- + Mini trots
- + Melon races and tomato cart races
- + Hobby horse races

### SHARING FACILITIES WITHIN THE COMMUNITY

Racing clubs, in particular regional racing clubs, have a limited requirement to use their facilities for racing purposes and therefore look to assist and support the community by providing these facilities and resources for use on a temporary and permanent basis. The majority of racing clubs engage with community groups including sporting clubs, Rotary and Lions clubs, emergency services and show societies to share their facilities and resources. This is particularly evident in rural and regional areas where facilities have been used extensively for community, public and crisis use.

Some of the 228 organisations which share facilities and resources with clubs include:

- + Regional tourism events and arts groups
- + Country women's associations, woodworkers
- + Animal clubs (equestrian, rodeo, campdraft, canine clubs, polocrosse, cow clubs, gymkhanas, camels etc.)
- + Rotary and Lions Clubs
- + Show Societies (regional agricultural societies)
- + Shire Councils
- + Sporting clubs (rugby league, cricket, judo, swimming, golf, gymnasiums, clay target clubs, running, boxing and fitness clubs etc.)
- + Neighbourhood Watch, Isolated Children's Parents' Association, Cancer Council, MS





Currently, Racing Queensland has the responsibility for the delivery of training as a Registered Training Organisation, based at Deagon racecourse. Racing Queensland currently offers nationally recognised training through traineeship and apprenticeship arrangements, for stablehands (including advanced courses), track work riders/jockeys and stable foreman. These opportunities provide practical access and theoretical knowledge to many aspects of professional racing in Queensland.

Racing clubs and participants directly employ staff on a full-time, part-time and casual basis. Club employees are involved in administration, which includes the conduct of raceday and other

non-raceday tasks. As part of their commitment to delivering an enjoyable experience for racing participants and customers, racing clubs have adopted a number of initiatives.

- + Over 50% of clubs have close to one member of their staff currently participating in further education, career development and training programs each year
- + All racing clubs encourage responsible gambling
- + 20% of clubs have partnerships with primary, secondary, trade and tertiary institutions

## EDUCATION AND TRAINING

Education and training is vitally important for the continued growth and success of all three codes of racing across Queensland.

Education and training programs also work to support communities through various avenues. Metropolitan hubs and regional areas alike feel the positive impact provided by community partnerships, training programs and welfare initiatives provided by the three racing codes. Racing Queensland incorporates a wide variety of education and training courses to both help better equip those within the industry to further their professional or tertiary development, and to assist those looking for opportunities to enter the industry. In 1995, the Racing Queensland Industry Training Centre was established to meet the training needs of the three codes of the Queensland racing industry.



**PROMOTING HEALTHY RACING CLUB ENVIRONMENTS**

Racing clubs in Queensland have developed and applied a number of initiatives to improve the raceday and non-raceday experience for attendees, participants, staff, partners and the broader community. These initiatives have arisen in response to changing consumer needs and community values.

Racing clubs play an active role in providing healthy environments for their customers and racing participants. Some examples include:

- + The provision of healthy choice options for both racing participants and customers
- + Customers are not able to bring alcohol on course when attending the races
- + All clubs have policies & practices in place to encourage responsible consumption of alcohol
- + Clubs have trained on-site medical staff available to assist participants, volunteers, staff and customers if required

Racing clubs manage major facilities and events involving large numbers of customers. Many of these events relate to non-raceday functions and events run by other community groups or individuals. Community and Government expectations of racing clubs, relating to environmentally friendly practices and policies, have led to the adoption of a number of important initiatives that have a positive impact on the Queensland environment.

Racing clubs are actively implementing policies and practices in key areas that impact on the environment. Close to 40% of all clubs have

policies in place to save water and re-use or recycle water. Examples include:

- + Use of bore water and council treatment plants
- + Effluent water usage
- + Timed and low flow irrigation (watering at nights)
- + Water turned off at mains following race meetings
- + Rain storage tanks, dams and storm water feeds
- + Water saving devices for cisterns and tap wear (e.g. shower heads)
- + Signage promoting water savings

A number of clubs have programs in place to utilise solar energy or save electricity. Examples include:

- + Installation of panels for solar generation
- + Lighting and power programming to save energy
- + Energy efficient light fittings (LED)

Close to one in four clubs have policies and programs to develop native flora and fauna. Examples include:

- + Beautification of the racing grounds with native plants that
- + Establishing gardens for protecting birdlife
- + Development of nurseries and herb gardens on-course
- + Tree planting programs in open areas (also to provide shade on racedays)





## CLUB HISTORY AND HERITAGE

Thoroughbred, harness and greyhound racing in Queensland has a long and celebrated history. The rich cultural, heritage and social significance of the sport has been recorded for close to 175 years. The historical elements of racecourses in Queensland are an important part of the fabric of many local communities and many clubs actively promote past sporting participants, racing identities and special anniversaries.

Thoroughbred racing in Queensland dates back to 17 July 1843, when the first official race meeting of the 'Moreton Bay Race Club' was conducted at a racecourse on Coopers Plains. The race meeting was held over three days with the main race, the Brisbane Town Plate valued at 50 pounds. Only 2 years later the racecourse was relocated to 'New Farm' and soon after the first races were held at Ipswich. Soon after, racing was established at Dalby and then racing spread to many towns throughout the state.

Queensland has provided some of Australia's most recognised national icons, including Bruce McLachlan, Mick Dittman and George Moore. The likes of Champion Queensland horses - Bernborough, Gunsynd, Strawberry Road, Vo Rogue and Buffering have also become entrenched in the hearts and minds of all Australians.

The first greyhound coursing meeting was held in Queensland at Allora on the Darling Downs in 1893, two years after the National Coursing Association of Queensland was established. In 1901 the Waterloo Cup was staged at Pittsworth and from 1908 greyhound racing was staged at Eagle Farm racecourse, Brisbane. In 1923 the Brisbane Cricket Ground hosted night racing and between 1949 and 1985 a significant number of greyhound clubs were established around Queensland. Queensland has produced many champion greyhounds including Flying Amy and Bogie Leigh.

Harness Racing commenced in Queensland at the Brisbane Showgrounds in 1876 and then moved to Eagle Farm on 8th November 1888. The first electric light race meeting (night race meeting) was held in 1911 at Wolloongabba. This special event included activities for the children and monkeys riding on horseback. Many harness racing tracks opened throughout the state including Goodna, Breakfast Creek Sports Ground, Virginia Park, Mackay and Kedron Park and in 1957 Redcliffe.

Destreos, the iron horse, kicked off his career at Redcliffe in 2008 before going on to win an incredible 101 races from 474 career starts - 73 of them at Albion Park - joining Paleface Adios (108 wins) and Central Queensland 1980's star Cane Smoke (120) as the only pacers in the Southern Hemisphere to win more than 100 races.

Over seventy-percent of racing clubs throughout Queensland take an active approach to promote the history and heritage elements of their club. This is an important aspect of racing as many of the clubs have a long and rich history. The initiatives that clubs have adopted in recording their history, convey the excitement of racing in their community to both visitors and locals. A number of examples include:

- + Industry awards and Halls of Fame to acknowledge horses/greyhounds, participants and associates
- + Club acknowledgement of participants - signage and plaques around club grounds
- + Publishing and contributions to history books written about the Clubs and/or regional area
- + Promoting club and feature race anniversaries e.g. 150th and 100th Cup or Club anniversaries
- + Promotion of history through on-course museums and history nights
- + Restoration of memorabilia (e.g. trophies donated back to the club)
- + Use of social media to promote club history



- + Dedicated calendar with racing stories of the past
- + Promotion of history through local museums, statues, local papers, radio and websites
- + Recognising heroes of the sport on dedicated racedays (e.g. Heritage Raceday)
- + Promotions in racebook, honour boards and historical photographs and newspaper clippings
- + Heritage listing buildings on-course
- + Memorial races

In recent years, clubs such as Burrandowan Picnic Race Club, Central Queensland Amateur Racing Club, Towers Jockey Club, Mt. Perry Race Club and Laura Amateur Turf Club have or will celebrate special anniversaries of either their club or cup race.

These have included 25th, 50th, 100th and 150th year celebrations with special racedays and promotions.

## REGIONAL SUMMARIES

### Brisbane

- + The population of the Brisbane region is 1,303,998 (Australian Bureau of Statistics).
- + There are a total of five (5) racing clubs operating in the region, two (2) of which are thoroughbred clubs, two (2) of which are greyhound racing clubs, and one (1) harness racing club.
- + The racing industry in the Brisbane region is responsible for generating more than \$963.5 million in value added contribution to Gross State Product. This equates to 51.7% of the total impact generated by the Queensland Racing Industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 6,305 full-time equivalent (FTE) jobs in the region.
- + There are close to 8,300 participants in the racing industry in Brisbane.

#### RACING CLUBS IN THE REGION

##### Thoroughbred

- + Brisbane Racing Club
- + Tattersall's Racing Club

##### Harness

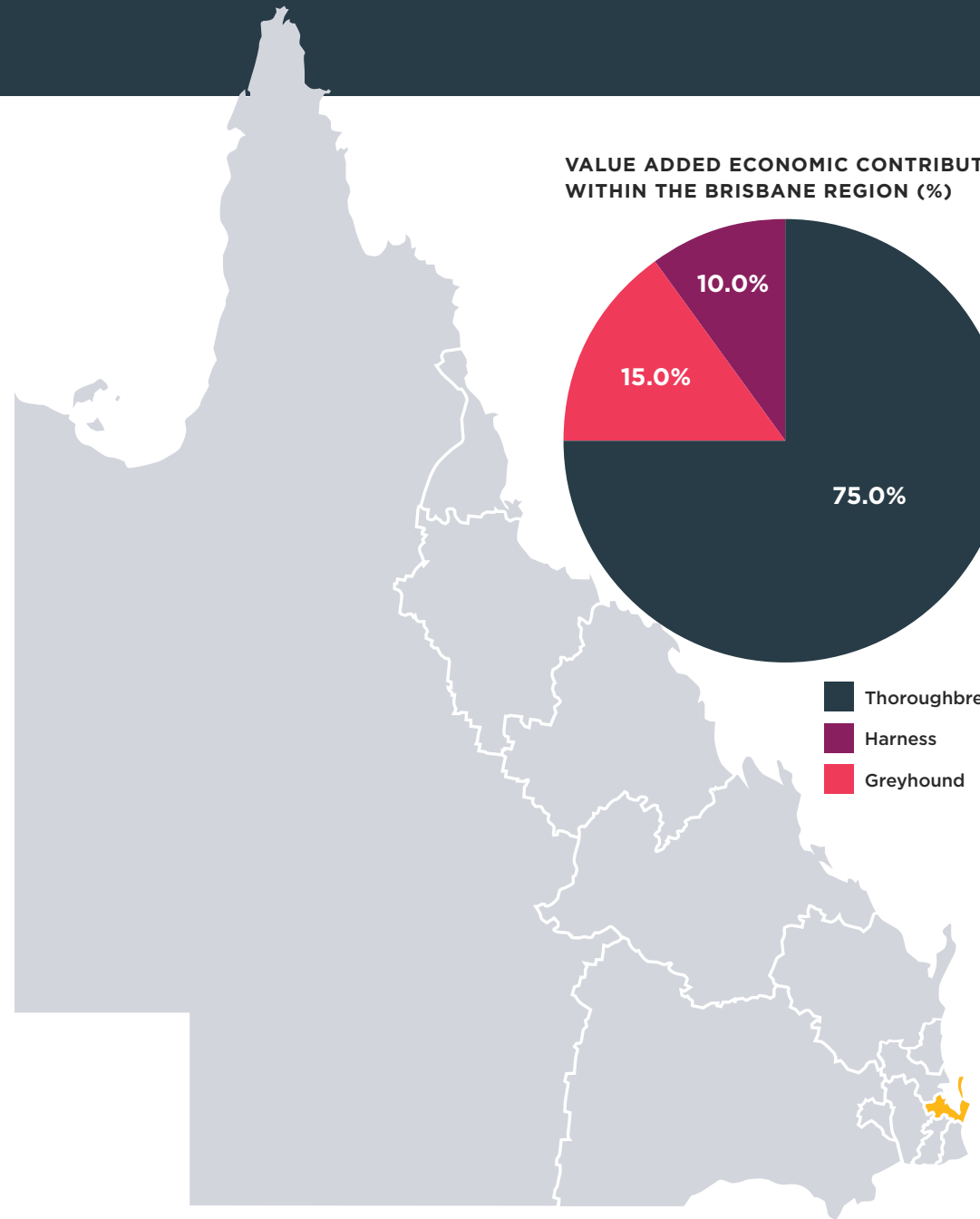
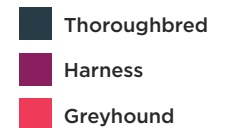
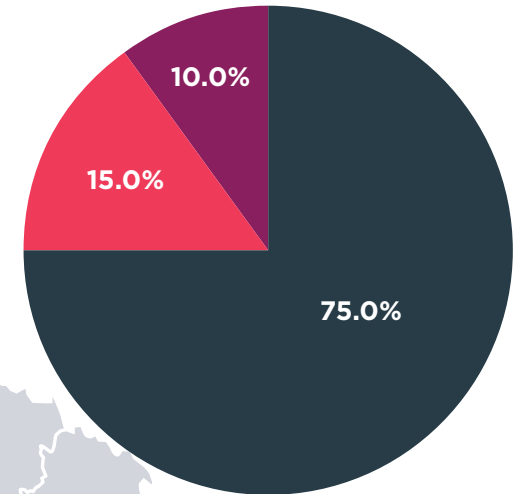
- + Albion Park Harness Racing Club

##### Greyhound

- + Brisbane Greyhound Racing Club Inc.
- + Capalaba Greyhound Racing Club

The racing industry in the **Brisbane region is responsible for generating \$963.5 million in value added** contribution to gross state product. This represents **51.7% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE BRISBANE REGION (%)





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$399.5m	\$57.0m	\$88.9m	\$545.3m
Total value added	\$722.9m	\$96.5m	\$144.1m	\$963.5m
Full-time equivalent employment	4,711	634	960	6,305

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	10	40	79	129
Horses and greyhounds in training	1,402	8	89	1,498

## TOTAL PARTICIPANTS IN RACING

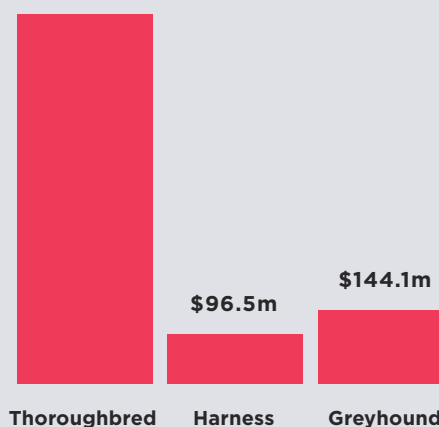
	Thoroughbred	Harness	Greyhound	Total
Breeders	151	31	7	189
Owners	5,067	162	229	5,458
Trainers	106	10	25	140
Breeders staff	130	16	10	156
Stable/Kennel employees	363	17	46	426
Racing Club & industry staff (FT, PT, casual)	1,137	158	238	1,533
Jockeys, drivers & apprentices	37	5	0	42
Racing club volunteers	0	0	7	7
Volunteers assisting participants	195	94	40	329
<b>Total participants in the Brisbane region</b>	<b>7,184</b>	<b>494</b>	<b>601</b>	<b>8,278</b>

\*Some totals do not add due to rounding.

Race meetings in the Brisbane region attracted attendances of **181,108** or **26.8%** of total attendances at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE BRISBANE REGION

\$722.9m



## AT A GLANCE

### 5 Racing Clubs

THOROUGHBRED	2
HARNES	1
GREYHOUND	2

### 511 Race Meetings

THOROUGHBRED	77
HARNES	150
GREYHOUND	284

### 5,120 Races

THOROUGHBRED	656
HARNES	1,391
GREYHOUND	3,073

### 8,551 Racing Club Members

THOROUGHBRED	7,951
HARNES	400
GREYHOUND	200

### 181,108 Attendances

THOROUGHBRED	119,648
HARNES	33,000
GREYHOUND	28,460

\*Some totals do not add due to rounding

# Cairns

- + The population of the Cairns region is 252,037 (Australian Bureau of Statistics).
- + There are a total of eight (8) racing clubs operating in the region which are all thoroughbred clubs.
- + The racing industry in the Cairns region is responsible for generating more than \$39.1 million in value added contribution to Gross State Product. This equates to 2.1% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 316 full-time equivalent (FTE) jobs in the region.
- + There are close to 1,900 participants in the racing industry in Cairns.

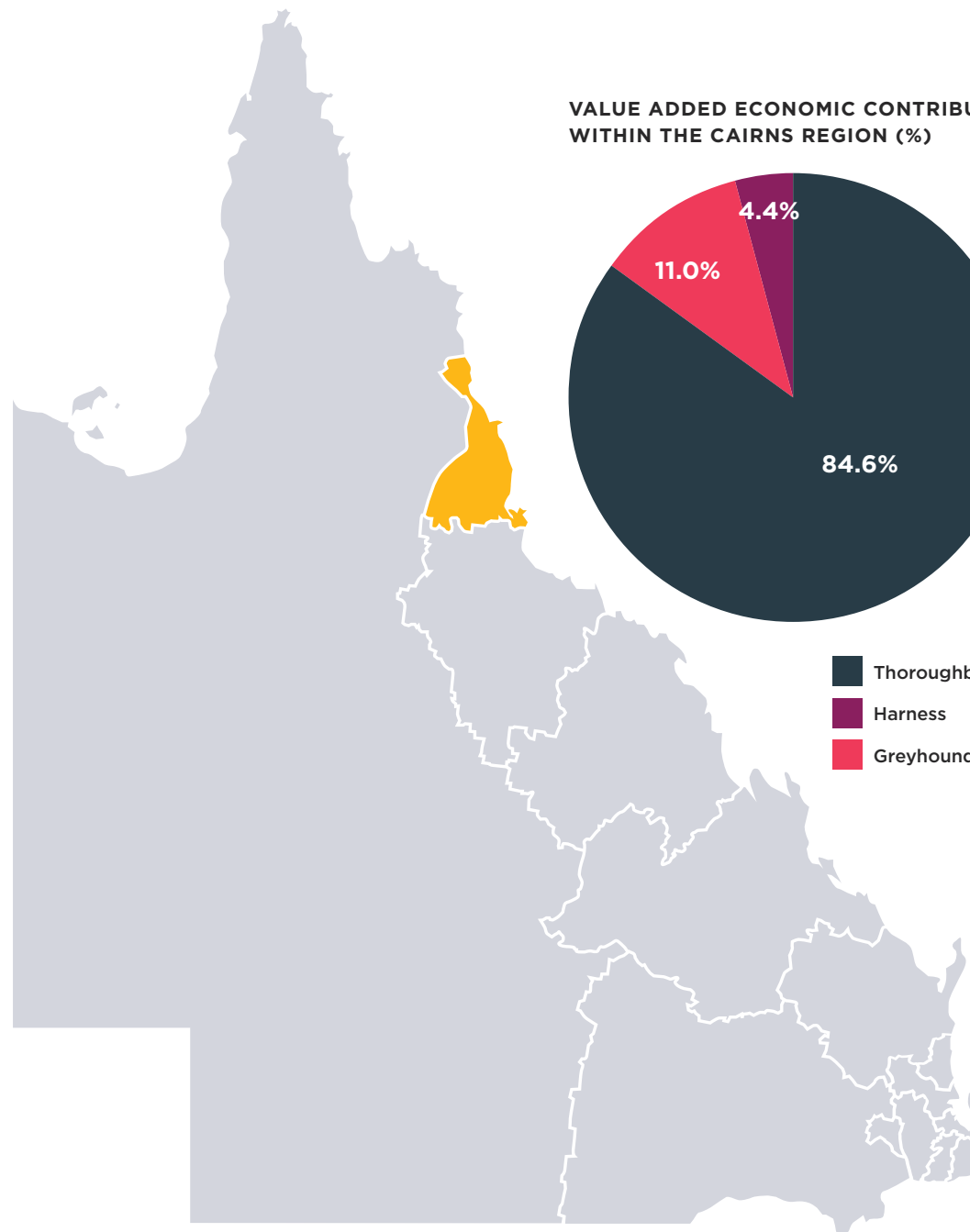
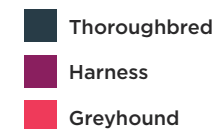
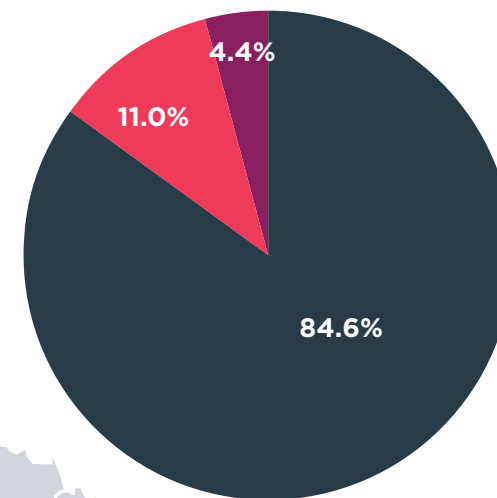
## RACING CLUBS IN THE REGION

### Thoroughbred

- + Atherton Turf Club
- + Cairns Jockey Club Inc.
- + Far North Queensland Amateur Turf Club Inc.
- + Gordonvale Turf Club Inc.
- + Innisfail Turf Club Inc.
- + Laura Amateur Turf Club
- + Mareeba Turf Club Inc.
- + Mt Garnet Amateur Turf Club

The racing industry in the **Cairns region is responsible for generating \$39.1 million in value added** contribution to gross state product. This represents **2.1% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CAIRNS REGION (%)



**ECONOMIC IMPACTS**

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$35.9m	\$2.0m	\$4.6m	\$42.5m
Total value added	\$33.1m	\$1.7m	\$4.3m	\$39.1m
Full-time equivalent employment	269	13	34	316

**ANIMALS**

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	15	1	10	26
Horses and greyhounds in training	396	0	33	429

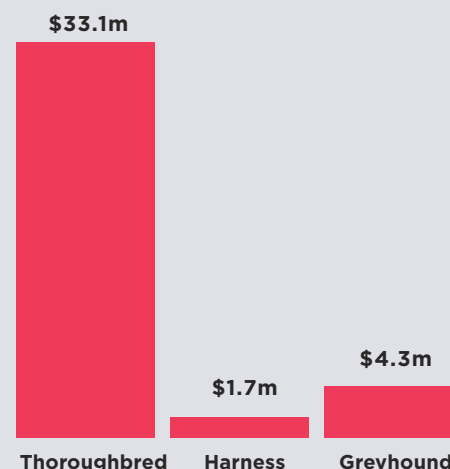
**TOTAL PARTICIPANTS IN RACING**

	Thoroughbred	Harness	Greyhound	Total
Breeders	29	0	1	31
Owners	912	2	16	931
Trainers	52	0	8	59
Breeders staff	25	1	2	27
Stable/Kennel employees	129	0	3	132
Racing Club & industry staff (FT, PT, casual)	338	0	0	338
Jockeys, drivers & apprentices	14	0	0	14
Racing club volunteers	224	0	0	224
Volunteers assisting participants	95	3	10	108
<b>Total participants in the Cairns region</b>	<b>1,819</b>	<b>7</b>	<b>39</b>	<b>1,864</b>

\*Some totals do not add due to rounding.

Race meetings in the Cairns region attracted attendances of **14,442** or **2.1%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE CAIRNS REGION



**AT A GLANCE**

8 Racing Clubs

THOROUGHBRED 8

44 Race Meetings

THOROUGHBRED 44

272 Races

THOROUGHBRED 272

642 Racing Club Members

THOROUGHBRED 642

14,442 Attendances

THOROUGHBRED 14,442

\*Some totals do not add due to rounding

# Central Queensland

- + The population of the Central Queensland region is 225,561 (Australian Bureau of Statistics).
- + There are a total of fourteen (14) racing clubs operating in the region, thirteen (13) of which are thoroughbred clubs, and one (1) a greyhound racing club.
- + The racing industry in the Central Queensland region is responsible for generating close to \$55.1 million in value added contribution to Gross State Product. This equates to 3.0% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 452 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,800 participants in the racing industry in Central Queensland.

## RACING CLUBS IN THE REGION

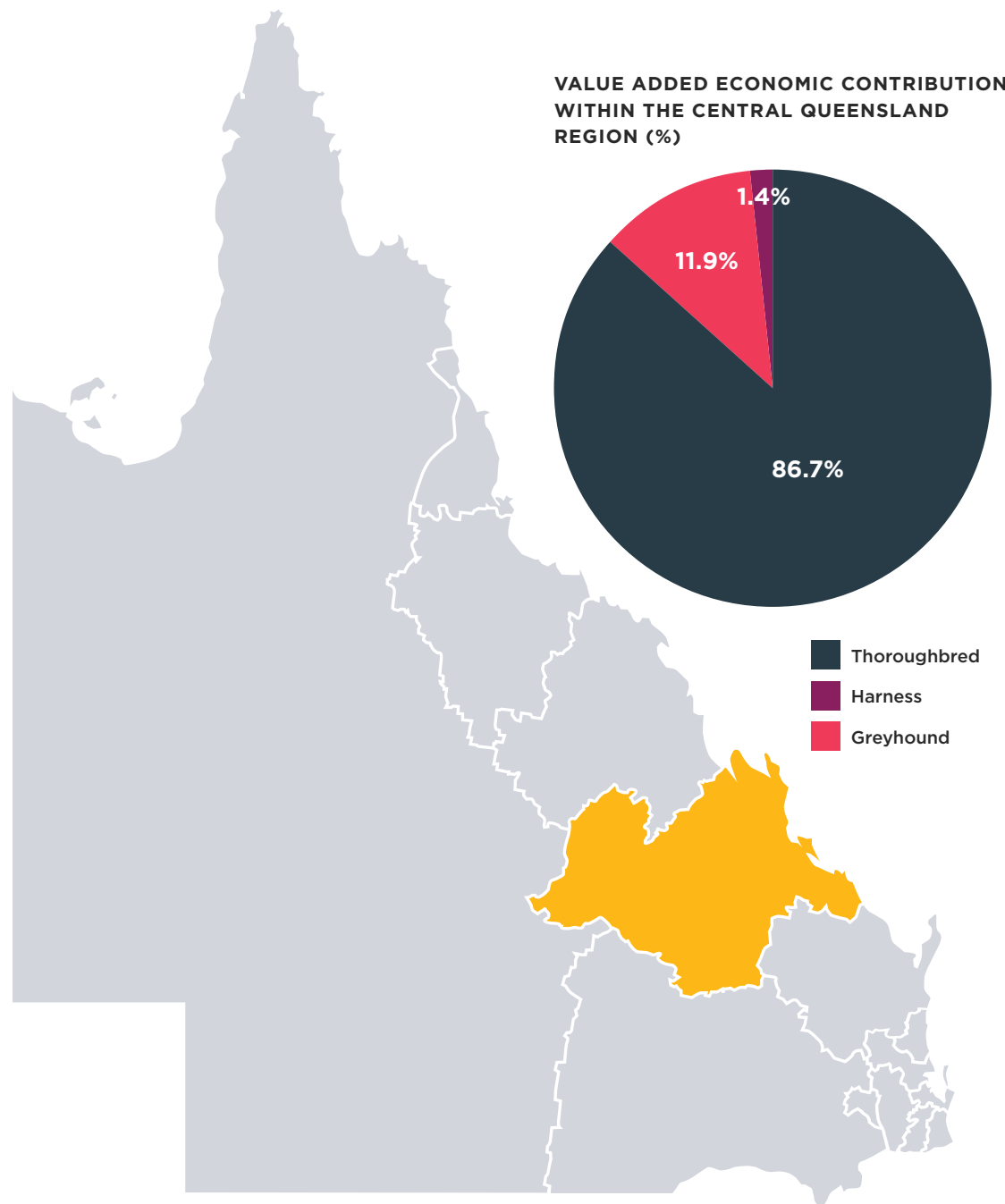
### Thoroughbred

- + Bluff Blackwater Amateur Race Club Inc.
- + Calliope Jockey Club
- + Central Queensland Amateur Racing Club Inc.
- + Dawson Jockey Club
- + Dingo Race Club Inc.
- + Emerald Jockey Club
- + Gladstone Turf Club Inc.
- + Rockhampton Jockey Club Inc.
- + Rockhampton St. Patricks Day Race Club Inc.
- + Springsure Jockey Club
- + Springsure St. Patricks Day Race Club
- + Thangool Race Club
- + Yeppoon Turf Club Inc.

### Greyhound

- + Rockhampton Greyhound Racing Club

The racing industry in the **Central Queensland region** is responsible for generating **\$55.1 million** in value added contribution to gross state product. This represents **3.0% of the industry total.**



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$53.6m	\$1.0m	\$7.7m	\$62.3m
Total value added	\$47.8m	\$0.8m	\$6.6m	\$55.1m
Full-time equivalent employment	393	6	54	452

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	67	0	46	113
Horses and greyhounds in training	715	0	269	984

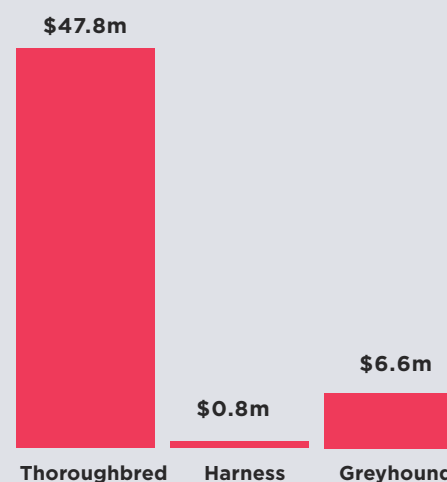
## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	75	0	5	80
Owners	1,302	9	57	1,368
Trainers	112	0	19	131
Breeders staff	64	0	7	72
Stable/Kennel employees	183	0	23	206
Racing Club & industry staff (FT, PT, casual)	291	0	30	321
Jockeys, drivers & apprentices	12	0	0	12
Racing club volunteers	371	0	6	377
Volunteers assisting participants	217	0	29	246
<b>Total participants in the Central Queensland region</b>	<b>2,627</b>	<b>9</b>	<b>176</b>	<b>2,812</b>

\*Some totals do not add due to rounding.

Race meetings in the Central Queensland region attracted attendances of **42,021** or **6.2%** of total attendances at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE CENTRAL QUEENSLAND REGION



## AT A GLANCE

## 14 Racing Clubs

THOROUGHBRED	13
GREYHOUND	1

## 115 Race Meetings

THOROUGHBRED	69
GREYHOUND	46

## 900 Races

THOROUGHBRED	441
GREYHOUND	459

## 991 Racing Club Members

THOROUGHBRED	948
GREYHOUND	43

## 42,021 Attendances

THOROUGHBRED	37,869
GREYHOUND	4,152

\*Some totals do not add due to rounding

# Darling Downs - Maranoa

- + The population of the Darling Downs - Maranoa region is 128,781 (Australian Bureau of Statistics).
- + There are a total of twenty-five (25) racing clubs operating in the region, twenty-four (24) of which are thoroughbred racing clubs with one (1) harness racing club.
- + The racing industry in the Darling Downs-Maranoa region is responsible for generating more than \$60.0 million in value added contribution to Gross State Product. This equates to 3.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 477 full-time equivalent (FTE) jobs in the region.
- + There are more than 3,500 participants in the racing industry in Darling Downs-Maranoa.

The racing industry in the **Darling Downs-Maranoa region** is responsible for generating **\$60.0 million** in value added contribution to gross state product. This represents **3.2%** of the industry total.

## RACING CLUBS IN THE REGION

### Thoroughbred

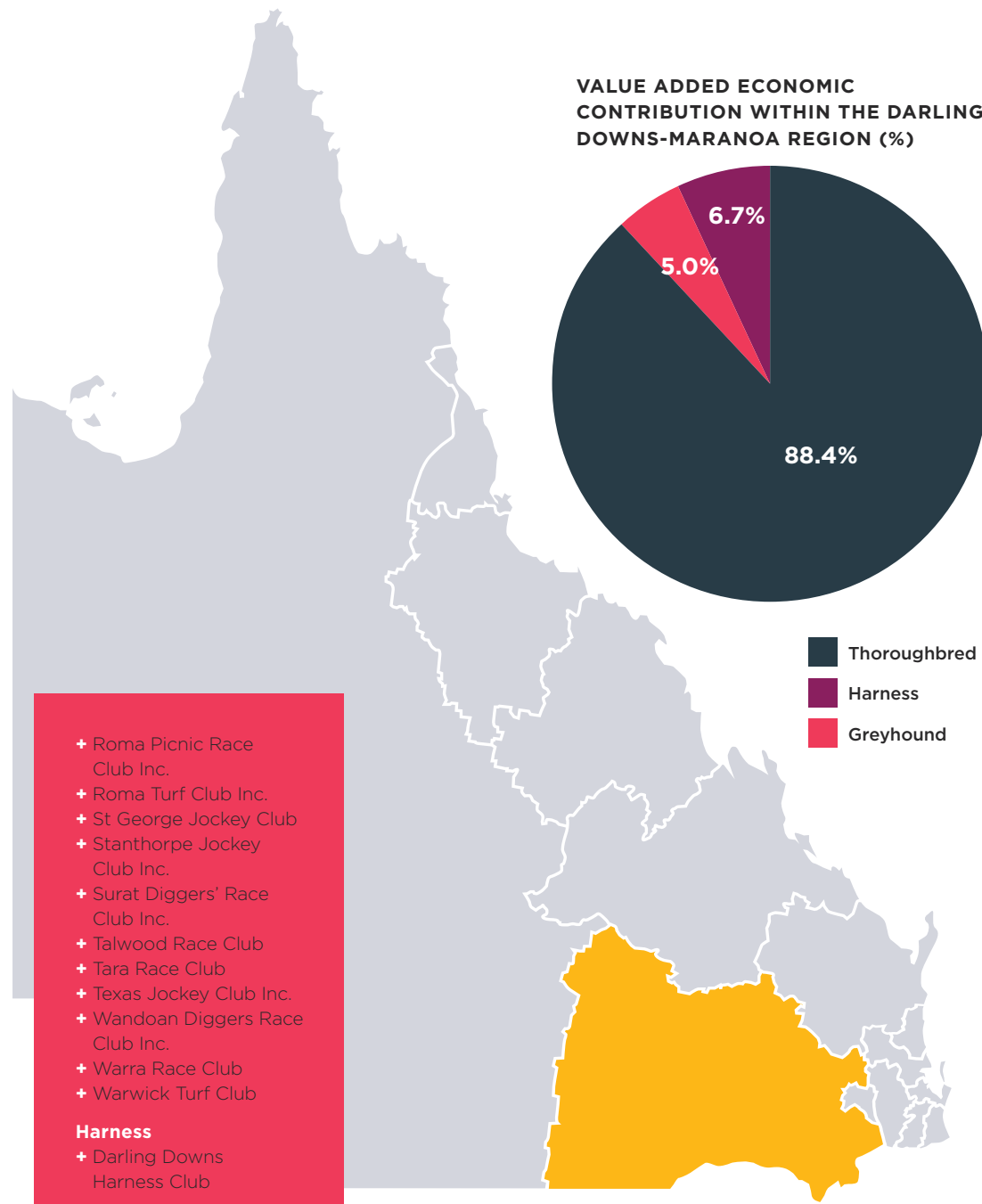
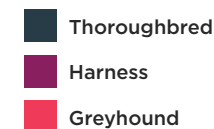
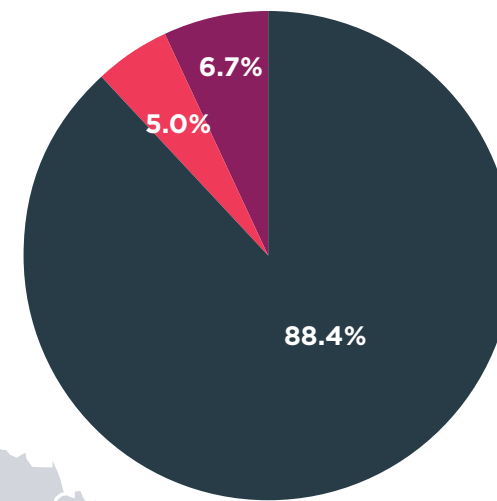
- + Bell Race Club Inc.
- + Chinchilla Race Club Inc.
- + Clifton Jockey Club Inc.
- + Dalby & Northern Downs Jockey Club Inc.
- + Dalby Amateur Picnic Race Club
- + Flinton Race Club
- + Goondiwindi & McIntyre Picnic Race Club Inc.
- + Goondiwindi Race Club Inc.
- + Injune Race Club
- + Jandowae Race Club Inc.
- + Maranoa Diggers Race Club Inc.
- + Miles & District Amateur Picnic Race Club
- + Oakey & District Race Club Inc.

- + Roma Picnic Race Club Inc.
- + Roma Turf Club Inc.
- + St George Jockey Club
- + Stanthorpe Jockey Club Inc.
- + Surat Diggers' Race Club Inc.
- + Talwood Race Club
- + Tara Race Club
- + Texas Jockey Club Inc.
- + Wandoan Diggers Race Club Inc.
- + Warra Race Club
- + Warwick Turf Club

### Harness

- + Darling Downs Harness Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE DARLING DOWNS-MARANOA REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$70.4m	\$5.4m	\$4.5m	\$80.3m
Total value added	\$53.1m	\$4.0m	\$3.0m	\$60.0m
Full-time equivalent employment	423	31	24	477

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	493	54	57	604
Horses and greyhounds in training	500	33	44	576

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	144	16	3	164
Owners	1,076	39	59	1,175
Trainers	105	9	7	121
Breeders staff	124	8	5	137
Stable/Kennel employees	184	7	7	197
Racing Club & industry staff (FT, PT, casual)	515	12	0	527
Jockeys, drivers & apprentices	10	8	0	18
Racing club volunteers	874	0	0	874
Volunteers assisting participants	262	56	13	331
<b>Total participants in the Darling Downs - Maranoa region</b>	<b>3,294</b>	<b>156</b>	<b>94</b>	<b>3,544</b>

\*Some totals do not add due to rounding.

Race meetings in the Darling Downs - Maranoa region attracted attendances of **33,736** or **5.0%** of total attendances at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE DARLING DOWNS-MARANOA REGION



## AT A GLANCE

## 25 Racing Clubs

THOROUGHBRED	24
HARNESS	1

## 45 Race Meetings

THOROUGHBRED	45
--------------	----

## 272 Races

THOROUGHBRED	272
--------------	-----

## 1,071 Racing Club Members

THOROUGHBRED	1,071
--------------	-------

## 33,736 Attendances

THOROUGHBRED	33,736
--------------	--------

\*Some totals do not add due to rounding

# Gold Coast

- + The population of the Gold Coast region is 622,048 (Australian Bureau of Statistics).
- + There is one (1) thoroughbred racing club operating in the region.
- + The racing industry in the Gold Coast region is responsible for generating more than \$180.9 million in value added contribution to Gross State Product. This equates to 9.7% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 1,461 full-time equivalent (FTE) jobs in the region.
- + There are close to 5,100 participants in the racing industry in Gold Coast.

The racing industry in the **Gold Coast region** is responsible for generating **\$180.9 million in value added** contribution to gross state product. This represents **9.7% of the industry total.**

## RACING CLUBS IN THE REGION

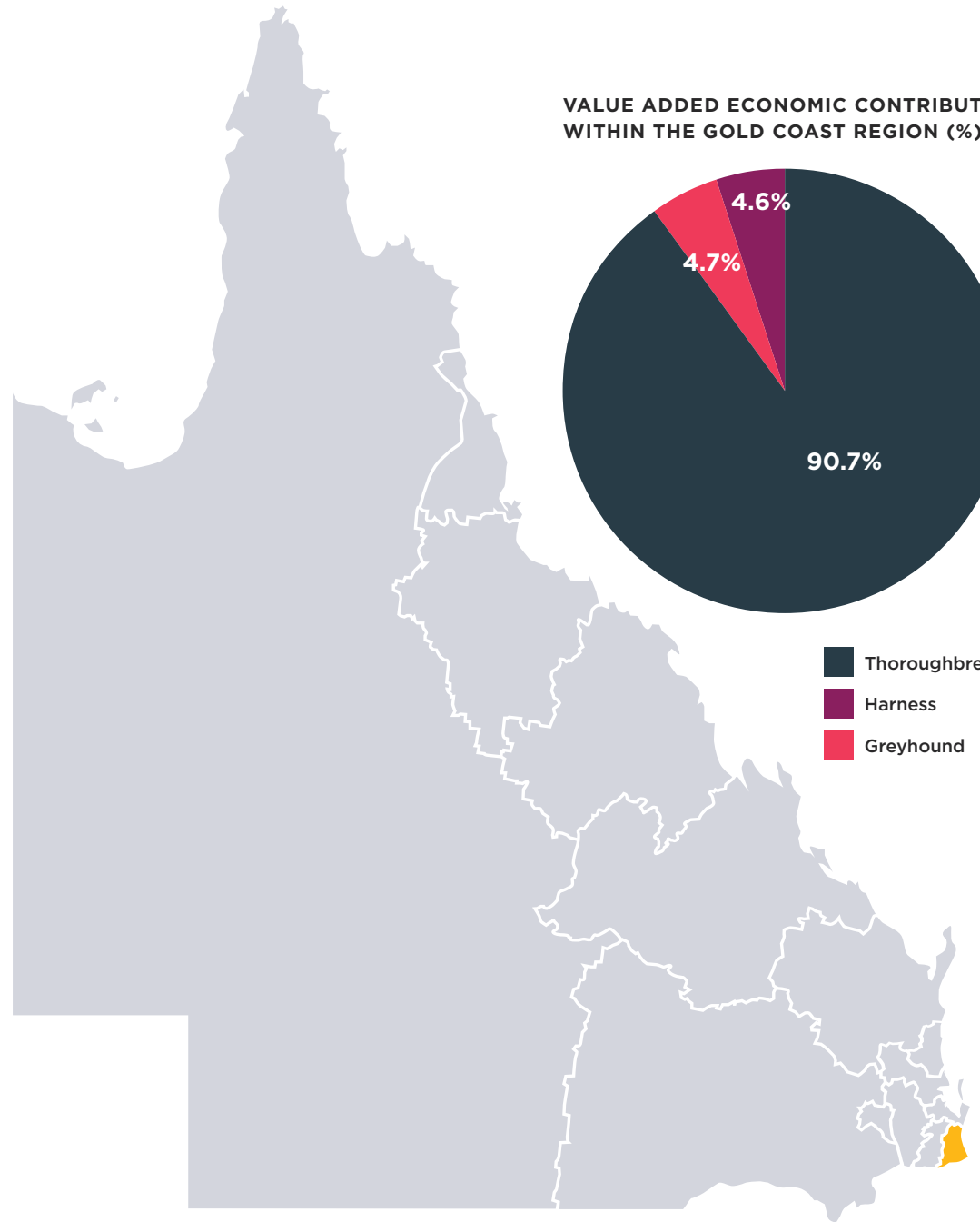
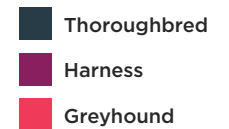
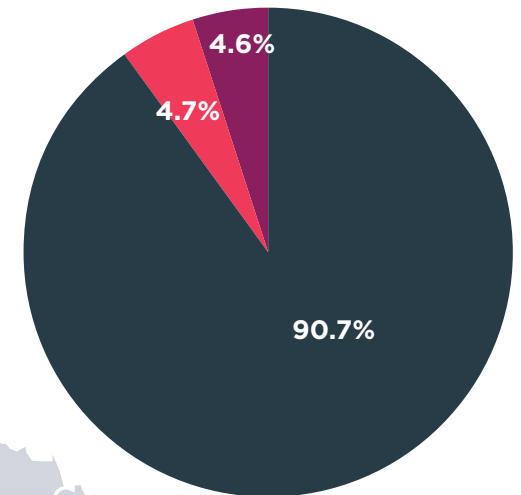
### Thoroughbred

- + Gold Coast Turf Club Ltd

### Harness

- + Gold Coast Harness Racing Club Inc

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE GOLD COAST REGION (%)





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$169.0m	\$8.8m	\$9.3m	\$187.1m
Total value added	\$164.0m	\$8.3m	\$8.5m	\$180.9m
Full-time equivalent employment	1,331	64	66	1,461

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	184	19	84	287
Horses and greyhounds in training	1,365	132	186	1,683

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	121	24	5	150
Owners	3,186	119	154	3,459
Trainers	126	17	18	161
Breeders staff	105	12	7	124
Stable/Kennel employees	311	27	27	364
Racing Club & industry staff (FT, PT, casual)	373	0	0	373
Jockeys, drivers & apprentices	37	11	0	48
Racing club volunteers	9	4	0	13
Volunteers assisting participants	273	87	28	389
<b>Total participants in the Gold Coast region</b>	<b>4,541</b>	<b>302</b>	<b>240</b>	<b>5,082</b>

\*Some totals do not add due to rounding.

Race meetings in the Gold Coast region attracted attendances of **95,510** or **14.1% of total attendances** at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE GOLD COAST REGION



## AT A GLANCE

## 2 Racing Clubs

THOROUGHBRED	1
HARNESS	1

## 50 Race Meetings

THOROUGHBRED	50
--------------	----

## 401 Races

THOROUGHBRED	401
--------------	-----

## 2,188 Racing Club Members

THOROUGHBRED	2,169
HARNESS	19

## 95,510 Attendances

THOROUGHBRED	95,510
--------------	--------

\*Some totals do not add due to rounding

# Ipswich

- + The population of the Ipswich region is 351,793 (Australian Bureau of Statistics).
- + There are a total of four (4) racing clubs operating in the region, two (2) of which are thoroughbred clubs, one (1) a harness racing club and one (1) a greyhound racing club.
- + The racing industry in the Ipswich region is responsible for generating more than \$97.3 million in value added contribution to Gross State Product. This equates to 5.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 794 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,200 participants in the racing industry in Ipswich.

The racing industry in the Ipswich region is responsible for generating **\$97.3 million in value added** contribution to gross state product. This represents **5.2% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Esk Jockey Club
- + Ipswich Turf Club

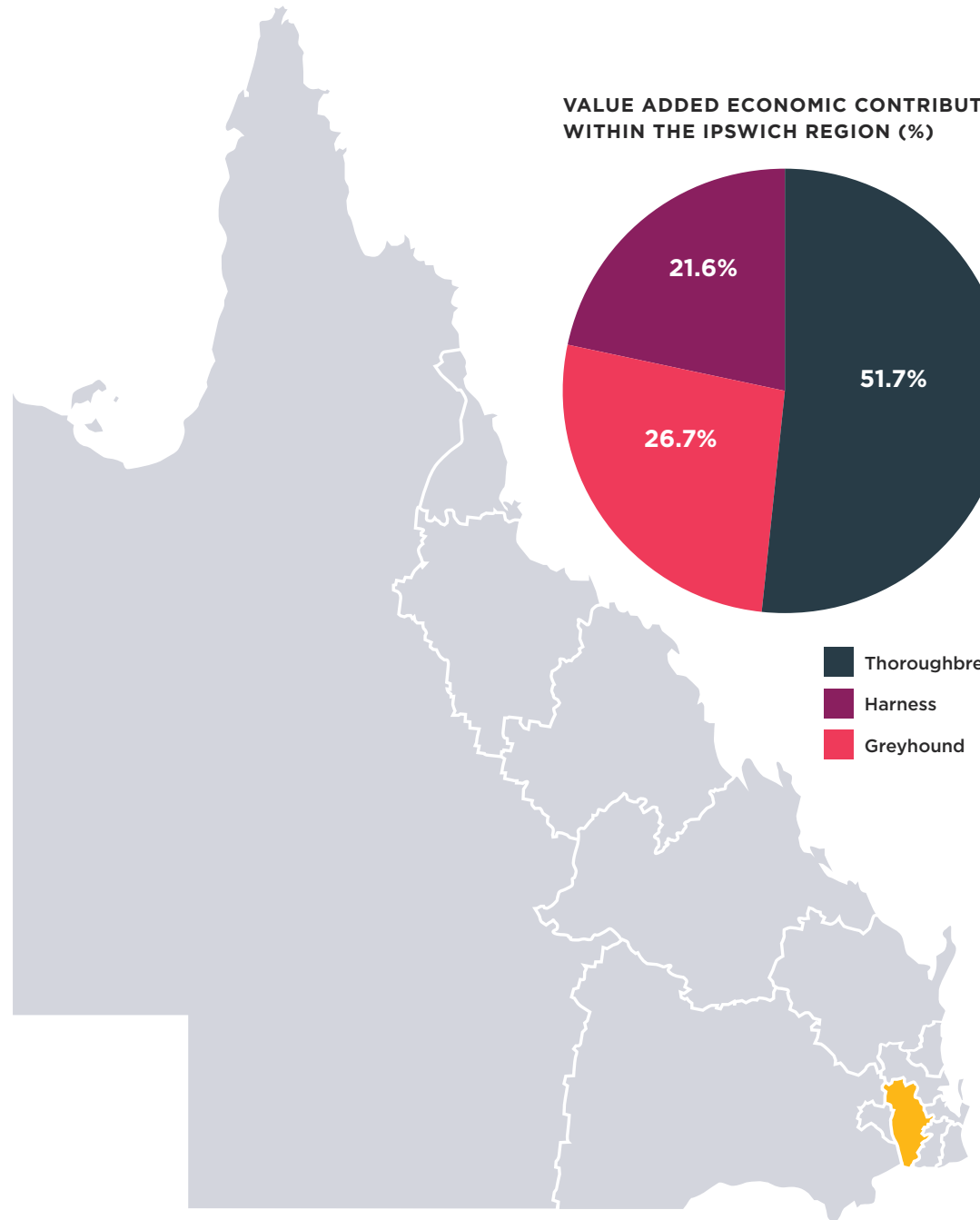
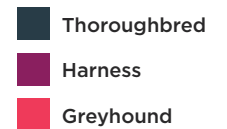
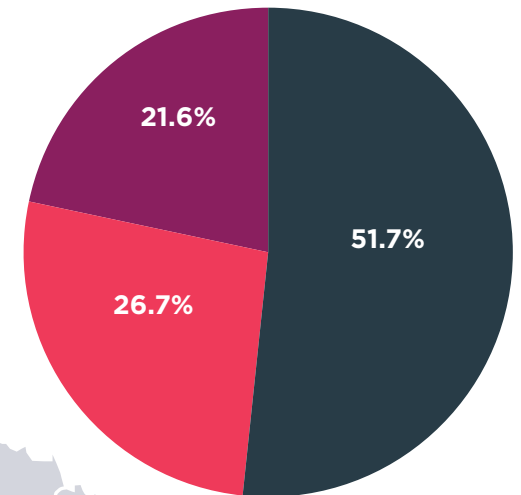
### Harness

- + Marburg Pacing Association Inc.

### Greyhound

- + Ipswich Greyhound Racing Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE IPSWICH REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$57.2m	\$22.6m	\$29.4m	\$109.2m
Total value added	\$50.3m	\$21.0m	\$26.0m	\$97.3m
Full-time equivalent employment	416	163	214	794

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	181	90	608	880
Horses and greyhounds in training	184	454	1,209	1,847

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	61	77	48	187
Owners	837	218	262	1,317
Trainers	44	89	109	242
Breeders staff	52	39	72	163
Stable/Kennel employees	126	30	81	237
Racing Club & industry staff (FT, PT, casual)	180	13	95	288
Jockeys, drivers & apprentices	8	61	0	69
Racing club volunteers	0	50	12	62
Volunteers assisting participants	110	323	199	633
<b>Total participants in the Ipswich region</b>	<b>1,418</b>	<b>899</b>	<b>879</b>	<b>3,196</b>

\*Some totals do not add due to rounding.

Race meetings in the Ipswich region attracted attendances of **55,753** or **8.3% of total attendances** at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE IPSWICH REGION



## AT A GLANCE

## 4 Racing Clubs

THOROUGHBRED	2
HARNES	1
GREYHOUND	1

## 218 Race Meetings

THOROUGHBRED	48
HARNES	16
GREYHOUND	154

## 2,043 Races

THOROUGHBRED	372
HARNES	135
GREYHOUND	1,536

## 614 Racing Club Members

THOROUGHBRED	461
HARNES	29
GREYHOUND	124

## 55,753 Attendances

THOROUGHBRED	39,128
HARNES	3,500
GREYHOUND	13,125

\*Some totals do not add due to rounding

# Logan - Beaudesert

- + The population of the Logan - Beaudesert region is 341,405 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region, both of which are thoroughbred clubs.
- + The racing industry in the Logan-Beaudesert region is responsible for generating more than \$62.8 million in value added contribution to Gross State Product. This equates to 3.4% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 486 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,100 participants in the racing industry in Logan-Beaudesert.

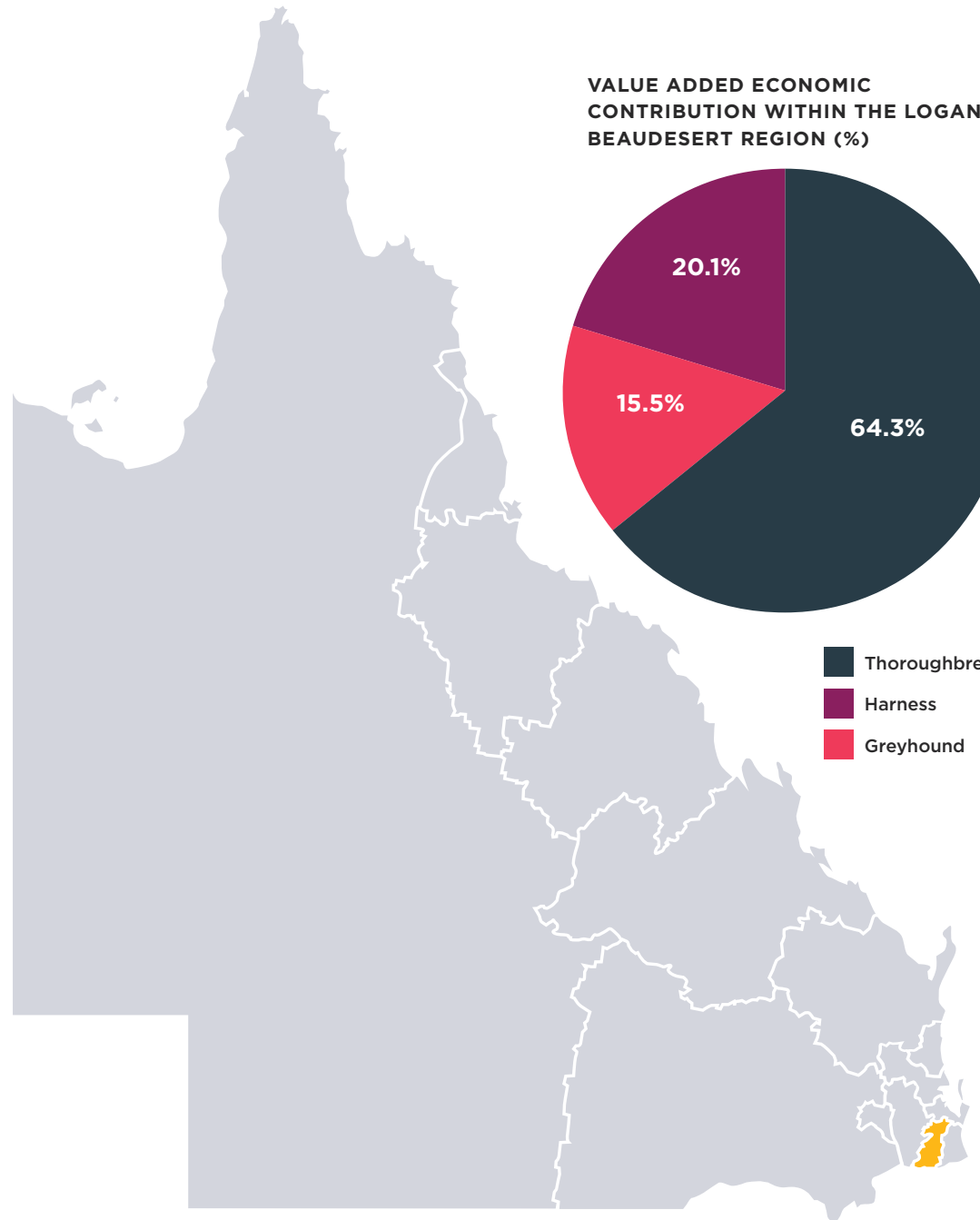
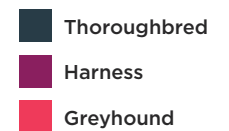
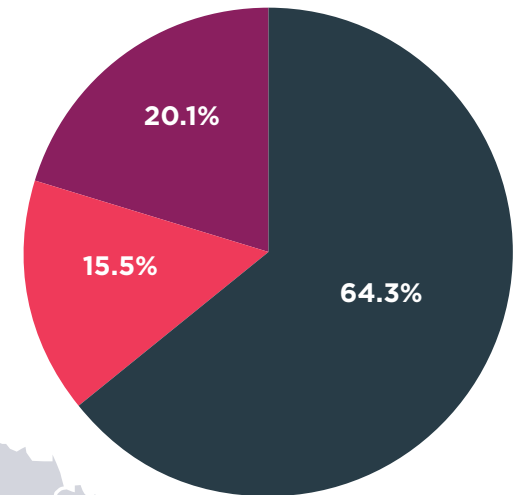
The racing industry in the **Logan-Beaudesert region is responsible for generating \$62.8 million in value added contribution to gross state product. This represents 3.4% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Beaudesert Hibernian Race Club Inc.
- + Beaudesert Race Club Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE LOGAN-BEAUDESERT REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$44.9m	\$13.4m	\$10.6m	\$69.0m
Total value added	\$40.4m	\$12.7m	\$9.7m	\$62.8m
Full-time equivalent employment	311	99	76	486

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	292	21	248	561
Horses and greyhounds in training	296	279	622	1,197

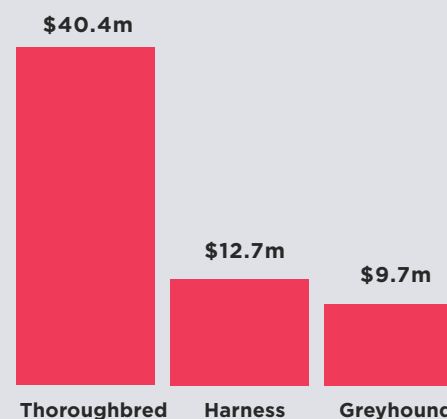
## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	61	40	22	123
Owners	688	119	151	958
Trainers	57	47	62	165
Breeders staff	53	20	33	105
Stable/Kennel employees	127	41	46	213
Racing Club & industry staff (FT, PT, casual)	33	0	0	33
Jockeys, drivers & apprentices	7	33	0	40
Racing club volunteers	15	0	0	15
Volunteers assisting participants	129	168	104	401
<b>Total participants in the Logan-Beaudesert region</b>	<b>1,170</b>	<b>468</b>	<b>417</b>	<b>2,055</b>

\*Some totals do not add due to rounding.

Race meetings in the Logan-Beaudesert region attracted attendances of **4,489** or **0.7%** of total attendances at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE LOGAN-BEAUDESERT REGION



## AT A GLANCE

## 2 Racing Clubs

THOROUGHBRED 2

## 9 Race Meetings

THOROUGHBRED 9

## 64 Races

THOROUGHBRED 64

## 11 Racing Club Members

THOROUGHBRED 11

## 4,489 Attendances

THOROUGHBRED 4,489

\*Some totals do not add due to rounding

# Mackay-Isaac-Whitsunday

- + The population of the Mackay-Isaac-Whitsunday region is 172,523 (Australian Bureau of Statistics).
- + There are a total of six (6) racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Mackay-Isaac-Whitsunday region is responsible for generating more than \$26.4 million in value added contribution to Gross State Product. This equates to 1.4% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 217 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,300 participants in the racing industry in Mackay-Isaac-Whitsunday.

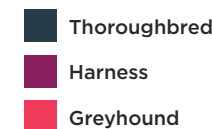
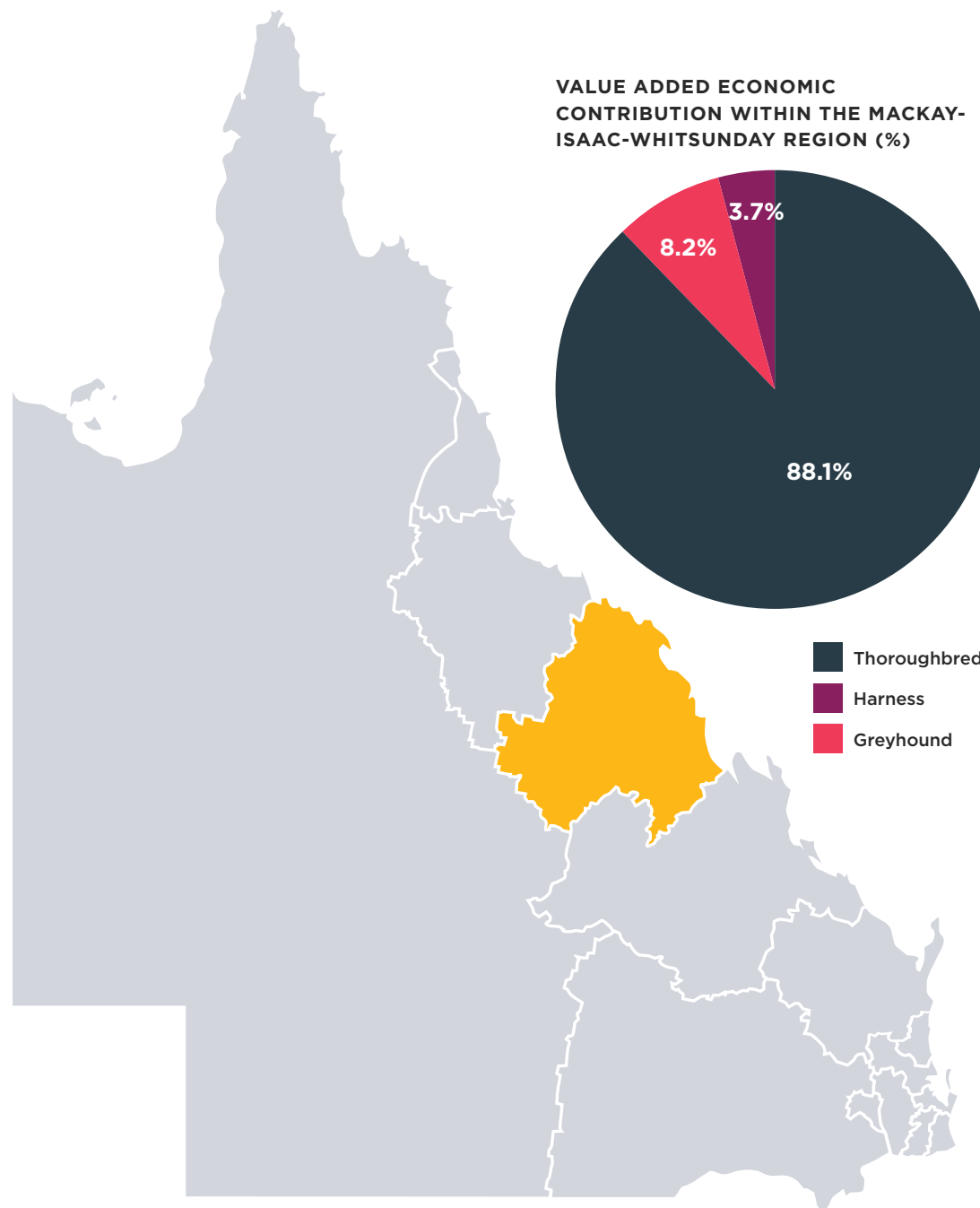
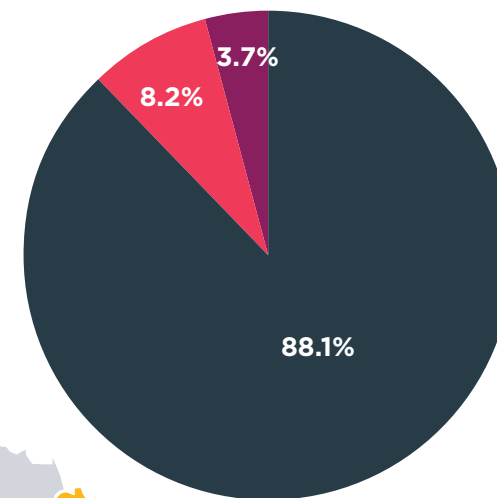
## RACING CLUBS IN THE REGION

### Thoroughbred

- + Bowen Turf Club Inc.
- + Clermont Race Club Inc.
- + Mackay Turf Club
- + Middlemount Race Club
- + Moranbah Race Club
- + Twin Hills Race Club Inc.

The racing industry in the **Mackay-Isaac-Whitsunday region is responsible for generating \$26.4 million in value added** contribution to gross state product. This represents **1.4% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE MACKAY-ISAAC-WHITSUNDAY REGION (%)



**ECONOMIC IMPACTS**

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$29.5m	\$1.4m	\$3.2m	\$34.2m
Total value added	\$23.3m	\$1.0m	\$2.2m	\$26.4m
Full-time equivalent employment	192	8	17	217

**ANIMALS**

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	29	3	0	32
Horses and greyhounds in training	292	0	30	322

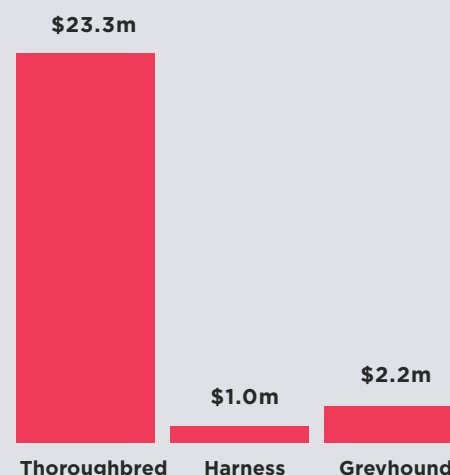
**TOTAL PARTICIPANTS IN RACING**

	Thoroughbred	Harness	Greyhound	Total
Breeders	23	4	0	27
Owners	699	21	20	740
Trainers	32	0	4	36
Breeders staff	20	2	0	22
Stable/Kennel employees	105	1	3	109
Racing Club & industry staff (FT, PT, casual)	168	0	0	168
Jockeys, drivers & apprentices	8	0	0	8
Racing club volunteers	132	0	0	132
Volunteers assisting participants	63	11	4	79
<b>Total participants in the Mackay-Isaac-Whitsunday region</b>	<b>1,251</b>	<b>39</b>	<b>31</b>	<b>1,322</b>

\*Some totals do not add due to rounding.

Race meetings in the Mackay-Isaac-Whitsunday region attracted attendances of **11,460** or **1.7%** of total attendances at race meetings in Queensland.

**VALUE ADDED GENERATED BY EACH CODE WITHIN THE MACKAY-ISAAC-WHITSUNDAY REGION**



**AT A GLANCE**

6 Racing Clubs

THOROUGHBRED 6

31 Race Meetings

THOROUGHBRED 31

218 Races

THOROUGHBRED 218

189 Racing Club Members

THOROUGHBRED 189

11,460 Attendances

THOROUGHBRED 11,460

\*Some totals do not add due to rounding

# Moreton Bay

- + The population of the Moreton Bay region is 465,441 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region, one (1) of which is a thoroughbred club, and one (1) a harness racing club.
- + The racing industry in the Moreton Bay region is responsible for generating almost \$60.2 million in value added contribution to Gross State Product. This equates to 3.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 495 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,600 participants in the racing industry in Moreton Bay.

The racing industry in the **Moreton Bay region** is responsible for generating **\$60.2 million in value added** contribution to gross state product. This represents **3.2% of the industry total.**

## RACING CLUBS IN THE REGION

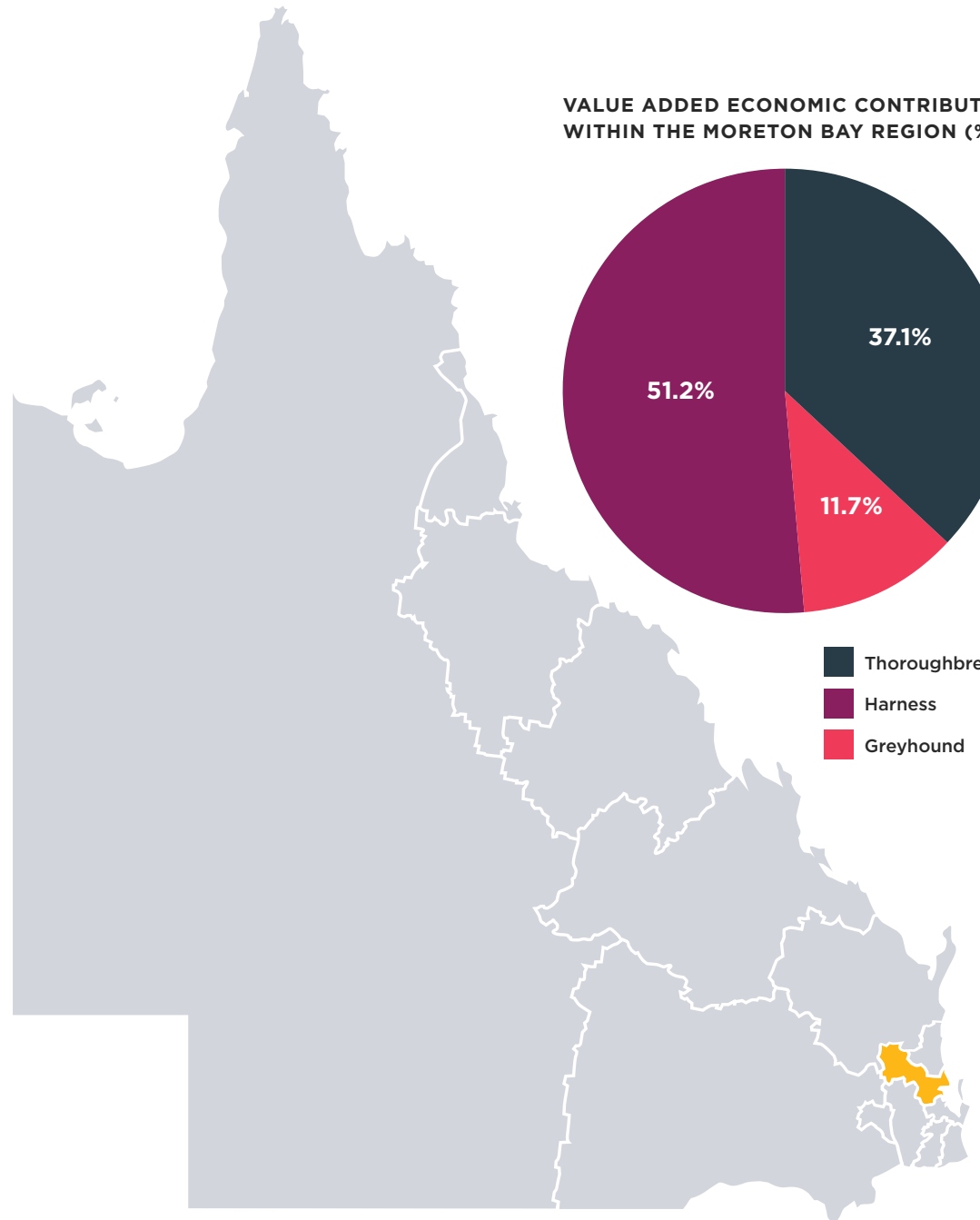
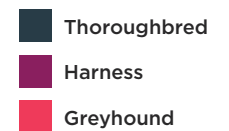
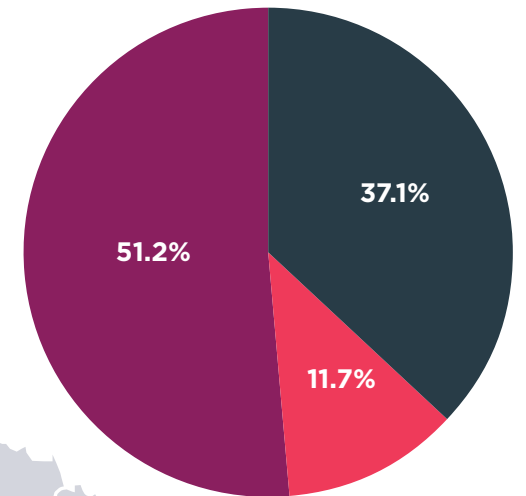
### Thoroughbred

- + Kilcoy Race Club Inc.

### Harness

- + Redcliffe Peninsula Harness Racing & Sporting Club Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE MORETON BAY REGION (%)





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$26.7m	\$33.3m	\$8.1m	\$68.1m
Total value added	\$22.3m	\$30.8m	\$7.0m	\$60.2m
Full-time equivalent employment	179	261	55	495

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	30	44	74	148
Horses and greyhounds in training	5	183	248	435

## TOTAL PARTICIPANTS IN RACING

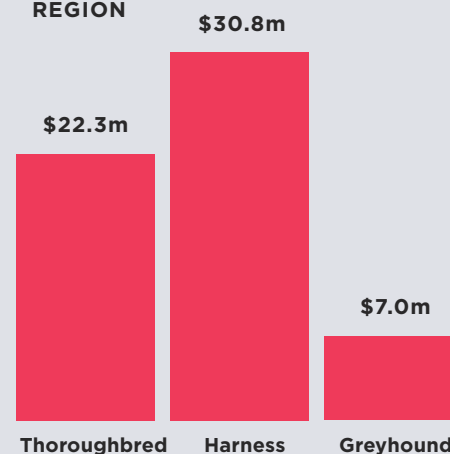
	Thoroughbred	Harness	Greyhound	Total
Breeders	56	57	8	122
Owners	1,191	182	132	1,504
Trainers	1	59	49	109
Breeders staff	49	29	12	89
Stable/Kennel employees	112	53	43	208
Racing Club & industry staff (FT, PT, casual)	66	102	0	168
Jockeys, drivers & apprentices	18	26	0	44
Racing club volunteers	6	20	0	26
Volunteers assisting participants	47	230	67	344
<b>Total participants in the Moreton Bay region</b>	<b>1,545</b>	<b>758</b>	<b>312</b>	<b>2,614</b>

\*Some totals do not add due to rounding.

## Race meetings in the Moreton Bay region

attracted attendances of **32,036** or **4.7%** of total attendances at race meetings in Queensland.

### VALUE ADDED GENERATED BY EACH CODE WITHIN THE MORETON BAY REGION



## AT A GLANCE

### 2 Racing Clubs

THOROUGHBRED	1
HARNESS	1

### 142 Race Meetings

THOROUGHBRED	9
HARNESS	133

### 1,287 Races

THOROUGHBRED	69
HARNESS	1,218

### 232 Racing Club Members

THOROUGHBRED	106
HARNESS	126

### 32,036 Attendances

THOROUGHBRED	6,865
HARNESS	25,171

\*Some totals do not add due to rounding

# Queensland Outback

- + The population of the Queensland Outback region is 82,311 (Australian Bureau of Statistics).
- + There are a total of thirty-five (35) racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Queensland - Outback region is responsible for generating more than \$27.5 million in value added contribution to Gross State Product. This equates to 1.5% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 234 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,100 participants in the racing industry in Queensland - Outback.

The racing industry in the **Queensland - Outback region is responsible for generating \$27.5 million in value added** contribution to gross state product. This represents **1.5% of the industry total.**

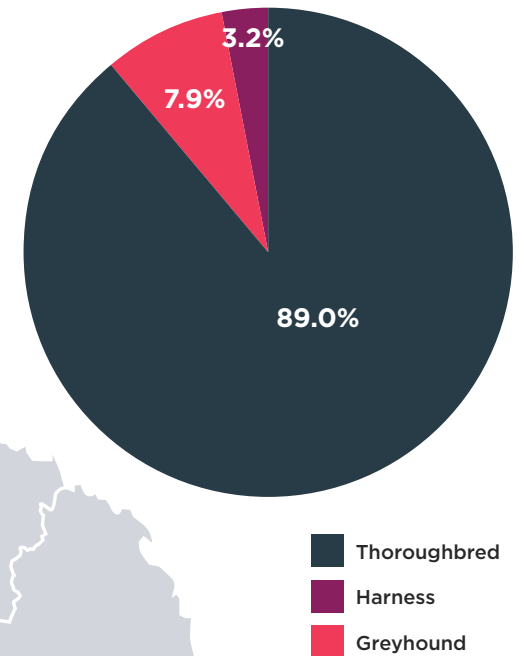
## RACING CLUBS IN THE REGION

### Thoroughbred

- + Alpha Jockey Club Inc.
- + Aramac Racing Club
- + Augathella Racing Club
- + Barcardine Racing Club Inc.
- + Barcoo Amateur Race Club Inc.
- + Bedourie Amateur Race Club Inc..
- + Birdsville Race Club Inc.
- + Boulia Turf Club
- + Camooweal Jockey Club
- + Central Warrego Race Club
- + Cloncurry & District Race Club Inc.
- + Cooktown Amateur Turf Club
- + Corfield Race Club
- + Cunnamulla & District Diggers Race Club Inc.
- + Gregory Downs Jockey Club Inc.
- + Hughenden Jockey Club Inc.

- + Ilfracombe Picnic Race Club Inc.
- + Isisford Race Club
- + Julia Creek Turf Club
- + Jundah Race Club
- + Longreach Jockey Club
- + Maxwellton Race Club
- + McKinlay Race Club
- + Morven Race Club
- + Mt Isa Race Club
- + Muttaborra Amateur Turf Club
- + Noorama Picnic Race Club Inc.
- + North Gregory Turf Club
- + Oakley Amateur Picnic Race Club
- + Prairie Jockey Club
- + Quilpie Diggers' Race Club
- + Richmond Turf Club
- + Stamford Race Club
- + Tambo & District Race Club
- + Tower Hill Picnic Amateur Race Club Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE QUEENSLAND - OUTBACK REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$36.4m	\$1.5m	\$3.5m	\$41.4m
Total value added	\$24.5m	\$0.9m	\$2.2m	\$27.5m
Full-time equivalent employment	209	7	18	234

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	4	0	0	4
Horses and greyhounds in training	550	0	3	553

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	20	0	0	20
Owners	557	3	2	561
Trainers	82	0	1	83
Breeders staff	17	0	0	17
Stable/Kennel employees	110	0	1	111
Racing Club & industry staff (FT, PT, casual)	533	0	0	533
Jockeys, drivers & apprentices	15	0	0	15
Racing club volunteers	1,627	0	0	1,627
Volunteers assisting participants	131	0	1	132
<b>Total participants in the Queensland Outback region</b>	<b>3,092</b>	<b>3</b>	<b>4</b>	<b>3,099</b>

\*Some totals do not add due to rounding.

Race meetings in the Queensland Outback region attracted attendances of **27,410** or **4.1%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE QUEENSLAND OUTBACK REGION  
\$24.5m



## AT A GLANCE

## 37 Racing Clubs

THOROUGHBRED 37

## 82 Race Meetings

THOROUGHBRED 82

## 460 Races

THOROUGHBRED 460

## 3,145 Racing Club Members

THOROUGHBRED 3,145

## 27,410 Attendances

THOROUGHBRED 27,410

\*Some totals do not add due to rounding

# Sunshine Coast

- + The population of the Sunshine Coast region is 375,271 (Australian Bureau of Statistics).
- + There is one (1) race club operating in the region and it is a thoroughbred club.
- + The racing industry in the Sunshine Coast region is responsible for generating more than \$103.6 million in value added contribution to Gross State Product. This equates to 5.6% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 842 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,700 participants in the racing industry in Sunshine Coast.

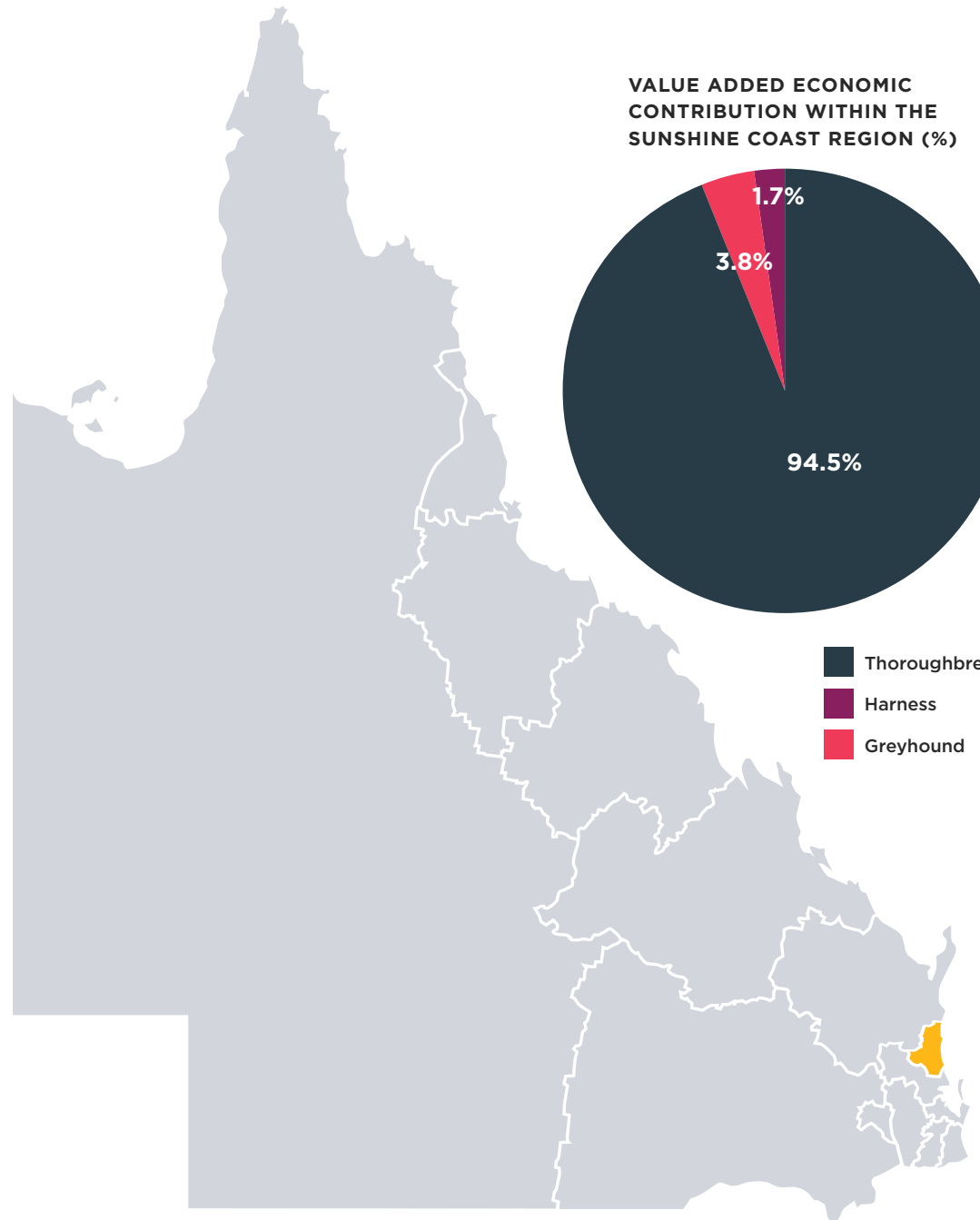
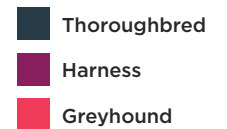
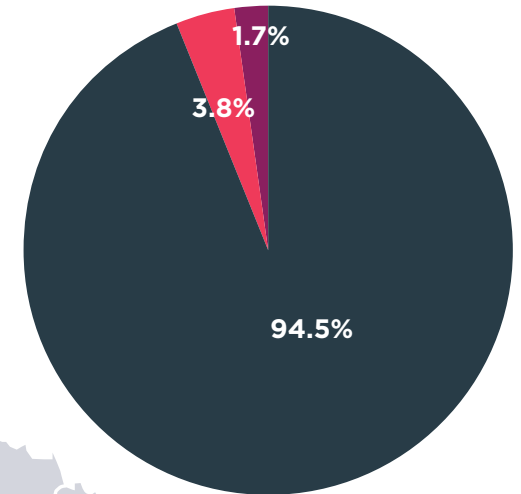
The racing industry in the **Sunshine Coast region** is responsible for generating **\$103.6 million** in value added contribution to gross state product. This represents **5.6%** of the industry total.

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Sunshine Coast Turf Club Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE SUNSHINE COAST REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$102.1m	\$2.0m	\$4.4m	\$108.5m
Total value added	\$97.9m	\$1.8m	\$3.9m	\$103.6m
Full-time equivalent employment	797	14	31	842

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	56	8	24	88
Horses and greyhounds in training	967	0	55	1,022

## TOTAL PARTICIPANTS IN RACING

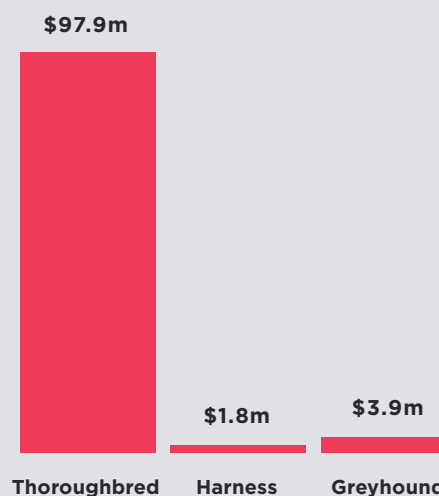
	Thoroughbred	Harness	Greyhound	Total
Breeders	59	12	4	75
Owners	1,753	23	42	1,818
Trainers	90	1	7	98
Breeders staff	51	6	6	63
Stable/Kennel employees	212	4	7	223
Racing Club & industry staff (FT, PT, casual)	219	0	0	219
Jockeys, drivers & apprentices	20	0	0	20
Racing club volunteers	0	0	0	0
Volunteers assisting participants	174	35	14	223
<b>Total participants in the Sunshine Coast region</b>	<b>2,578</b>	<b>81</b>	<b>80</b>	<b>2,738</b>

\*Some totals do not add due to rounding.

## Race meetings in the Sunshine Coast region

attracted attendances of **72,477** or **10.7% of total attendances** at race meetings in Queensland.

### VALUE ADDED GENERATED BY EACH CODE WITHIN THE SUNSHINE COAST REGION



## AT A GLANCE

### 1 Racing Clubs

THOROUGHBRED 1

### 62 Race Meetings

THOROUGHBRED 62

### 484 Races

THOROUGHBRED 484

### 2,837 Racing Club Members

THOROUGHBRED 2,837

### 72,477 Attendances

THOROUGHBRED 72,477

\*Some totals do not add due to rounding

# Toowoomba

- + The population of the Toowoomba region is 156,757 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region, both of which are thoroughbred clubs.
- + The racing industry in the Toowoomba region is responsible for generating more than \$85.2 million in value added contribution to Gross State Product. This equates to 4.6% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 669 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,200 participants in the racing industry in Toowoomba.

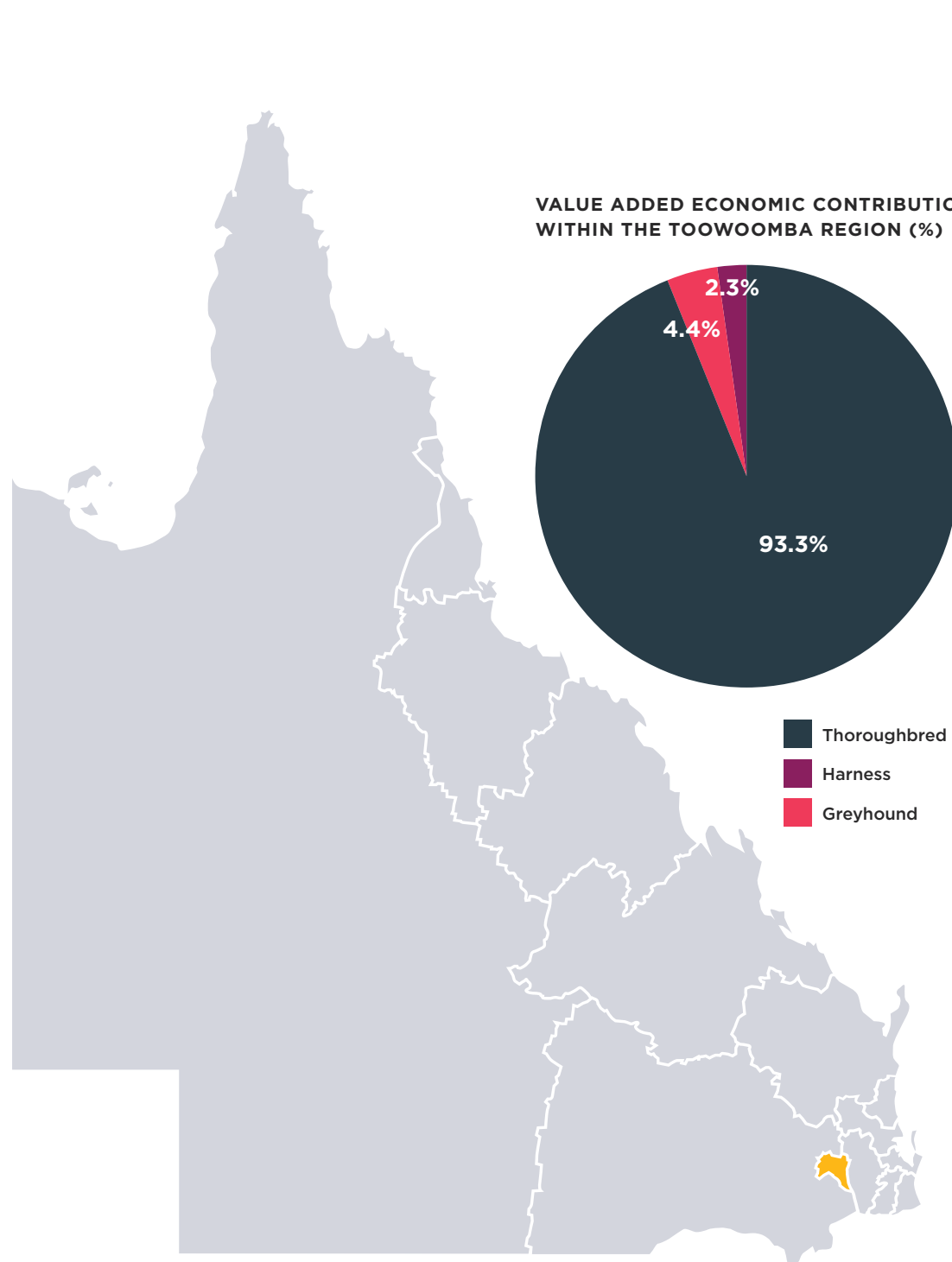
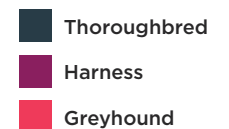
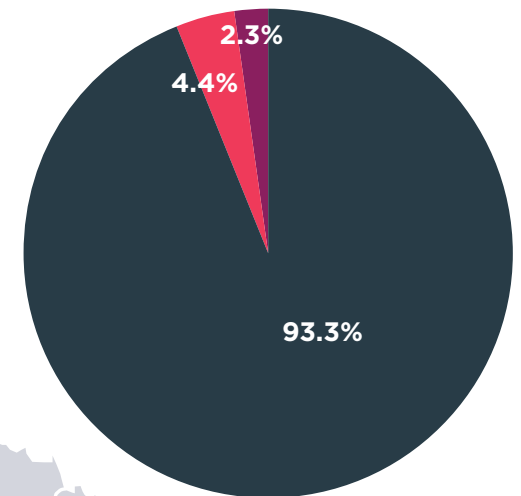
The racing industry in the **Toowoomba region is responsible for generating \$85.2 million in value added** contribution to gross state product. This represents **4.6% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Lockyer Valley Turf Club
- + Toowoomba Turf Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOOWOOMBA REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$83.1m	\$2.1m	\$3.9m	\$89.1m
Total value added	\$79.6m	\$2.0m	\$3.7m	\$85.2m
Full-time equivalent employment	626	15	28	669

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	320	3	76	399
Horses and greyhounds in training	842	22	140	1,004

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	86	3	7	95
Owners	956	24	58	1,039
Trainers	114	7	13	135
Breeders staff	74	1	10	85
Stable/Kennel employees	242	3	20	264
Racing Club & industry staff (FT, PT, casual)	216	0	0	216
Jockeys, drivers & apprentices	23	6	0	28
Racing club volunteers	52	0	0	52
Volunteers assisting participants	229	16	25	271
<b>Total participants in the Toowoomba region</b>	<b>1,992</b>	<b>60</b>	<b>133</b>	<b>2,186</b>

\*Some totals do not add due to rounding.

Race meetings in the Toowoomba region attracted attendances of **28,350** or **4.2%** of total attendances at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE TOOWOOMBA REGION



## AT A GLANCE

## 2 Racing Clubs

THOROUGHBRED 2

## 58 Race Meetings

THOROUGHBRED 58

## 445 Races

THOROUGHBRED 445

## 491 Racing Club Members

THOROUGHBRED 491

## 28,350 Attendances

THOROUGHBRED 28,350

\*Some totals do not add due to rounding

# Townsville

- + The population of the Townsville region is 236,441 (Australian Bureau of Statistics).
- + There are a total of nine (9) racing clubs operating in the region, eight (8) of which are thoroughbred clubs, and one (1) a greyhound racing club.
- + The racing industry in the Townsville region is responsible for generating almost \$60.4 million in value added contribution to Gross State Product. This equates to 3.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 498 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,200 participants in the racing industry in Townsville.

The racing industry in the **Townsville region is responsible for generating \$60.4 million in value added** contribution to gross state product. This represents **3.2% of the industry total.**

## RACING CLUBS IN THE REGION

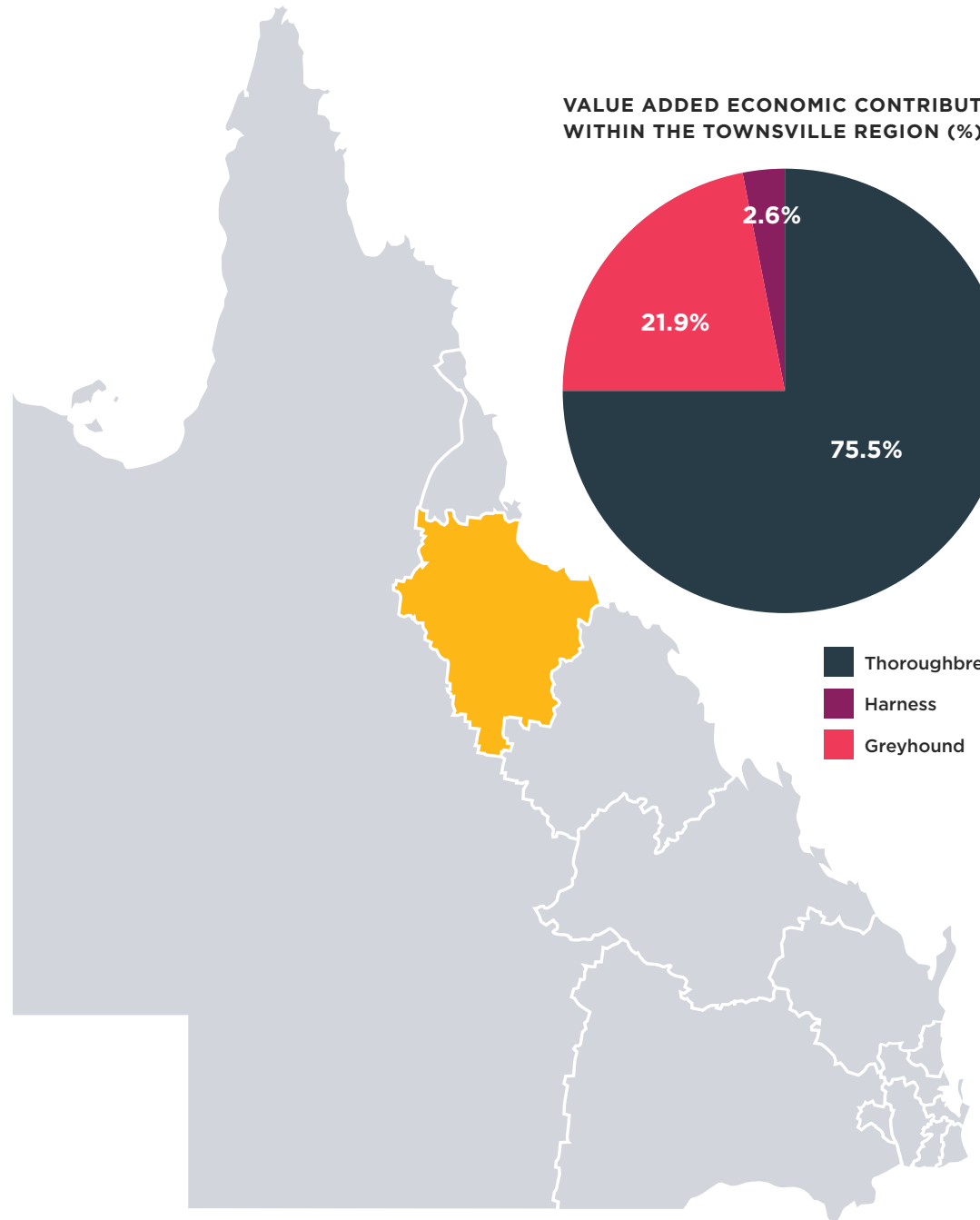
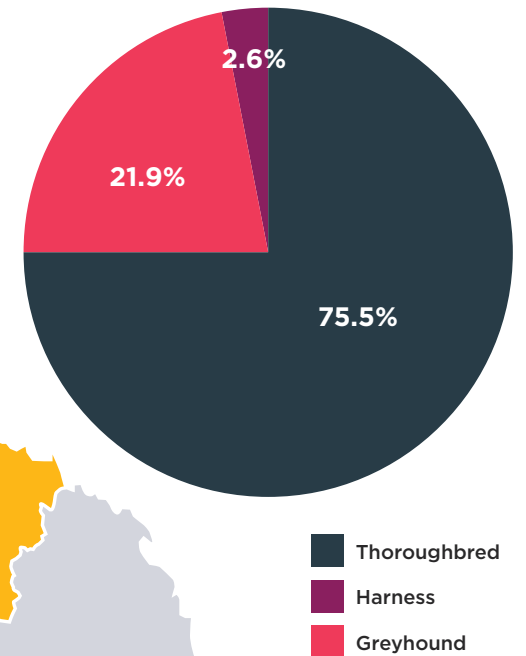
### Thoroughbred

- + Burdekin Race Club Inc.
- + Charter Towers Race Club Inc.
- + Einasleigh Race Club Inc.
- + Ewan Amateur Turf Club Inc.
- + Herbert River Jockey Club Inc.
- + Pentland Race Club Inc.
- + Towers Jockey Club
- + Townsville Turf Club Inc.

### Greyhound

- + Townsville Greyhound Racing Club Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOWNSVILLE REGION (%)





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$49.9m	\$1.8m	\$14.5m	\$66.2m
Total value added	\$45.6m	\$1.6m	\$13.2m	\$60.4m
Full-time equivalent employment	337	12	109	498

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	10	0	40	50
Horses and greyhounds in training	456	0	428	884

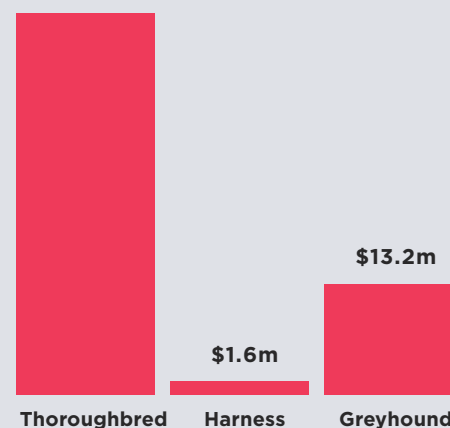
## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	27	0	5	32
Owners	1,020	6	79	1,105
Trainers	82	0	33	114
Breeders staff	23	0	7	31
Stable/Kennel employees	176	0	34	210
Racing Club & industry staff (FT, PT, casual)	256	0	46	301
Jockeys, drivers & apprentices	13	0	0	13
Racing club volunteers	255	0	0	255
Volunteers assisting participants	136	0	44	180
<b>Total participants in the Townsville region</b>	<b>1,987</b>	<b>6</b>	<b>248</b>	<b>2,241</b>

\*Some totals do not add due to rounding.

Race meetings in the Townsville region attracted attendances of **51,792** or **7.7% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE TOWNSVILLE REGION  
\$45.6m



## AT A GLANCE

## 9 Racing Clubs

THOROUGHBRED	8
GREYHOUND	1

## 153 Race Meetings

THOROUGHBRED	53
GREYHOUND	100

## 1,440 Races

THOROUGHBRED	368
GREYHOUND	1,072

## 1,303 Racing Club Members

THOROUGHBRED	1,254
GREYHOUND	49

## 51,792 Attendances

THOROUGHBRED	44,510
GREYHOUND	7,282

\*Some totals do not add due to rounding

# Wide Bay

- + The population of the Wide Bay region is 296,849 (Australian Bureau of Statistics).
- + There are a total of eleven (11) racing clubs operating in the region, ten (10) of which are thoroughbred clubs, and one (1) greyhound racing club.
- + The racing industry in the Wide Bay region is responsible for generating almost \$41.3 million in value added contribution to Gross State Product. This equates to 2.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 334 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,400 participants in the racing industry in Wide Bay.

## RACING CLUBS IN THE REGION

### Thoroughbred

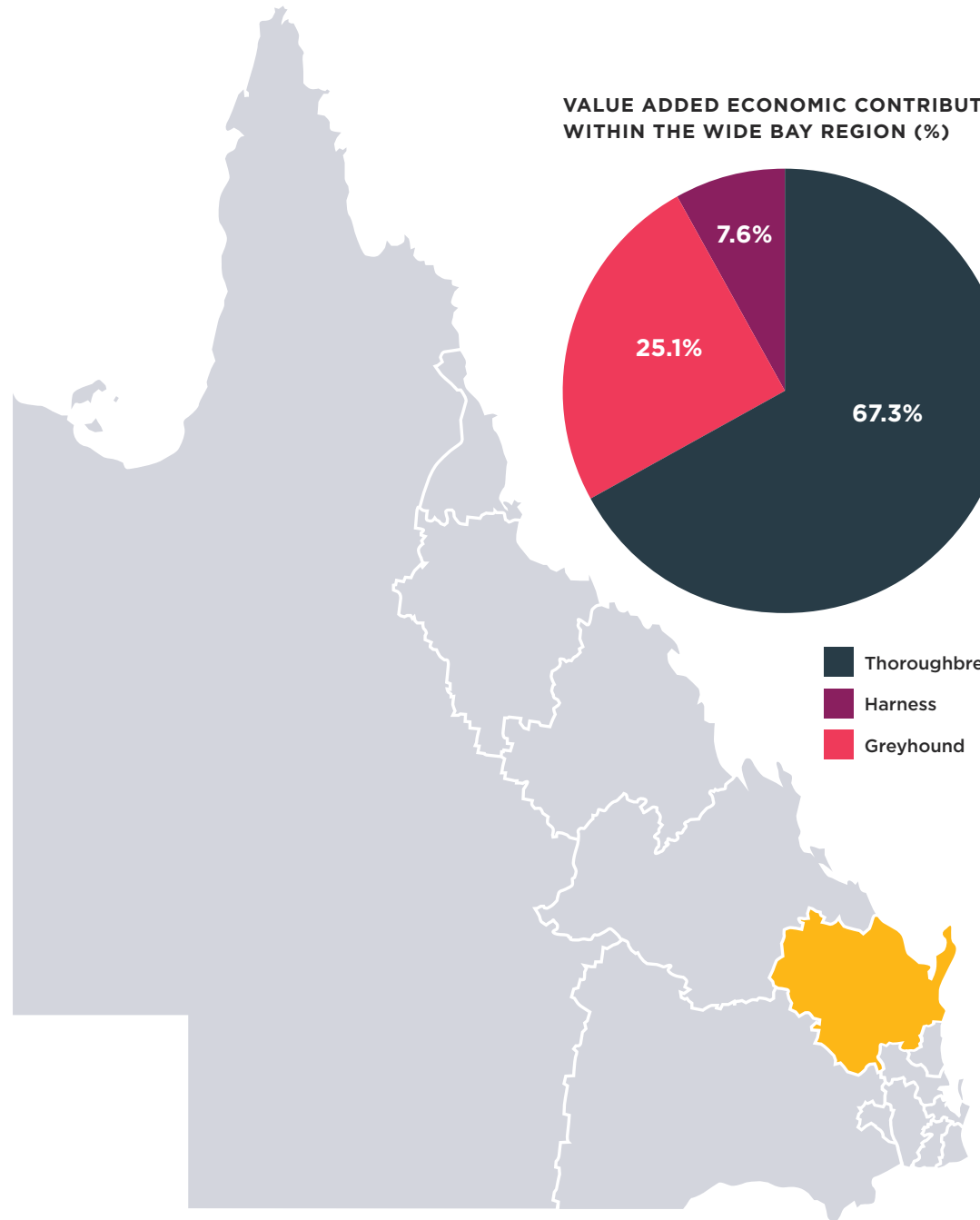
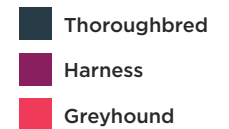
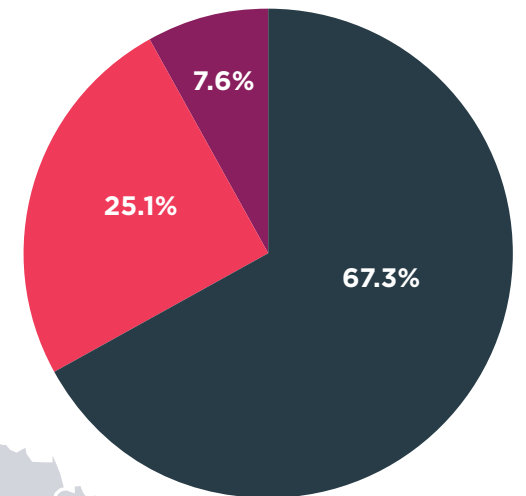
- + Bundaberg Race Club Inc.
- + Burrandowan Picnic Races Inc.
- + Eidsvold Race Club Inc.
- + Gayndah Jockey Club Inc.
- + Gympie Turf Club
- + Kumbia Race Club
- + Monto Race Club
- + Mt Perry Race Club Inc.
- + Nanango Race Club Inc.
- + South Burnett Race Club

### Greyhound

- + Bundaberg Greyhound Racing Club Inc.

The racing industry in the **Wide Bay region is responsible for generating \$41.3 million in value added** contribution to gross state product. This represents **2.2% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE WIDE BAY REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$33.3m	\$3.8m	\$12.4m	\$49.4m
Total value added	\$27.8m	\$3.2m	\$10.4m	\$41.3m
Full-time equivalent employment	224	25	85	334

## ANIMALS

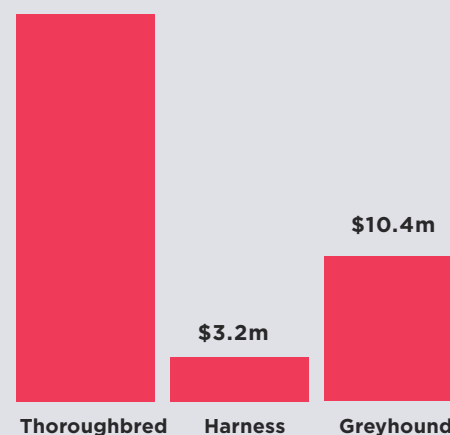
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	82	8	137	228
Horses and greyhounds in training	241	33	309	582

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	80	12	10	102
Owners	816	21	79	915
Trainers	59	7	36	103
Breeders staff	69	6	14	89
Stable/Kennel employees	92	5	32	129
Racing Club & industry staff (FT, PT, casual)	182	0	25	207
Jockeys, drivers & apprentices	8	4	0	12
Racing club volunteers	627	0	10	637
Volunteers assisting participants	147	41	56	244
<b>Total participants in the Wide Bay region</b>	<b>2,081</b>	<b>95</b>	<b>262</b>	<b>2,438</b>

\*Some totals do not add due to rounding.

Race meetings in the Wide Bay region attracted attendances of **24,704** or **3.7% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE WIDE BAY REGION  
\$27.8m

## AT A GLANCE

## 11 Racing Clubs

THOROUGHBRED	10
GREYHOUND	1

## 83 Race Meetings

THOROUGHBRED	29
GREYHOUND	54

## 679 Races

THOROUGHBRED	149
GREYHOUND	530

## 1,082 Racing Club Members

THOROUGHBRED	1,010
GREYHOUND	72

## 24,704 Attendances

THOROUGHBRED	19,220
GREYHOUND	5,484

\*Some totals do not add due to rounding

# South East Queensland

- + The population of the South East Queensland region is 3,616,713 (Australian Bureau of Statistics).
- + There are a total of seventeen (17) racing clubs operating in the region, eleven (11) of which are thoroughbred clubs, three (3) harness and three (3) greyhound racing clubs.
- + The racing industry in the South East Queensland region is responsible for generating almost \$1553.7 million in value added contribution to Gross State Product. This equates to 83.4% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 11,052 full-time equivalent (FTE) jobs in the region.
- + There are more than 26,100 participants in the racing industry in South East Queensland.

The racing industry in the **South East Queensland region is responsible for generating \$1,553.7 million in value added** contribution to gross state product. This represents **83.4% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

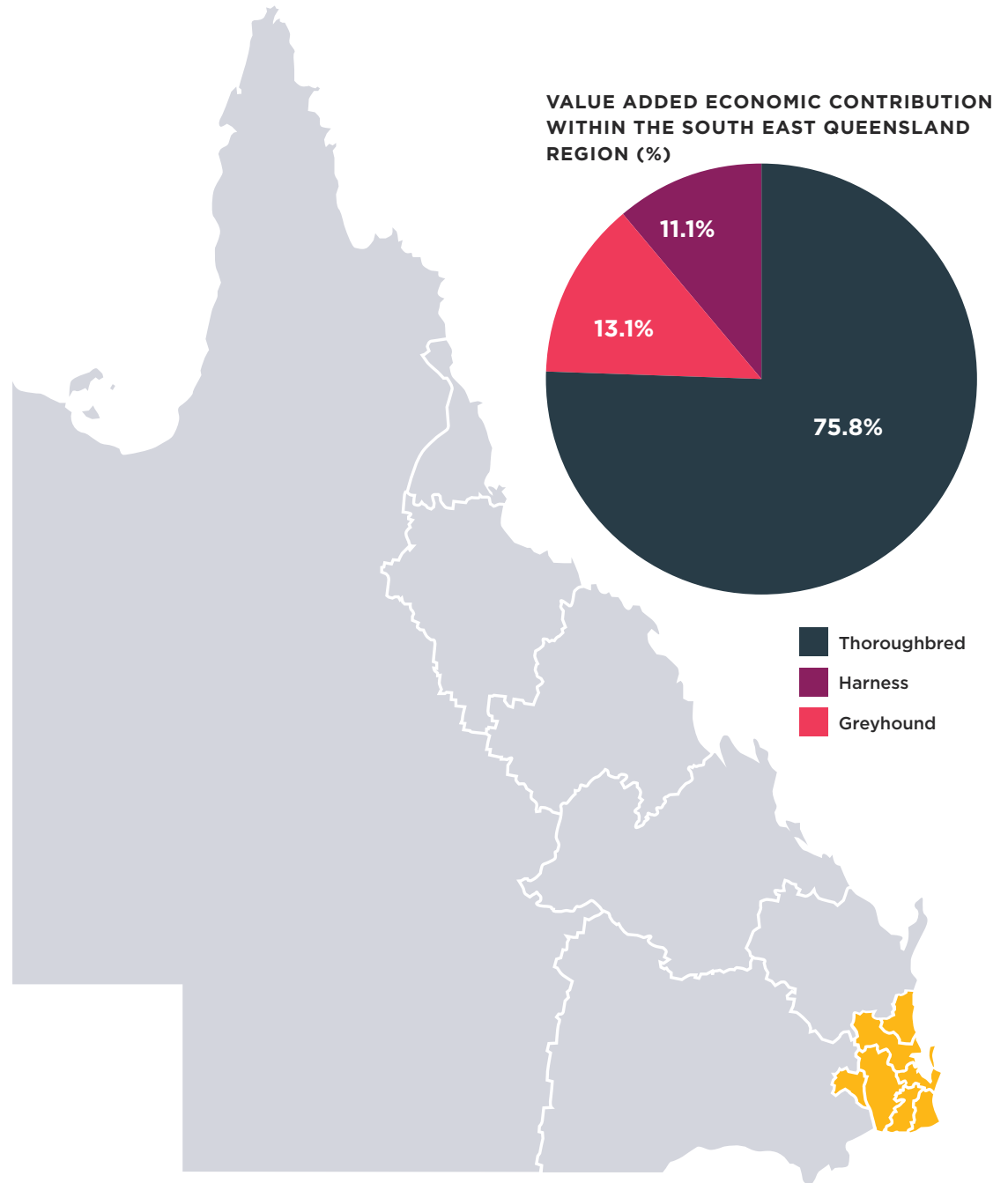
- + Beaudesert Hibernian Race Club
- + Beaudesert Race Club
- + Brisbane Racing Club
- + Esk Jockey Club
- + Gold Coast Turf Club
- + Ipswich Turf Club
- + Kilcoy Race Club
- + Lockyer Valley Turf Club
- + Sunshine Coast Turf Club
- + Tattersall's Racing Club
- + Toowoomba Turf Club

### Harness

- + Albion Park Harness Racing Club
- + Marburg Pacing Association
- + Redcliffe Peninsula Harness Racing and Sporting Club

### Greyhound

- + Brisbane Greyhound Racing Club
- + Capalaba Greyhound Racing Club
- + Ipswich Greyhound Racing Club



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$882.5m	\$139.2m	\$154.6m	\$1,176.3m
Total value added	\$1,177.4m	\$173.1m	\$203.2m	\$1,553.7m
Full-time equivalent employment	8,371	1,250	1,430	11,052

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	1,073	225	1,194	2,492
Horses and greyhounds in training	5,061	1,077	2,547	8,685

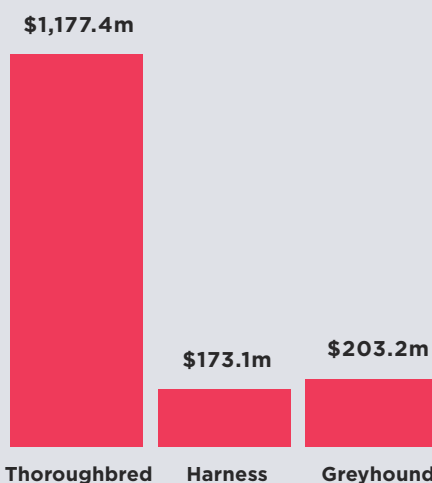
## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	596	244	101	941
Owners	13,678	848	1,028	15,553
Trainers	538	230	282	1,050
Breeders staff	513	122	151	786
Stable/Kennel employees	1,491	174	269	1,935
Racing Club & industry staff (FT, PT, casual)	2,224	273	333	2,829
Jockeys, drivers & apprentices	150	142	0	292
Racing club volunteers	82	74	19	175
Volunteers assisting participants	1,156	954	479	2,589
<b>Total participants in the South East Queensland region</b>	<b>20,427</b>	<b>3,061</b>	<b>2,661</b>	<b>26,150</b>

\*Some totals do not add due to rounding.

Race meetings in the South East Queensland region attracted attendances of **469,723** or **69.6%** of total attendances at race meetings in Queensland.

## VALUE ADDED GENERATED BY EACH CODE WITHIN THE SOUTH EAST QUEENSLAND REGION



## AT A GLANCE

## 18 Racing Clubs

THOROUGHBRED	11
HARNES	4
GREYHOUND	3

## 1,050 Race Meetings

THOROUGHBRED	313
HARNES	299
GREYHOUND	438

## 9,844 Races

THOROUGHBRED	2,491
HARNES	2,744
GREYHOUND	4,609

## 14,924 Racing Club Members

THOROUGHBRED	14,026
HARNES	574
GREYHOUND	324

## 469,723 Attendances

THOROUGHBRED	366,467
HARNES	61,671
GREYHOUND	41,585

\*Some totals do not add due to rounding

## About IER

IER is a leading strategic consulting business specialising in the tourism, events and entertainment industries. For over twenty years, IER has provided economic impact evaluations for both private and Government clients. In particular, IER has specialised in consulting on a variety of projects related to the racing industries in Australia and New Zealand over this time.

This study constitutes an economic and social impact evaluation of the NT thoroughbred racing industry. An understanding of the intricate and sometimes complex flow of money in the racing industry underpins this assessment. IER has recently prepared similar studies for:

- + Australian Greyhound Racing Industry
- + Australian Thoroughbred Racing Industry
- + New Zealand Racing Industry (3 Codes)
- + South Australian Racing Industry (3 Codes)
- + Tasmanian Racing Industry (3 Codes)
- + Thoroughbred Racing Industry in Country Victoria
- + Victorian Racing Industry (3 Codes)
- + Western Australian Racing Industry (3 Codes)

The economic modelling for this study was undertaken by Associate Professor Barry Burgan (B Ec (Hons), FINSIA (Fellow)). Barry is a director of Economic Research Consultants Pty Ltd and has extensive experience in the area of economic and financial assessment and policy advice.

He has a background in the public and private sectors, academia and has worked on various projects in the area of economic policy, including in the area of economic modelling. In particular, Barry has extensive experience in the use of both computable general equilibrium and input output models, regional economic development and cost benefit analysis. He has undertaken a number of these studies and projects with the Sustainable Tourism Cooperative Research Centre.

Barry has undertaken a significant range of studies on special events, with some specific examples including:

- + Size and Scope of the South Australian Racing Industry (2019)
- + Economic and Social Impact Study of Harness Racing in Australia (2012)
- + The Economic Impact of the Melbourne Fringe Festival (2010 & 2011)
- + Analysis of economic impact (CGE modelling exercise) of 2006 Commonwealth Games on the Victorian economy (with KPMG, 2005)

- + Pre-event evaluation of impacts of the Sydney Olympic Games on NSW – with KPMG
- + Size and Scope study of the Victorian Racing Industry (2018)
- + Economic Impact assessment of the InterDominion (Sydney) 2013 - 2016
- + Annual assessment of the Adelaide Fringe, WomAdelaide and Clipsal 500 (over the last 5-10 years)
- + Size and Scope Study of Thoroughbred Racing Industry in NT
- + Size and Scope of the Western Australian Racing Industry (2021)
- + Size and Scope of the Australian Football League (2021)

Barry provides the economic modelling and advisory services to IER.

This report (Report) has been produced independently by IER as requested by Racing Queensland (RQ). The report has been prepared to meet the requirements set out by RQ within the terms of reference. The information, statements, statistics and commentary (together the 'Information') contained in this Report have been prepared by IER from a combination of publicly available material, data from various stakeholder organisations and from confidential discussions held with participants of the industry. IER has prepared this Report on the information that was received or obtained, on the basis that such information is accurate and, where it is represented to IER as such, complete. The Information contained in this Report has not been subject to an audit.

# Economic Methodology

The purpose of this study is to measure the contribution made by the three codes of racing towards the Queensland economy. In this way, it is a generalised measure of the industry's contribution to the State's economy.

## BASIS OF EVALUATION

This study is based on a consistent methodology to that used by IER in the evaluation of the contribution of racing industry's in other states and regions. The modelling is based on assessing the way in which expenditures that underpin the racing industry impact in a 'whole of economy context' through the creation of jobs and incomes.

More specifically, the economic contribution of an industry to the region in which it operates represents the contribution that the industry makes in terms of the generation of gross state (or regional product), household income and the employment these incomes support. The racing industry does this in two ways

- ✦ Through the employment and activity, it supports directly within racing (including the impact on the industries that depend on it as a customer); and
- ✦ The flow on effects of that which filters through the economy as a result of this activity

The importance of the expenditures generated by an industry, in the production process, is that they will sustain turnover in local industry, and specifically this will support local jobs and incomes. It is the jobs and incomes that are taken to be the measure of economic impact or benefit, netting out leakages such as expenditure on imports etc.

In addition to the jobs created with direct suppliers of services to the racing industry, economic activity produces a broader effect throughout the community, due to supply chain linkages and the impact of the spend of wage - extending the spend effect and the impact through various layers of the economy. This is known as the flow on or induced impact.

The result of an unconstrained whole of economy or general equilibrium model underpinned by input output tables, is a prominent process for translating direct created expenditure (a final demand stimulus) of industries or projects into jobs and incomes, and for establishing the extent of the flow on impact. There is some level of academic argument about appropriate models for converting increases in external expenditure (final demand) into regional economic impacts. The critics of using unconstrained models such as input output tables often argue that they overstate the value of an industry - and reference that "multiplier" impacts are taken as method of ratcheting up the stated value (noting that this study uses an impact assessment rather than multipliers per se). This criticism would be valid when analysts applied turnover multipliers but is not the case with the more appropriate use of value added multipliers - which translate the expenditure estimates to national accounting framework measure with a whole of economy context. Indeed, value added multipliers (the value added impact (direct and induced) relative to a dollar of created expenditure) are often less than 1. It is further noted that the constraints that are applied in more complex economic models do not tend to be substantial at the state and regional level in a longer term context (labour flows from state

to state and region to region and capital can also flow freely).

Used correctly, a whole of economy approach provides a more appropriate measure of economic impact than expenditure. In short, use of input output based models allow for reporting with respect to the estimated outcomes of the industry in terms of:

- ✦ The effect of expenditure or turnover on value added or incomes across a State/regional economy; and
- ✦ In terms of job creation

These measures ensure that the analysis is consistent with national accounting frameworks.

It should be emphasised that this methodology includes the identification and inclusion of local (Queensland) expenditure associated with racing. The economic impacts determined by this approach do not represent the value that would be lost to the State if the industry did not exist. Generally, when considering expenditure by locals it is often held that substitution is a significant factor in whether that spending would be lost to the economy. Taking the racing industry as an example, it is likely (under a scenario where it no longer existed) that much of the local resident spend would substitute to other activities. Depending on where this spending occurs the overall economic impact of that spending could be higher or lower than what it was when spent on racing.

What this study calculates is the level of direct and induced employment and income that is linked to people choosing to spend their

entertainment dollar on racing (after allowing for imports which are used in the production process). This could be considered the gross economic impact of the sector and is therefore a measure of its significance generally. If a similar gross impact was calculated for every other sector of the economy, then the sum of the impacts would be considerably greater than the size of the economy in total. An alternative methodology would be to measure the net economic impact. Such a study would represent the extent to which this industry expenditure is supported by revenues that can be considered new to the state or region. This would include the supply of services by the local industry to racing activities interstate. It would also include the spending made by tourists or visitors to the state whose main reason for visiting is to attend/participate in the races and wagering by out-of-state residents on local racing product. Finally, it would include industry revenues that locals spend where they would not spend it in the state but for their involvement in the activities of racing. It would also reasonably be expected that some race attendees would attend events interstate if they were not available in Queensland, and that some operators would base their operations interstate if this was the case. The information required for this assessment is not available, and as such is out of the scope of this analysis.

### ESTIMATES OF EXPENDITURE BY THE INDUSTRY

This study of the Queensland racing industry is undertaken by firstly identifying the expenditures generated by the industry and then applying this expenditure to state input output model. The State input output model has been prepared using the latest ABS national input output table

(2018-19) as a base and has been created using the location quotient method and using state labour force and national accounts data and updated to the relevant year for inflation. The model condenses the industry structure of the national input output table to a 26 industry sector level focusing on industries more directly impacted by production activity in the racing industry. The approach identifies the structural context of expenditure and then applies this to industry sectors from which point it is assumed that the general industry production function can be applied.

The estimated racing industry expenditure is determined at two levels. Firstly, the industry expenditure generated within each code of racing is identified, as well as the region in which this spend occurs. Secondly, final expenditures are allocated to the model's industry sectors. Expenditure on labour in the racing sector itself is allocated to the sport and recreation sector. By allocating these expenditures in this way, the imports required to support racing industry activity can be estimated for the production function of respective industry sectors and excluded as they represent a leakage from the state economy.

From an industry classification perspective, whilst "sport and recreation" is the dominant sector, there are significant purchases made from other sectors such as agriculture, business services, property services etc., while racing events include spend on food and beverage services and other general consumer spend.

### ADJUSTMENT OF EXPENDITURES

The expenditure data is converted from purchasers' prices to basic prices, as the final expenditure data includes margins, taxes and subsidies and all monetary values in the input output model are expressed as basic values. The prime differences between purchaser prices and basic prices are that:

- + Basic values exclude the cost of transport and wholesale and retail trade embedded in the purchase price (and allocate these to the transport and trade sectors).
- + GST will be allocated to Gross Operating Surplus. In the modelling herein this is then considered to support Government expenditure (an implied revenue neutral situation).

The core assumptions to make the adjustments from purchaser price distributions to basic values are:

- + The average value added in each of the industry sectors is extracted and then the GST component (at 10% - which is only paid on the value added) is deducted and separately identified. It is assumed that the value added coefficient for the arts and recreation sector understates that of the spend for the racing industry as the cultural industry will be dominated by public sector institutions and not for profits - whereas the recreation sector is more commercial.
- + The purchaser price is adjusted for the average margin for wholesale, retail and transport sectors, as identified in the national input output tables.

### DISTRIBUTION TO REGIONS

The final expenditures outlined within this study has been allocated to regions across Queensland. The level of economic activity will not proportionally follow the expenditure, as regional areas generally have higher import penetrations than metropolitan areas (i.e. regional areas have a higher likelihood of needing to import products and services from the metropolitan area).

This study develops a regional input output model for each of the nominated regions. These regional models are created from the underlying state table and again using the location quotient method based on regional employment estimates for each region from the latest data available through the ABS Census. Outcomes for the regions are adjusted for feedback impacts to be consistent with the state level modelling results, with much of the feedback being assumed to occur within the greater Brisbane area.

### ACKNOWLEDGEMENTS

IER would like to acknowledge the contribution of the following organisations and individuals:

- + Harness Racing Australia
- + Oz Chase
- + Participants who provided detailed financial data on training and breeding racing animals
- + Racing Queensland Clubs
- + Queensland Racing Integrity Commission
- + Racing Australia
- + Racing Information Services Enterprise
- + Racing Queensland
- + Responsible Wagering Australia
- + Tabcorp



# Definitions

The following terms have been used throughout the study and are defined as follows:

- + Direct Expenditure** - is defined as expenditure associated with producing racing animals (breeding and rearing), preparing racing animals (training), racing customer expenditure and expenditure by RQ and racing clubs on operating the industry. Direct expenditure is counted at the point at which it leaves the racing industry and hits the broader economy
- + Direct Economic Impact (value added)** - represents the amount of income included in the direct in-scope expenditure, and therefore is the amount of wages and salaries plus gross operating surplus directly created in supply these services and product, which is also equal to the direct in scope expenditure less the purchases the provider of the goods and services makes in providing the goods and services
- + Indirect Economic Impact (flow-on)** - represents the value added activity generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this
- + Total Value Added** - is the sum of the direct value added plus the flow on impact. It therefore represents the contribution to Gross State Product resulting from the events and activities of the Queensland racing industry

- + Full-time Equivalent Employment** - is a unit that indicates the workload of an employed person in a way that makes workloads or class loads comparable across various contexts. An FTE of 1.0 is equivalent to a full-time worker (i.e. 38 hours), while an FTE of 0.5 signals half of a full work load (i.e. 19 hours)
- + Household Income** - is defined as being wages and salaries (before tax) earned from employment generated by the racing industry
- + Participants in Racing** - is defined as being the number of employees (full-time, part-time and casual), participants and volunteers directly involved in the racing industry. Does not include down-the-line suppliers of goods and services
- + Input Output Modelling** - is the economic modelling used to determine the economic outputs within this study. It is an economy wide model, which shows the inter-linkages between industry sectors in the economy. Therefore, the change in economic circumstances (specifically a change in final demand), for one sector of the economy can be traced though to its effect on other sectors

The analysis has been undertaken in a consistent format and with consistent assumptions to evaluations of other projects and studies of the horse and greyhound racing industry (for consistency and comparative purposes). An input output model, as used herein is an economy wide model which shows the inter-linkages between industry sectors in the economy. Therefore, the change in economic circumstances (specifically a change in final demand) for one sector of the economy (e.g. through a major project) can be traced though to its effect on other sectors, allowing a more comprehensive look at the effects of the project. It is based on assumptions that all changes in final demand can be met by the economy without constraint. A computable general equilibrium (CGE) model is also an economy wide model and has a similar outcome, but differs from input output models in that it includes supply side and macro-economic constraints, thereby limiting the extent that the change in final demand will be fully captured in other sectors (because of market limitations). The labour market is in effect the most significant constraining factor. At the national level, such constraints will be critical, and as such national impacts are best assessed in this framework. However, at a state level, where supply constraints in the labour market are demonstrably small (responded to by immigration) and there are also limited capital market constraints - the estimates of jobs and GSP outcomes are of a similar order of magnitude at the state level. Both models would generally show a project in one region causing a positive effect in that region. A CGE model would show that project causing negative impacts in other regions to heavily offset the gains. In this analysis, we are clearly concerned with the impacts on the state economy.



FOCUSED THINKING



RACING QUEENSLAND

YOUNG AND  
DES