

Size and Scope of the

# QUEENSLAND RACING INDUSTRY

PREPARED BY IER | FEBRUARY 2023









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## KEY FINDINGS

In 2021/22 the Queensland racing industry was responsible for **generating more than \$2.2 billion in value added contribution** to the Queensland economy – **52% of which directly benefits regional economies**

In 2021/22, the Queensland racing industry generated total direct spending of \$1,734.5 million. This expenditure was responsible for creating a direct value added impact (in terms of wages, salaries and profits) of \$770.4 million. However, the flow-on effects linked to this expenditure increase the size of the industry's value added contribution to over \$2.2 billion.

More than 52% of the total value added impact occurred in regional areas of Queensland, with the Gold Coast (10.3%), Ipswich (6.7%) and Sunshine Coast (6.3%) 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 7,105 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 15,593 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.

### DIRECT SPENDING IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Direct Expenditure <sup>1</sup>	\$1,329.9m	\$170.5m	\$234.1m	\$1,734.5m

### ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Value Added <sup>2</sup>	\$1,702.4m	\$216.2m	\$301.6m	\$2,220.3m
% of Industry Value Added	76.7%	9.7%	13.6%	
Total Household Income <sup>3</sup>	\$978.0m	\$123.5m	\$176.0m	\$1,277.5m
Total FTE Employment	12,004	1,509	2,080	15,593

<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.

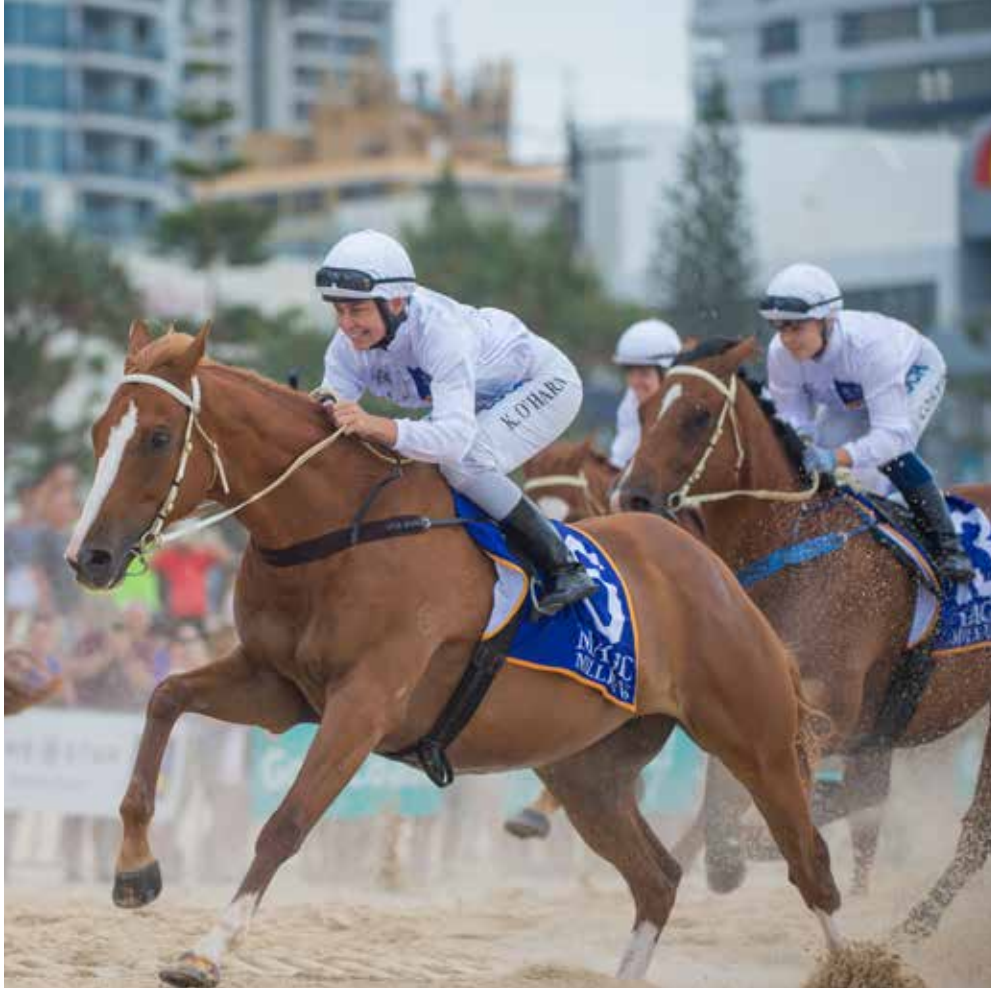
<sup>2</sup> Value added contribution is defined as the value of sales less the value of inputs used in production, i.e. it is equal to the income (wages, salaries and profits) generated in production

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



Of the **15,593 FTE jobs sustained** by the Queensland racing industry around **46% 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 2021/22, more than 759,600 attendances were recorded at thoroughbred, harness and greyhound race meetings in Queensland.

More than 76% of these attendances were made at regional racecourses, with the Gold Coast (14.0%), Sunshine Coast (9.0%), Ipswich (7.5%) and Central Queensland (7.1%) 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

close to 49,800 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 supported by almost 8,400 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.

## AT A GLANCE

### RACING ACTIVITY

#### 125 Racing Clubs

THOROUGHBRED	116
HARNESS	3
GREYHOUND	6

#### 1,366 TAB Race Meetings

THOROUGHBRED	452
HARNESS	300
GREYHOUND	614

#### 223 Non-TAB Race Meetings

THOROUGHBRED	221
HARNESS	1
GREYHOUND	1

#### 14,237 Total Races

THOROUGHBRED	4,695
HARNESS	2,780
GREYHOUND	6,762

There are close to **31 race meetings** held in **Queensland** every week providing live entertainment to **more than 759,600 attendees** each year

#### 759,638 Attendances

THOROUGHBRED	636,931
HARNESS	66,300
GREYHOUND	56,407

#### 3,510 Live Foals/ Pups Bred

THOROUGHBRED	1,814
HARNESS	273
GREYHOUND	1,423

#### 13,921 Horses and Greyhounds in Training

THOROUGHBRED	8,894
HARNESS	1,152
GREYHOUND	3,875



## AT A GLANCE

### THE PEOPLE

#### 1,328 Breeders

THOROUGHBRED	983
HARNESS	214
GREYHOUND	131

#### 28,475 Owners & Syndicate Members

THOROUGHBRED	22,454
HARNESS	944
GREYHOUND	5,077

#### 1,982 Trainers

THOROUGHBRED	1,061
HARNESS	256
GREYHOUND	665

#### 4,734 Racing Club & Industry Staff

THOROUGHBRED	4,173
HARNESS	197
GREYHOUND	365

#### 4,495 Staff employed by participants

THOROUGHBRED	3,607
HARNESS	311
GREYHOUND	577

There are **close to 49,800 individuals** who are involved in the Queensland racing industry as an **employee, participant or volunteer**. Close to **81% of these Queensland participants** in racing are in **regional communities**

#### 401 Jockeys & Drivers

THOROUGHBRED	249
HARNESS	152

#### 8,371 Volunteers

THOROUGHBRED	6,424
HARNESS	950
GREYHOUND	998

## 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).

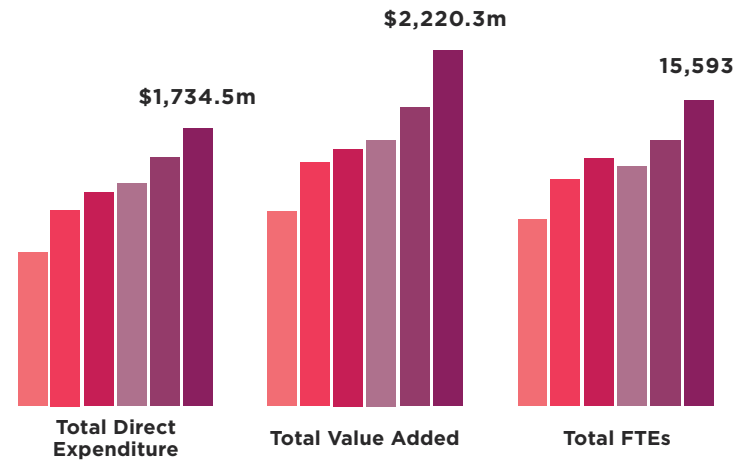
When comparing the overall results for the racing industry in Queensland it is evident that there has been an increase across each of the key economic indicators during this period.

In 2021/22 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.

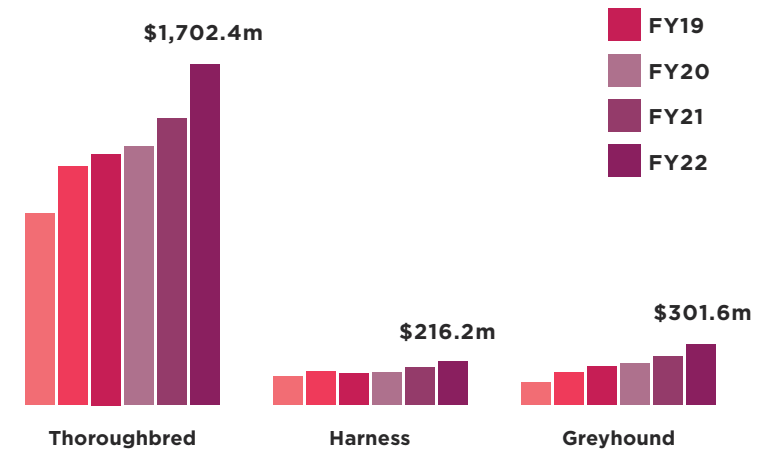
Looking at the total direct expenditure it is evident that there was an increase across all three of the codes in 2021/22. Greyhounds experienced the largest growth in total direct expenditure in 2021/22 increasing by 14.2%, this was followed by Thoroughbred (11.6%) and then Harness (9.3%).

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.

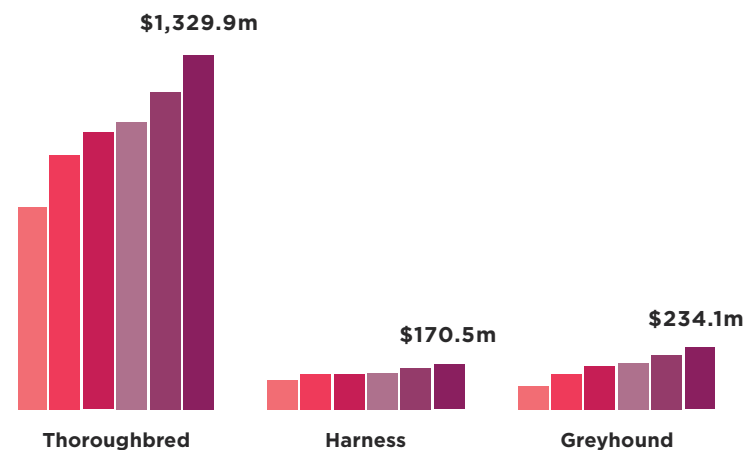
#### AGGREGATE KEY ECONOMIC INDICATORS



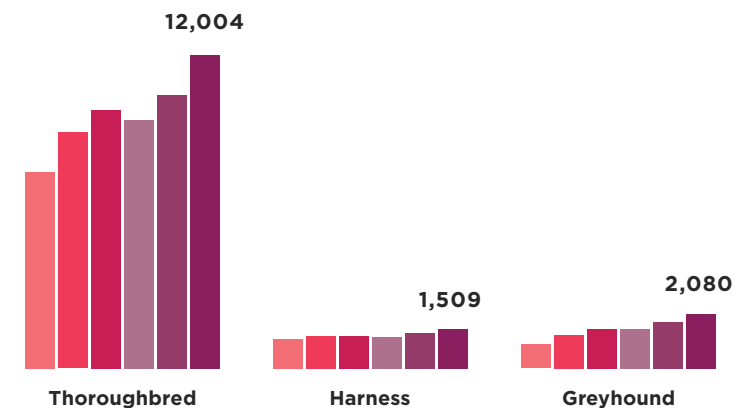
#### TOTAL VALUE ADDED BY CODE



#### TOTAL DIRECT EXPENDITURE BY CODE



#### TOTAL FTE BY CODE







# INTRODUCTION

In July 2022, 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 for 2020/21.

## 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.







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).

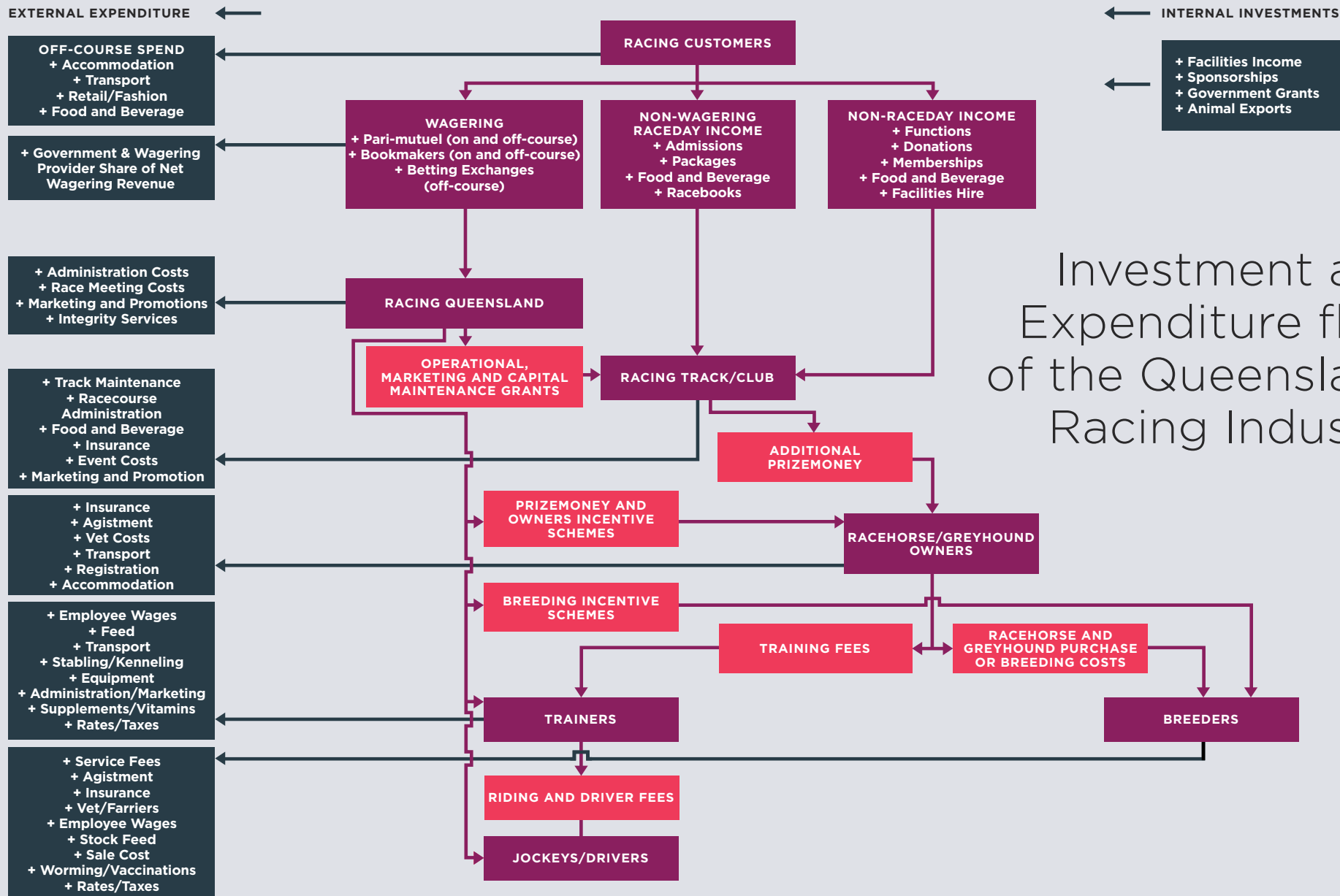
**3 Economic modelling** IER has utilised an input output methodology for the calculation of economic impacts associated with the racing industry in Queensland. The input output model provides direct and indirect impacts in relation to value added, income and employment.

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



## 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 2021/22, the Queensland racing industry generated more than \$1.7 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 Queensland racing industry is responsible for **generating more than \$1.7 billion in expenditure** in Queensland. Close to 68% of this expenditure was **generated in regional parts of the state.**

The breakdown of final expenditures is outlined below:

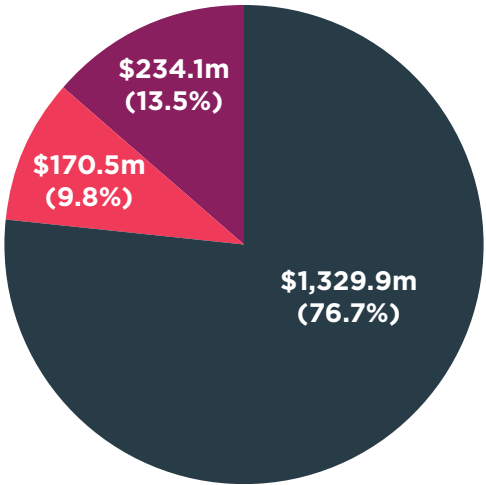
Sources of Final Expenditure	Funded by	Amount	% of Final Expenditure
Production of racing horses and greyhounds (Breeding)	+ Private investment + Service fees revenue + Industry bonuses & incentives	\$135.1m	7.8%
Preparation of racing horses and greyhounds (Training)	+ Private investment + Prizemoney + Industry bonuses & incentives	\$350.8m	20.2%
Racing Club & Industry Expenditure	+ Wagering product fees + Raceday revenues + Sponsorship & membership + Non-raceday revenues + Nominations	\$496.7m	28.6%
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	\$690.7m	39.8%
Racing customer expenditure off-course	+ Private investment	\$61.2m	3.5%
Total		\$1,734.5m	



Thoroughbred racing is responsible for generating close to 77% of the final expenditures. More than 69% of this expenditure was in regional parts of the state. Harness racing is responsible for generating close to 10% of the final expenditures. Almost 66% of this expenditure is in regional parts of the state. Greyhound racing is responsible for generating over 13% of the final expenditures. Close to 63% of this expenditure is in regional parts of the state.

DIRECT SPENDING BY CODE (\$MIL)

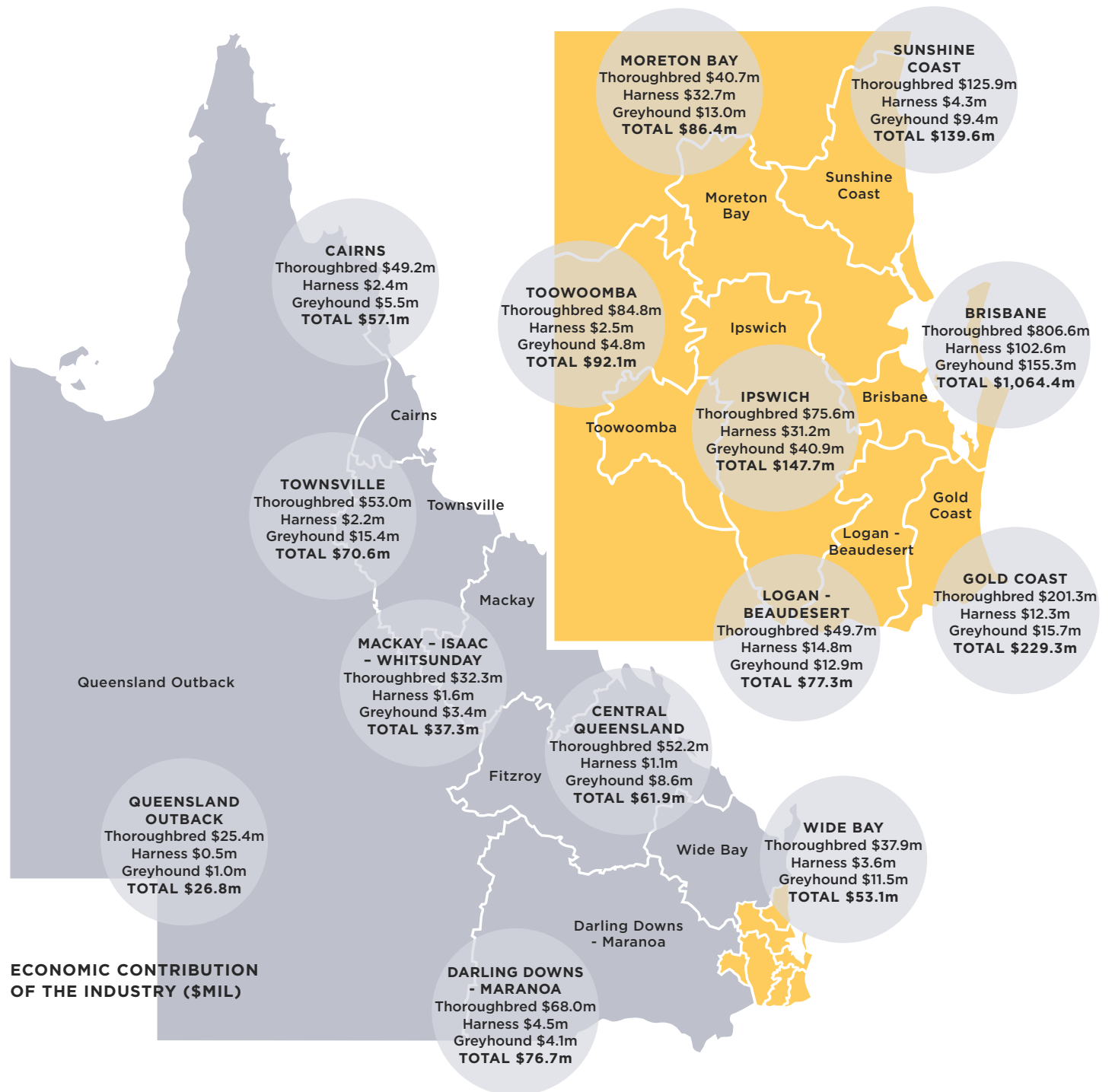
- Thoroughbred
- Harness
- Greyhound



# Economic Contribution of the Industry

The Queensland racing industry is responsible for generating a real gross value added contribution of \$2,220.3 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).





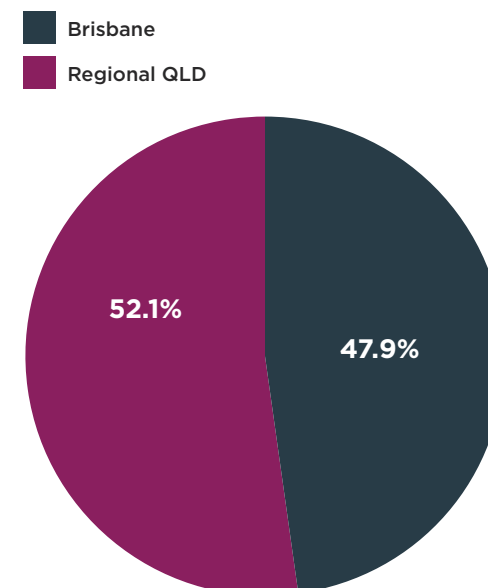
Generally, the level of economic activity will not always proportionally follow the final expenditures, as regional areas generally have higher import penetrations than metropolitan areas – i.e. a lot of the expenditure is on product imported from the metropolitan area. As such, the model takes into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

When considering the value added contribution of \$2,220 million generated by the Queensland racing industry, it is important to note that it is made up of:

- + Direct value added (\$770.4 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 (\$1,449.9 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





# 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 (full-time, part-time and casual employees of the industry), trainers, breeders, owners (as investors in the industry), 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.

The ownership consideration across the codes is considered as per the below definitions:

- Thoroughbred - the number of individuals and syndicate members who own a horse and have raced during the defined period in Queensland.
- Harness - the number of individual owners, including syndicate or partnership members who own a horse that has raced in Queensland during the defined period.
- Greyhound - this is a count of QLD owners (individual or syndicate) of a Queensland registered Greyhound valid during the specified date range.

Close to 32,800 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 8,371 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 49,786 individuals who participate in the Queensland racing industry as a participant, employee or volunteer. Close to 81% of the Queensland participants are in regional parts of the State.

### TOTAL PARTICIPANTS IN RACING

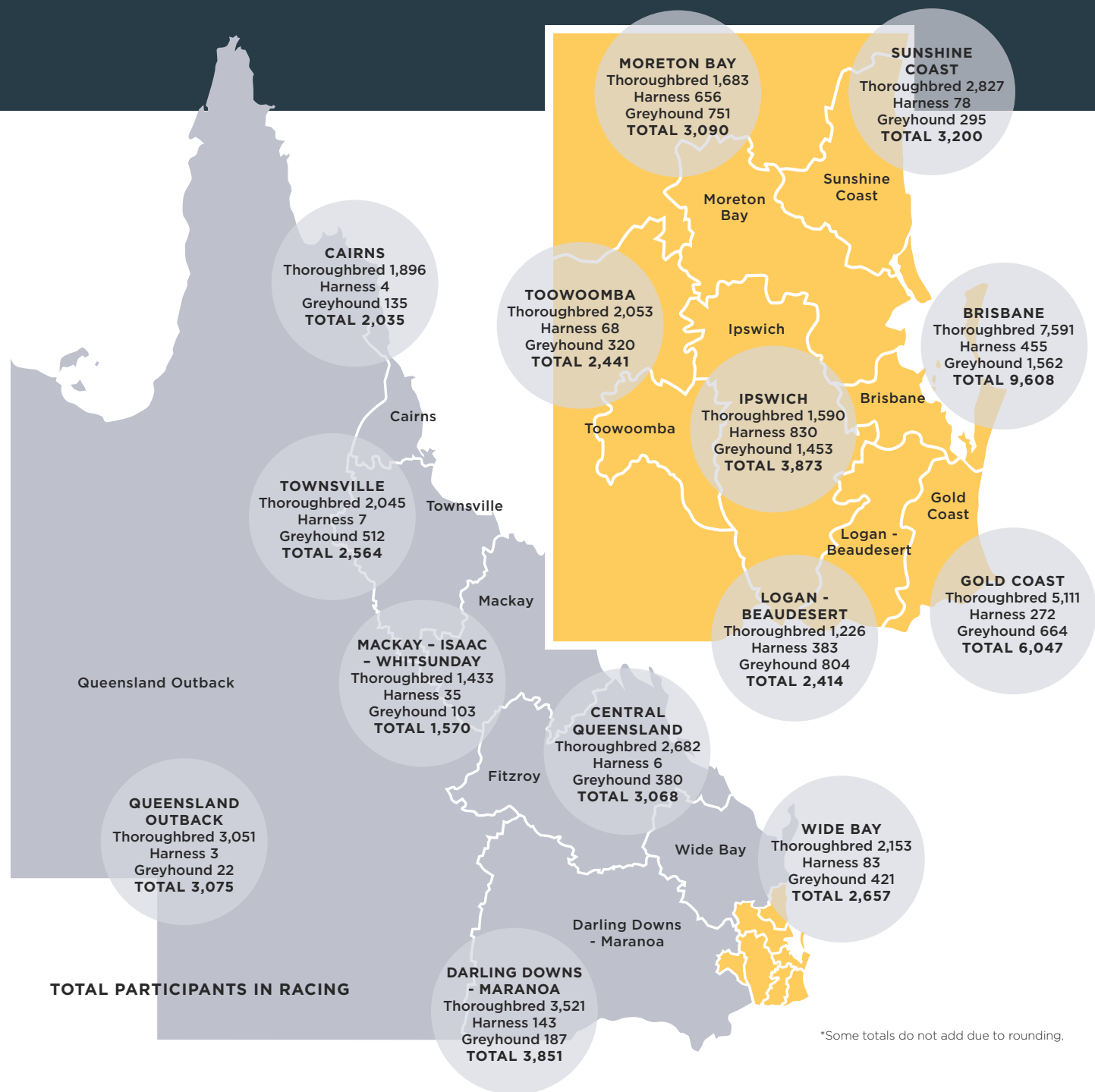
	Thoroughbred	Harness	Greyhound	Total
<b>Breeders</b>	983	214	131	1,328
<b>Owners &amp; Syndicate Members</b>	22,454	944	5,077	28,475
<b>Trainers</b>	1,061	256	665	1,982
<b>Racing Club &amp; Industry Staff (FT, PT, Casual)</b>	4,173	197	365	4,734
<b>Breeders Staff</b>	847	107	195	1,149
<b>Stable/Kennel Employees</b>	2,760	204	382	3,346
<b>Jockeys &amp; Drivers</b>	249	152	0	401
<b>Racing club volunteers</b>	4,226	50	40	4,316
<b>Volunteers assisting participants</b>	2,198	900	958	4,055
<b>Total</b>	<b>38,951</b>	<b>3,023</b>	<b>7,812</b>	<b>49,786</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)





\*Some totals do not add due to rounding.



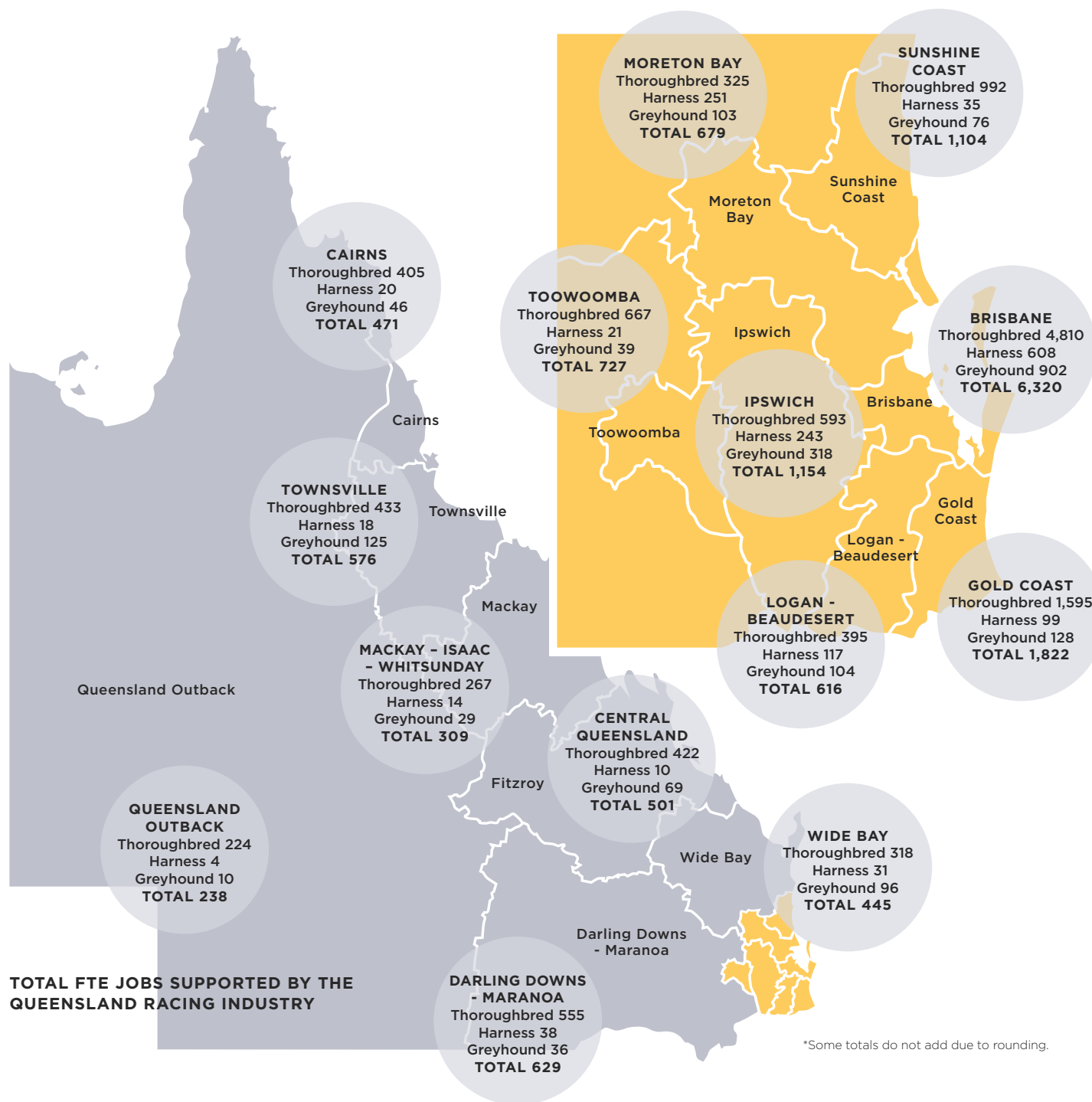


# Employment Generated by Racing in Queensland

The Queensland racing industry, like racing jurisdictions 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 of employees within the industry.

In 2021/22, the economic activity generated by the Queensland racing industry directly sustained 7,105 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 8,488 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Queensland racing industry was 15,593 FTE jobs.

The FTE positions that are sustained by the Queensland racing industry resulted in close to \$1,277.5 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.

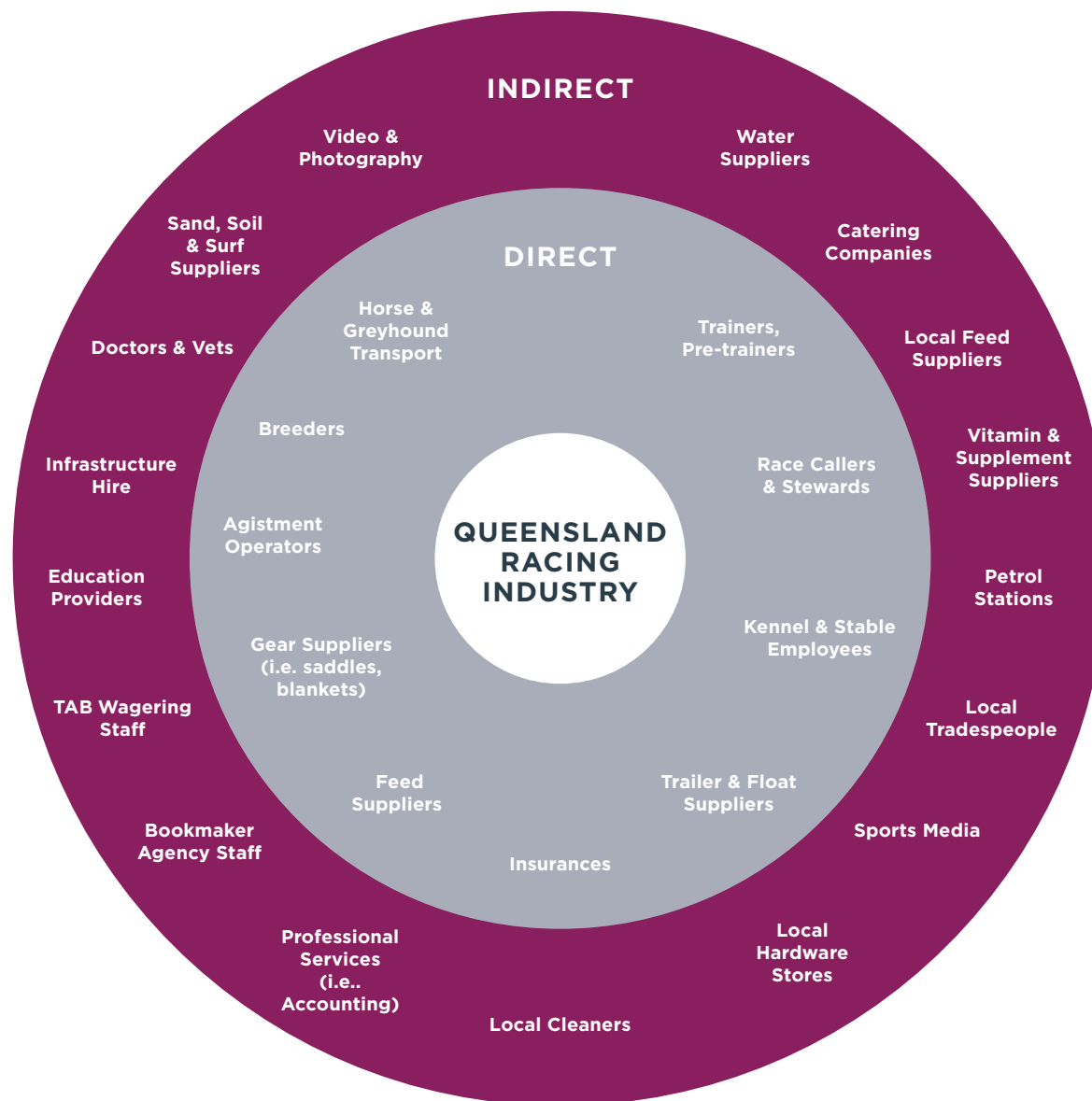
# The Supplier Network

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
Other Gambling services	+ Direct value added - \$155.2m + Direct FTE jobs - 1,505	+ Bookmaker operation + Gambling activity
Professional, Scientific & Technology Services	+ Direct value added - \$106.6m + Direct FTE jobs - 773	+ Veterinary Services + Scientific Research Services + Management & Related Consulting Services
Agriculture, Forestry & Fishing	+ Direct value added - \$78.2m + Direct FTE jobs - 818	+ Horse Farming/ Breeding







## Case study

### FEMALE PARTICIPATION ACROSS THE INDUSTRY

Female participants continue to play a significant role across the racing industry in Queensland and are changing the face of racing in the Sunshine State.

From barrier attendants to photo-finish operators, as well as a growing number of female presidents and chairs who volunteer their time far and wide across the state, it's all for the love of the sport.

Presently, more than 280 women currently serve as presidents and/or committee members of clubs across Queensland. At the Esk Jockey Club six of the 11 members on the committee are women including key positions of president, treasurer and secretary. At the Boulia Turf Club, Kyrraley Woodhouse was one of the youngest to hold the honorary position of president, when she commenced the role at the age of 24.

Additionally, 294 out of 477 trackwork riders are women (61.6%), while 1,525 out of 2,893 (52.7%) thoroughbred stable hands are also female.

Melanie Johnson combines both the hands on and management roles in racing; managing the Johnson racing stable and as president of the Moranbah Race Club. At race meets she will be seen both presenting trophies and assisting in the stabling area.

However, of all the positions involved with racing in Queensland, it's the apprentice jockey ranks that are dominated by women – accounting for 42 of the 52 junior riders across the state.

The prominence of female hoops has been evident with numerous instances across the state in the past few years where women rode winners of every race on the card.

It even happened twice on the same day at two different tracks - on October 23, 2021 at Gladstone during the afternoon, and then Toowoomba under lights that evening.

With 46 female jockeys currently plying their trade across Queensland, there's sure to be many more headlining achievements to come as female participation continues to go from strength-to-strength.







# RACING'S PARTICIPANTS AND ANIMALS

## The Breeding Industry

### NUMBER OF BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	23	0	1	24
Central Queensland	80	0	5	85
Darling Downs - Maranoa	144	15	3	163
Gold Coast	138	22	7	168
Ipswich	63	55	51	169
Logan - Beaudesert	62	24	22	108
Mackay - Isaac - Whitsunday	32	2	0	34
Moreton Bay	47	45	11	103
Queensland - Outback	16	0	0	16
Sunshine Coast	62	8	6	76
Toowoomba	95	4	7	105
Townsville	28	0	6	34
Wide Bay	60	9	9	78
Total Regional Queensland	851	183	128	1,162
Brisbane	132	31	3	166
<b>Total</b>	<b>983</b>	<b>214</b>	<b>131</b>	<b>1,328</b>

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

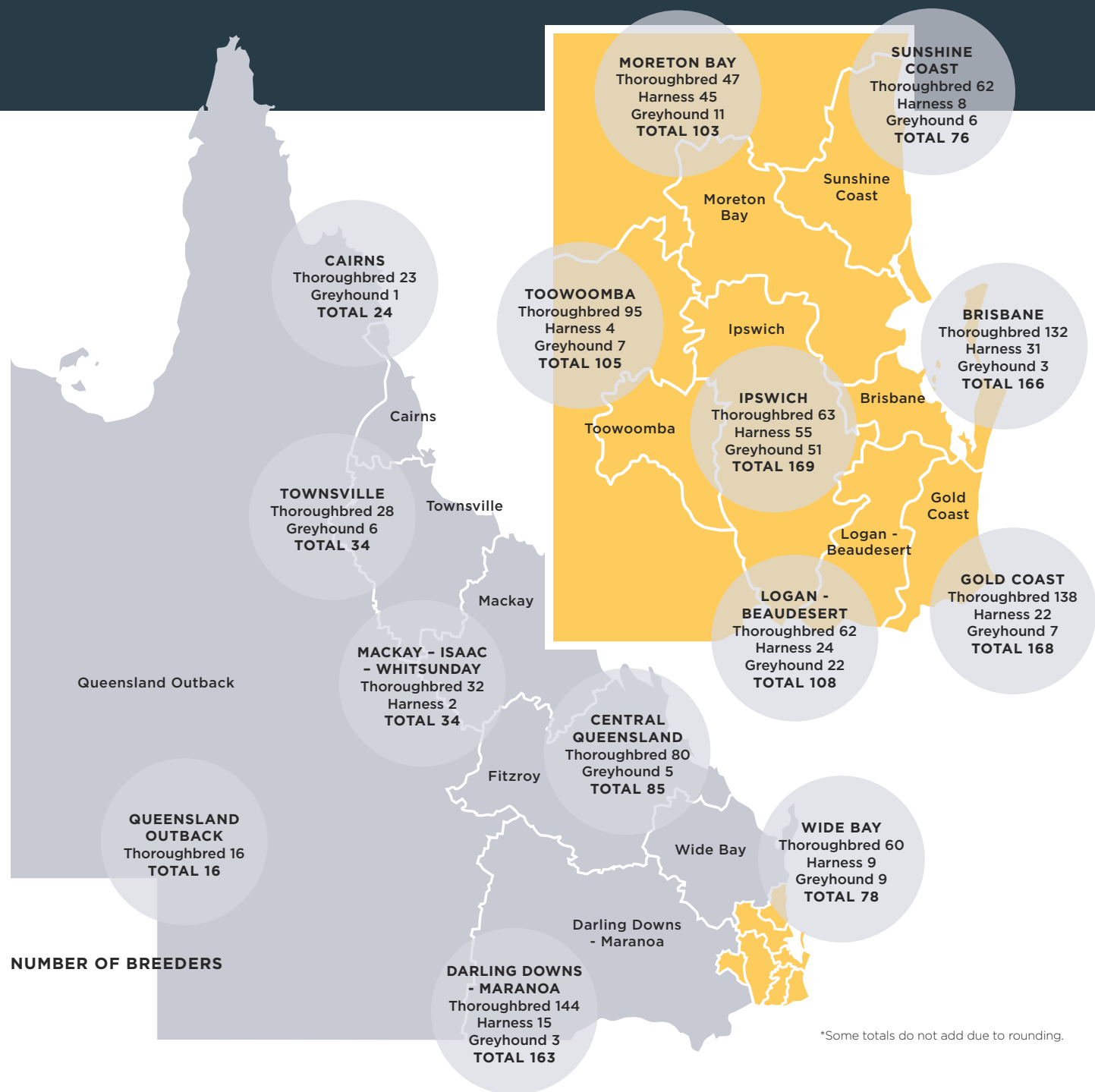
### NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	20	0	1	21
Central Queensland	69	0	7	76
Darling Downs - Maranoa	124	8	5	137
Gold Coast	119	11	10	141
Ipswich	54	28	76	158
Logan - Beaudesert	54	12	33	98
Mackay - Isaac - Whitsunday	28	1	0	29
Moreton Bay	41	22	16	80
Queensland - Outback	14	0	0	14
Sunshine Coast	53	4	9	66
Toowoomba	81	2	10	93
Townsville	24	0	9	33
Wide Bay	52	4	13	70
Total Regional Queensland	733	92	190	1,015
Brisbane	114	15	4	133
<b>Total</b>	<b>847</b>	<b>107</b>	<b>195</b>	<b>1,149</b>

\*Some totals do not add due to rounding.



There are **more than 1,300 individuals** who either breed, or have an ownership interest in a broodmare, broodmatron, stallion or sire. They are supported by **1,149 employees and 1,590 volunteers** – meaning that the industry is supported by **close to 4,100 people directly involved in breeding activities** across the three codes



NUMBER OF VOLUNTEERS ASSISTING BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	18	0	2	20
Central Queensland	64	0	8	72
Darling Downs - Maranoa	116	42	5	163
Gold Coast	111	62	11	184
Ipswich	50	154	84	289
Logan - Beaudesert	50	67	36	153
Mackay - Isaac - Whitsunday	26	6	0	31
Moreton Bay	38	125	18	181
Queensland - Outback	13	0	0	13
Sunshine Coast	49	22	10	82
Toowoomba	76	11	11	97
Townsville	22	0	10	32
Wide Bay	48	24	15	87
Total Regional Queensland	681	513	210	1,404
Brisbane	106	77	3	183
Total	786	590	213	1,590

\*Some totals do not add due to rounding.

The breeding sector provides and replenishes the racing horses and greyhounds for the Queensland racing industry. There are 1,328 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.







# Producing Racing Animals

## NUMBER OF STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Cairns	3	0	0	3
Central Queensland	9	0	1	10
Darling Downs - Maranoa	22	5	0	28
Gold Coast	9	0	0	9
Ipswich	10	4	1	15
Logan - Beaudesert	5	0	3	8
Mackay - Isaac - Whitsunday	3	0	1	4
Moreton Bay	0	12	0	12
Queensland - Outback	0	0	0	0
Sunshine Coast	7	0	0	7
Toowoomba	9	2	1	11
Townsville	3	0	1	4
Wide Bay	17	0	2	19
Total Regional Queensland	97	23	10	130
Brisbane	0	0	5	5
<b>Total</b>	<b>97</b>	<b>23</b>	<b>15</b>	<b>135</b>



## NUMBER OF BROODMARES/BREEDING FEMALES COVERED

	Thoroughbred	Harness	Greyhound	Total
Cairns	25	0	1	26
Central Queensland	99	0	7	106
Darling Downs - Maranoa	895	58	6	959
Gold Coast	224	34	9	266
Ipswich	354	104	72	530
Logan - Beaudesert	442	49	21	513
Mackay - Isaac - Whitsunday	71	5	0	75
Moreton Bay	60	59	13	132
Queensland - Outback	11	0	0	11
Sunshine Coast	66	14	7	87
Toowoomba	528	1	13	543
Townsville	31	0	8	39
Wide Bay	144	5	14	163
Total Regional Queensland	2,948	328	172	3,448
Brisbane	30	90	3	123
<b>Total</b>	<b>2,978</b>	<b>418</b>	<b>175</b>	<b>3,571</b>

## NUMBER OF FOALS/PUPS PRODUCED

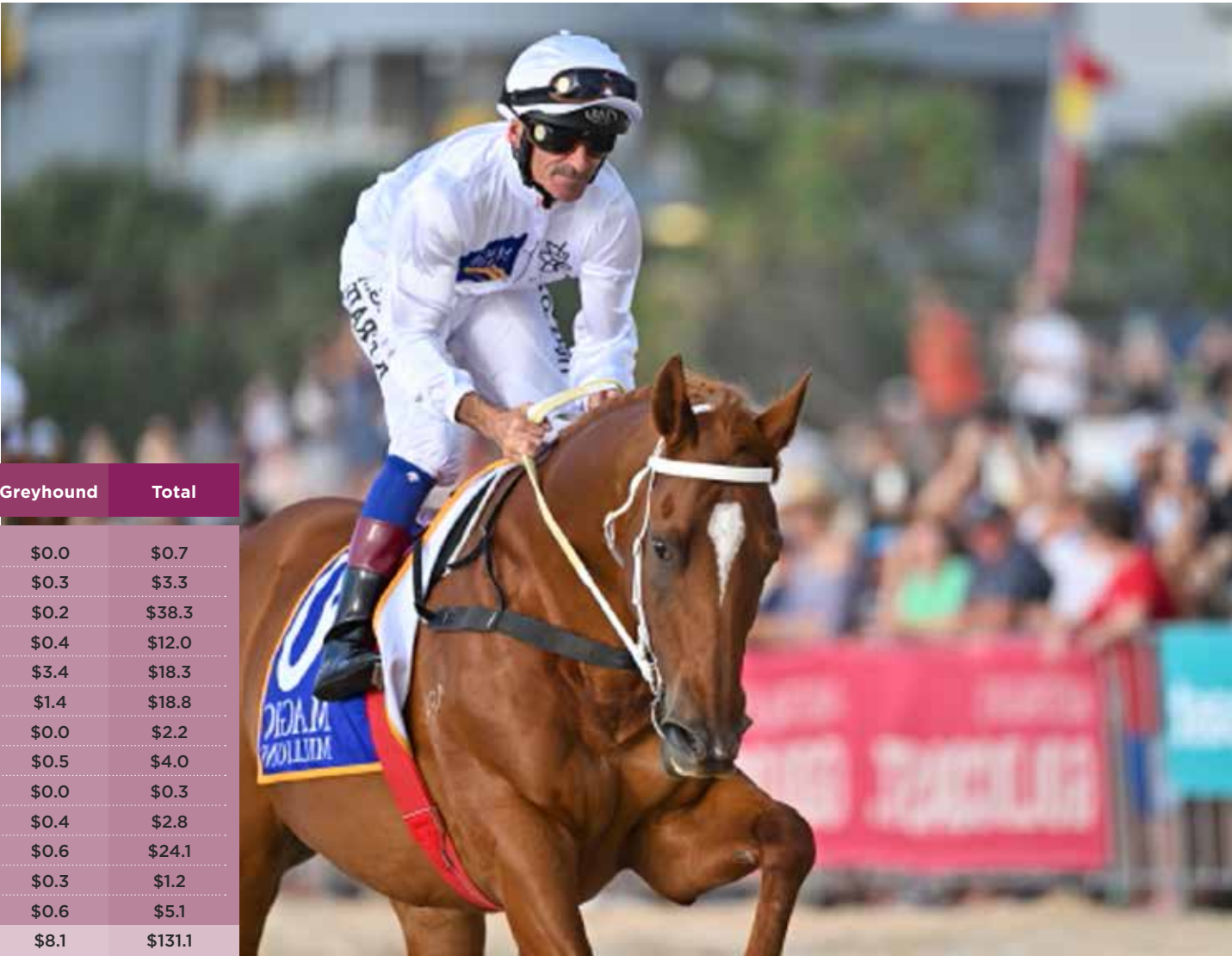
	Thoroughbred	Harness	Greyhound	Total
Cairns	15	0	0	15
Central Queensland	60	0	50	110
Darling Downs - Maranoa	545	38	35	618
Gold Coast	136	22	78	236
Ipswich	215	68	589	872
Logan - Beaudesert	269	32	240	542
Mackay - Isaac - Whitsunday	43	3	0	46
Moreton Bay	36	39	90	165
Queensland - Outback	7	0	0	7
Sunshine Coast	40	9	65	114
Toowoomba	322	1	97	420
Townsville	19	0	44	63
Wide Bay	88	3	108	199
Total Regional Queensland	1,796	214	1,396	3,406
Brisbane	18	59	27	104
<b>Total</b>	<b>1,814</b>	<b>273</b>	<b>1,423</b>	<b>3,510</b>

\*Some totals do not add due to rounding.

COST OF PRODUCING RACEHORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	\$0.7	\$0.0	\$0.0	\$0.7
Central Queensland	\$3.0	\$0.0	\$0.3	\$3.3
Darling Downs - Maranoa	\$36.1	\$2.0	\$0.2	\$38.3
Gold Coast	\$10.5	\$1.1	\$0.4	\$12.0
Ipswich	\$11.6	\$3.3	\$3.4	\$18.3
Logan - Beaudesert	\$15.9	\$1.5	\$1.4	\$18.8
Mackay - Isaac - Whitsunday	\$2.1	\$0.1	\$0.0	\$2.2
Moreton Bay	\$1.7	\$1.7	\$0.5	\$4.0
Queensland - Outback	\$0.3	\$0.0	\$0.0	\$0.3
Sunshine Coast	\$2.0	\$0.4	\$0.4	\$2.8
Toowoomba	\$23.4	\$0.0	\$0.6	\$24.1
Townsville	\$0.9	\$0.0	\$0.3	\$1.2
Wide Bay	\$4.3	\$0.1	\$0.6	\$5.1
Total Regional Queensland	\$112.6	\$10.4	\$8.1	\$131.1
Brisbane	\$0.8	\$3.0	\$0.2	\$4.0
Total	\$113.4	\$13.5	\$8.3	\$135.1

\*Some totals do not add due to rounding.





# Economic Contribution of the Breeding Industry

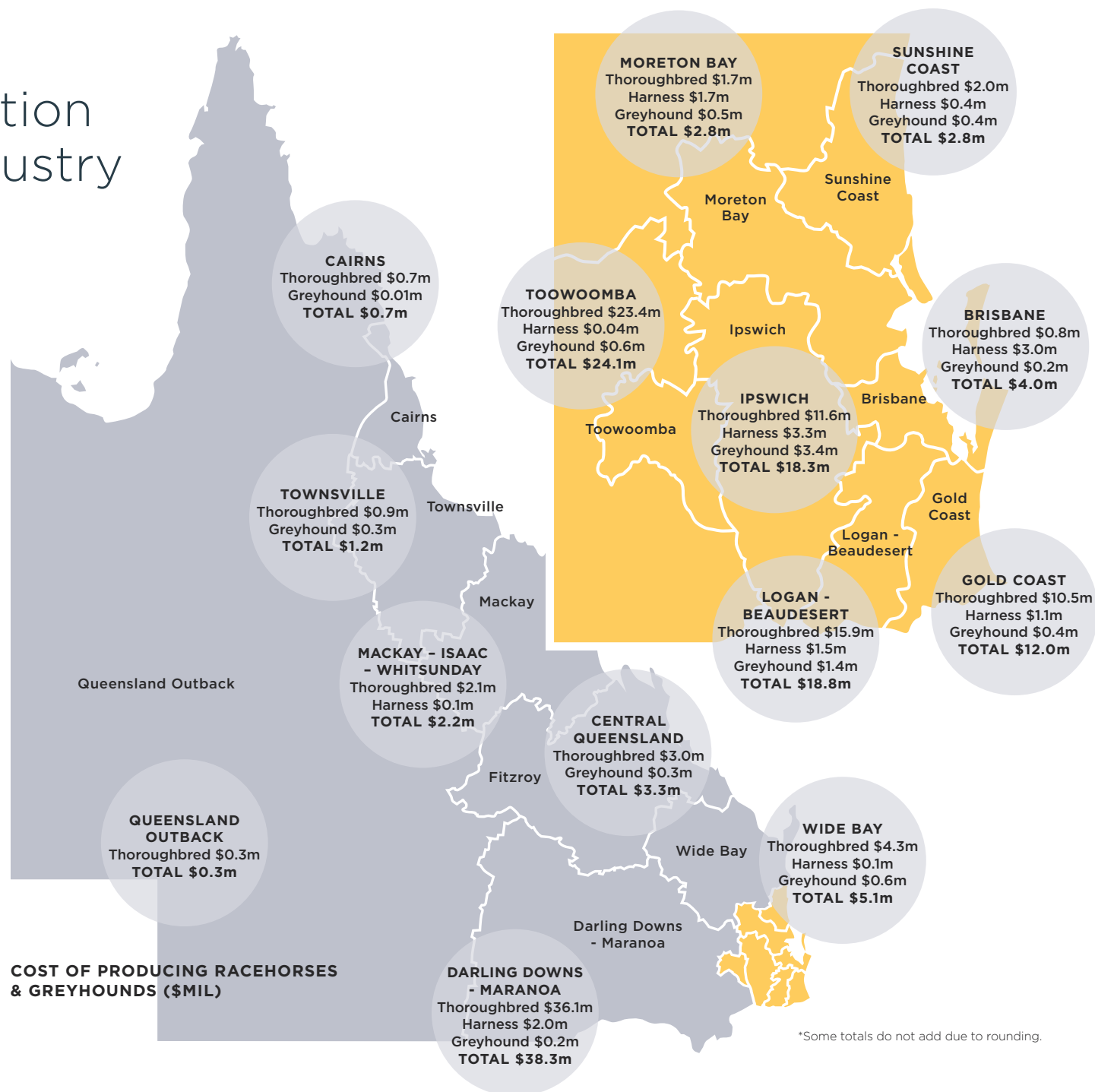
In 2021/22, breeders in the Queensland racing industry spent more than \$135 million on the production of racing stock. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of broodmares, broodmatrons, stallions 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 74% of all breeding related expenditure occurs in four Queensland regions. The Darling Downs - Maranoa (28.3%), Toowoomba (17.8%), Logan - Beaudesert (13.9%) and the Ipswich (13.6%) 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 2021/22, there were 2,978 broodmares covered in Queensland, producing 1,814 foals. This thoroughbred breeding activity is responsible for generating more than \$113.4 million in the production and care of racing stock.

Darling Downs – Maranoa	\$36.1m (31.8%)
Toowoomba	\$23.4m (20.7%)
Logan – Beaudesert	\$15.9m (14.0%)

HARNESS RACING

In 2021/22 there were 418 broodmares covered in Queensland, producing 273 foals. This standardbred breeding activity is responsible for generating close to \$13.5 million in the production and care of racing stock.

Ipswich	\$3.3m (24.7%)
Brisbane	\$3.0m (22.4%)
Darling Downs - Maranoa	\$2.0m (14.9%)

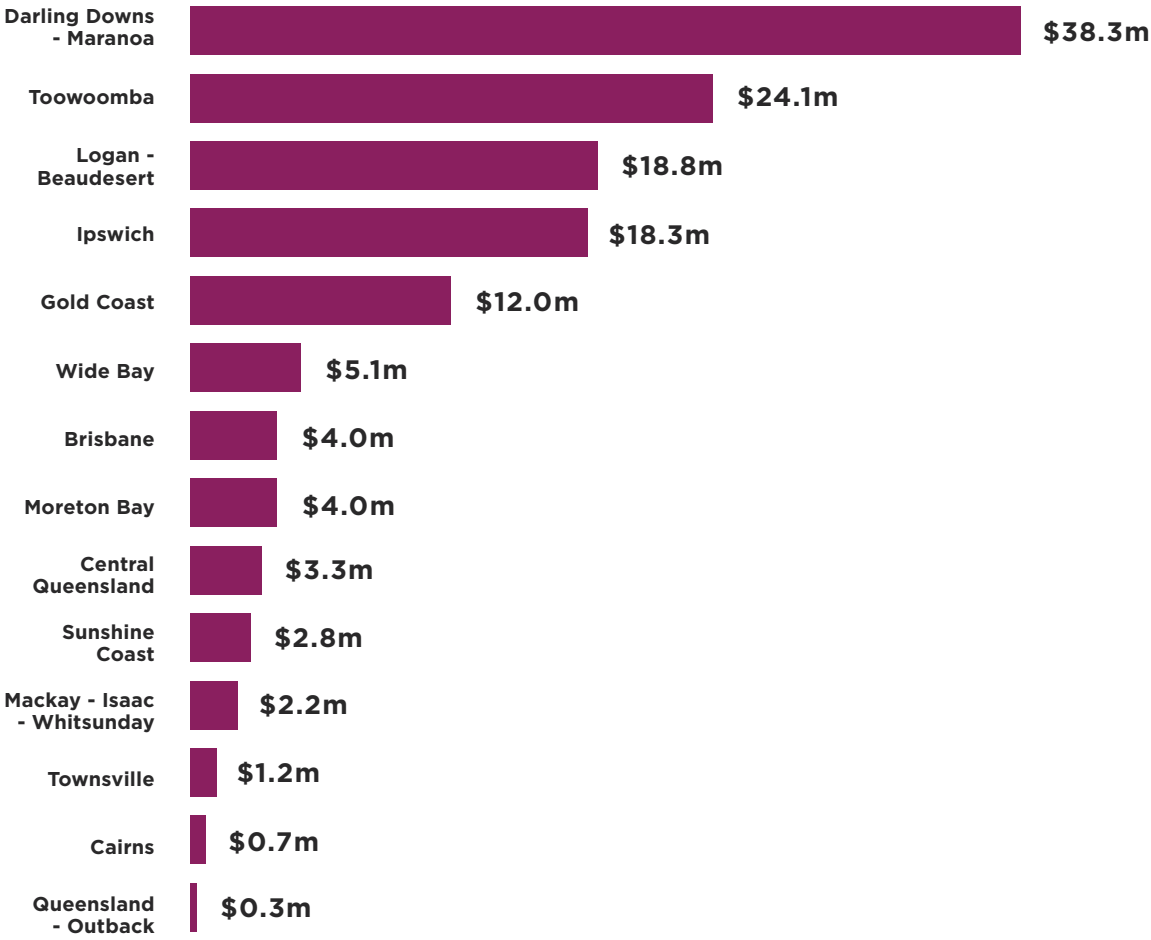
GREYHOUND RACING

In 2021/22, there were 175 breeding females covered in Queensland, producing 1,423 pups. This greyhound breeding activity is responsible for generating close to \$8.3 million in the production and care of greyhound racing stock.

Ipswich	\$3.4m (41.4%)
Logan – Beaudesert	\$1.4m (16.4%)
Wide Bay	\$0.6m (7.6%)

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

EXPENDITURE BY THE BREEDING SECTOR







# THE TRAINING INDUSTRY

## The Training Industry

### NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	49	0	12	61
Central Queensland	107	0	32	139
Darling Downs - Maranoa	107	9	12	129
Gold Coast	131	19	27	176
Ipswich	38	93	190	321
Logan - Beaudesert	54	47	106	207
Mackay - Isaac - Whitsunday	31	0	5	36
Moreton Bay	2	61	81	145
Queensland - Outback	83	0	2	85
Sunshine Coast	91	1	13	105
Toowoomba	113	8	25	146
Townsville	87	0	62	148
Wide Bay	63	7	56	126
Total Regional Queensland	956	246	622	1,824
Brisbane	105	10	43	158
<b>Total</b>	<b>1,061</b>	<b>256</b>	<b>665</b>	<b>1,982</b>

### NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Cairns	162	0	3	165
Central Queensland	190	0	24	214
Darling Downs - Maranoa	198	5	6	208
Gold Coast	324	28	29	381
Ipswich	134	39	83	255
Logan - Beaudesert	145	42	44	230
Mackay - Isaac - Whitsunday	106	1	3	110
Moreton Bay	147	62	44	253
Queensland - Outback	129	0	0	129
Sunshine Coast	250	4	9	263
Toowoomba	274	5	24	302
Townsville	199	0	37	236
Wide Bay	110	3	32	145
Total Regional Queensland	2,366	188	338	2,892
Brisbane	394	16	44	454
<b>Total</b>	<b>2,760</b>	<b>204</b>	<b>382</b>	<b>3,346</b>



#### NUMBER OF VOLUNTEERS ASSISTING TRAINERS

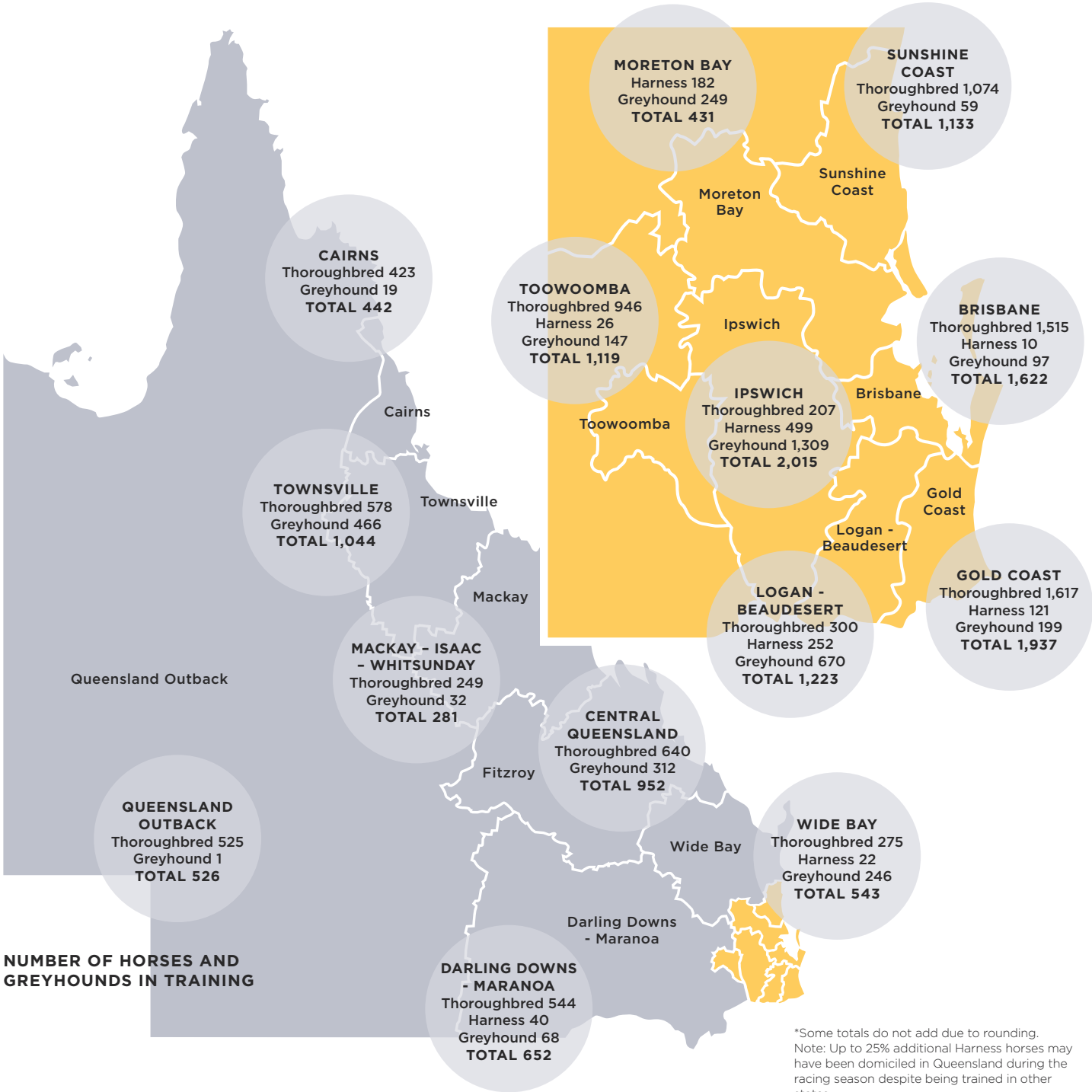
	Thoroughbred	Harness	Greyhound	Total
Cairns	69	0	13	82
Central Queensland	150	0	35	185
Darling Downs - Maranoa	150	11	13	175
Gold Coast	183	23	30	235
Ipswich	53	111	209	374
Logan - Beaudesert	76	56	116	249
Mackay - Isaac - Whitsunday	43	0	6	49
Moreton Bay	3	73	90	165
Queensland - Outback	116	0	2	118
Sunshine Coast	127	1	14	143
Toowoomba	158	10	27	195
Townsville	122	0	68	189
Wide Bay	88	8	62	158
Total Regional Queensland	1,338	294	684	2,316
Brisbane	74	16	60	149
<b>Total</b>	<b>1,412</b>	<b>310</b>	<b>744</b>	<b>2,466</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 2021/22 racing season, there were close to 2,000 horse and greyhound trainers providing services to owners in Queensland. These trainers were also supported by close to 2,500 volunteers. The majority of these trainers operate in regional parts of the State.

Overall, there were close to 14,000 racing horses and greyhounds in training in Queensland in 2021/22. The Gold Coast (18.2%), Brisbane (17.0%) and the Sunshine Coast (12.1%) represent the largest areas of thoroughbred training activity. In the Harness and Greyhound racing industries, Ipswich (36.0%), Logan - Beaudesert (18.4%) and Townsville (9.3%) make up most of the training activity.











# Ownership

## OWNERS & SYNDICATE MEMBERS OF RACING HORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,038	4	103	1,145
Central Queensland	1,378	6	231	1,616
Darling Downs - Maranoa	1,092	45	143	1,280
Gold Coast	3,584	97	549	4,230
Ipswich	927	226	669	1,821
Logan - Beaudesert	757	105	447	1,310
Mackay - Isaac - Whitsunday	780	25	89	894
Moreton Bay	1,335	182	486	2,003
Queensland - Outback	589	3	18	610
Sunshine Coast	2,056	36	234	2,326
Toowoomba	1,026	22	217	1,265
Townsville	1,145	7	276	1,429
Wide Bay	916	23	197	1,136
Total Regional Queensland	16,623	781	3,660	21,065
Brisbane	5,741	163	1,214	7,117
<b>Total</b>	<b>22,454</b>	<b>944</b>	<b>5,077</b>	<b>28,475</b>

\*Some totals do not add due to rounding.

## NUMBER OF TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,255	0	0	1,255
Central Queensland	2,351	0	4,476	6,827
Darling Downs - Maranoa	1,174	0	0	1,174
Gold Coast	3,091	0	0	3,091
Ipswich	3,539	1,795	15,209	20,543
Logan - Beaudesert	546	0	0	546
Mackay - Isaac - Whitsunday	1,603	0	0	1,603
Moreton Bay	543	10,042	0	10,585
Queensland - Outback	392	0	0	392
Sunshine Coast	5,149	0	0	5,149
Toowoomba	3,761	0	0	3,761
Townsville	2,680	0	7,740	10,420
Wide Bay	100	0	3,498	3,598
Total Regional Queensland	26,184	11,837	30,923	68,944
Brisbane	5,952	12,052	19,874	37,878
<b>Total</b>	<b>32,136</b>	<b>23,889</b>	<b>50,797</b>	<b>106,822</b>



NUMBER OF NON-TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	910	0	0	910
Central Queensland	948	0	0	948
Darling Downs - Maranoa	1,595	0	0	1,595
Gold Coast	0	0	0	0
Ipswich	189	0	0	189
Logan - Beaudesert	0	0	0	0
Mackay - Isaac - Whitsunday	549	0	0	549
Moreton Bay	38	50	0	88
Queensland - Outback	3,068	0	0	3,068
Sunshine Coast	0	0	0	0
Toowoomba	34	0	0	34
Townsville	454	0	0	454
Wide Bay	1,139	0	0	1,139
Total Regional Queensland	8,924	50	0	8,974
Brisbane	0	0	63	63
Total	8,924	50	63	9,037

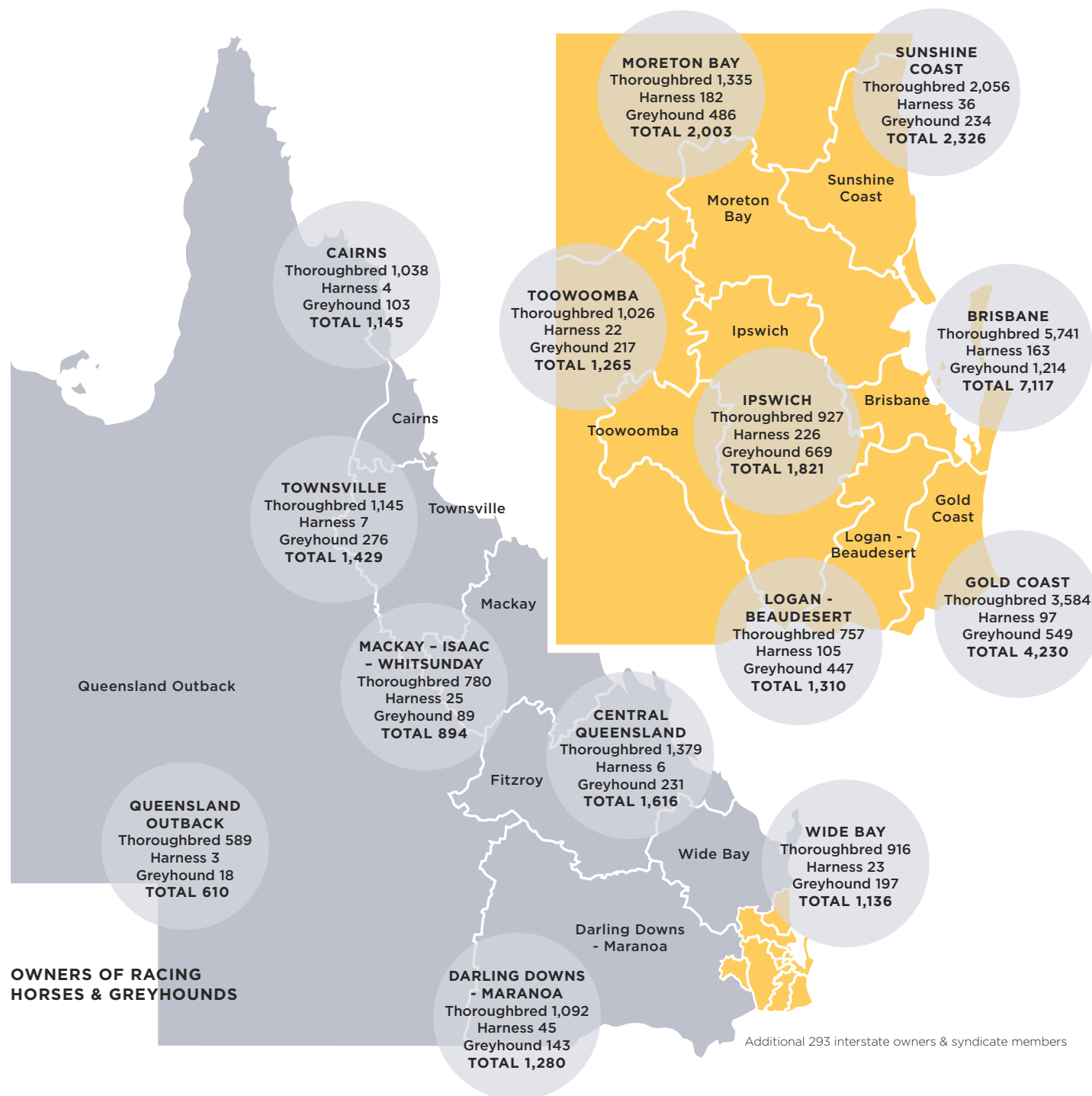
TOTAL RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2,165	0	0	2,165
Central Queensland	3,299	0	4,476	7,775
Darling Downs - Maranoa	2,769	0	0	2,769
Gold Coast	3,091	0	0	3,091
Ipswich	3,728	1,795	15,209	20,732
Logan - Beaudesert	546	0	0	546
Mackay - Isaac - Whitsunday	2,152	0	0	2,152
Moreton Bay	581	10,092	0	10,673
Queensland - Outback	3,460	0	0	3,460
Sunshine Coast	5,149	0	0	5,149
Toowoomba	3,795	0	0	3,795
Townsville	3,134	0	7,740	10,874
Wide Bay	1,239	0	3,498	4,737
Total Regional Queensland	35,108	11,887	30,923	77,918
Brisbane	5,952	12,052	19,937	37,941
Total	41,060	23,939	50,860	115,859

## Owners race for close to \$209 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 2021/22 there were more than 28,400 individuals with an ownership interest in thoroughbred, harness and/or greyhound racing in Queensland. Almost 75% of Queensland owners reside in regional areas of Queensland, with Brisbane (25.3%) and the Gold Coast (15.0%) 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 \$350 million** in 2021/22 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 2021/22, owners of racehorses and greyhounds trained in Queensland spent more than \$350 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

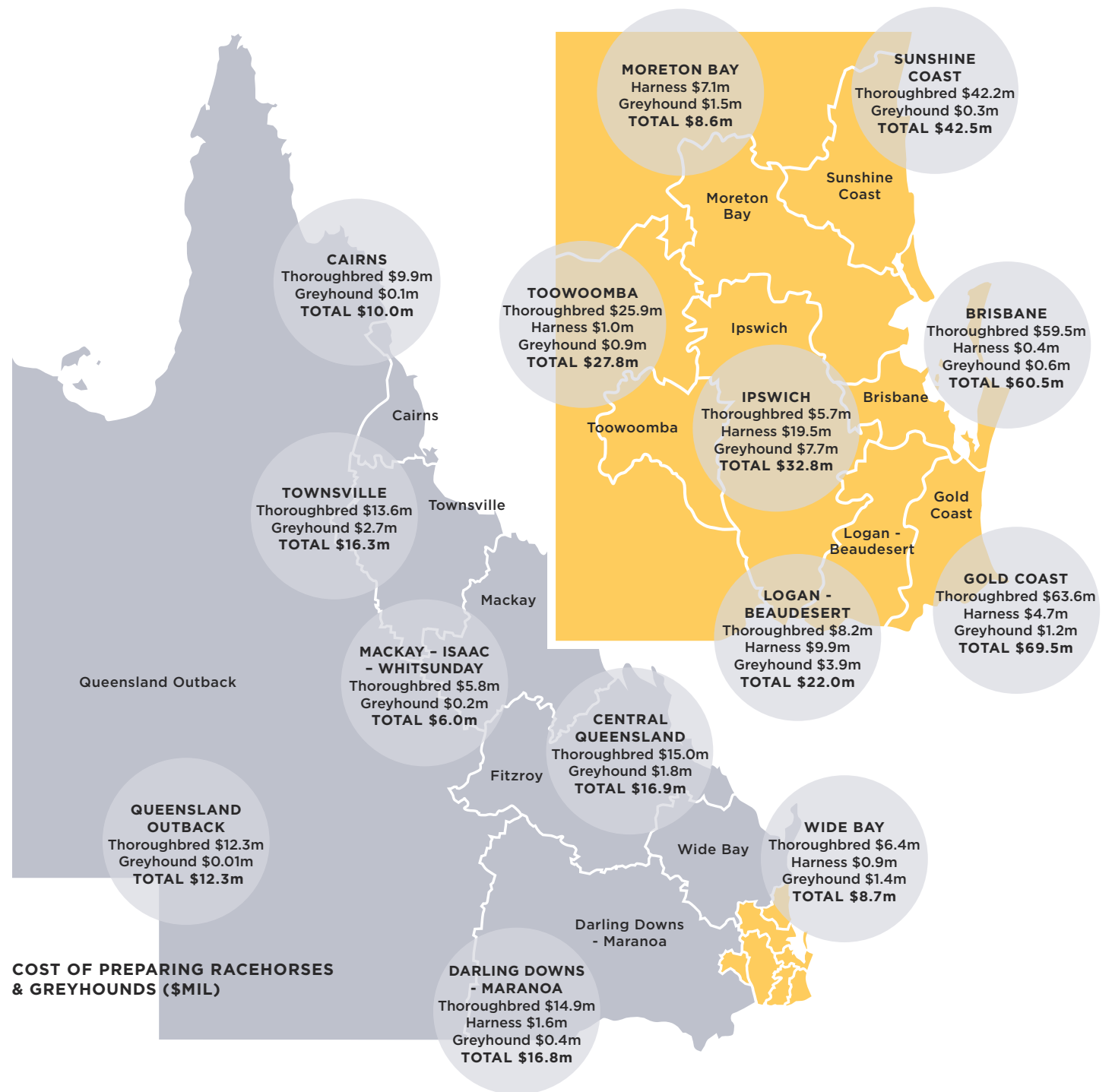
non-Queensland owned racing horses and greyhounds which are trained in the state. Developing expenditure profiles on a 'per horse/ greyhound in training' basis, ensures that they are also included in the assessment.

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, close to 83% of the expenditure on training activities occurs in regional areas of the state. Regionally, Gold Coast (19.8%), Sunshine Coast (12.1%) and Ipswich (9.4%) make up the largest training areas outside of Brisbane (17.2%).

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 close to \$283.1 million in expenditure impacts in Queensland.

Gold Coast	\$63.6m (22.5%)
Brisbane	\$59.5m (21.0%)
Sunshine Coast	\$42.2m (14.9%)

HARNESS RACING

Standardbred training activity is responsible for generating more than \$45.0 million in expenditure impacts in Queensland.

Ipswich	\$19.5m (43.3%)
Logan-Beaudesert	\$9.9m (21.9%)
Moreton Bay	\$7.1m (15.8%)

GREYHOUND RACING

Greyhound training activity is responsible for generating close to \$22.7 million in expenditure impacts in Queensland.

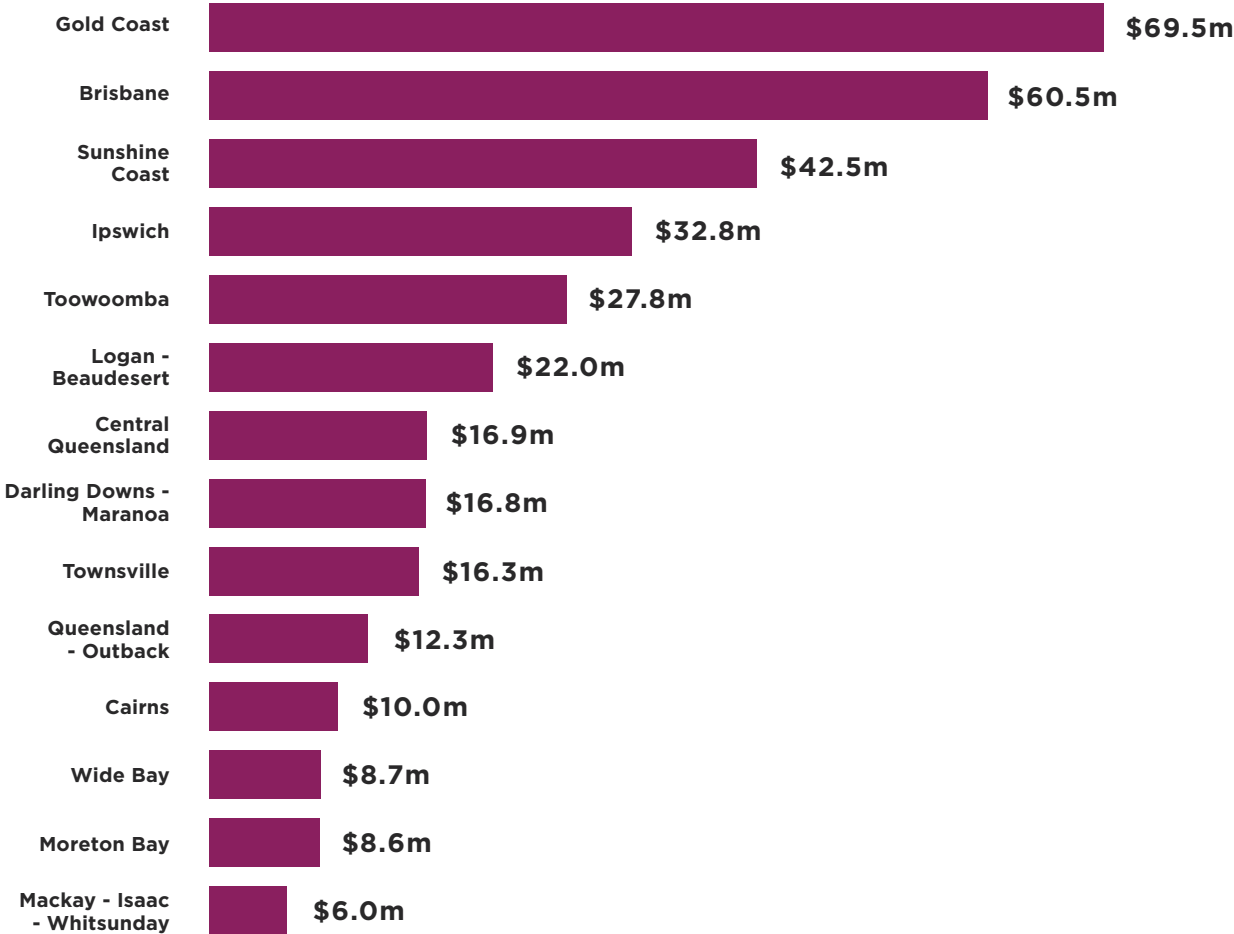
Ipswich	\$7.7m (33.8%)
Logan-Beaudesert	\$3.9m (17.3%)
Townsville	\$2.7m (12.0%)





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

### ACCESS FOR ALL

The opportunity to experience the thrills of horse racing should be an opportunity for all so it is vitally important that amenities at racetracks throughout Queensland are accessible for all.

Around 1 in 6 Australians (4.4 million) have a disability that can limit or even exclude them from participation in many recreational pursuits. Racing Queensland (RQ) is committed to ensuring that its racetracks across the State are of a premium standard.

RQ are to undertake an access audit of all Tier 1 Clubs to fully understand the current state of facilities, identify obstacles and ascertain where improvements for patron mobility can be made.

However, some urgent projects have been identified and fast tracked with RQ committing up to \$450,000.



Brisbane Racing Club, Queensland's leading metropolitan race club, will improve accessibility at both Eagle Farm and Doomben with the addition of accessible toilets, installation of lifts to member and public areas and the provision of buggies to transport patrons throughout the Clubs.

On the Darling Downs, the Toowoomba Turf Club, one of the fastest-growing clubs in the state, will improve access to the Members' Weetwood Room at Clifford Park with provision of a lift from ground level.

Ensuring buildings and amenities are accessible enable all patrons to have dignified and non-discriminatory access, removing barriers to everyday life and an opportunity to enjoy a day at the races.

## Case study

### **MOST IMPORTANT - FROM RACETRACK TO SHOW RING**

Many horses enjoy satisfying careers on racetracks across Queensland but what happens after they retire?

The Queensland Off-The-Track (QOTT) Program was established by Racing Queensland (RQ) in 2021 to provide a high-quality first transition for thoroughbreds and standardbreds from racing and breeding activities to retirement.

The QOTT supports rehomed horses throughout their journey with four major initiatives; the Acknowledged Retrainers Program, the Subsidised Lessons Program, the Event Sponsorship Program and the QOTT Grants Program.

In its first 12 months, 105 horses have been accepted into the program, with 70 of those horses having completed their retraining and successfully rehomed to date.

Former champion thoroughbred Most Important was one of those to participate in the program and find a new career beyond racing. He had a superb 42-start career, with multiple Group 3 victories including the Keith Noud Stakes, Sunshine Coast Cup, Lough Neagh Stakes and the Buffering.

Upon retirement at the age of 10 and with a recommendation from QOTT Acknowledged Retrainer Gemma Creighton, the gelding landed in the care of the Fedrick family at their property at Gatton, in the Lockyer Valley in Southwest Queensland and retrained as a show horse.

After just eight weeks of training, the Fedricks decided the time was right for Most Important to step up to competition and success came immediately as he was named Champion Novice and Reserve Champion Open Horse at his very first agricultural show. Within 12 months Most Important had qualified for Grand Nationals and Equestrian Australia Nationals.

His success culminated in being named the inaugural winner of the QOTT High Point Horse Award at the 2022 Equestrian Queensland Awards. The prize recognises an OTT horse who has achieved the highest points across a range of equestrian disciplines throughout the year



# 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	0	0	3
Gold Coast	1	0	0	1
Ipswich	1	1	1	3
Logan - Beaudesert	1	0	0	1
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	18	2	4	24
Brisbane	2	1	2	5
<b>Total</b>	<b>20</b>	<b>3</b>	<b>6</b>	<b>29</b>

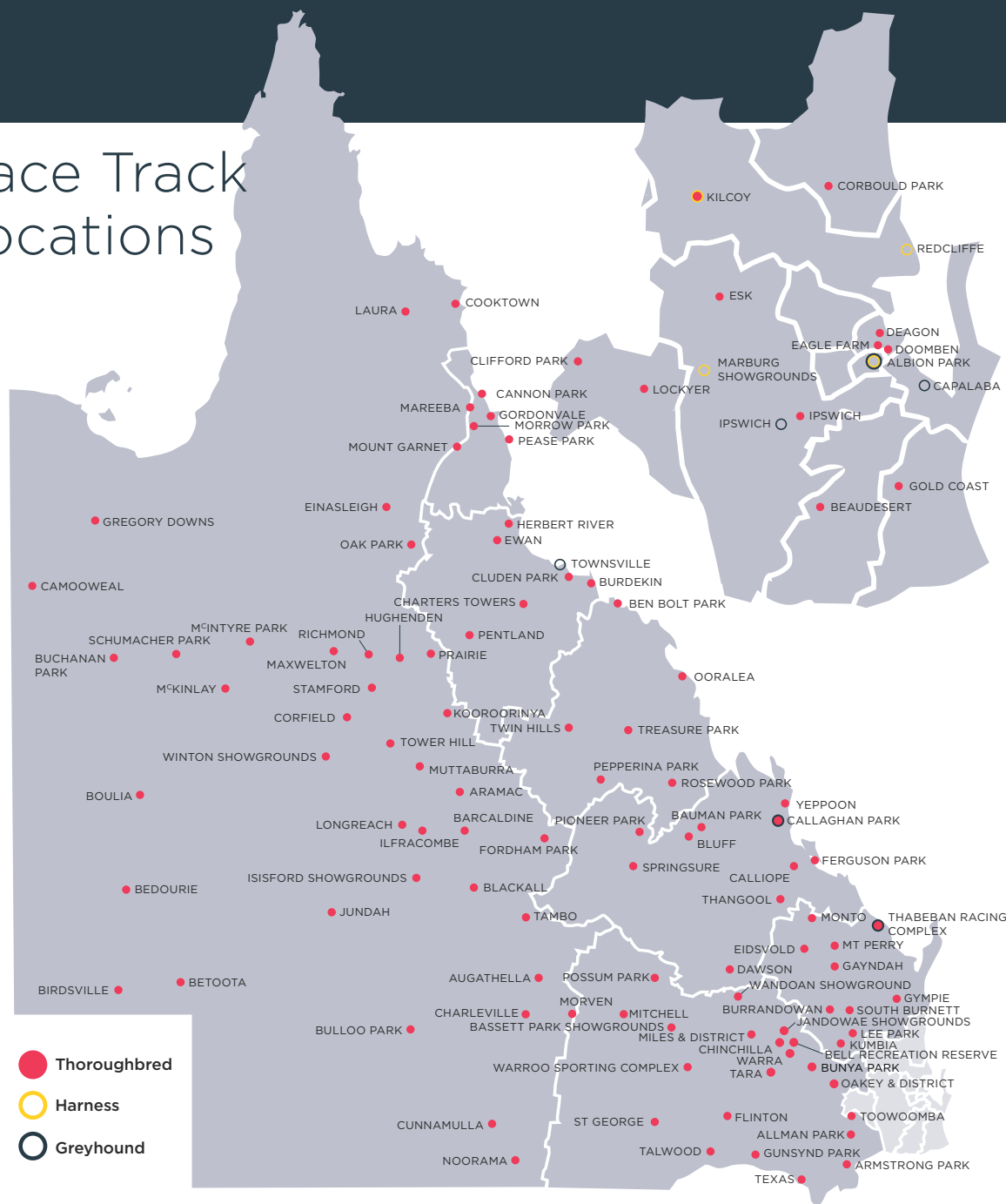
\* Note - A TAB club is classified as holding TAB race meetings throughout the racing season.

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	40	0	0	40
Central Queensland	67	0	55	122
Darling Downs - Maranoa	50	0	0	50
Gold Coast	42	0	0	42
Ipswich	52	27	179	258
Logan - Beaudesert	8	0	0	8
Mackay - Isaac - Whitsunday	40	0	0	40
Moreton Bay	10	131	0	141
Queensland - Outback	86	0	0	86
Sunshine Coast	72	0	0	72
Toowoomba	57	0	0	57
Townsville	47	0	94	141
Wide Bay	29	0	50	79
Total Regional Queensland	600	158	378	1,136
Brisbane	73	143	237	453
Total	673	301	615	1,589

TOTAL RACES

	Thoroughbred	Harness	Greyhound	Total
Cairns	262	0	0	262
Central Queensland	424	0	595	1,019
Darling Downs - Maranoa	315	0	0	315
Gold Coast	342	0	0	342
Ipswich	402	222	1,982	2,606
Logan - Beaudesert	59	0	0	59
Mackay - Isaac - Whitsunday	263	0	0	263
Moreton Bay	64	1,220	0	1,284
Queensland - Outback	485	0	0	485
Sunshine Coast	558	0	0	558
Toowoomba	412	0	0	412
Townsville	331	0	1,038	1,369
Wide Bay	153	0	487	640
Total Regional Queensland	4,070	1,442	4,102	9,614
Brisbane	625	1,338	2,660	4,623
Total	4,695	2,780	6,762	14,237





## TOTAL ATTENDANCES

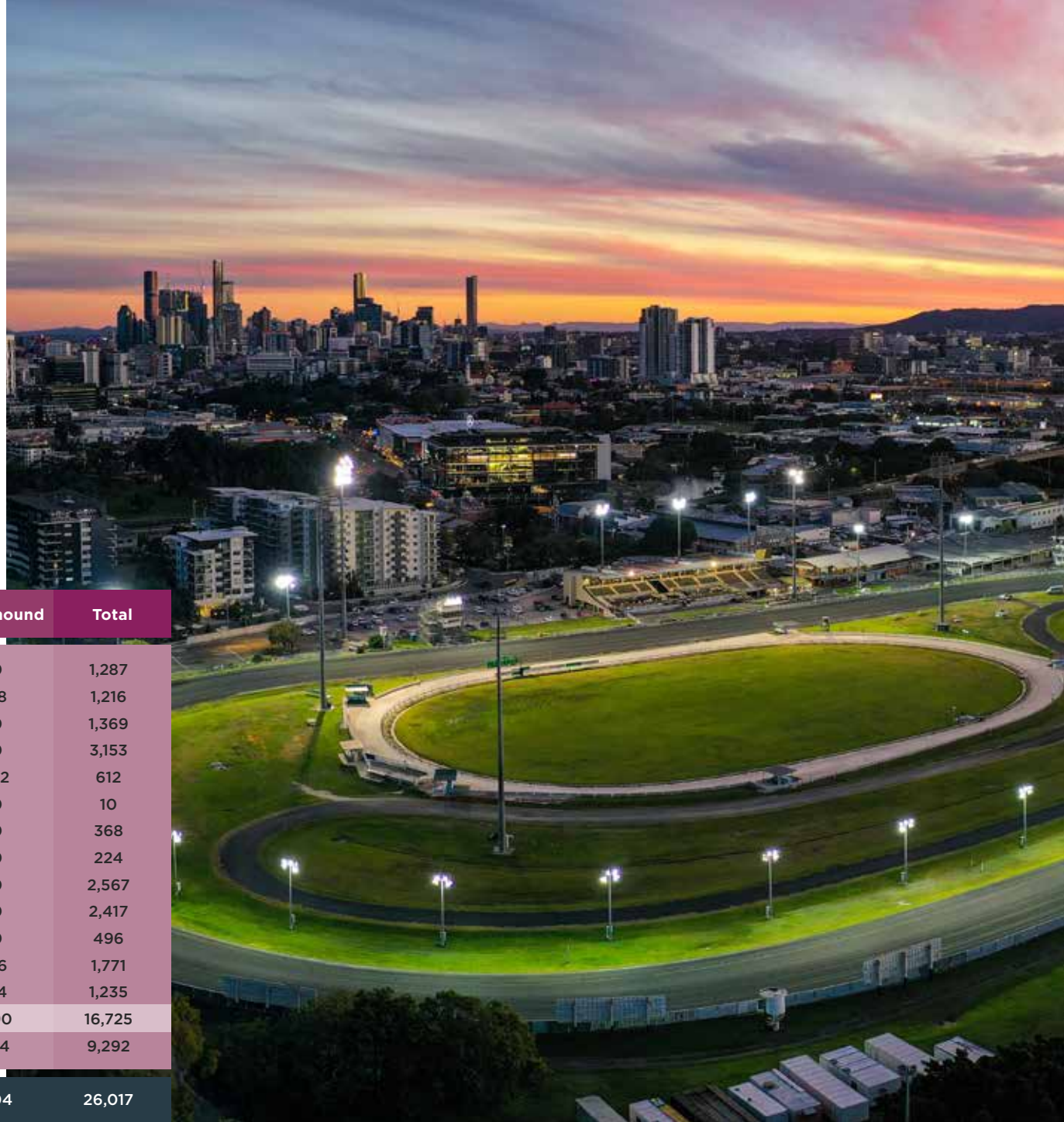
	Thoroughbred	Harness	Greyhound	Total
Cairns	40,483	0	0	40,483
Central Queensland	50,104	0	4,032	54,136
Darling Downs - Maranoa	42,462	0	0	42,462
Gold Coast	106,452	0	0	106,452
Ipswich	33,442	7,205	15,951	56,598
Logan - Beaudesert	384	0	0	384
Mackay - Isaac - Whitsunday	25,588	0	0	25,588
Moreton Bay	4,500	28,170	0	32,670
Queensland - Outback	44,290	0	0	44,290
Sunshine Coast	68,688	0	0	68,688
Toowoomba	30,461	0	0	30,461
Townsville	38,924	0	7,588	46,512
Wide Bay	26,486	0	3,826	30,312
Total Regional Queensland	512,264	35,375	31,397	579,036
Brisbane	124,667	30,925	25,010	180,602
<b>Total</b>	<b>636,931</b>	<b>66,300</b>	<b>56,407</b>	<b>759,638</b>

\*Some totals do not add due to rounding.



## NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,287	0	0	1,287
Central Queensland	1,168	0	48	1,216
Darling Downs - Maranoa	1,369	0	0	1,369
Gold Coast	3,153	0	0	3,153
Ipswich	440	40	132	612
Logan - Beaudesert	10	0	0	10
Mackay - Isaac - Whitsunday	368	0	0	368
Moreton Bay	78	146	0	224
Queensland - Outback	2,567	0	0	2,567
Sunshine Coast	2,417	0	0	2,417
Toowoomba	496	0	0	496
Townsville	1,725	0	46	1,771
Wide Bay	1,171	0	64	1,235
Total Regional Queensland	16,249	186	290	16,725
Brisbane	8,678	400	214	9,292
<b>Total</b>	<b>24,927</b>	<b>586</b>	<b>504</b>	<b>26,017</b>





# Racing Clubs

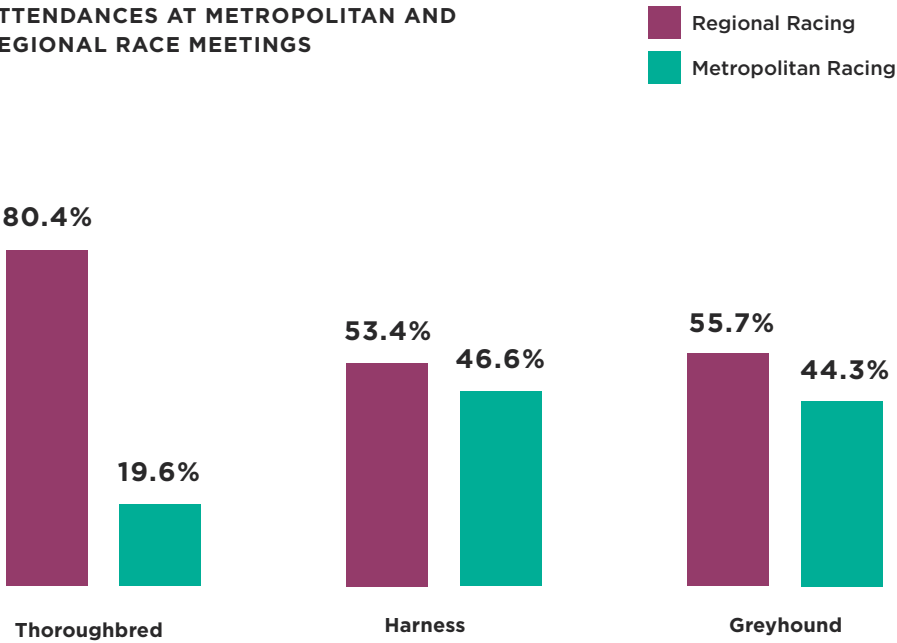
There are 125 racing clubs in Queensland across the three codes of racing. Queensland is unique in the Australian racing landscape with the majority of these racing clubs (96) running primarily non-TAB race meetings. This means that racing at these clubs is not covered by the TAB and instead is driven moreso by community involvement and on-course bookmaker betting.

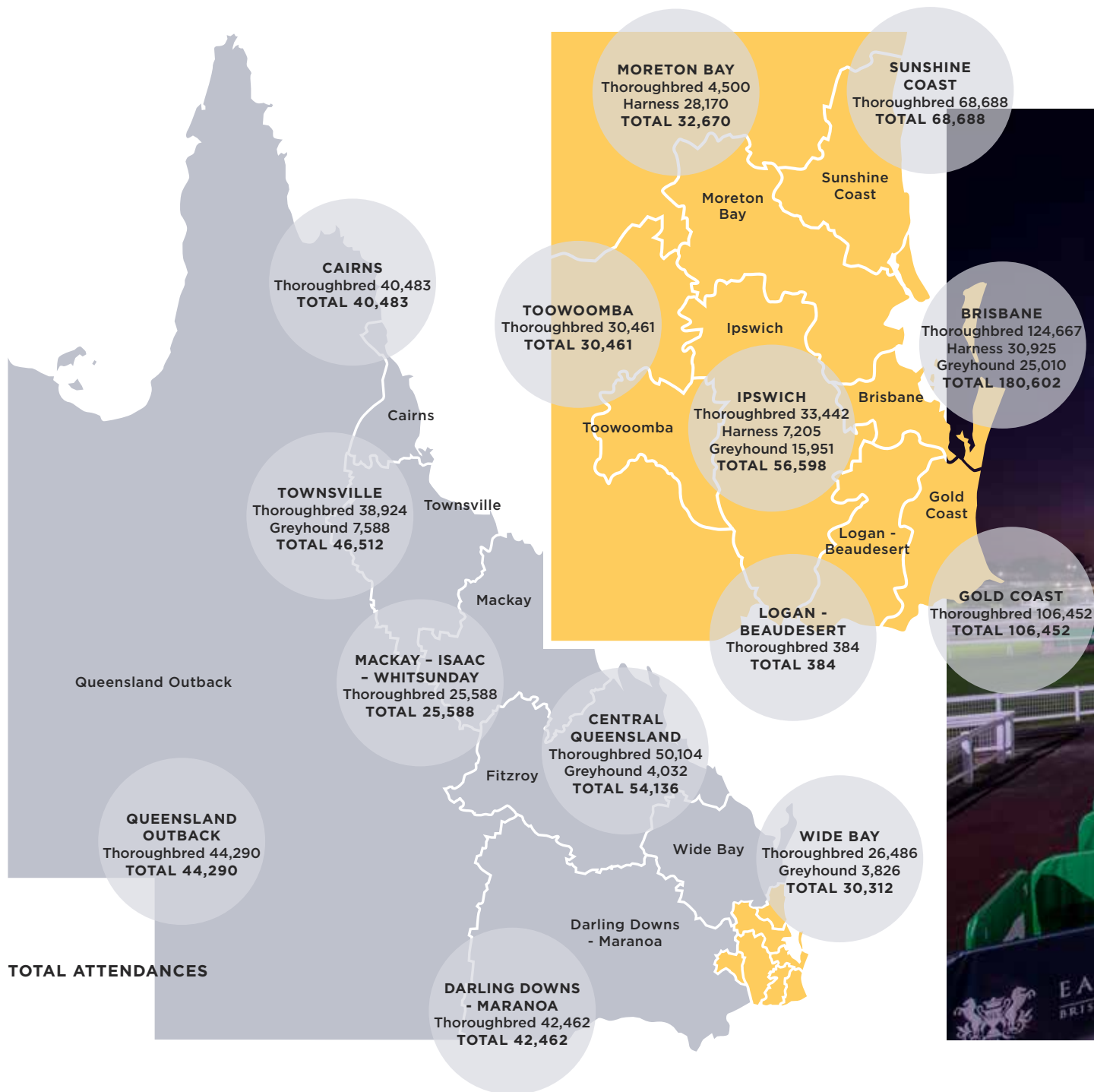
Racing clubs not only provide the opportunity for participants and spectators to participate in the sport of racing, they also provide an important social destination and in many regions, are an important part of the social fabric of the community.

In 2021/22, there were 1,366 TAB race meetings and a further 223 non-TAB race meetings. These race meetings attracted attendances more than 759,600 – 76% of which were in regional areas. Thoroughbred race meetings, in Queensland, attracted a total of 636,931 attendances. Race meetings in Brisbane (124,667) and the Gold Coast (106,452) were responsible for the largest attendance. Harness race meetings attracted 66,300 attendances with race meetings in Brisbane (30,925) and Moreton Bay (28,170) making up the majority of this amount. Greyhound racing attracted attendance of 56,407 with race meetings in Brisbane (25,010) and Ipswich (15,951) 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

ATTENDANCES AT METROPOLITAN AND REGIONAL RACE MEETINGS









# Customer Expenditure Generated by Racing Clubs and Events

In 2021/22 it is estimated that the total expenditure generated by racing customers was close to \$188.5 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.)

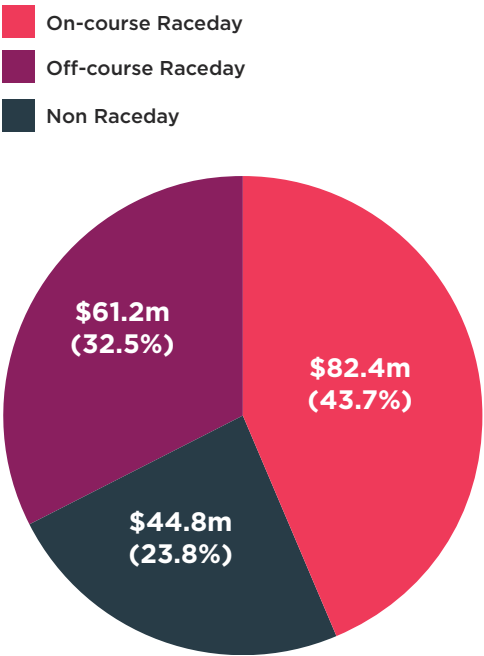
On-course customer expenditure funds the administration, operation and other costs that racing clubs incur.

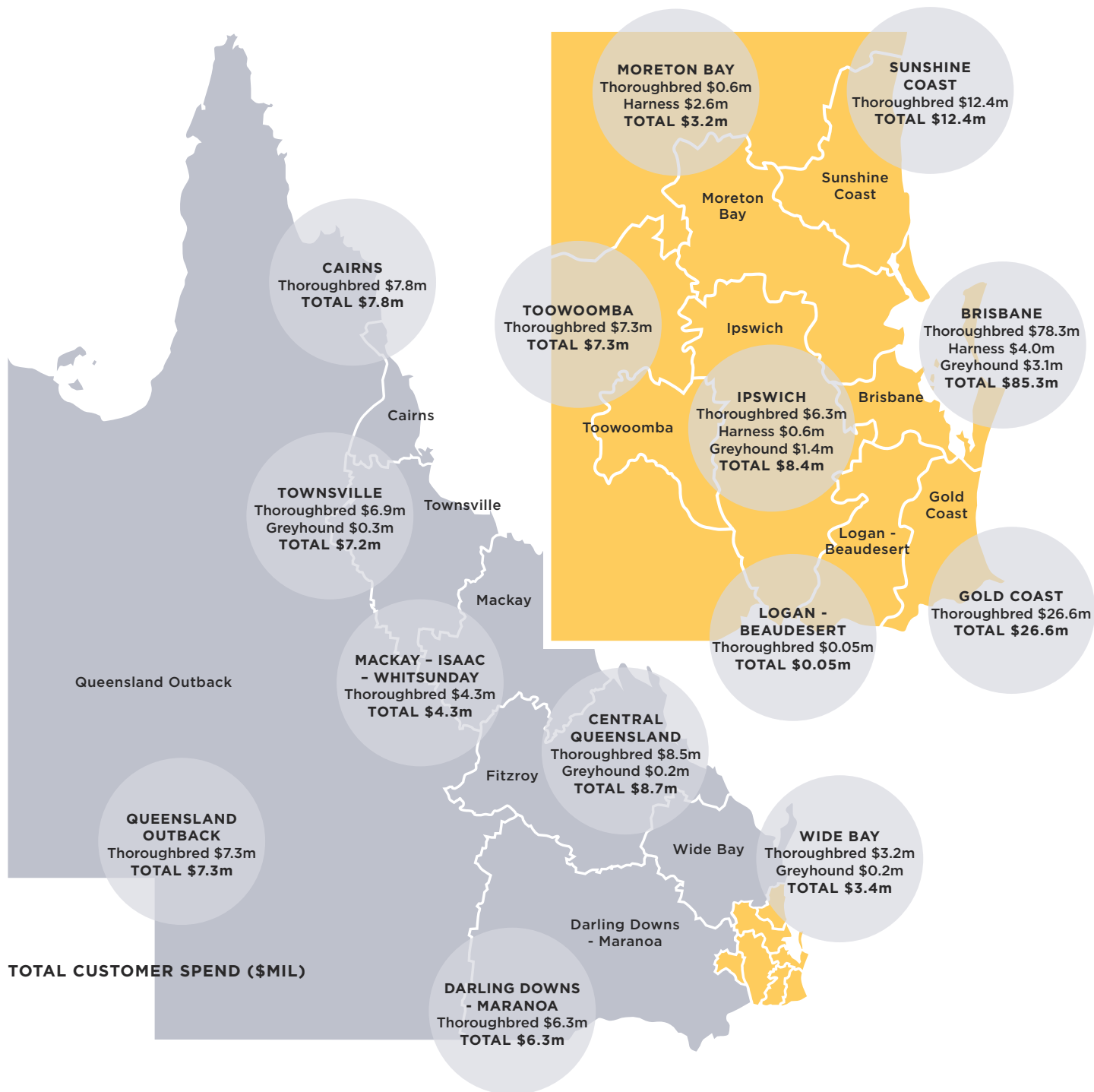
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. Major racing events have long proven their ability to extend the generation of economic stimulus into a broader cross-section of the local 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**











Wagering customers represent one of the key funding sources for the Queensland racing industry. In 2021/22, 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 wagering turnover on Queensland racing product by code:

(\$MIL)	Thoroughbred	Harness	Greyhound	Total
Wagering on QLD racing product with QTAB	\$257.5	\$30.3	\$42.8	\$330.6
Interstate TAB turnover product (including RWWA)	\$1,044.1	\$186.2	\$344.7	\$1,575.0
Wagering on QLD product with other wagering providers (i.e. excluding TAB)	\$3,137.1	\$514.0	\$1,215.2	\$4,866.3
Total	\$4,438.7	\$730.5	\$1,602.7	\$6,771.9

\*Noting the above excludes turnover on - Wagering on Interstate/Overseas racing product with QTAB.



**Close to 59% 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 33.3% of all wagering turnover** on Queensland Racing product.

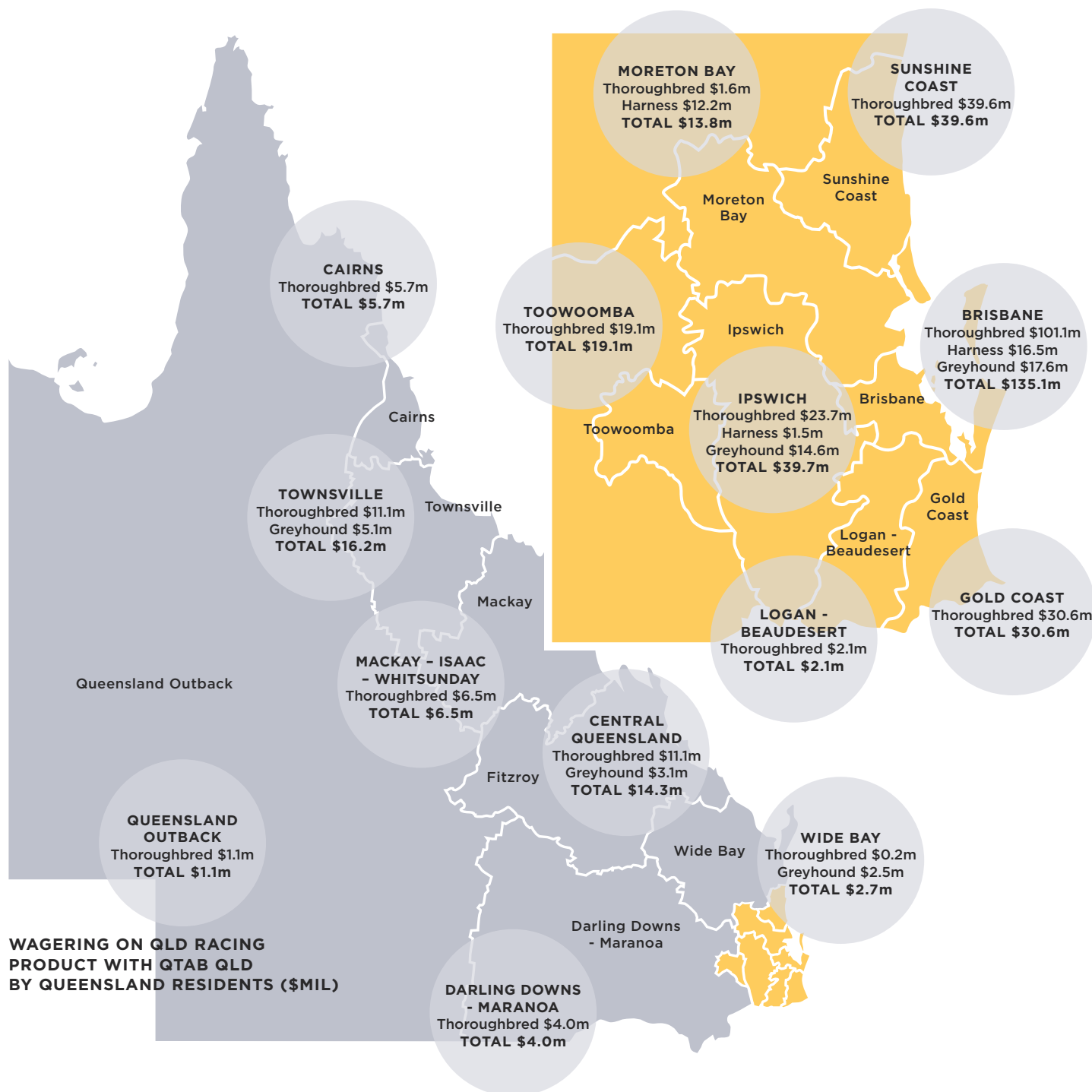
Races held in Queensland generate close to \$331 million in wagering turnover with QTAB QLD by Queensland residents.

Brisbane (39.2%), Sunshine Coast (15.4%) and Gold Coast (11.9%) 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 35.7% of all thoroughbred race meetings held in Queensland.

In the harness racing sector, Brisbane (54.6%) and the Moreton Bay region (40.5%) 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 (41.1%) and Ipswich (34.0%) where 68% of the greyhound racing activity occurs.

\* Note - Turnover is not based on customer location



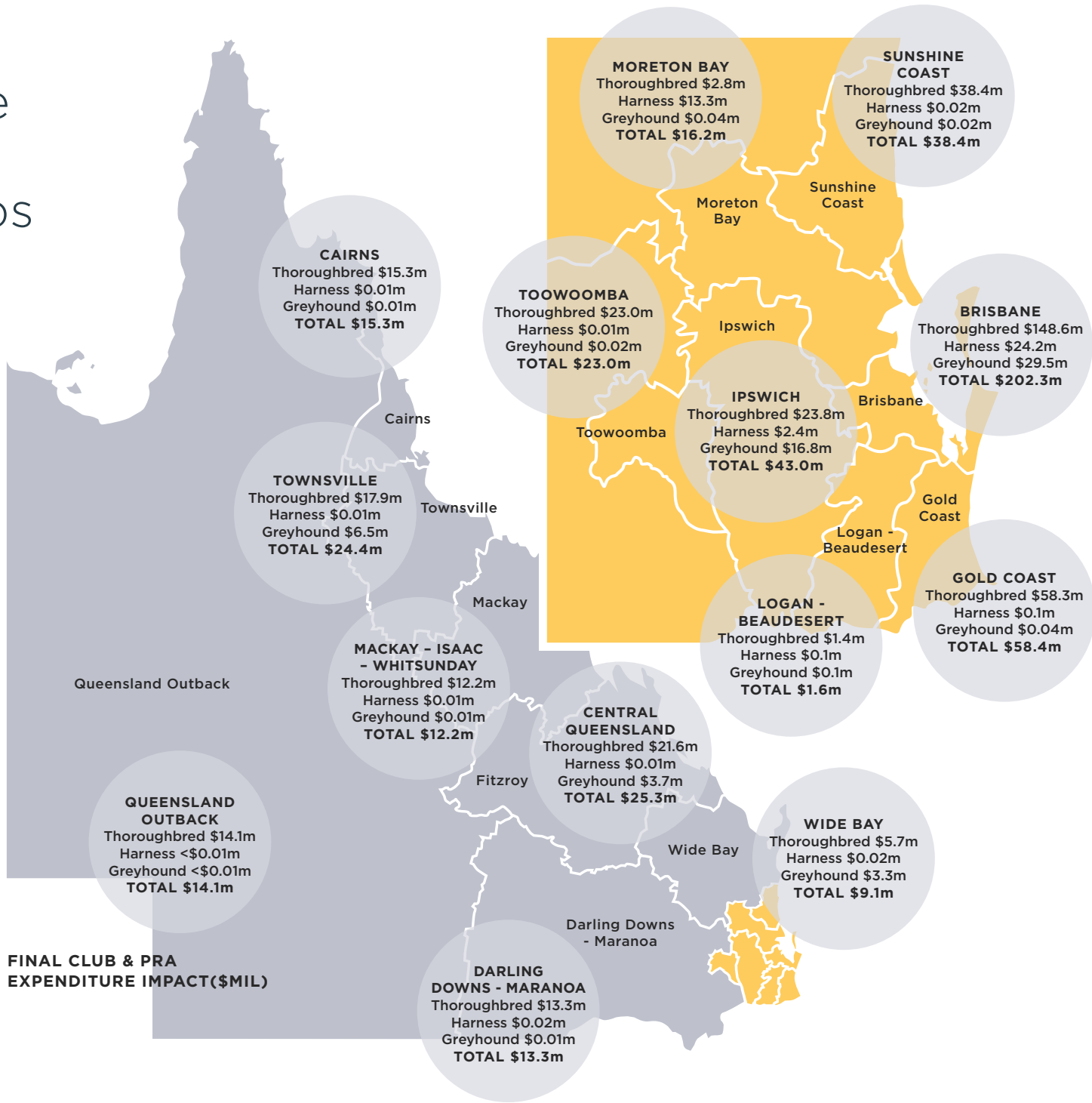
# Expenditure by the Principal Racing Authority and Clubs

In 2021/22, Racing Queensland and the 125 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of close to \$497 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

Almost 41% (\$202.3 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 (11.8%) 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 \$12 million in prizemoney on offer. In 2022, the raceday attracted attendances of 15,100 people.

### KEY TOURISM IMPACTS

In 2022, an economic impact assessment of the Magic Millions Raceday was undertaken. The study found that the event generated \$15.63 million of direct in-scope expenditure for the Queensland economy. The event was directly responsible for close to 4,600 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	2022
In-scope visitors (spectators, sponsors and participants)	5,299	5,977	2,947	4,594
In-scope expenditure for the QLD economy	\$15.0m	\$17.3m	\$14.1m	\$15.6m
Visitor Nights generated in QLD	26,930	31,528	25,614	28,124

Economic Impact (\$AUD)	2019	2020	2021	2022
Magic Millions Polo	\$2.3m	\$2.9m	-	\$3.0m
Magic Millions Raceday	\$17.4m	\$20.0m	\$16.5m	\$18.3m
Gold Coast Yearling Sale	\$14.1	\$15.8m	\$14.6m	\$17.9m
Gold Coast National Sale	\$16.0m	\$10.7m	\$13.8m	\$16.4m
<b>Total Economic Impact</b>	<b>\$49.8m</b>	<b>\$49.4m</b>	<b>\$44.9m</b>	<b>\$55.6m</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.







# 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

More than 570 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

Close to 8,400 individuals provide their skills, time and support to the racing industry as a volunteer

FACILITY SHARING

More than 220 community and not-for-profit organisations share racing club facilities in Queensland

COMMUNITY

Racing clubs provide an important community for more than 30,300 members and volunteers who are actively engaged in their club. Close to 759,640 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:

- + More than 570 community organisations or charities are assisted and supported by racing clubs
- + More than 220 community organisations share racing club facilities and resources
- + Racing in Queensland currently engage more than 8,400 volunteers who assist in various club, kindred body and industry related roles
- + 26,017 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 4,316 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 573 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 organisations supported by racing include:

- + Cancer Charities (e.g. Queensland Cancer Council, Cure Cancer, Prostate Cancer Foundation, National Breast Cancer Foundation)
- + Children's Charities (e.g. Make a Wish, Ronald McDonald House, Brainchild foundation,



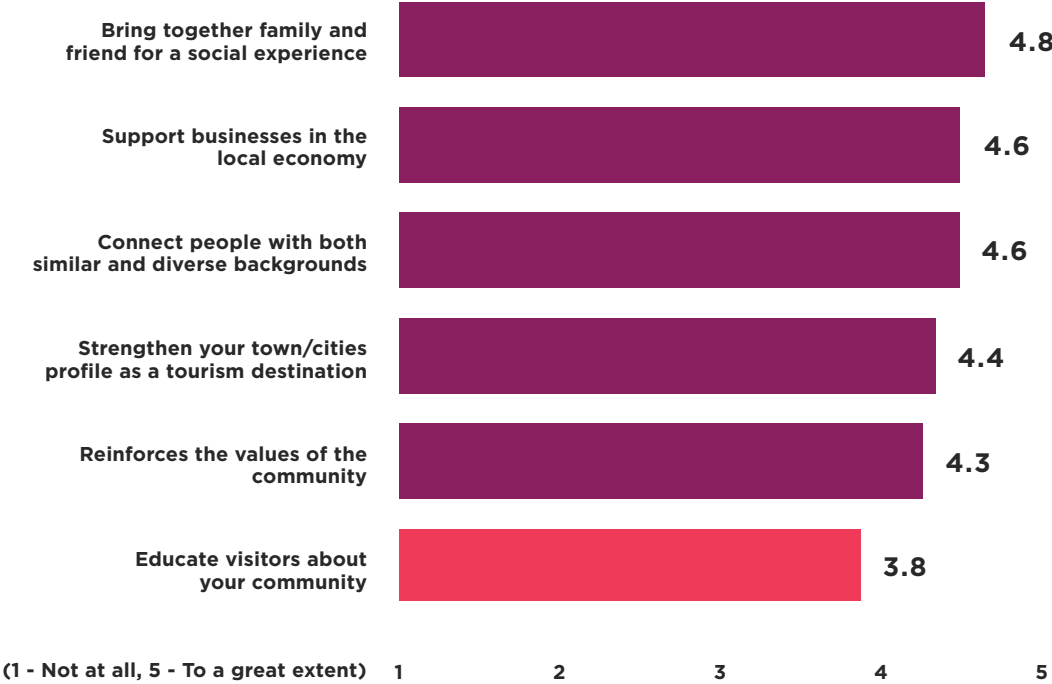
Starlight Children's Foundation, Harrison's Little Wings Inc, Isolated Children's Parents' Association, YoungCare, Give ME 5 for Kids Charity, Wantok Foundation)

- + Sporting Clubs (e.g. Rugby League, Rowing, Gymnastics, Dance Groups, Equestrian Groups, Surf Lifesaving, Netball, Tennis, AFL, Cricket)
- + Schools (e.g. Kindergartens, Pre-School, State schools and Colleges)
- + Rotary, Lions, Apex, RSL's and Variety Clubs
- + Hospitals and Health Organisations (e.g. Gold Coast Hospital, Men's Shed)
- + General Charities (e.g. Guide Dogs, Legacy, 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' (4.8), to 'support businesses in the local economy' (4.6) and to 'connect people with both similar and diverse backgrounds' (4.6). 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
- + Close to 88% of clubs offer events for families and children on special racedays
- + Over 73% 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
- + Kid's Disco
- + Christmas and Easter promotions
- + Kid's fashions on the field
- + Permanent play areas
- + Arts and Crafts activities
- + Tug-o-wars, egg and spoon, three legged races
- + Face painting
- + Children's rides and amusements
- + Fireworks
- + 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 221 organisations which share facilities and resources with clubs include:

- + Regional tourism events and arts groups
- + Country women's associations
- + Animal clubs (equestrian, rodeo, campdraft, canine, polocrosse, cow, camels etc.)
- + Rotary, Lions and Scout groups
- + Show Societies (regional agricultural societies)
- + Shire Councils
- + Local schools
- + Sporting clubs (rugby league, cricket, judo, swimming, golf, gymnasiums, clay target clubs, running, boxing and fitness clubs etc.)
- + Blaze Aid, Queensland Rural Doctors Foundation, Cancer Council, MS





## 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.

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.

- + 12% of clubs have at least one member of their staff currently participating in further education, career development and training programs each year
- + All racing clubs encourage responsible gambling
- + 16% of clubs have partnerships with primary, secondary, trade and tertiary institutions





## 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 33% of all clubs have

policies in place to save water or to 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)

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 eight clubs have policies and programs to develop native flora and fauna. Examples include:

- + Beautification of the racing grounds with native plants that also establishes habitat for protecting birdlife
- + Development of nurseries 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 180 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 facebook, 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 1,339,017 (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 \$1,064.4 million in value added contribution to Gross State Product. This equates to 47.9% 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 6,320 full-time equivalent (FTE) jobs in the region.
- + There are more than 9,600 participants in the racing industry in Brisbane.

#### RACING CLUBS IN THE REGION

##### Thoroughbred

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

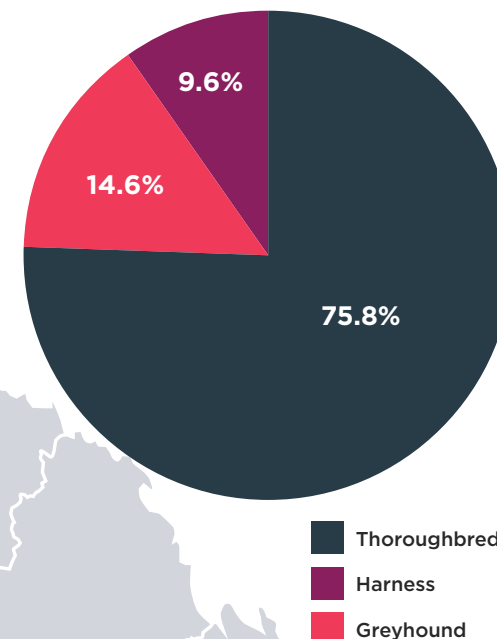
##### Harness

- + Albion Park Harness Racing Club

##### Greyhound

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

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE BRISBANE REGION (%)



The racing industry in the **Brisbane region is responsible for generating \$1,064.4 million in value added** contribution to gross state product. This represents **47.9% of the industry total.**

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$410.4m	\$58.4m	\$87.6m	\$556.4m
Total value added	\$806.6m	\$102.6m	\$155.3m	\$1,064.4m
Full-time equivalent employment	4,810	608	902	6,320

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	18	59	27	104
Horses and greyhounds in training	1,515	10	97	1,622

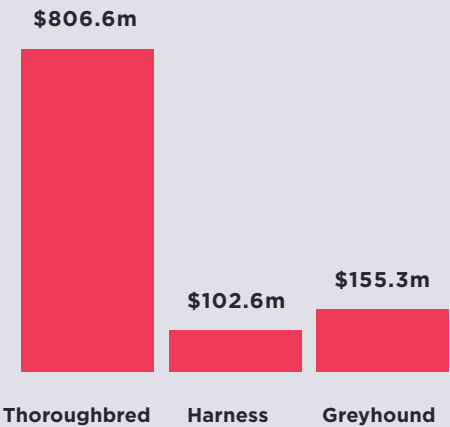
TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	132	31	3	166
Owners & Syndicate Members	5,741	163	1,214	7,117
Trainers	105	10	43	158
Breeders staff	114	15	4	134
Stable/Kennel employees	394	16	44	454
Racing Club & industry staff (FT, PT, casual)	881	117	183	1,181
Jockeys, drivers & apprentices	46	5	0	51
Racing club volunteers	0	5	8	13
Volunteers assisting participants	179	93	63	335
Total participants in the Brisbane region	7,591	455	1,562	9,608

\*Some totals do not add due to rounding.

Race meetings in the Brisbane region attracted attendances of **180,602** or **23.8% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE BRISBANE REGION



AT A GLANCE

5 Racing Clubs

THOROUGHBRED	2
HARNESS	1
GREYHOUND	2

453 Race Meetings

THOROUGHBRED	73
HARNESS	143
GREYHOUND	237

4,623 Races

THOROUGHBRED	625
HARNESS	1,338
GREYHOUND	2,660

9,292 Racing Club Members

THOROUGHBRED	8,678
HARNESS	400
GREYHOUND	214

180,602 Attendances

THOROUGHBRED	124,667
HARNESS	30,925
GREYHOUND	25,010

\*Some totals do not add due to rounding



# Cairns

- + The population of the Cairns region is 257,149 (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 close to \$57.1 million in value added contribution to Gross State Product. This equates to 2.6% 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 471 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,000 participants in the racing industry in Cairns.

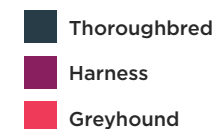
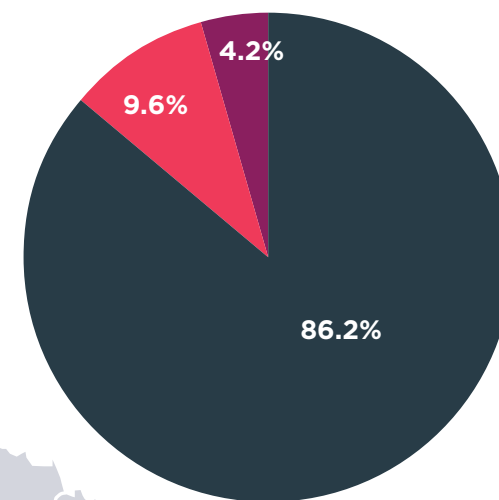
## RACING CLUBS IN THE REGION

### 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 \$57.1 million in value added** contribution to gross state product. This represents **2.6% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CAIRNS REGION (%)



### ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$49.1m	\$2.4m	\$5.4m	\$56.9m
Total value added	\$49.2m	\$2.4m	\$5.5m	\$57.1m
Full-time equivalent employment	405	20	46	471

### ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	15	0	0	15
Horses and greyhounds in training	423	0	19	442

### TOTAL PARTICIPANTS IN RACING

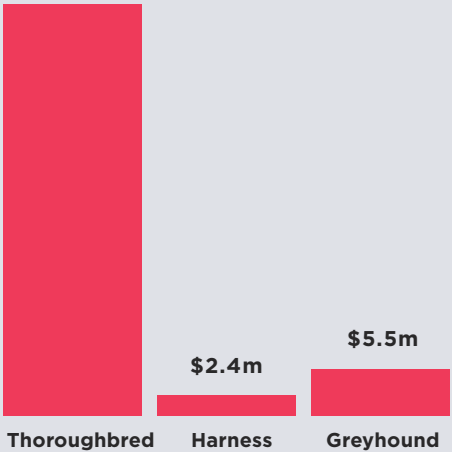
	Thoroughbred	Harness	Greyhound	Total
Breeders	23	0	1	24
Owners & Syndicate Members	1,038	4	103	1,145
Trainers	49	0	12	61
Breeders staff	20	0	1	21
Stable/Kennel employees	162	0	3	165
Racing Club & industry staff (FT, PT, casual)	300	0	0	300
Jockeys, drivers & apprentices	15	0	0	15
Racing club volunteers	202	0	0	202
Volunteers assisting participants	87	0	15	102
Total participants in the Cairns region	1,896	4	135	2,035

\*Some totals do not add due to rounding.

Race meetings in the Cairns region attracted attendances of **40,483** or **5.3%** of total attendances at race meetings in Queensland.

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

\$49.2m



### AT A GLANCE

#### 8 Racing Clubs

THOROUGHBRED 8

#### 40 Race Meetings

THOROUGHBRED 40

#### 262 Races

THOROUGHBRED 262

#### 1,287 Racing Club Members

THOROUGHBRED 1,287

#### 40,483 Attendances

THOROUGHBRED 40,483

\*Some totals do not add due to rounding

# Central Queensland

- + The population of the Central Queensland region is 231,104 (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 \$61.9 million in value added contribution to Gross State Product. This equates to 2.8% 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 501 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,100 participants in the racing industry in Central Queensland.

The racing industry in the **Central Queensland region** is responsible for generating **\$61.9 million in value added** contribution to gross state product. This represents **2.8% of the industry total**.

## RACING CLUBS IN THE REGION

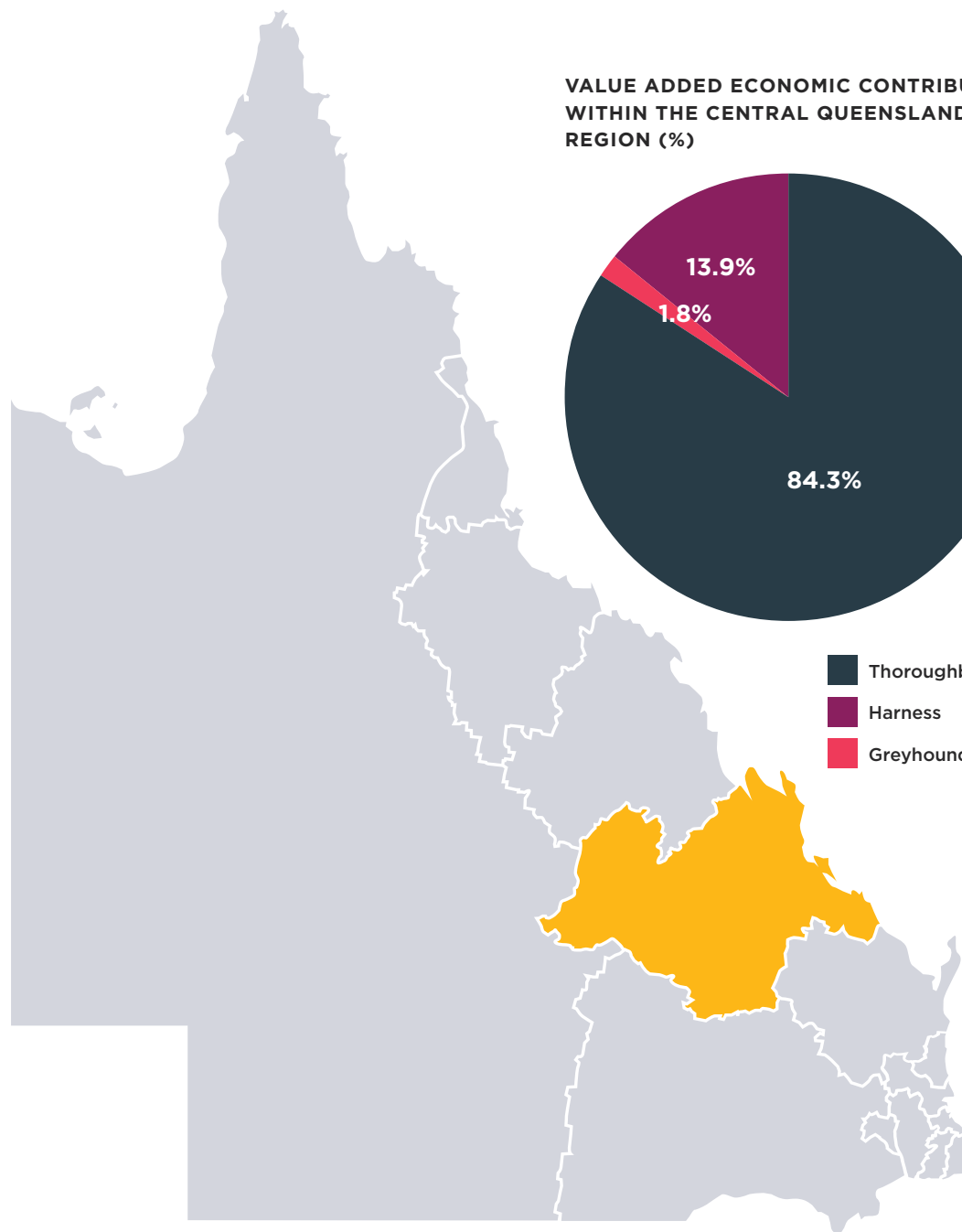
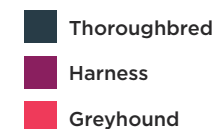
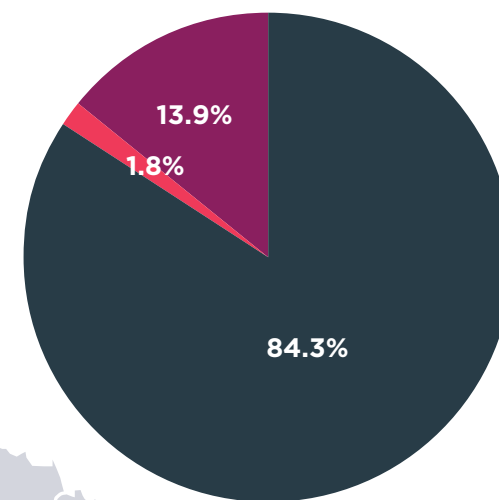
### Thoroughbred

- + 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

## VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CENTRAL QUEENSLAND REGION (%)





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$55.7m	\$1.2m	\$9.2m	\$66.2m
Total value added	\$52.2m	\$1.1m	\$8.6m	\$61.9m
Full-time equivalent employment	422	10	69	501

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	60	0	50	110
Horses and greyhounds in training	640	0	312	952

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	80	0	5	85
Owners & Syndicate Members	1,379	6	231	1,616
Trainers	107	0	32	139
Breeders staff	69	0	7	76
Stable/Kennel employees	190	0	24	214
Racing Club & industry staff (FT, PT, casual)	272	0	31	303
Jockeys, drivers & apprentices	13	0	0	13
Racing club volunteers	358	0	6	364
Volunteers assisting participants	214	0	43	258
<b>Total participants in the Central Queensland region</b>	<b>2,682</b>	<b>6</b>	<b>380</b>	<b>3,068</b>

\*Some totals do not add due to rounding.

Race meetings in the Central Queensland region attracted attendances of **54,136** or **7.1% 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

### 122 Race Meetings

THOROUGHBRED	67
GREYHOUND	55

### 1,019 Races

THOROUGHBRED	424
GREYHOUND	595

### 1,216 Racing Club Members

THOROUGHBRED	1,168
GREYHOUND	48

### 54,136 Attendances

THOROUGHBRED	50,104
GREYHOUND	4,032

\*Some totals do not add due to rounding

# Darling Downs - Maranoa

- + The population of the Darling Downs - Maranoa region is 130,066 (Australian Bureau of Statistics).
- + There are a total of twenty-four (24) racing clubs operating in the region, all of which are thoroughbred racing clubs.
- + The racing industry in the Darling Downs-Maranoa region is responsible for generating more than \$76.7 million in value added contribution to Gross State Product. This equates to 3.5% 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 629 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,900 participants in the racing industry in Darling Downs-Maranoa.

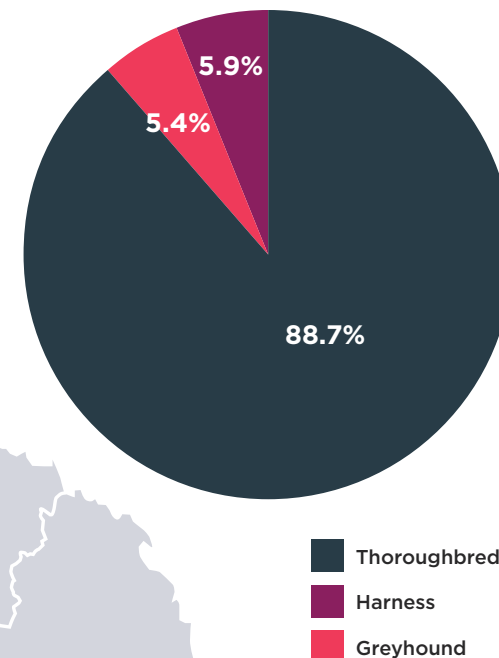
## RACING CLUBS IN THE REGION

### 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

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



The racing industry in the **Darling Downs-Maranoa region** is responsible for generating **\$76.7 million** in **value added** contribution to gross state product. This represents **3.5%** of the industry total.

## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$86.0m	\$5.7m	\$5.4m	\$97.1m
Total value added	\$68.0m	\$4.5m	\$4.1m	\$76.7m
Full-time equivalent employment	555	38	36	629

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	545	38	35	618
Horses and greyhounds in training	544	40	68	652

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	144	15	3	163
Owners & Syndicate Members	1,092	45	143	1,280
Trainers	107	9	12	129
Breeders staff	124	8	5	137
Stable/Kennel employees	198	5	6	208
Racing Club & industry staff (FT, PT, casual)	563	0	0	563
Jockeys, drivers & apprentices	16	8	0	24
Racing club volunteers	1,010	0	0	1,010
Volunteers assisting participants	266	53	18	338
<b>Total participants in the Darling Downs - Maranoa region</b>	<b>3,521</b>	<b>143</b>	<b>187</b>	<b>3,851</b>

\*Some totals do not add due to rounding.

Race meetings in the Darling Downs - Maranoa region attracted attendances of **42,462** or **5.6%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

24 Racing Clubs

THOROUGHBRED 24

50 Racing Clubs

THOROUGHBRED 50

315 Races

THOROUGHBRED 315

1,369 Racing Club Members

THOROUGHBRED 1,369

42,462 Attendances

THOROUGHBRED 42,462

\*Some totals do not add due to rounding



# Gold Coast

- + The population of the Gold Coast region is 649,659 (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 close to \$229.3 million in value added contribution to Gross State Product. This equates to 10.3% 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 1,822 full-time equivalent (FTE) jobs in the region.
- + There are more than 6,000 participants in the racing industry in Gold Coast.

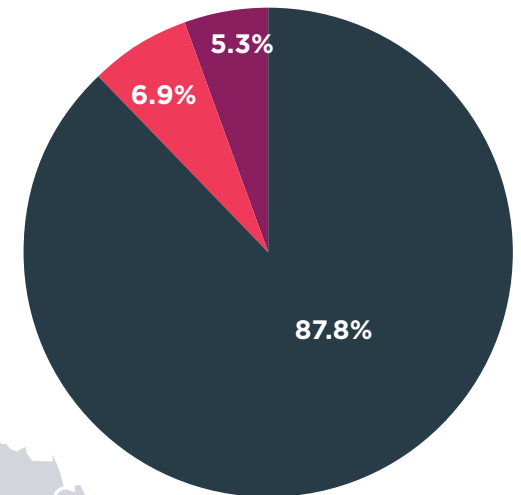
The racing industry in the **Gold Coast region** is responsible for generating **\$229.3 million in value added** contribution to gross state product. This represents **10.3% of the industry total**.

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Gold Coast Turf Club Ltd

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



- Thoroughbred
- Harness
- Greyhound

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$191.5m	\$11.8m	\$15.0m	\$218.4m
Total value added	\$201.3m	\$12.3m	\$15.7m	\$229.3m
Full-time equivalent employment	1,595	99	128	1,822

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	136	22	78	236
Horses and greyhounds in training	1,617	121	199	1,937

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	138	22	7	168
Owners & Syndicate Members	3,584	97	549	4,230
Trainers	131	19	27	176
Breeders staff	119	11	10	141
Stable/Kennel employees	324	28	29	381
Racing Club & industry staff (FT, PT, casual)	475	0	0	476
Jockeys, drivers & apprentices	37	10	0	47
Racing club volunteers	9	0	0	9
Volunteers assisting participants	294	85	41	419
Total participants in the Gold Coast region	5,111	272	664	6,047

\*Some totals do not add due to rounding.

Race meetings in the Gold Coast region attracted attendances of **106,452** or **14.0% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE GOLD COAST REGION



AT A GLANCE

1 Racing Club	
THOROUGHBRED	1
42 Race Meetings	
THOROUGHBRED	42
342 Races	
THOROUGHBRED	342
3,153 Racing Club Members	
THOROUGHBRED	3,153
106,452 Attendances	
THOROUGHBRED	106,452

\*Some totals do not add due to rounding

# Ipswich

- + The population of the Ipswich region is 373,651 (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 \$147.7 million in value added contribution to Gross State Product. This equates to 6.7% 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 1,154 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,900 participants in the racing industry in Ipswich.

The racing industry in the Ipswich region is responsible for generating \$147.7 million in value added contribution to gross state product. This represents 6.7% of the industry total.

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Esk Jockey Club
- + Ipswich Turf Club

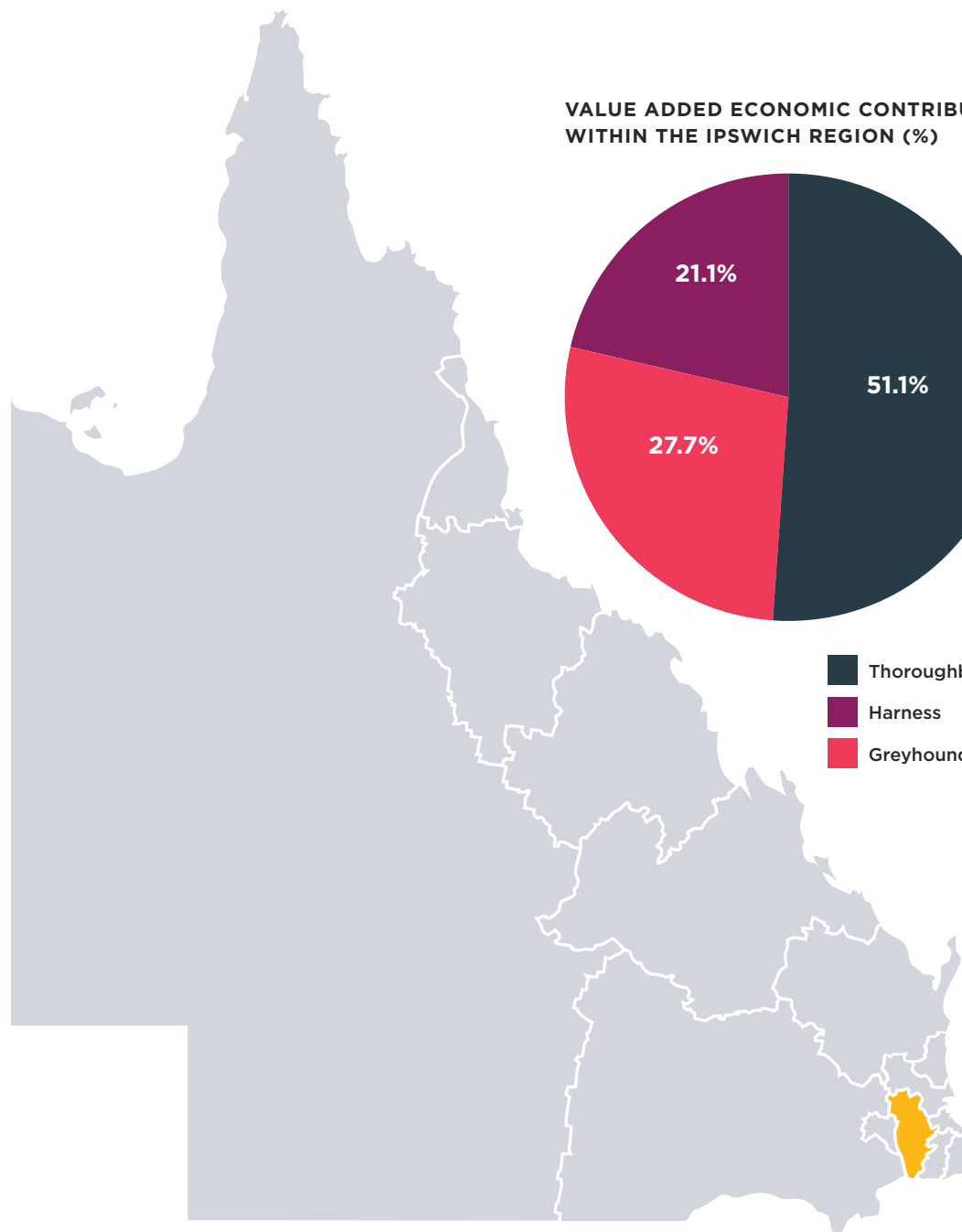
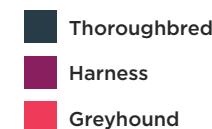
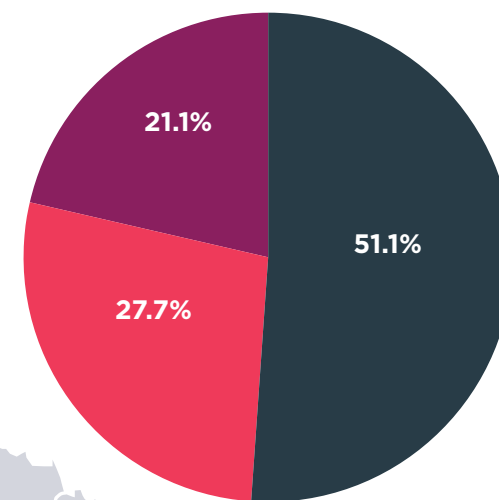
### Harness

- + 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	\$71.1m	\$29.8m	\$38.5m	\$139.4m
Total value added	\$75.6m	\$31.2m	\$40.9m	\$147.7m
Full-time equivalent employment	593	243	318	1,154

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	215	68	589	872
Horses and greyhounds in training	207	499	1,309	2,015

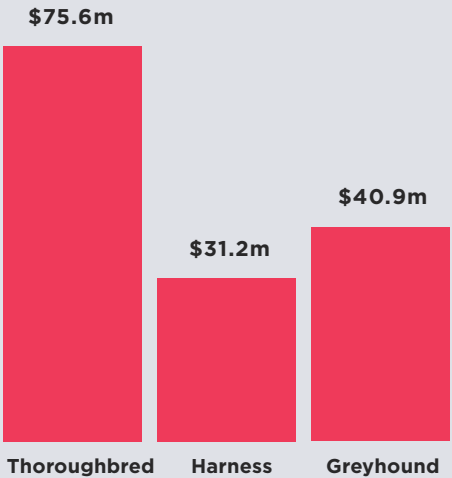
TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	63	55	51	169
Owners & Syndicate Members	927	226	669	1,821
Trainers	38	93	190	321
Breeders staff	54	28	76	158
Stable/Kennel employees	134	39	83	255
Racing Club & industry staff (FT, PT, casual)	234	30	76	339
Jockeys, drivers & apprentices	8	59	0	67
Racing club volunteers	30	35	14	79
Volunteers assisting participants	103	266	293	663
Total participants in the Ipswich region	1,590	830	1,453	3,873

\*Some totals do not add due to rounding.

Race meetings in the Ipswich region attracted attendances of **56,598** or **7.5% 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
HARNESS	1
GREYHOUND	1

258 Race Meetings

THOROUGHBRED	52
HARNESS	27
GREYHOUND	179

2,606 Races

THOROUGHBRED	402
HARNESS	222
GREYHOUND	1,982

612 Racing Club Members

THOROUGHBRED	440
HARNESS	40
GREYHOUND	132

56,598 Attendances

THOROUGHBRED	33,442
HARNESS	7,205
GREYHOUND	15,951

\*Some totals do not add due to rounding

# Logan - Beaudesert

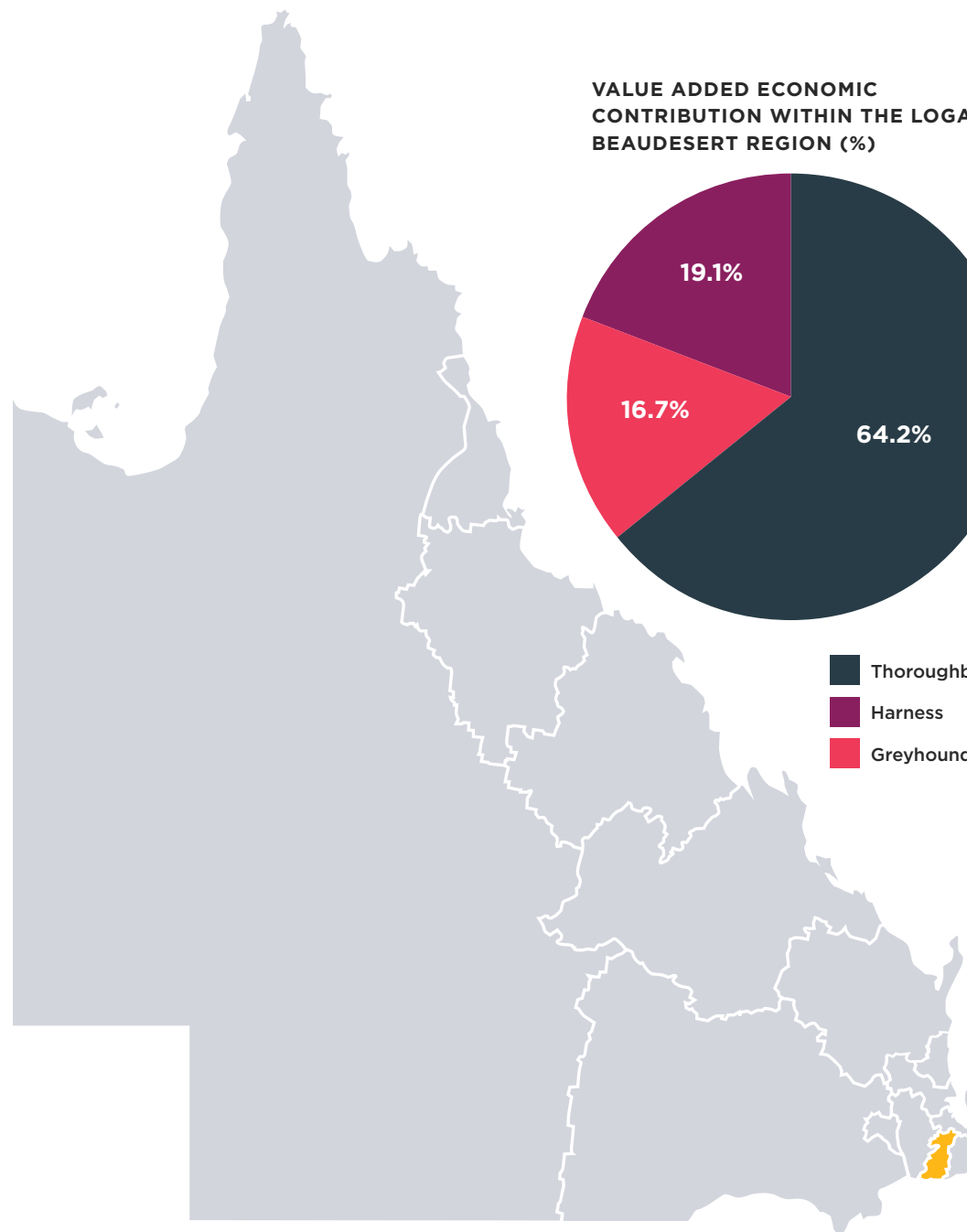
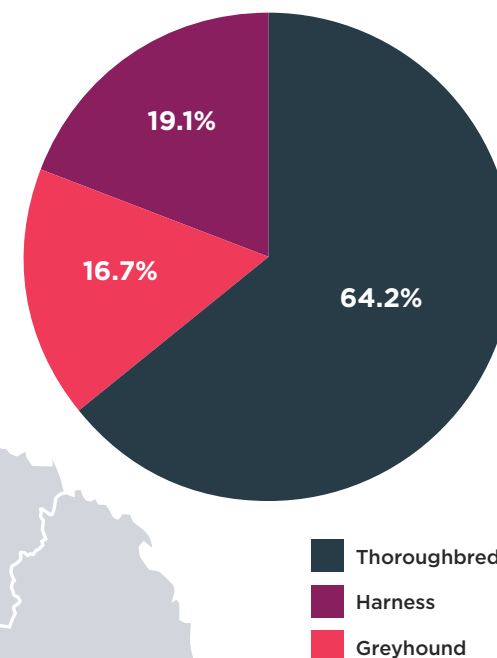
- + The population of the Logan - Beaudesert region is 365,653 (Australian Bureau of Statistics).
- + There is one (1) thoroughbred racing club operating in the region.
- + The racing industry in the Logan-Beaudesert region is responsible for generating more than \$77.3 million in value added contribution to Gross State Product. This equates to 3.5% 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 616 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,400 participants in the racing industry in Logan-Beaudesert.

The racing industry in the **Logan-Beaudesert region** is responsible for generating **\$77.3 million** in value added contribution to gross state product. This represents **3.5% of the industry total**.

## RACING CLUBS IN THE REGION

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

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$50.3m	\$14.8m	\$12.9m	\$78.0m
Total value added	\$49.7m	\$14.8m	\$12.9m	\$77.3m
Full-time equivalent employment	395	117	104	616

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	269	32	240	542
Horses and greyhounds in training	300	252	670	1,223

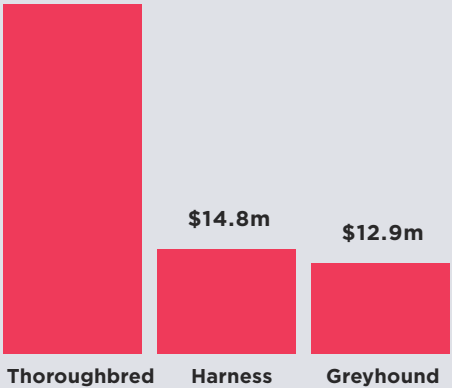
TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	62	24	22	108
Owners & Syndicate Members	757	105	447	1,310
Trainers	54	47	106	207
Breeders staff	54	12	33	98
Stable/Kennel employees	145	42	44	230
Racing Club & industry staff (FT, PT, casual)	20	0	0	20
Jockeys, drivers & apprentices	8	30	0	38
Racing club volunteers	0	0	0	0
Volunteers assisting participants	126	123	153	401
Total participants in the Logan-Beaudesert region	1,226	383	804	2,414

\*Some totals do not add due to rounding.

Race meetings in the Logan-Beaudesert region attracted attendances of **384** or **0.1% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE LOGAN-BEAUDESERT REGION  
\$49.7m



AT A GLANCE

1 Racing Club

THOROUGHBRED 1

8 Race Meetings

THOROUGHBRED 8

59 Races

THOROUGHBRED 59

10 Racing Club Members

THOROUGHBRED 10

384 Attendances

THOROUGHBRED 384

\*Some totals do not add due to rounding



# Mackay-Isaac-Whitsunday

- + The population of the Mackay-Isaac-Whitsunday region is 183,269 (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 \$37.3 million in value added contribution to Gross State Product. This equates to 1.7% 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 309 full-time equivalent (FTE) jobs in the region.
- + There are close to 1,600 participants in the racing industry in Mackay-Isaac-Whitsunday.

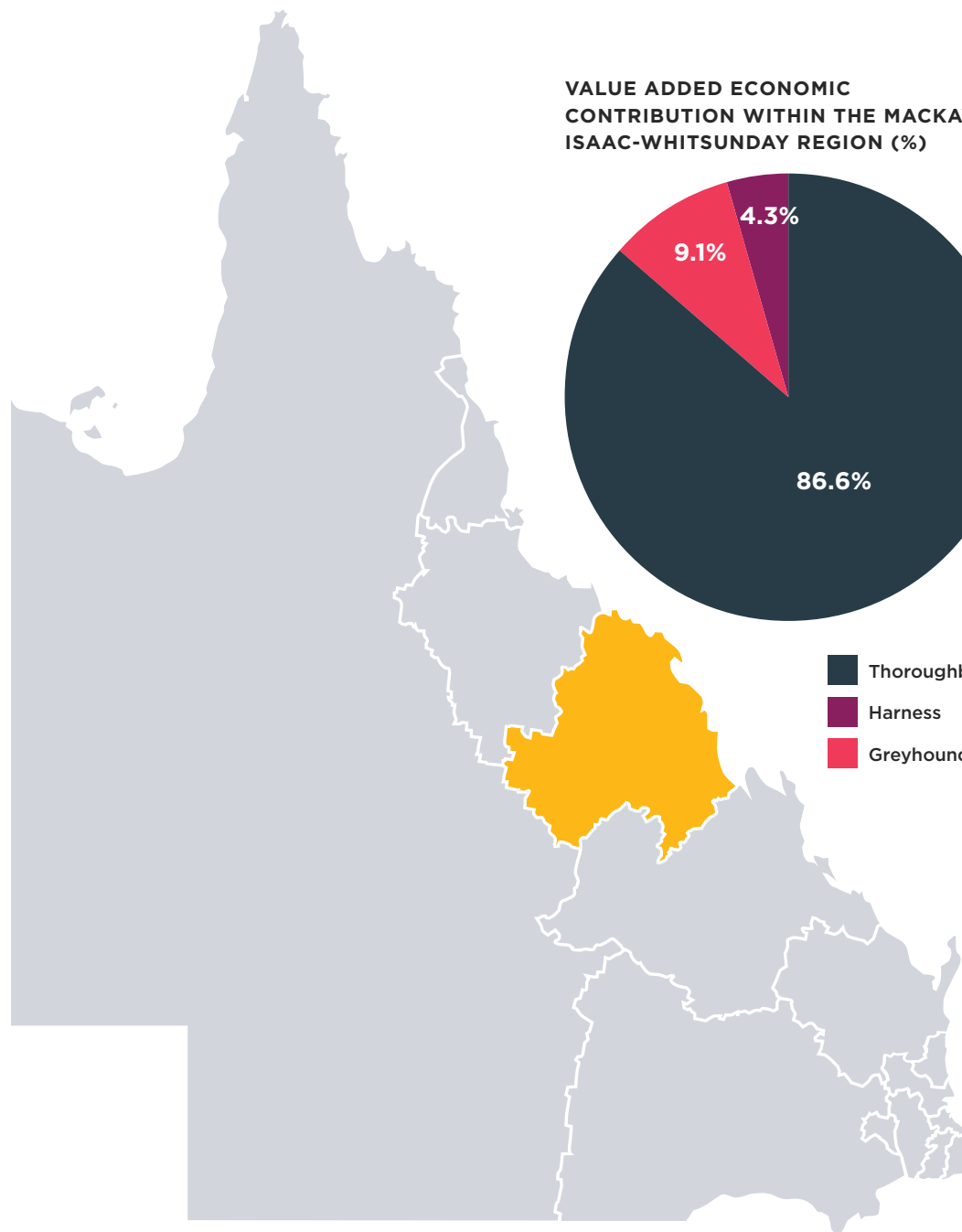
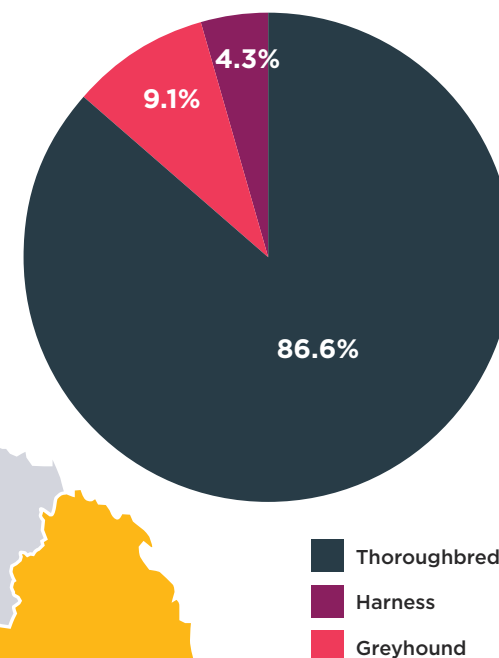
## RACING CLUBS IN THE REGION

### 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 **\$37.3 million in value added** contribution to gross state product. This represents **1.7% of the industry total**.

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



### ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$36.1m	\$1.8m	\$4.0m	\$42.0m
Total value added	\$32.3m	\$1.6m	\$3.4m	\$37.3m
Full-time equivalent employment	267	14	29	309

### ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	43	3	0	46
Horses and greyhounds in training	249	0	32	281

### TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	32	2	0	34
Owners & Syndicate Members	780	25	89	894
Trainers	31	0	5	36
Breeders staff	28	1	0	29
Stable/Kennel employees	106	1	3	110
Racing Club & industry staff (FT, PT, casual)	165	0	0	165
Jockeys, drivers & apprentices	10	0	0	10
Racing club volunteers	213	0	0	213
Volunteers assisting participants	69	6	6	80
Total participants in the Mackay-Isaac-Whitsunday region	1,433	35	103	1,570

\*Some totals do not add due to rounding.

Race meetings in the Mackay-Isaac-Whitsunday region attracted attendances of **25,588** or **3.4%** 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

#### 40 Race Meetings

THOROUGHBRED 40

#### 263 Races

THOROUGHBRED 263

#### 368 Racing Club Members

THOROUGHBRED 368

#### 25,588 Attendances

THOROUGHBRED 25,588

\*Some totals do not add due to rounding

# Moreton Bay

- + The population of the Moreton Bay region is 490,606 (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 more than \$86.4 million in value added contribution to Gross State Product. This equates to 3.9% 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 679 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,100 participants in the racing industry in Moreton Bay.

The racing industry in the **Moreton Bay region** is responsible for generating **\$86.4 million** in **value added** contribution to gross state product. This represents **3.9% of the industry total**.

## RACING CLUBS IN THE REGION

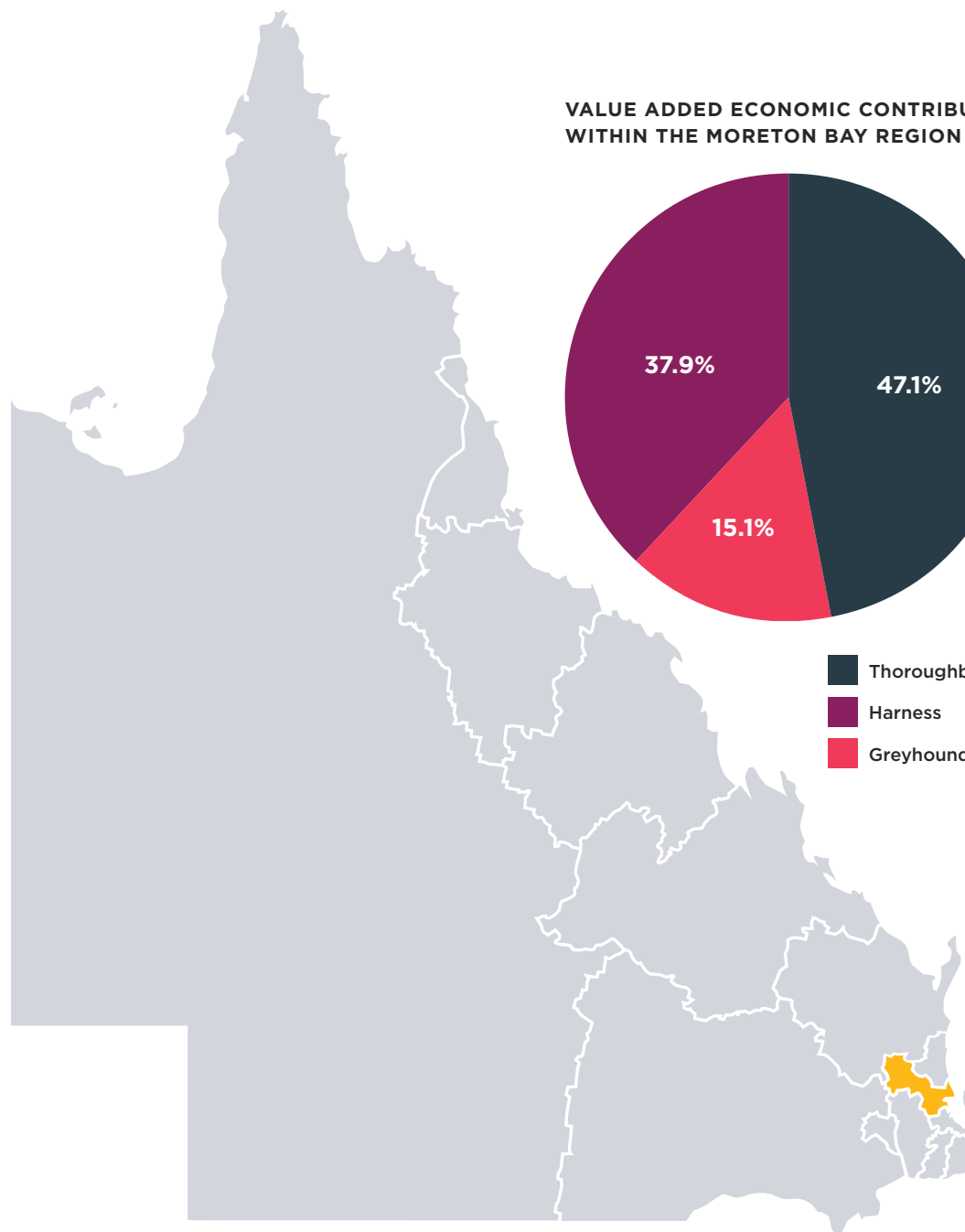
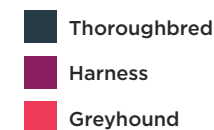
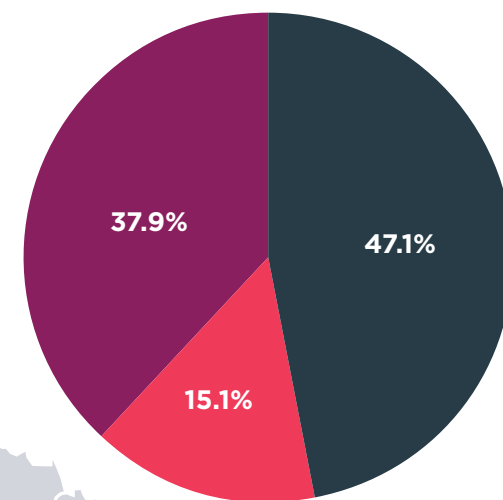
### Thoroughbred

- + 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	\$38.2m	\$31.0m	\$12.1m	\$81.4m
Total value added	\$40.7m	\$32.7m	\$13.0m	\$86.4m
Full-time equivalent employment	325	251	103	679

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	36	39	90	165
Horses and greyhounds in training	0	182	249	431

TOTAL PARTICIPANTS IN RACING

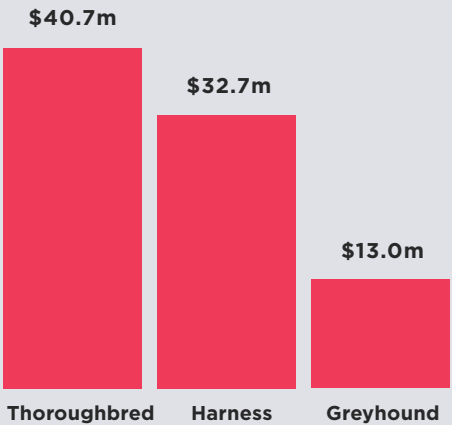
	Thoroughbred	Harness	Greyhound	Total
Breeders	47	45	11	103
Owners & Syndicate Members	1,335	182	486	2,003
Trainers	2	61	81	145
Breeders staff	41	22	16	80
Stable/Kennel employees	147	62	44	253
Racing Club & industry staff (FT, PT, casual)	48	49	5	102
Jockeys, drivers & apprentices	15	28	0	42
Racing club volunteers	7	10	0	17
Volunteers assisting participants	41	198	108	346
Total participants in the Moreton Bay region	1,683	656	751	3,090

\*Some totals do not add due to rounding.

Race meetings in the Moreton Bay region

attracted attendances of **32,670** or **4.3%** 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

141 Race Meetings

THOROUGHBRED	10
HARNESS	131

1,284 Races

THOROUGHBRED	64
HARNESS	1,220

224 Racing Club Members

THOROUGHBRED	78
HARNESS	146

32,670 Attendances

THOROUGHBRED	4,500
HARNESS	28,170

\*Some totals do not add due to rounding

# Queensland Outback

- + The population of the Queensland Outback region is 81,634 (Australian Bureau of Statistics).
- + There are a total of thirty-seven (37) 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 \$26.8 million in value added contribution to Gross State Product. This equates to 1.2% 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 238 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 \$26.8 million in value added** contribution to gross state product. This represents **1.2% of the industry total.**

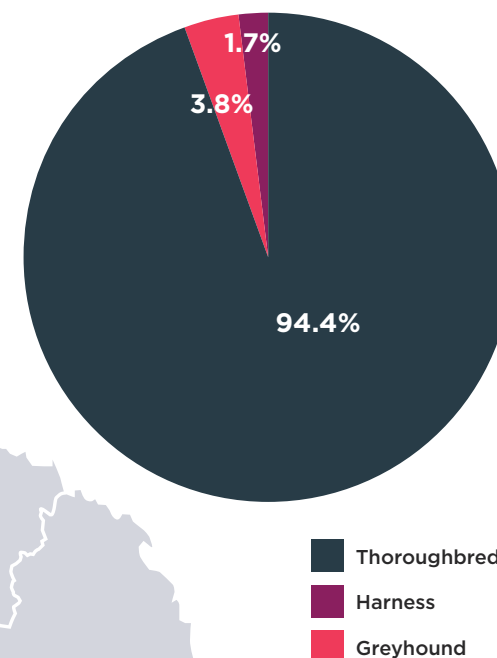
## RACING CLUBS IN THE REGION

### Thoroughbred

- + Alpha Jockey Club Inc.
- + Aramac Racing Club
- + Augathella Racing Club
- + Barcaldine Racing Club Inc.
- + Barcoo Amateur Race Club Inc.
- + Bedourie Amateur Race Club Inc.
- + Betoota 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
- + Oak Park Race Club Inc.
- + 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	\$38.6m	\$0.8m	\$1.7m	\$41.0m
Total value added	\$25.4m	\$0.5m	\$1.0m	\$26.8m
Full-time equivalent employment	224	4	10	238

### ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	7	0	0	7
Horses and greyhounds in training	525	0	1	526

### TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	16	0	0	16
Owners & Syndicate Members	589	3	18	610
Trainers	83	0	2	85
Breeders staff	14	0	0	14
Stable/Kennel employees	129	0	0	129
Racing Club & industry staff (FT, PT, casual)	506	0	0	506
Jockeys, drivers & apprentices	12	0	0	12
Racing club volunteers	1,572	0	0	1,572
Volunteers assisting participants	129	0	2	131
<b>Total participants in the Queensland Outback region</b>	<b>3,051</b>	<b>3</b>	<b>22</b>	<b>3,075</b>

\*Some totals do not add due to rounding.

Race meetings in the Queensland Outback region attracted attendances of **44,290** or **5.8%** of total attendances at race meetings in Queensland.

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



### AT A GLANCE

37 Racing Clubs

THOROUGHBRED 37

86 Race Meetings

THOROUGHBRED 86

485 Races

THOROUGHBRED 485

2,567 Racing Club Members

THOROUGHBRED 2,567

44,290 Attendances

THOROUGHBRED 44,290

\*Some totals do not add due to rounding



# Sunshine Coast

- + The population of the Sunshine Coast region is 403,521 (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 close to \$139.6 million in value added contribution to Gross State Product. This equates to 6.3% 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 1,104 full-time equivalent (FTE) jobs in the region.
- + There are 3,200 participants in the racing industry in the Sunshine Coast.

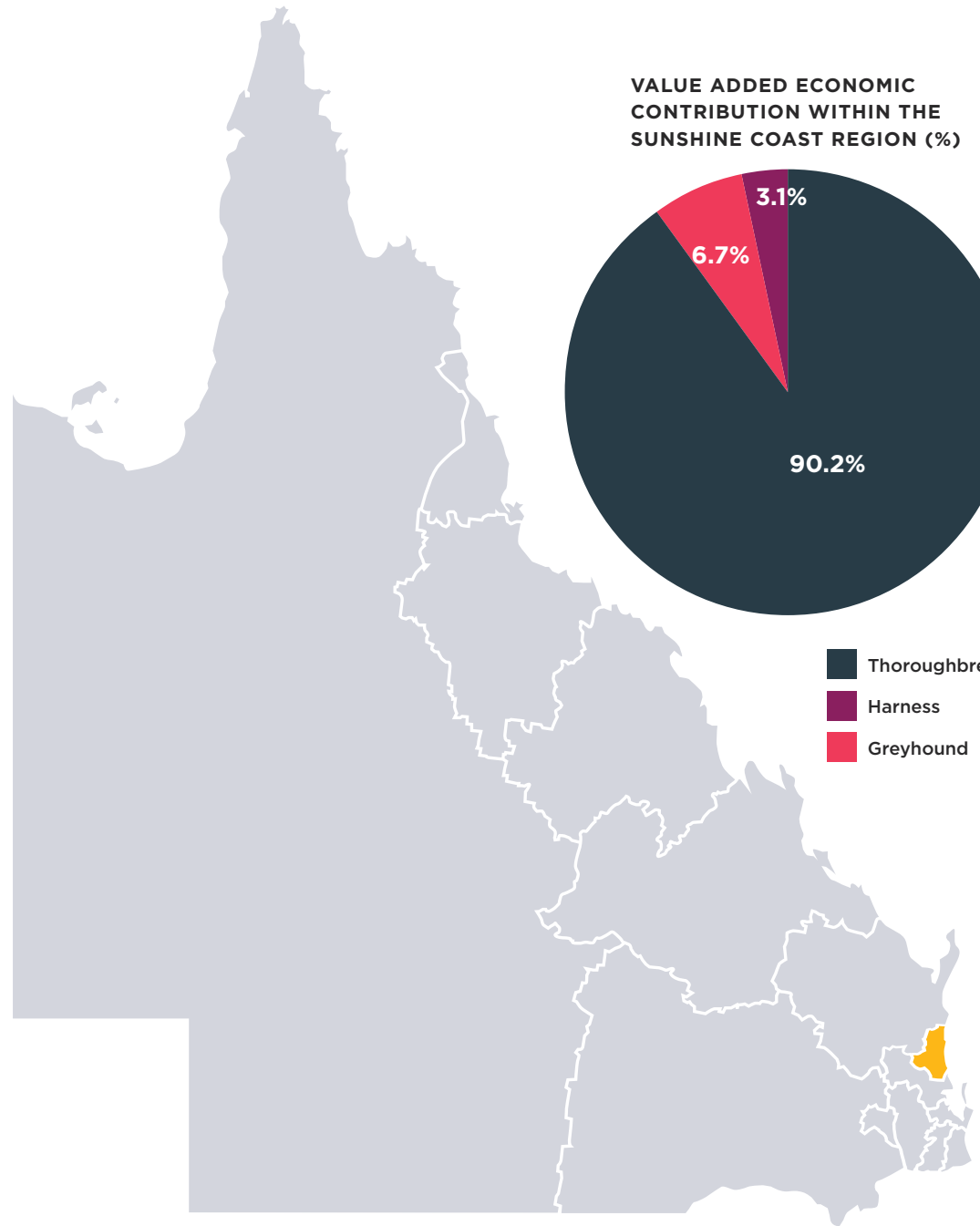
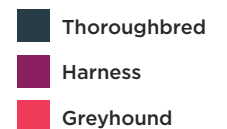
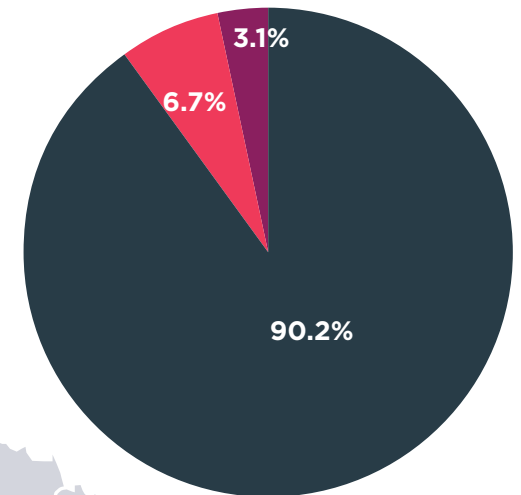
The racing industry in the **Sunshine Coast region** is responsible for generating **\$139.6 million** in **value added** contribution to gross state product. This represents **6.3%** of the industry total.

## 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	\$119.7m	\$4.2m	\$9.1m	\$132.9m
Total value added	\$125.9m	\$4.3m	\$9.4m	\$139.6m
Full-time equivalent employment	992	35	76	1,104

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	40	9	65	114
Horses and greyhounds in training	1,074	0	59	1,133

## TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	62	8	6	76
Owners & Syndicate Members	2,056	36	234	2,326
Trainers	91	1	13	105
Breeders staff	53	4	9	66
Stable/Kennel employees	250	4	9	263
Racing Club & industry staff (FT, PT, casual)	111	0	0	111
Jockeys, drivers & apprentices	21	1	0	22
Racing club volunteers	7	0	0	7
Volunteers assisting participants	177	24	24	224
<b>Total participants in the Sunshine Coast region</b>	<b>2,827</b>	<b>78</b>	<b>295</b>	<b>3,200</b>

\*Some totals do not add due to rounding.

## Race meetings in the Sunshine Coast region

attracted attendances of **68,688** or **9.0%** 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

### 72 Race Meetings

THOROUGHBRED 72

### 558 Races

THOROUGHBRED 558

### 2,417 Racing Club Members

THOROUGHBRED 2,417

### 68,688 Attendances

THOROUGHBRED 68,688

\*Some totals do not add due to rounding

# Toowoomba

- + The population of the Toowoomba region is 164,144 (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 close to \$92.1 million in value added contribution to Gross State Product. This equates to 4.1% 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 727 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,400 participants in the racing industry in Toowoomba.

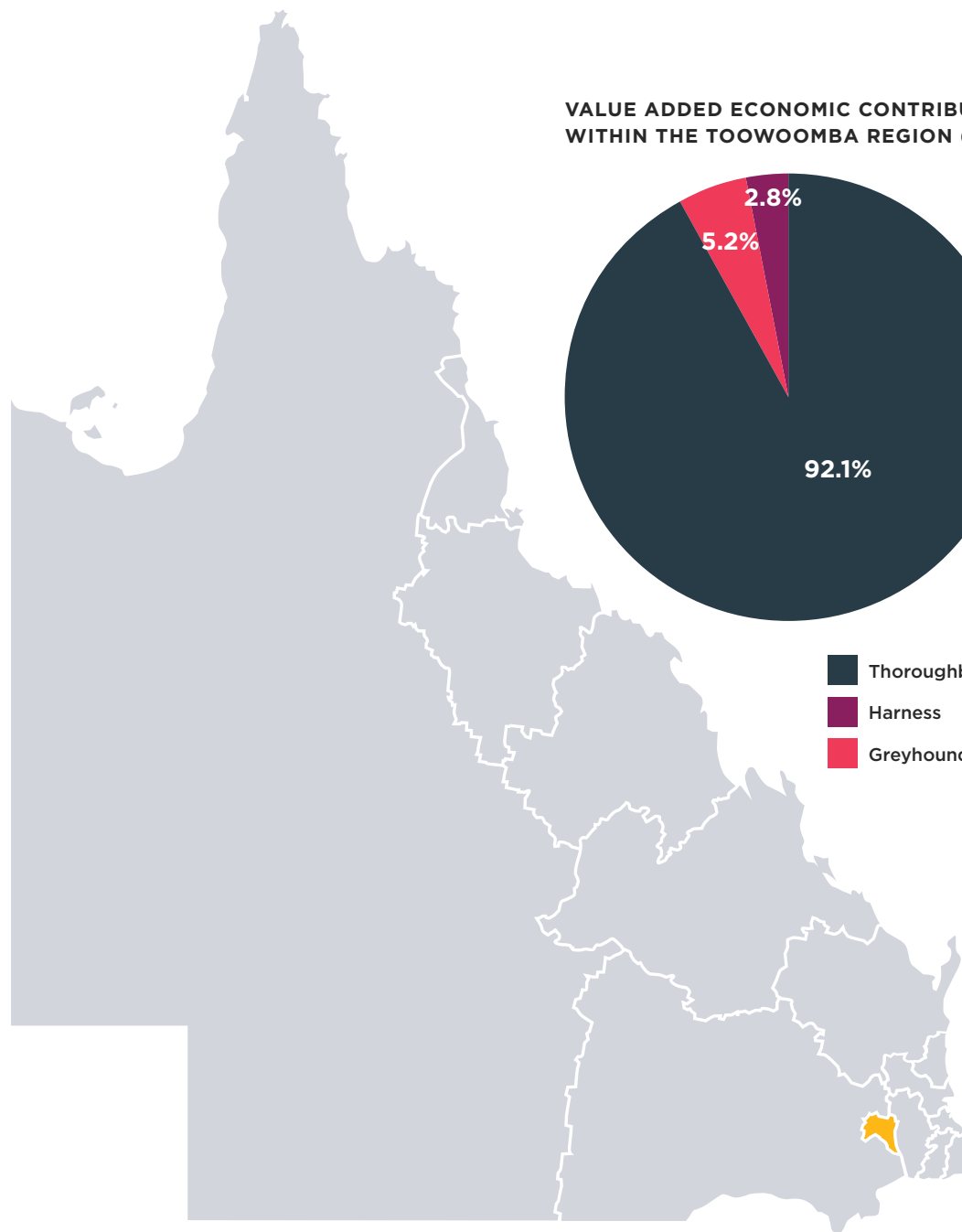
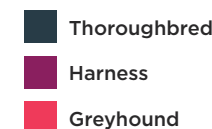
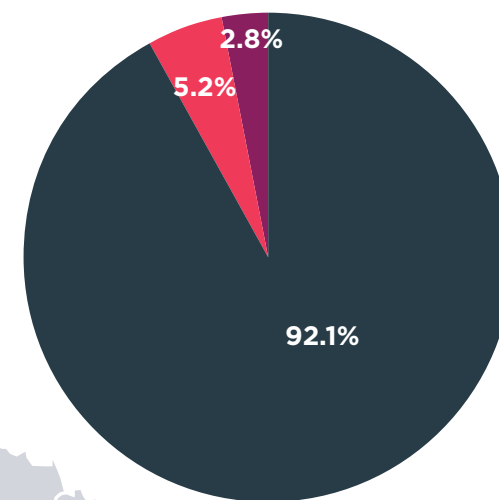
The racing industry in the **Toowoomba region is responsible for generating \$92.1 million in value added** contribution to gross state product. This represents **4.1% of the industry total.**

## 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	\$87.8m	\$2.6m	\$4.8m	\$95.3m
Total value added	\$84.8m	\$2.5m	\$4.8m	\$92.1m
Full-time equivalent employment	667	21	39	727

### ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	322	1	97	420
Horses and greyhounds in training	946	26	147	1,119

### TOTAL PARTICIPANTS IN RACING

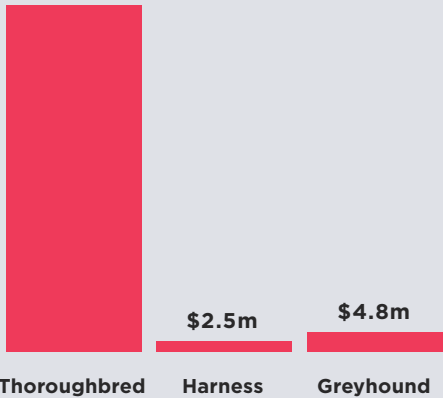
	Thoroughbred	Harness	Greyhound	Total
Breeders	95	4	7	105
Owners & Syndicate Members	1,026	22	217	1,265
Trainers	113	8	25	146
Breeders staff	81	2	10	93
Stable/Kennel employees	274	5	24	302
Racing Club & industry staff (FT, PT, casual)	175	0	0	176
Jockeys, drivers & apprentices	24	7	0	31
Racing club volunteers	32	0	0	32
Volunteers assisting participants	233	20	38	292
Total participants in the Toowoomba region	2,053	68	320	2,441

\*Some totals do not add due to rounding.

Race meetings in the Toowoomba region attracted attendances of **30,461** or **4.0%** of total attendances at race meetings in Queensland.

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

\$84.8m



### AT A GLANCE

#### 2 Racing Clubs

THOROUGHBRED 2

#### 57 Race Meetings

THOROUGHBRED 57

#### 412 Races

THOROUGHBRED 412

#### 496 Racing Club Members

THOROUGHBRED 496

#### 30,461 Attendances

THOROUGHBRED 30,461

\*Some totals do not add due to rounding

# Townsville

- + The population of the Townsville region is 237,452 (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 \$70.6 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 576 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,600 participants in the racing industry in Townsville.

## RACING CLUBS IN THE REGION

### Thoroughbred

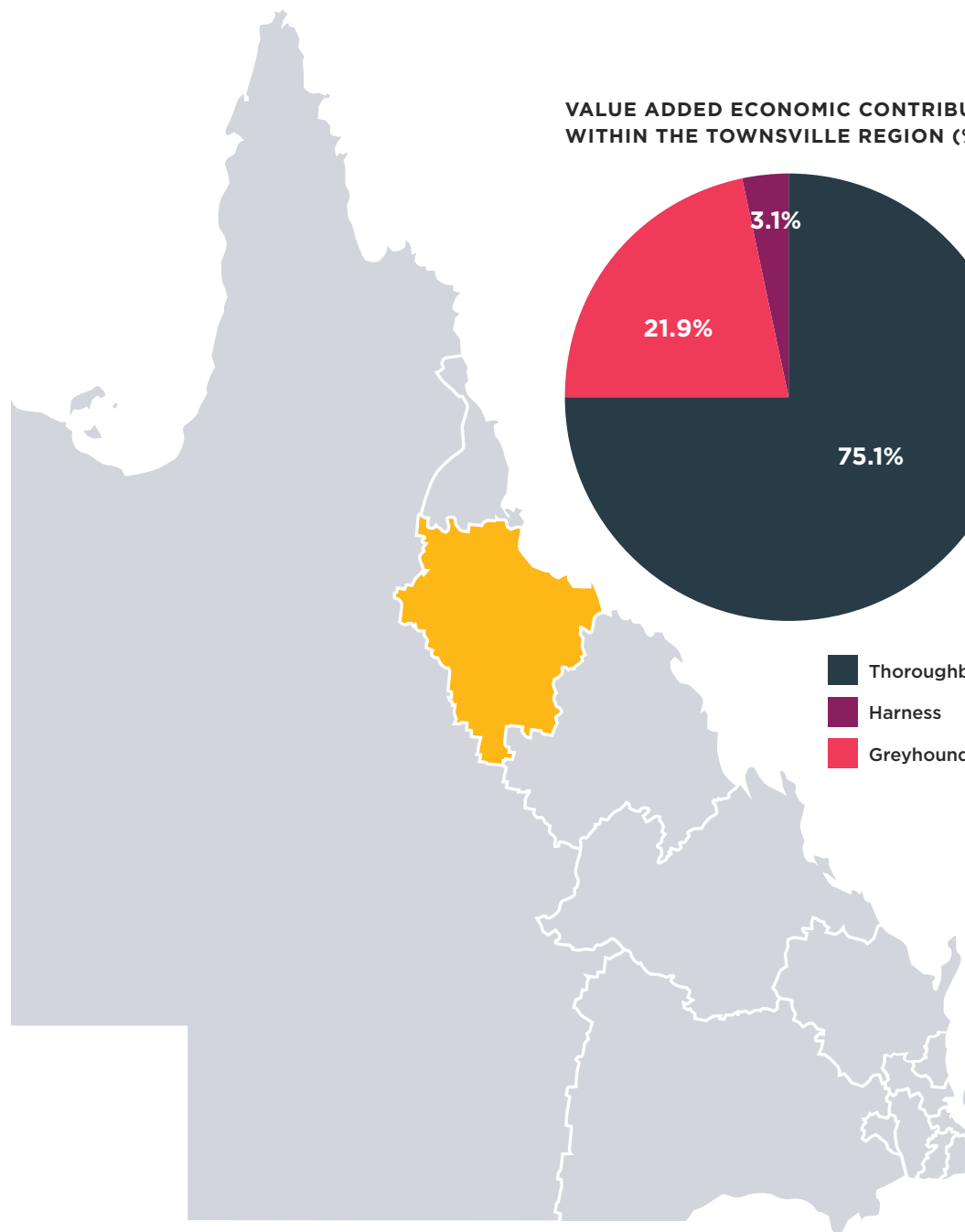
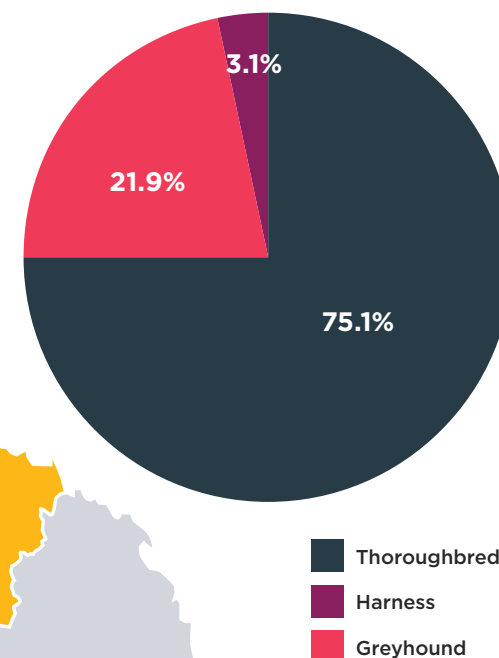
- + Burdekin Race Club Inc.
- + Charter Towers Race Club Inc.
- + Einasleigh Race Club Inc.
- + Ewan Amateur Turf Club Inc.
- + Herbert River Jockey Club Inc.
- + Pentland Race Club Inc.
- + Towers Jockey Club
- + Townsville Turf Club Inc.

### Greyhound

- + Townsville Greyhound Racing Club Inc.

The racing industry in the **Townsville region is responsible for generating \$70.6 million in value added** contribution to gross state product. This represents **3.2% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOWNSVILLE REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$54.0m	\$2.2m	\$15.8m	\$72.0m
Total value added	\$53.0m	\$2.2m	\$15.4m	\$70.6m
Full-time equivalent employment	433	18	125	576

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	19	0	44	63
Horses and greyhounds in training	578	0	466	1,044

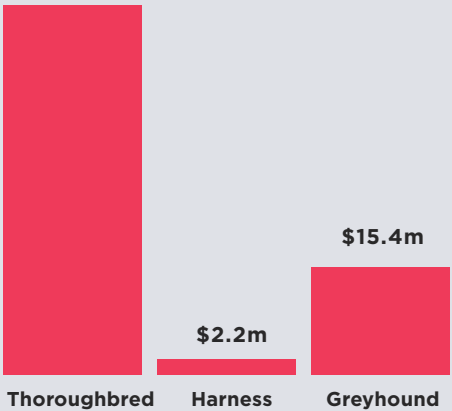
TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	28	0	6	34
Owners & Syndicate Members	1,145	7	276	1,429
Trainers	87	0	62	148
Breeders staff	24	0	9	33
Stable/Kennel employees	199	0	37	236
Racing Club & industry staff (FT, PT, casual)	182	0	40	221
Jockeys, drivers & apprentices	14	0	0	14
Racing club volunteers	223	0	5	228
Volunteers assisting participants	144	0	78	222
Total participants in the Townsville region	2,045	7	512	2,564

\*Some totals do not add due to rounding.

Race meetings in the Townsville region attracted attendances of **46,512** or **6.1% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE TOWNSVILLE REGION  
\$53.0m



AT A GLANCE

9 Racing Clubs

THOROUGHBRED	8
GREYHOUND	1

141 Race Meetings

THOROUGHBRED	47
GREYHOUND	94

1,369 Races

THOROUGHBRED	331
GREYHOUND	1,038

1,771 Racing Club Members

THOROUGHBRED	1,725
GREYHOUND	46

46,512 Attendances

THOROUGHBRED	38,924
GREYHOUND	7,588

\*Some totals do not add due to rounding



# Wide Bay

- + The population of the Wide Bay region is 310,728 (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 \$51.3 million in value added contribution to Gross State Product. This equates to 2.4% 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 445 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,700 participants in the racing industry in Wide Bay.

The racing industry in the **Wide Bay region is responsible for generating \$53.1 million in value added** contribution to gross state product. This represents **2.4% of the industry total.**

## RACING CLUBS IN THE REGION

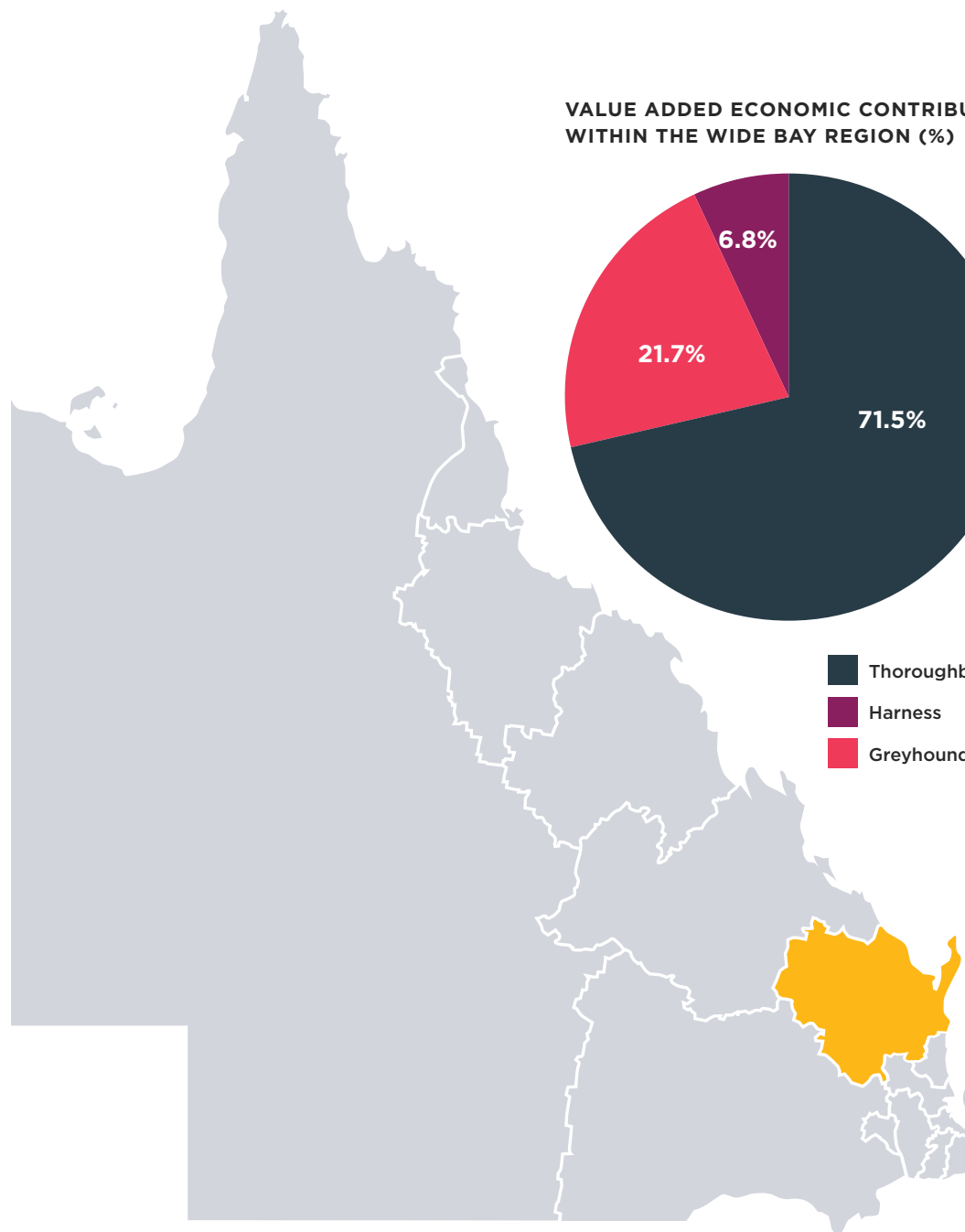
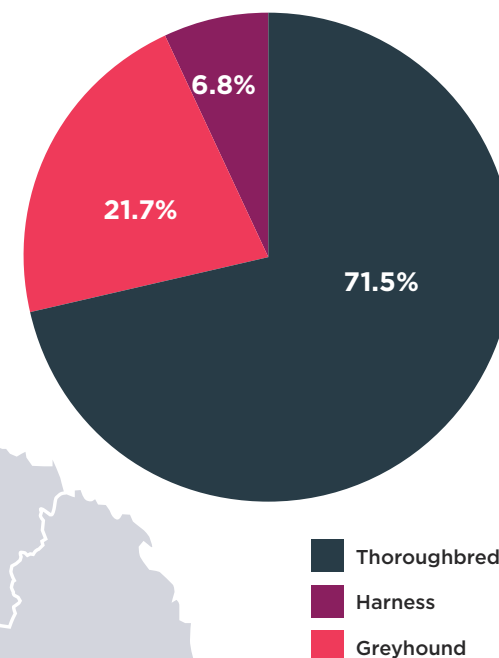
### Thoroughbred

- + 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.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$41.2m	\$3.9m	\$12.5m	\$57.6m
Total value added	\$37.9m	\$3.6m	\$11.5m	\$53.1m
Full-time equivalent employment	318	31	96	445

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	88	3	108	199
Horses and greyhounds in training	275	22	246	543

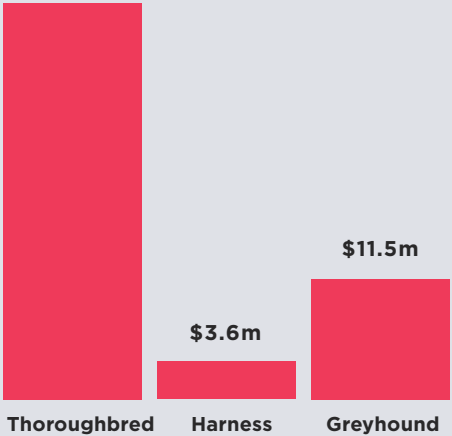
TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	60	9	9	78
Owners & Syndicate Members	916	23	197	1,136
Trainers	63	7	56	126
Breeders staff	52	4	13	70
Stable/Kennel employees	110	3	32	145
Racing Club & industry staff (FT, PT, casual)	242	0	30	272
Jockeys, drivers & apprentices	10	4	0	14
Racing club volunteers	563	0	7	570
Volunteers assisting participants	136	33	76	246
Total participants in the Wide Bay region	2,153	83	421	2,657

\*Some totals do not add due to rounding.

Race meetings in the Wide Bay region attracted attendances of **30,312** or **4.0%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE WIDE BAY REGION  
\$37.9m



AT A GLANCE

11 Racing Clubs

THOROUGHBRED	10
GREYHOUND	1

79 Race Meetings

THOROUGHBRED	29
GREYHOUND	50

640 Races

THOROUGHBRED	153
GREYHOUND	487

1,235 Racing Club Members

THOROUGHBRED	1,171
GREYHOUND	64

30,312 Attendances

THOROUGHBRED	26,486
GREYHOUND	3,826

\*Some totals do not add due to rounding

# South East Queensland

- + The population of the South East Queensland region is 3,786,251 (Australian Bureau of Statistics).
- + There are a total of sixteen (16) 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 \$1836.9 million in value added contribution to Gross State Product. This equates to 82.7% 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 12,423 full-time equivalent (FTE) jobs in the region.
- + There are close to 30,700 participants in the racing industry in South East Queensland.

The racing industry in the **South East Queensland region is responsible for generating \$1,836.9 million in value added** contribution to gross state product. This represents **82.7% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Beaudesert Hibernian 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

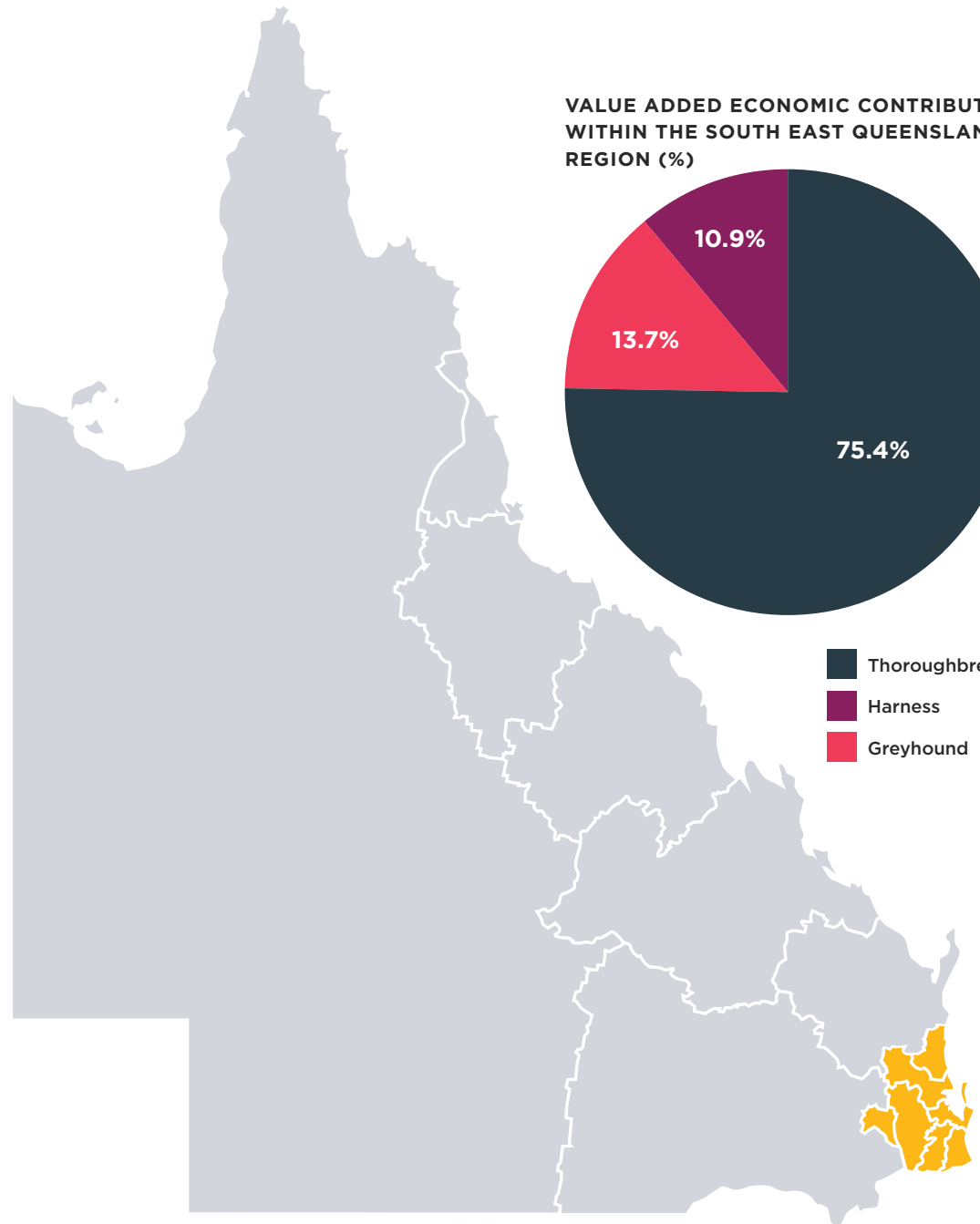
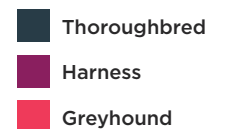
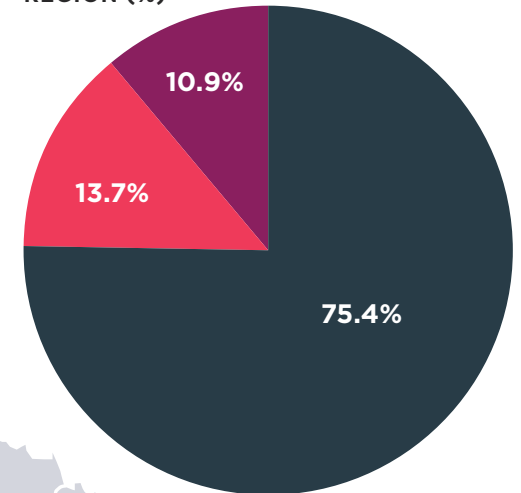
### Harness

- + 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

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE SOUTH EAST QUEENSLAND REGION (%)





### ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$969.1m	\$152.5m	\$180.1m	\$1,301.8m
Total value added	\$1,384.4m	\$200.4m	\$252.0m	\$1,836.9m
Full-time equivalent employment	9,379	1,374	1,670	12,423

### ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	1,037	229	1,186	2,452
Horses and greyhounds in training	5,660	1,090	2,731	9,481

### TOTAL PARTICIPANTS IN RACING

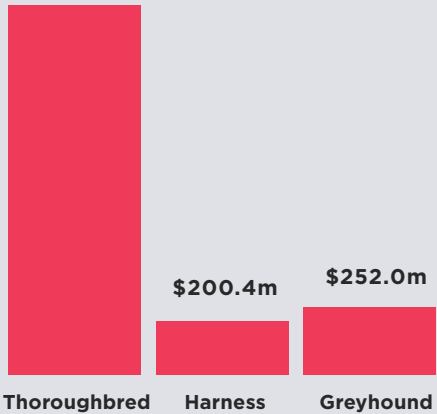
	Thoroughbred	Harness	Greyhound	Total
Breeders	599	188	107	894
Owners & Syndicate Members	15,426	831	3,816	20,073
Trainers	533	240	485	1,258
Breeders staff	516	94	159	769
Stable/Kennel employees	1,666	195	277	2,138
Racing Club & industry staff (FT, PT, casual)	1,944	196	264	2,404
Jockeys, drivers & apprentices	159	140	0	299
Racing club volunteers	85	50	22	157
Volunteers assisting participants	1,153	808	720	2,681
<b>Total participants in the South East Queensland region</b>	<b>22,081</b>	<b>2,742</b>	<b>5,850</b>	<b>30,673</b>

\*Some totals do not add due to rounding.

Race meetings in the South East Queensland region attracted attendances of **475,855** or **62.6% of total attendances** at race meetings in Queensland.

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

**\$1,384.4m**



### AT A GLANCE

#### 16 Racing Clubs

THOROUGHBRED	10
HARNESS	3
GREYHOUND	3

#### 1,031 Race Meetings

THOROUGHBRED	314
HARNESS	301
GREYHOUND	416

#### 9,884 Races

THOROUGHBRED	2,462
HARNESS	2,780
GREYHOUND	4,642

#### 16,204 Racing Club Members

THOROUGHBRED	15,272
HARNESS	586
GREYHOUND	346

#### 475,855 Attendances

THOROUGHBRED	368,594
HARNESS	66,300
GREYHOUND	40,961

\*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 three codes of racing in Queensland.

It has been developed utilising the following source data:

- + Registration data relating to participants and animals
- + Breeding and Training expenditure data captured from surveys with racing participants
- + Expenditure and taxation data provided by wagering operators throughout Australia
- + Data provided by the three codes of racing and racing clubs

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)
- + Northern Territory Thoroughbred Racing Industry
- + 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 (2022)
- + Size and Scope study of the Tasmanian Racing Industry (2021)
- + 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 the NT (2022)
- + Size and Scope of the Western Australian Racing Industry (2021)
- + Size and Scope of the Australian Football League (2022)

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 terms of determining average costs of producing a horse/greyhound (breeding) and preparing a horse/greyhound (training) for racing, IER consults with Queensland Thoroughbred, Harness and Greyhound breeders and trainers. The focus is to determine an average cost of breeding and training at the different lifecycle stages. Data collected in similar jurisdictions is sometimes used to make comparisons and determine per horse/greyhound expenditures.

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.





# 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.

