

Size and Scope of the

# QUEENSLAND RACING INDUSTRY

PREPARED BY IER | APRIL 2024







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# KEY FINDINGS

In 2022/23 the Queensland racing industry was responsible for **generating more than \$2.4 billion in value added contribution** to the Queensland economy – **51% of which directly benefits regional economies**

## DIRECT SPENDING IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Direct Expenditure <sup>1</sup>	\$1,368.9m	\$177.2m	\$256.6m	\$1,802.7m

## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Value Added <sup>2</sup>	\$1,825.5m	\$231.9m	\$344.0m	\$2,401.4m
% of Industry Value Added	76.0%	9.7%	14.3%	
Total Household Income <sup>3</sup>	\$1,066.7m	\$134.0m	\$204.3m	\$1,405.0m
Total FTE Employment	12,077	1,514	2,247	15,839

In 2022/23, the Queensland racing industry generated total direct spending of \$1,802.7 million. This expenditure was responsible for creating a direct value added impact (in terms of wages, salaries and profits) of \$790.8 million. However, the flow-on effects linked to this expenditure increase the size of the industry's value added contribution to in excess of \$2.4 billion.

More than half of the total value added impact occurred in regional areas of Queensland, with the Gold Coast (9.8%), Ipswich (6.6%) and Sunshine Coast (6.1%) regions representing the largest regional areas of racing related economic activity.

The economic output generated by the Queensland racing industry was directly responsible for sustaining 6,697 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 15,839 jobs. This total represents the employment sustained within the industry, as well as the employment that is sustained in supply industries who meet the demand created by racing industry activity.

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

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

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





Of the **15,839 FTE jobs sustained** by the Queensland racing industry over **42% 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 2022/23, over 795,300 attendances were recorded at thoroughbred, harness and greyhound race meetings in Queensland. Approximately 75% of these attendances were made at regional racecourses, with the Gold Coast (14.1%), Sunshine Coast (9.6%), Ipswich (7.1%) and Central Queensland (6.2%) 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 49,770 roles occupied 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 close to 8,300 volunteer roles providing their time and resources. For many of these people, local racing clubs and participants are an important part of their community and provide valuable opportunities to stay active and engage with their community.

There are close to **32 race meetings held in Queensland** every week providing live entertainment to **over 795,300 attendees**

## AT A GLANCE

### RACING ACTIVITY

#### 124 Racing Clubs

<b>THOROUGHbred</b>	<b>115</b>
<b>HARNESS</b>	<b>3</b>
<b>GREYHOUND</b>	<b>6</b>

#### 1,435 TAB Race Meetings

<b>THOROUGHbred</b>	<b>475</b>
<b>HARNESS</b>	<b>301</b>
<b>GREYHOUND</b>	<b>659</b>

#### 218 Non-TAB Race Meetings

<b>THOROUGHbred</b>	<b>215</b>
<b>HARNESS</b>	<b>1</b>
<b>GREYHOUND</b>	<b>2</b>

#### 15,138 Total Races

<b>THOROUGHbred</b>	<b>4,905</b>
<b>HARNESS</b>	<b>2,791</b>
<b>GREYHOUND</b>	<b>7,442</b>

#### 795,325 Attendances

<b>THOROUGHbred</b>	<b>668,332</b>
<b>HARNESS</b>	<b>66,697</b>
<b>GREYHOUND</b>	<b>60,296</b>

#### 3,277 Live Foals/ Pups Bred

<b>THOROUGHbred</b>	<b>1,688</b>
<b>HARNESS</b>	<b>401</b>
<b>GREYHOUND</b>	<b>1,188</b>

#### 14,427 Horses and Greyhounds in Training

<b>THOROUGHbred</b>	<b>9,184</b>
<b>HARNESS</b>	<b>1,108</b>
<b>GREYHOUND</b>	<b>4,135</b>





## AT A GLANCE

### THE PEOPLE

#### 1,392 Breeders

THOROUGHBRED	979
HARNESS	231
GREYHOUND	182

#### 28,265 Owners

THOROUGHBRED	22,197
HARNESS	782
GREYHOUND	5,286

#### 1,955 Trainers

THOROUGHBRED	1,049
HARNESS	258
GREYHOUND	648

#### 4,879 Racing Club & Industry Staff

THOROUGHBRED	4,217
HARNESS	224
GREYHOUND	437

#### 4,649 Staff employed by participants

THOROUGHBRED	3,709
HARNESS	288
GREYHOUND	652

There are **close to 49,770 roles occupied** in the Queensland racing industry as an **employee, participant or volunteer**. Almost **81% of these participants** in racing are in **regional communities**

#### 368 Jockeys & Drivers

THOROUGHBRED	221
HARNESS	147

#### 8,258 Volunteers

THOROUGHBRED	6,209
HARNESS	990
GREYHOUND	1,058

## Historical snapshot

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

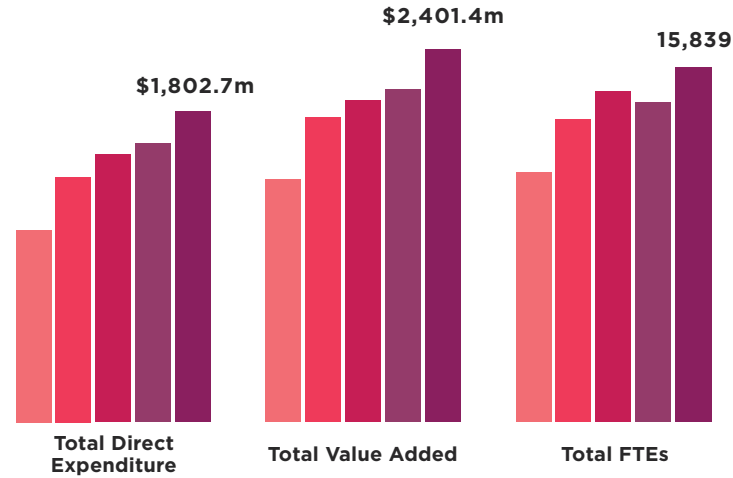
The following charts illustrate the key economic indicators across previous Queensland Racing size and scope studies since 2015/16 (excluding 2016/17).

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.

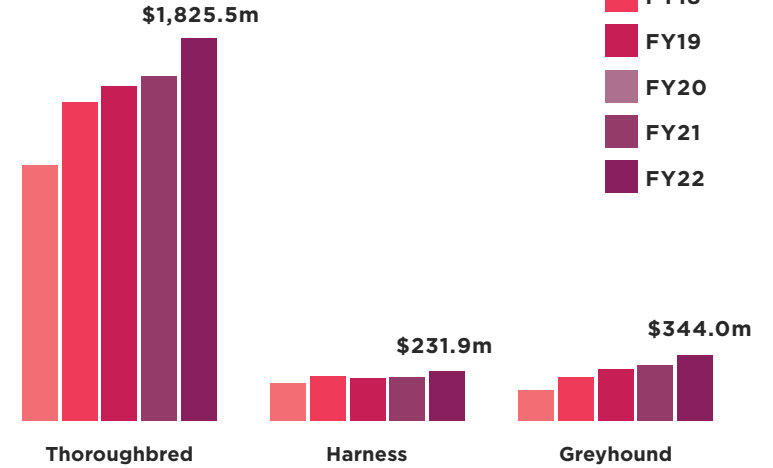
In 2022/23 this pattern was also evident across each of the three codes. Looking at the total direct expenditure it is evident that there was an increase across all three of the codes in 2022/23. Greyhounds experienced the largest growth in total direct expenditure in 2022/23 increasing by 10%, this was followed by Harness (4%) and then Thoroughbred (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.

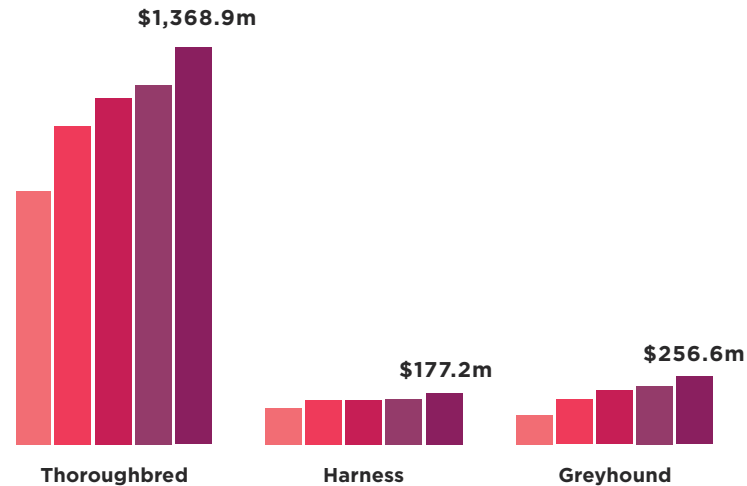
AGGREGATE KEY ECONOMIC INDICATORS



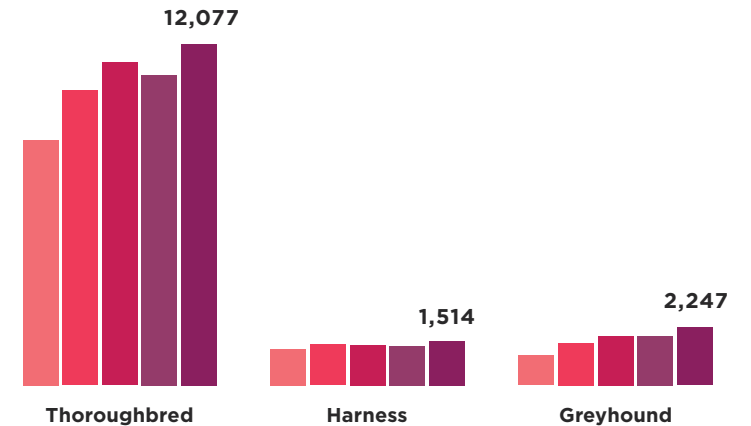
TOTAL VALUE ADDED BY CODE



TOTAL DIRECT EXPENDITURE BY CODE



TOTAL FTE BY CODE







**RACE 8**

NO.	ORIG.	NAME	DRIVER	TRAINER	WGT	AGE	FORM	SP
1	...	...	...	...	...	...	...	...
2	...	...	...	...	...	...	...	...
3	...	...	...	...	...	...	...	...
4	...	...	...	...	...	...	...	...
5	...	...	...	...	...	...	...	...
6	...	...	...	...	...	...	...	...
7	...	...	...	...	...	...	...	...
8	...	...	...	...	...	...	...	...

# INTRODUCTION

In July 2023, Racing Queensland commissioned a study into the size and scope of the three codes of racing in Queensland. The last size and scope study was undertaken in 2022.

## 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:

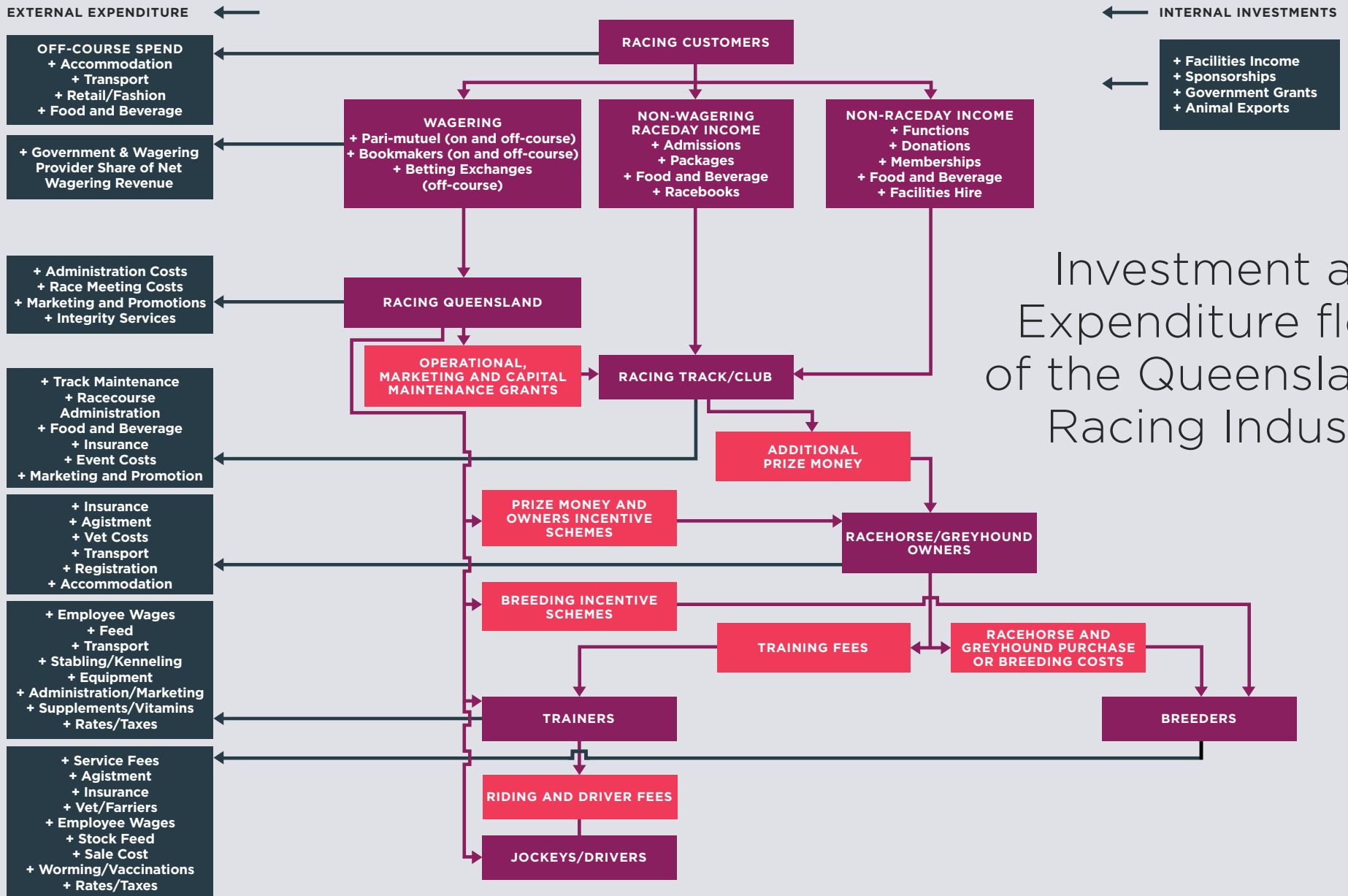
- a.** R9114 - Sport and Physical Recreation Administration,
- b.** R9121 - Horse and Dog Racing Activities,
- c.** R9129 - Training and Racing Activities,
- d.** R9209 - Other Gambling (Racing).

**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



## ECONOMIC IMPACTS

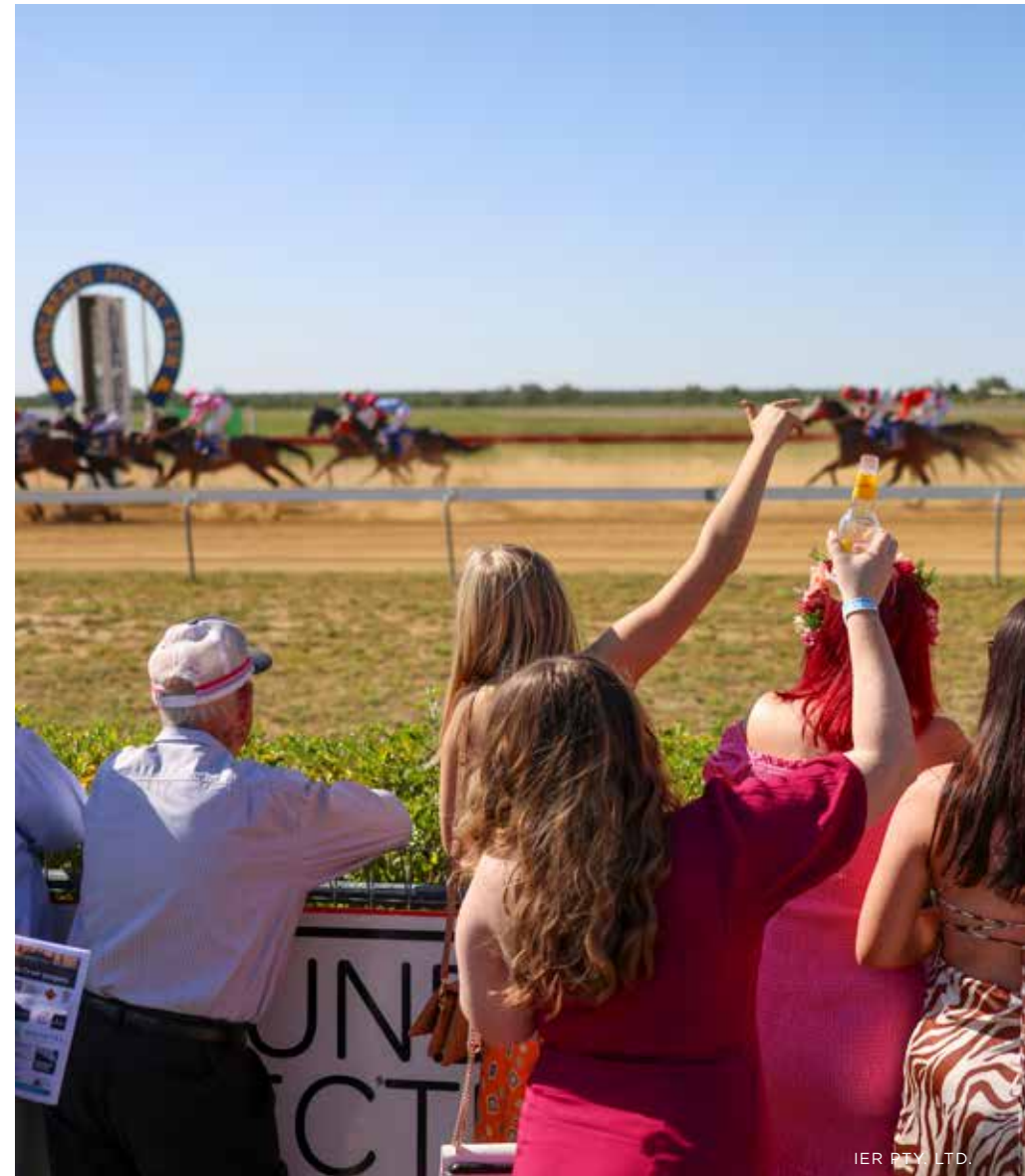
The Queensland racing industry is responsible for **generating in excess of \$1.8 billion in expenditure** in Queensland. More than two thirds of this expenditure was **generated in regional parts of the state.**

### Direct Spending by the Queensland racing industry

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

In 2022/23, the Queensland racing industry generated \$1.8 billion in direct expenditure. The calculation of direct expenditure is based on

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

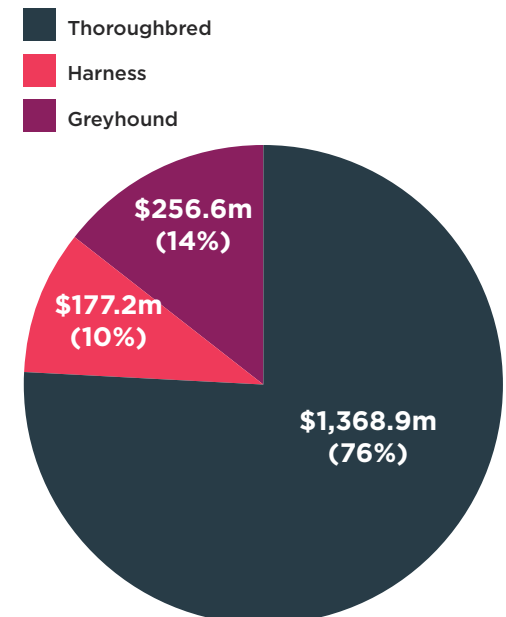


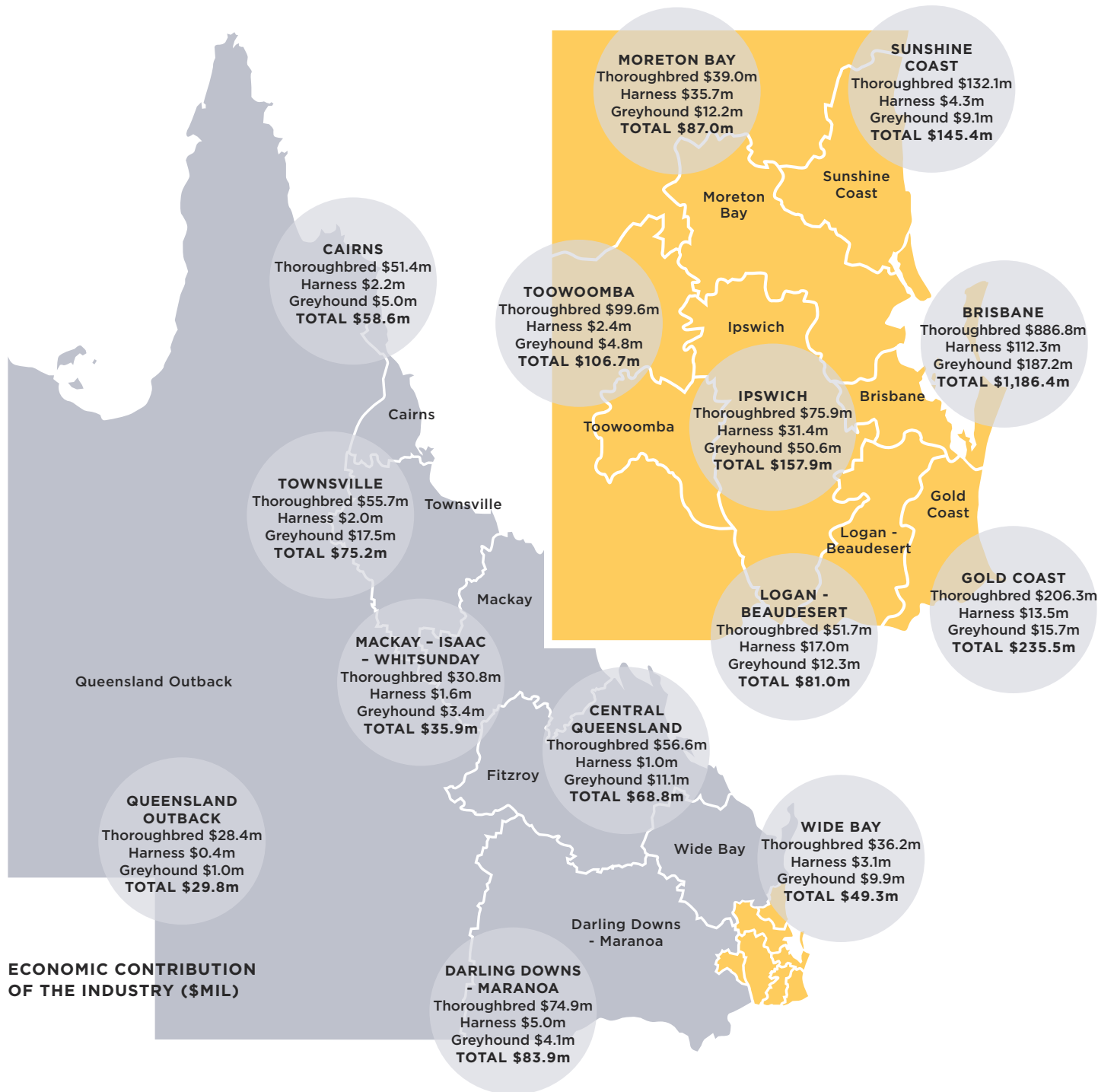
The breakdown of final expenditures is outlined below:

Sources of Final Expenditure	Funded by	Amount	% of Final Expenditure
Production of racing horses and greyhounds (Breeding)	+ Private investment + Service fees revenue + Industry bonuses & incentives	\$136.7m	7.6%
Preparation of racing horses and greyhounds (Training)	+ Private investment + Prize money + Industry bonuses & incentives	\$386.5m	21.4%
Racing Club & Industry Expenditure	+ Wagering product fees + Raceday revenues + Sponsorship & membership + Non-raceday revenues + Nominations	\$591.1m	32.8%
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	\$601.6m	33.4%
Racing customer expenditure off-course	+ Private investment	\$86.8m	4.8%
<b>Total</b>		<b>\$1,802.7m</b>	

Thoroughbred racing is responsible for generating three quarters of the final expenditures. More than 66% of this expenditure was in regional parts of the state. Harness racing is responsible for generating over 10% of the final expenditures. For every \$10 spent, \$7 is in regional parts of the state. Greyhound racing is responsible for generating 14% of the final expenditures. Close to 60% of this expenditure is in regional parts of the state.

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





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

## Economic Contribution of the Industry

The Queensland racing industry is responsible for generating a real gross value added contribution of \$2,401.4 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.

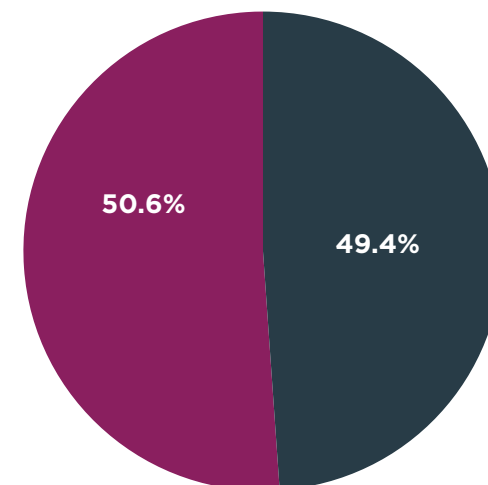
When considering the value added contribution of \$2,401.4 million generated by the Queensland racing industry, it is important to note that it is made up of:

- ✦ Direct value added (\$790.8 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 (\$1,610.6 million) – represents the value added activity (wages, salaries and gross operating surplus) generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this.

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

#### QUEENSLAND RACING INDUSTRY ECONOMIC IMPACT BY REGION

- Brisbane
- Regional QLD



## Participants in the Queensland racing industry

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

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

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

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.

More than 31,600 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 8,258 volunteer roles occupied, in which individuals provide their time and skills

### TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	979	231	182	1,392
Owners	22,197	782	5,286	28,265
Trainers	1,049	258	648	1,955
Racing Club & Industry Staff (FT, PT, Casual)	4,217	224	437	4,879
Breeders Staff	843	116	271	1,230
Stable/Kennel Employees	2,866	172	381	3,419
Jockeys & Drivers	221	147	0	368
Racing club volunteers	4,021	40	37	4,098
Volunteers assisting participants	2,188	950	1,021	4,160
<b>Total</b>	<b>38,582</b>	<b>2,920</b>	<b>8,263</b>	<b>49,766</b>

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

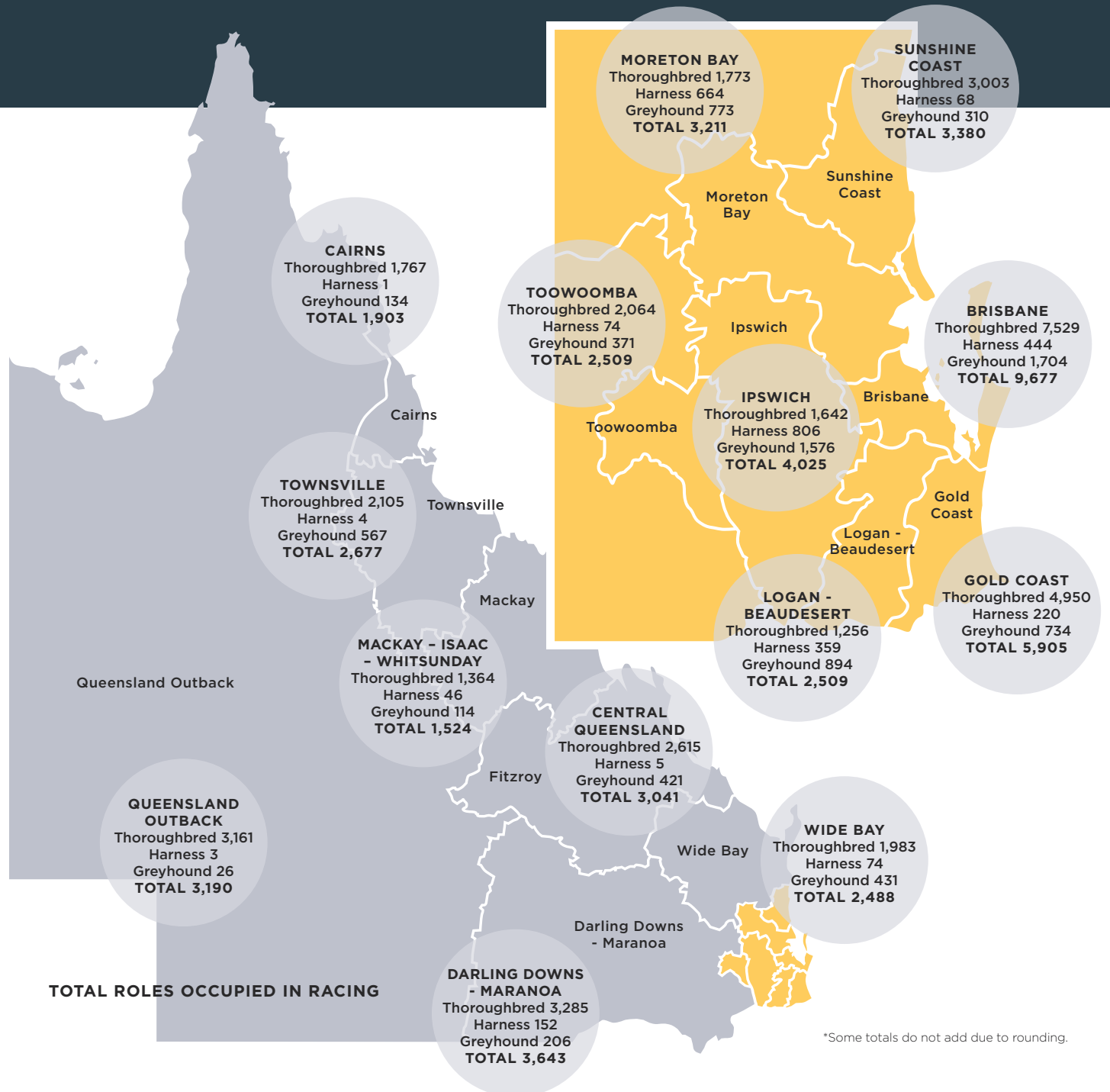
\*Racing Club & Industry staff includes:

- 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)

in a variety ways 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 49,766 roles occupied in the Queensland racing industry as a participant, employee or volunteer. Close to 81% of these Queensland roles are in regional parts of the State.





\*Some totals do not add due to rounding.

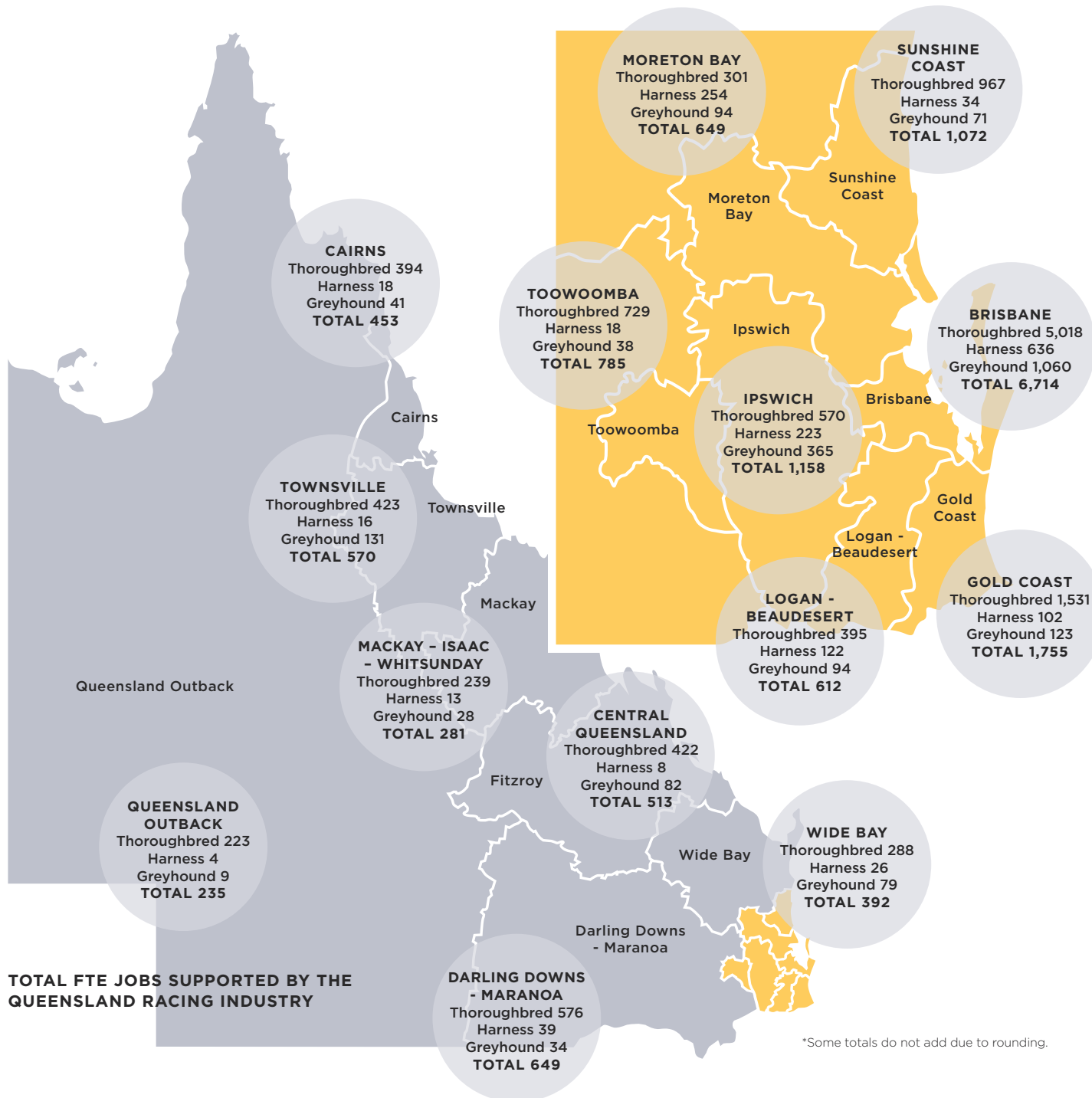


# Employment Generated by Racing in Queensland

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 2022/23, the economic activity generated by the Queensland racing industry directly sustained 6,697 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 9,141 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Queensland racing industry was 15,839 FTE jobs.

The FTE positions that are sustained by the Queensland racing industry resulted in close to \$1,405 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.

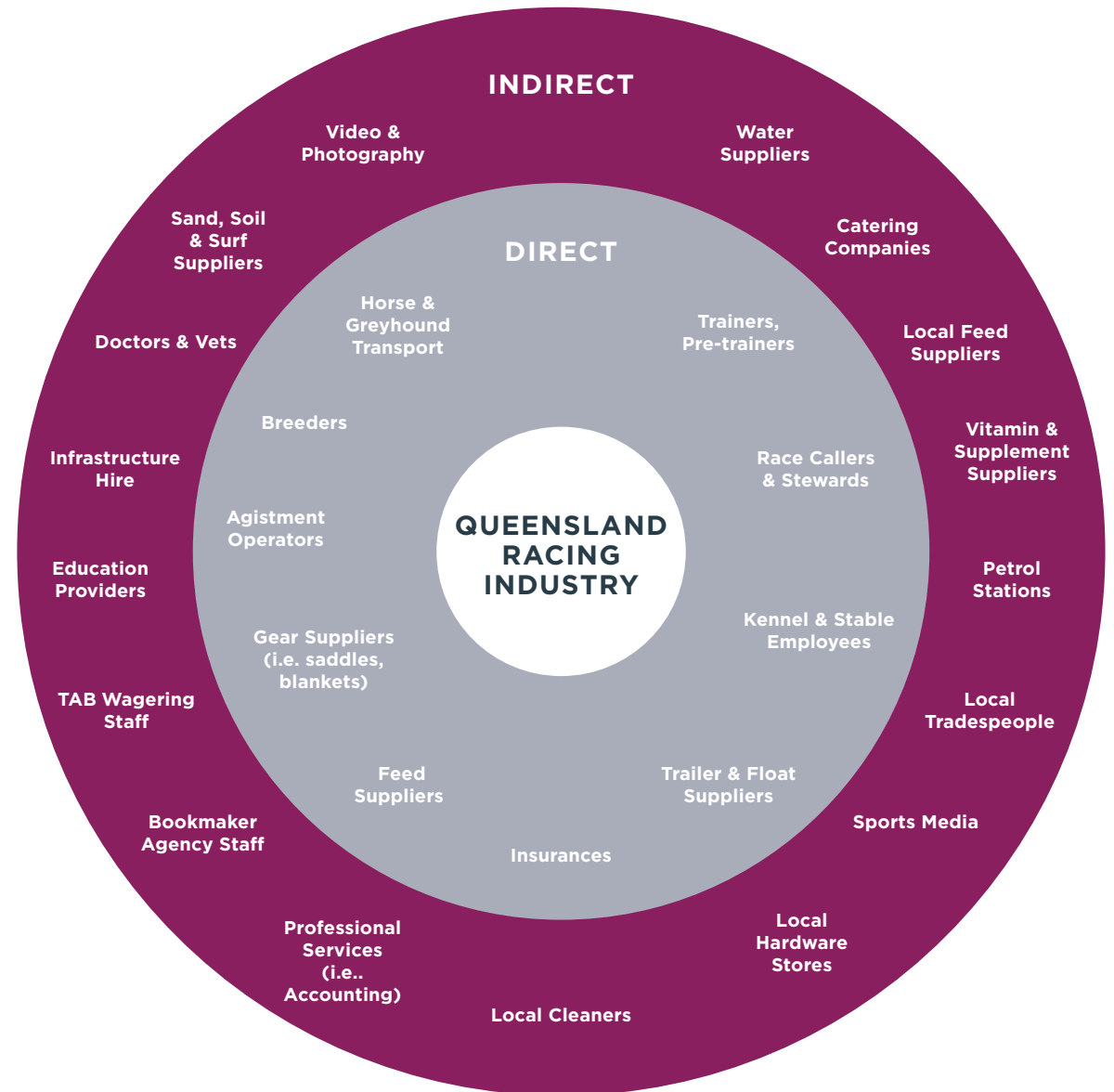
# The Supplier Network

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
Health care and social assistance	+ Direct value added - \$114.0m + Direct FTE jobs - 1,043	+ Taxation on wagering revenue generated by the Racing Queensland product
Public administration and safety	+ Direct value added - \$105.2m + Direct FTE jobs - 716	+ Taxation on wagering revenue generated by the Racing Queensland product
Other gambling services	+ Direct value added - \$104.0m + Direct FTE jobs - 972	+ Bookmaker operation + Gambling activity





## Case study

### STUDENTS GETTING THE JUMP ON INDUSTRY JOBS WITH AITC EQUINE ACADEMY

The next generation of Queensland's racing industry workers are being given a leg up by the Australian Industry Trade College Equine Academy.

Originally starting in conjunction with the Gold Coast Turf Club, the program provides Year 10 and Year 11 students with work experience opportunities within the industry, with the potential of developing into school-based traineeships or apprenticeships.

The idea for the program came about when the club identified a shortage of resources within racing, particularly around the Gold Coast area. While Racing Queensland's focus centres around core racing vocations like track work riders, stablehands and apprentices, the AITC Equine Academy looks across the industry more broadly, as it looks to develop vets, farriers, groundskeepers, breeders and media.

Starting in May 2022, five students from the Gold Coast were the first to graduate out of the academy in late 2023.

Ella Batten and Jenna Tetley were two students who signed on to school-based traineeships with the stable of Adam Campton, with Ella working as a stablehand and progressing to a trackwork rider.

Additionally, brothers Dylan and Tiago Comes have started turf management apprenticeships at the GCTC - timely with the recent completion of the new grass surface at Aquis Park.

The success of the program has now seen it expand to incorporate academies in Brisbane, the Sunshine Coast, Ipswich and Toowoomba.

The AITC campus in Toowoomba is working closely with the Toowoomba Turf Club who had their first intake in July 2023, while students at the Ipswich campus, Brisbane campus and Sunshine Coast campus are all aligned with the race clubs in those areas.





## Case study

### HIGHGROVE STUD

It's the Darling Downs stud that has produced 26 Stakes winners, and there is a secret behind the success of Highgrove Stud.

The property near Westbrook outside Toowoomba has been run by Ron Gilbert and wife Debbie for 24 years.

A passionate farmer, Ron bought the property and built the farm across 90 acres, and was committed from the first day to sustainable pasture management.

The property currently holds 30 mares who feed twice a day for seven days a week, but the farm does not grow its own hay.

Instead, it buys it from suppliers to avoid cutting anything off the land. A mulcher is used to trim grass when it gets too high, with the trimmings feeding the soil and keeping the goodness contained.

It has led to improved pasture for horses, with the sale price of Highgrove's yearlings reflecting the quality of the feed.

Ron says that the bone density tests had produced top results for his yearlings, reflecting the importance of mineral rich soil while raising his equine stars.

The 2010 Newmarket Handicap winner Wanted is one of the products of the Highgrove Stud, along with with Snapped, who won the 2022/23 G3 Proud Miss Stakes as a 3-year old.

Highgrove Stud is a prime example of the true value that the journey towards greatness in racing is important from the ground up.



# RACING'S PARTICIPANTS AND ANIMALS

## The Breeding Industry

### NUMBER OF BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	16	0	0	16
Central Queensland	75	0	9	84
Darling Downs - Maranoa	149	18	5	172
Gold Coast	136	19	15	170
Ipswich	54	57	66	177
Logan - Beaudesert	64	29	33	126
Mackay - Isaac - Whitsunday	27	7	0	34
Moreton Bay	49	52	16	117
Queensland - Outback	18	0	1	19
Sunshine Coast	68	8	5	81
Toowoomba	95	4	12	111
Townsville	28	0	9	37
Wide Bay	62	9	6	77
<b>Total Regional Queensland</b>	<b>841</b>	<b>203</b>	<b>177</b>	<b>1,220</b>
Brisbane	138	28	5	172
<b>Total</b>	<b>979</b>	<b>231</b>	<b>182</b>	<b>1,392</b>

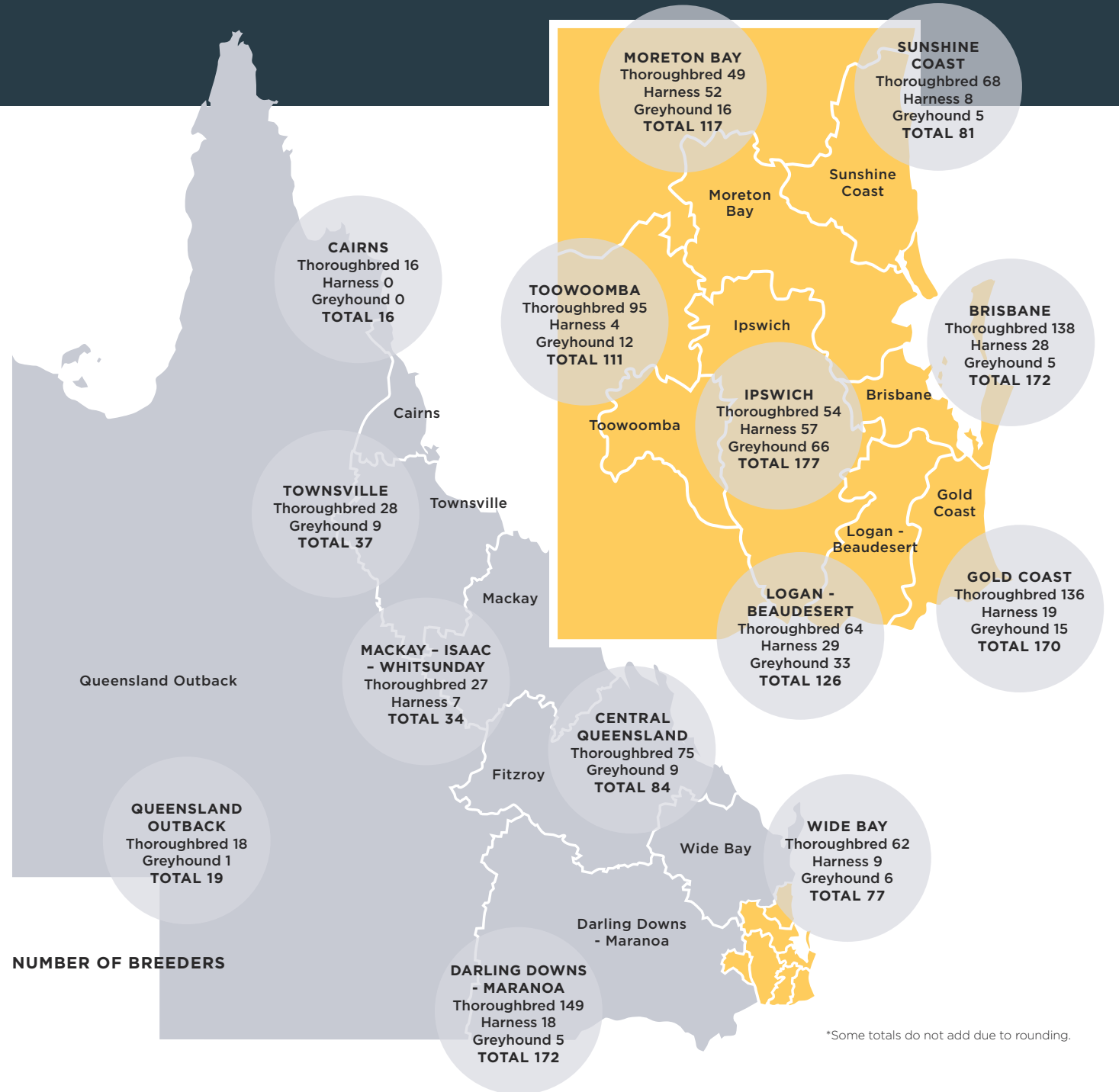
\*Includes part owners of broodmares/breeding females and stallions/sires

### NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	14	0	0	14
Central Queensland	65	0	13	78
Darling Downs - Maranoa	128	9	8	145
Gold Coast	117	10	22	149
Ipswich	46	29	98	173
Logan - Beaudesert	55	14	49	118
Mackay - Isaac - Whitsunday	23	4	0	27
Moreton Bay	42	26	24	92
Queensland - Outback	15	0	1	17
Sunshine Coast	58	4	7	70
Toowoomba	82	2	17	101
Townsville	24	0	13	37
Wide Bay	54	4	9	67
<b>Total Regional Queensland</b>	<b>724</b>	<b>101</b>	<b>263</b>	<b>1,088</b>
Brisbane	119	14	8	141
<b>Total</b>	<b>843</b>	<b>116</b>	<b>271</b>	<b>1,230</b>

\*Some totals do not add due to rounding.

There are **close to 1,400 individuals** who either breed, or have an ownership interest in a broodmare, broodmatron, stallion or sire. They are supported by **1,230 employees and 1,717 volunteers** – meaning that the industry is supported by **more than 4,300 roles directly involved in breeding activities** across the three codes



The breeding sector provides and replenishes the racing horses and greyhounds for the Queensland racing industry. There are 1,392 registered breeders in Queensland across the three codes of racing. At the top end of the breeding sector, large stud farms employ many staff and produce large numbers of foals each year. At the other end of the scale, there are a large number of hobby breeders also producing foals and pups.

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

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

#### NUMBER OF VOLUNTEERS ASSISTING BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	13	0	0	13
Central Queensland	60	0	15	75
Darling Downs - Maranoa	119	51	9	178
Gold Coast	108	54	25	187
Ipswich	43	160	109	312
Logan - Beaudesert	51	81	54	186
Mackay - Isaac - Whitsunday	22	20	0	41
Moreton Bay	39	146	26	212
Queensland - Outback	14	0	2	16
Sunshine Coast	54	22	8	85
Toowoomba	76	10	19	106
Townsville	22	0	15	37
Wide Bay	50	24	10	84
<b>Total Regional Queensland</b>	<b>673</b>	<b>568</b>	<b>290</b>	<b>1,530</b>
Brisbane	111	71	5	187
<b>Total</b>	<b>783</b>	<b>638</b>	<b>296</b>	<b>1,717</b>

\*Some totals do not add due to rounding.



# Producing Racing Animals

## NUMBER OF STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Cairns	3	0	0	3
Central Queensland	9	0	0	9
Darling Downs - Maranoa	15	5	0	20
Gold Coast	17	1	1	19
Ipswich	9	9	6	24
Logan - Beaudesert	5	1	0	6
Mackay - Isaac - Whitsunday	2	0	0	2
Moreton Bay	0	9	0	9
Queensland - Outback	1	0	0	1
Sunshine Coast	2	0	0	2
Toowoomba	7	0	1	8
Townsville	2	0	0	2
Wide Bay	10	0	1	11
<b>Total Regional Queensland</b>	<b>83</b>	<b>25</b>	<b>9</b>	<b>117</b>
Brisbane	1	0	0	1
<b>Total</b>	<b>84</b>	<b>25</b>	<b>9</b>	<b>118</b>



## NUMBER OF BROODMARES/BREEDING FEMALES COVERED

	Thoroughbred	Harness	Greyhound	Total
Cairns	12	0	0	12
Central Queensland	106	0	9	115
Darling Downs - Maranoa	889	68	4	961
Gold Coast	245	50	9	304
Ipswich	353	163	72	588
Logan - Beaudesert	476	46	26	549
Mackay - Isaac - Whitsunday	39	7	2	48
Moreton Bay	35	87	13	135
Queensland - Outback	4	0	0	4
Sunshine Coast	73	15	4	92
Toowoomba	504	5	14	523
Townsville	22	0	6	28
Wide Bay	123	13	3	139
Total Regional Queensland	2,882	453	164	3,499
Brisbane	22	87	4	113
<b>Total</b>	<b>2,904</b>	<b>540</b>	<b>168</b>	<b>3,612</b>

## NUMBER OF FOALS/PUPS PRODUCED

	Thoroughbred	Harness	Greyhound	Total
Cairns	7	0	1	8
Central Queensland	62	0	70	132
Darling Downs - Maranoa	517	52	29	598
Gold Coast	143	38	75	256
Ipswich	205	120	515	840
Logan - Beaudesert	277	31	173	482
Mackay - Isaac - Whitsunday	23	5	19	47
Moreton Bay	20	70	87	177
Queensland - Outback	2	0	0	2
Sunshine Coast	43	11	34	88
Toowoomba	293	5	110	407
Townsville	13	0	34	47
Wide Bay	72	9	20	100
Total Regional Queensland	1,676	340	1,168	3,184
Brisbane	13	61	20	94
<b>Total</b>	<b>1,688</b>	<b>401</b>	<b>1,188</b>	<b>3,277</b>

\*Some totals do not add due to rounding.

**COST OF PRODUCING RACEHORSES AND GREYHOUNDS**

	Thoroughbred	Harness	Greyhound	Total
Cairns	\$0.4	\$0.0	\$0.0	\$0.4
Central Queensland	\$3.3	\$0.0	\$0.5	\$3.8
Darling Downs - Maranoa	\$35.9	\$2.4	\$0.2	\$38.5
Gold Coast	\$11.1	\$1.6	\$0.5	\$13.1
Ipswich	\$11.7	\$5.1	\$3.4	\$20.2
Logan - Beaudesert	\$17.0	\$1.4	\$1.2	\$19.6
Mackay - Isaac - Whitsunday	\$1.2	\$0.2	\$0.1	\$1.5
Moreton Bay	\$1.0	\$2.9	\$0.6	\$4.5
Queensland - Outback	\$0.1	\$0.0	\$0.0	\$0.1
Sunshine Coast	\$2.2	\$0.5	\$0.2	\$2.9
Toowoomba	\$22.6	\$0.2	\$0.7	\$23.5
Townsville	\$0.7	\$0.0	\$0.2	\$0.9
Wide Bay	\$3.8	\$0.4	\$0.1	\$4.3
<b>Total Regional Queensland</b>	<b>\$110.9</b>	<b>\$14.6</b>	<b>\$7.7</b>	<b>\$133.2</b>
Brisbane	\$0.6	\$2.6	\$0.1	\$3.4
<b>Total (m)</b>	<b>\$111.6</b>	<b>\$17.2</b>	<b>\$7.8</b>	<b>\$136.6</b>

\*Some totals do not add due to rounding.





# Economic Contribution of the Breeding Industry

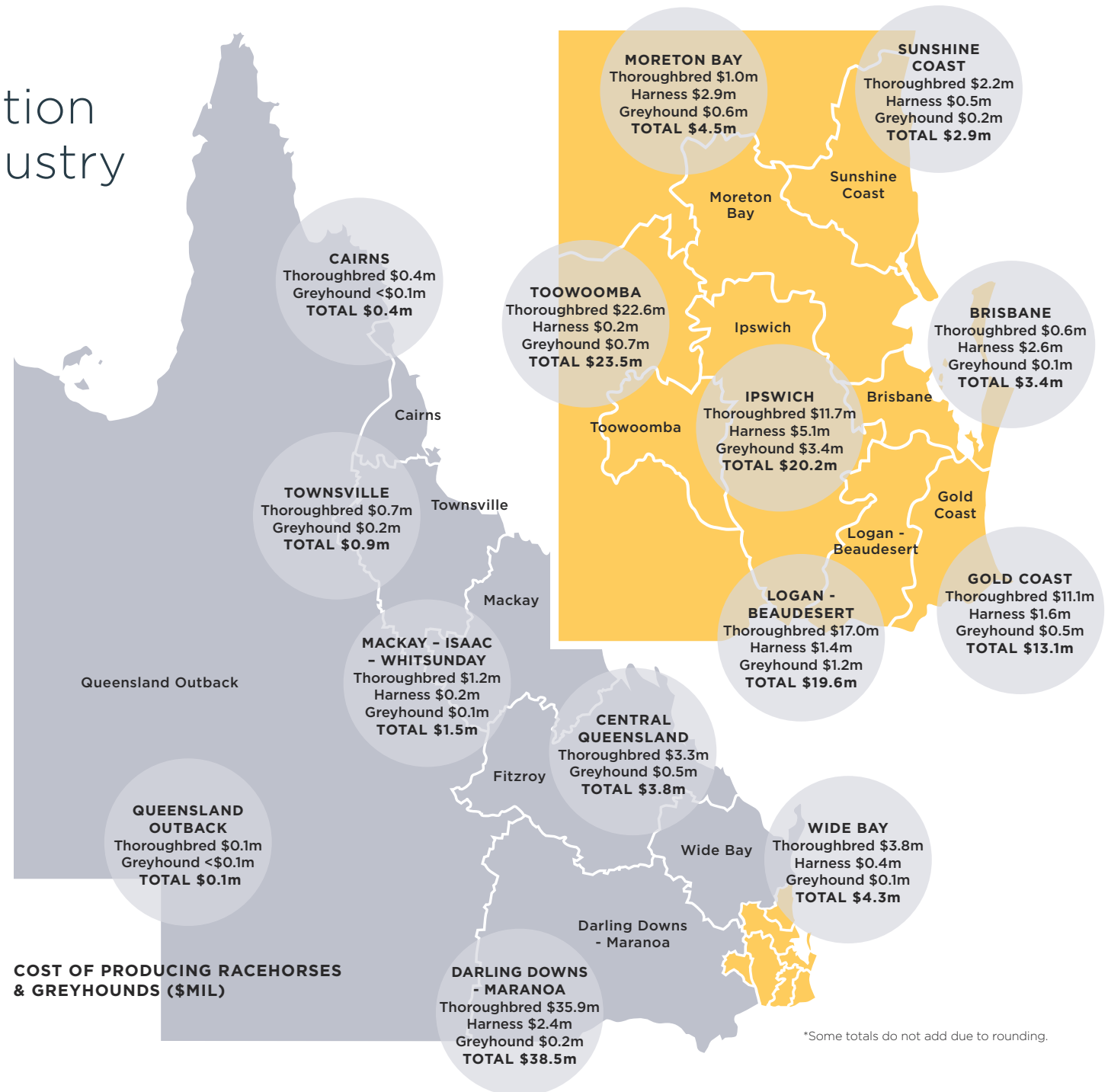
In 2022/23, breeders in the Queensland racing industry spent close to \$137 million on the production of racing stock. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of broodmares, broodmatrons, stallions 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 three quarters of all breeding related expenditure occurs in four Queensland regions. The Darling Downs - Maranoa (28.1%), Toowoomba (17.2%), Ipswich (14.8%) and Logan - Beaudesert (14.3%) 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 2022/23, there were 2,904 broodmares covered in Queensland, producing 1,688 foals. This thoroughbred breeding activity is responsible for generating close to \$111.6 million in the production and care of racing stock.

Darling Downs - Maranoa	\$35.9m (32.2%)
Toowoomba	\$22.6m (20.3%)
Logan - Beaudesert	\$17.0m (15.2%)

**HARNESS RACING**

In 2022/23 there were 540 broodmares covered in Queensland, producing 401 foals. This standardbred breeding activity is responsible for generating more than \$17.2 million in the production and care of racing stock.

Ipswich	\$5.1m (29.7%)
Moreton Bay	\$2.9m (16.7%)
Brisbane	\$2.6m (15.4%)

**GREYHOUND RACING**

In 2022/23, there were 168 breeding females covered in Queensland, producing 1,188 pups. This greyhound breeding activity is responsible for generating more than \$7.8 million in the production and care of greyhound racing stock.

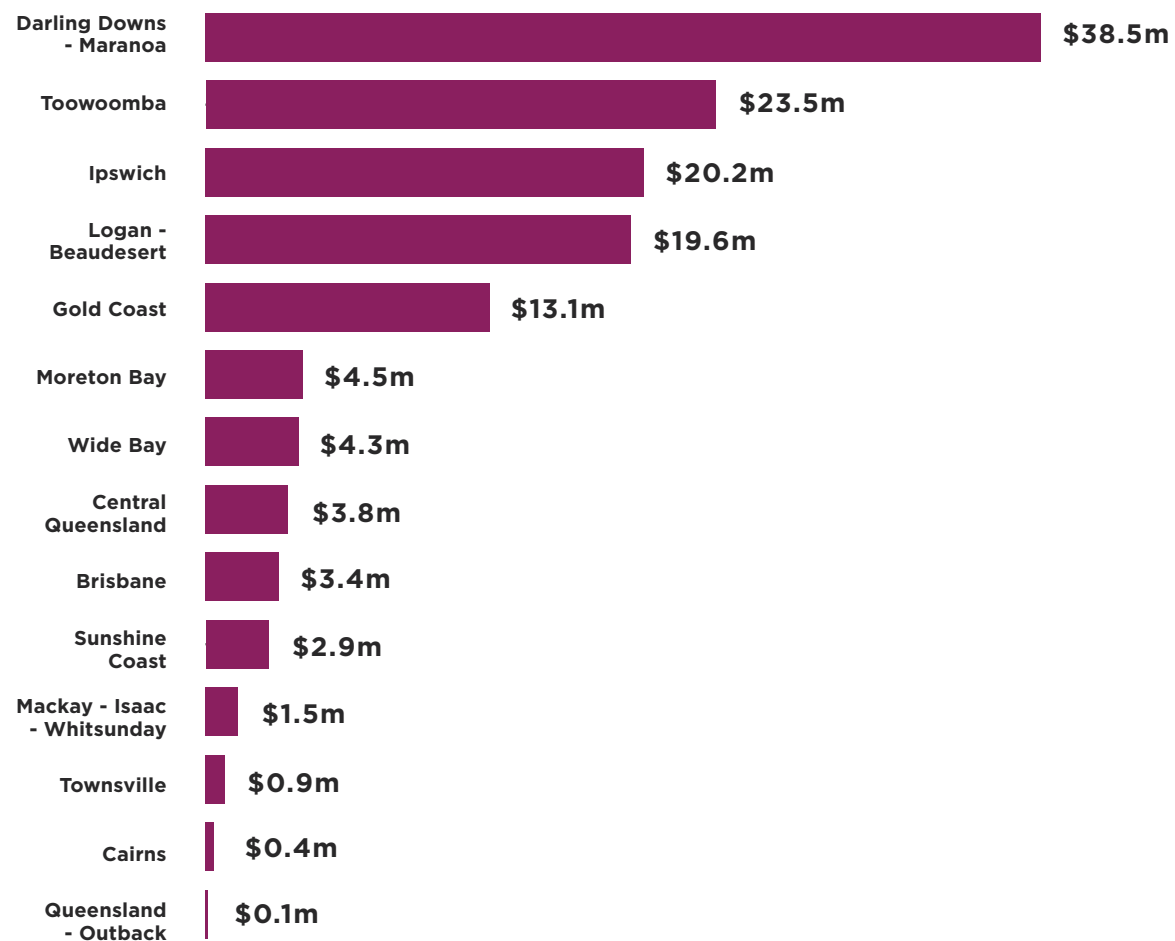
Ipswich	\$3.4m (43.3%)
Logan - Beaudesert	\$1.2m (14.7%)
Toowoomba	\$0.7m (9.2%)





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

#### EXPENDITURE BY THE BREEDING SECTOR



## Case study

### IPSWICH CUP

#### OVERVIEW

Dating back to 1866, the Ipswich Cup is the social event of the year for the greater Ipswich region with almost 14,000 in attendance to witness the race. The event features a host of raceday precincts where patrons can enjoy the racing and social festivities, notably the infield which is a hive of activity with nationally and internationally recognised DJ's.

#### KEY TOURISM IMPACTS

In 2023, an economic impact assessment of the Ipswich Cup was undertaken by IER. The study found that the event generated in total expenditure stimulus of more than \$3.4 million for Ipswich's regional economy.

Furthermore, the Ipswich Cup was responsible for attracting close to \$1.4 million in new money for the region. This money was generated by more than 5,500 visitors to Ipswich, who were responsible for generating more than 4,100 visitor nights for the Queensland economy.

#### KEY SOCIAL IMPACTS

As a part of the study, attendees were asked to consider the social impact of the event. The research found strong engagement with the role the cup plays in the local region.

Approximately 9 in every 10 attendees agreed that "Ipswich is a great location for the event" and that "local residents should feel proud of the event" as well as agreeing the "event adds to the appeal of Ipswich."

The following tables illustrate the key impacts to the Ipswich Region:

Tourism Impact	2023
In-scope visitors (spectators, sponsors and participants)	5,475
Total expenditure stimulus	\$3.4m
In-scope expenditure for the QLD economy	\$1.4m
Visitor Nights generated in QLD	4,123

#### SOCIAL IMPACTS OF 2023 IPSWICH CUP (NET AGREE)





# THE TRAINING INDUSTRY

## The Training Industry

### NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	53	0	11	64
Central Queensland	108	0	29	137
Darling Downs - Maranoa	113	9	13	136
Gold Coast	104	18	28	151
Ipswich	45	98	184	327
Logan - Beaudesert	59	44	104	207
Mackay - Isaac - Whitsunday	31	0	5	36
Moreton Bay	31	61	66	159
Queensland - Outback	77	0	1	77
Sunshine Coast	84	2	12	98
Toowoomba	98	8	28	138
Townsville	87	0	64	151
Wide Bay	69	7	59	135
<b>Total Regional Queensland</b>	<b>958</b>	<b>248</b>	<b>605</b>	<b>1,811</b>
Brisbane	91	10	43	144
<b>Total</b>	<b>1,049</b>	<b>258</b>	<b>648</b>	<b>1,955</b>

### NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Cairns	181	0	3	184
Central Queensland	171	0	22	193
Darling Downs - Maranoa	204	5	5	214
Gold Coast	330	23	25	378
Ipswich	133	47	84	265
Logan - Beaudesert	162	32	50	244
Mackay - Isaac - Whitsunday	114	1	6	121
Moreton Bay	148	46	43	236
Queensland - Outback	132	0	1	133
Sunshine Coast	284	2	11	297
Toowoomba	293	5	23	321
Townsville	186	0	32	218
Wide Bay	107	1	30	138
<b>Total Regional Queensland</b>	<b>2,445</b>	<b>162</b>	<b>335</b>	<b>2,941</b>
Brisbane	421	10	46	478
<b>Total</b>	<b>2,866</b>	<b>172</b>	<b>381</b>	<b>3,419</b>



#### NUMBER OF VOLUNTEERS ASSISTING TRAINERS

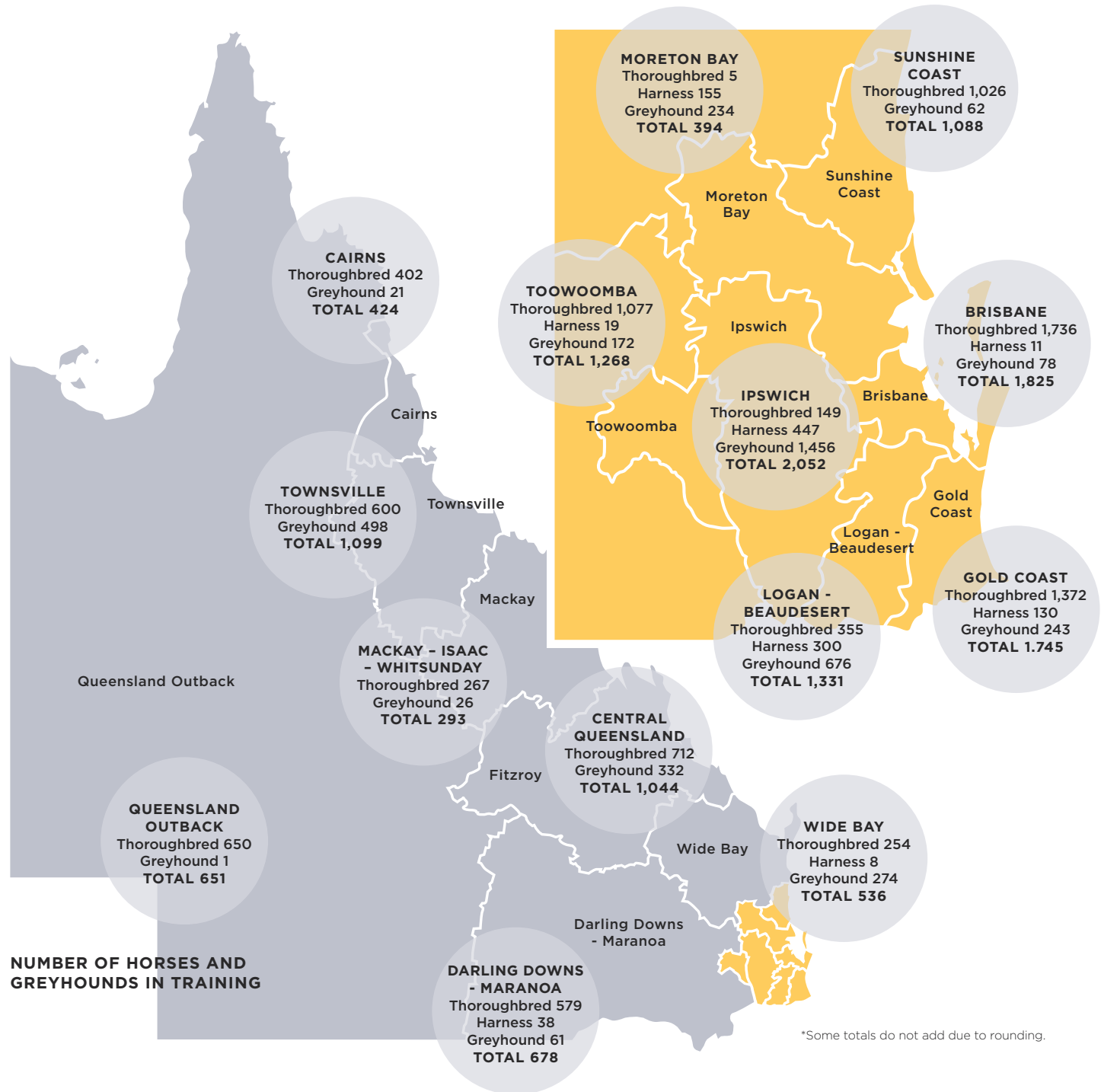
	Thoroughbred	Harness	Greyhound	Total
Cairns	75	0	12	87
Central Queensland	151	0	32	183
Darling Downs - Maranoa	159	11	14	184
Gold Coast	146	22	31	199
Ipswich	63	117	203	382
Logan - Beaudesert	82	52	115	249
Mackay - Isaac - Whitsunday	43	0	6	48
Moreton Bay	44	73	73	190
Queensland - Outback	107	0	1	108
Sunshine Coast	117	2	13	133
Toowoomba	137	10	30	177
Townsville	122	0	71	193
Wide Bay	97	8	65	170
<b>Total Regional Queensland</b>	<b>1,342</b>	<b>296</b>	<b>665</b>	<b>2,303</b>
Brisbane	64	16	60	139
<b>Total</b>	<b>1,405</b>	<b>312</b>	<b>726</b>	<b>2,443</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 prize money won.

During the 2022/23 racing season, there were close to 2,000 horse and greyhound trainers providing services to owners in Queensland. These trainers were also supported by more than 2,400 volunteers. The majority of these trainers operate in regional parts of the State.

Overall, there were more than 14,400 racing horses and greyhounds in training in Queensland in 2022/23. Brisbane (18.9%), the Gold Coast (14.9%) and Toowoomba (11.7%) represent the largest areas of thoroughbred training activity. In the Harness and Greyhound racing industries, Ipswich (36.3%), Logan - Beaudesert (18.6%) and Townsville (9.5%) make up the majority of the training activity.



\*Some totals do not add due to rounding.







# Owners

## OWNERS OF RACING HORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	958	0	108	1,066
Central Queensland	1,303	5	261	1,569
Darling Downs - Maranoa	1,058	40	153	1,251
Gold Coast	3,506	63	587	4,157
Ipswich	943	187	733	1,863
Logan - Beaudesert	744	81	490	1,314
Mackay - Isaac - Whitsunday	748	15	98	861
Moreton Bay	1,347	172	520	2,039
Queensland - Outback	573	3	19	596
Sunshine Coast	2,058	26	253	2,337
Toowoomba	1,053	27	242	1,322
Townsville	1,173	4	305	1,482
Wide Bay	935	16	217	1,168
<b>Total Regional Queensland</b>	<b>16,399</b>	<b>639</b>	<b>3,987</b>	<b>21,024</b>
Brisbane	5,715	143	1,299	7,158
<b>Total</b>	<b>22,197</b>	<b>782</b>	<b>5,286</b>	<b>28,265</b>

\*Some totals do not add due to rounding.

## NUMBER OF TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,558	0	0	1,558
Central Queensland	2,374	0	5,798	8,172
Darling Downs - Maranoa	1,669	0	0	1,669
Gold Coast	2,885	0	0	2,885
Ipswich	3,180	1,162	17,360	21,702
Logan - Beaudesert	820	0	0	820
Mackay - Isaac - Whitsunday	1,708	0	0	1,720
Moreton Bay	842	10,685	0	11,527
Queensland - Outback	510	0	0	510
Sunshine Coast	5,249	0	0	5,249
Toowoomba	4,146	0	0	4,146
Townsville	2,750	0	7,743	10,493
Wide Bay	202	0	1,469	1,671
<b>Total Regional Queensland</b>	<b>27,893</b>	<b>11,847</b>	<b>32,370</b>	<b>72,110</b>
Brisbane	6,771	12,765	23,350	42,886
<b>Total</b>	<b>34,664</b>	<b>24,612</b>	<b>55,720</b>	<b>114,996</b>

## NUMBER OF NON-TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	668	0	0	668
Central Queensland	1,002	0	0	1,002
Darling Downs - Maranoa	1,483	0	0	1,483
Gold Coast	0	0	0	0
Ipswich	186	0	0	186
Logan - Beaudesert	0	0	0	0
Mackay - Isaac - Whitsunday	629	0	0	629
Moreton Bay	46	47	0	93
Queensland - Outback	2,921	0	0	2,921
Sunshine Coast	0	0	0	0
Toowoomba	48	0	0	48
Townsville	464	0	0	464
Wide Bay	1,097	0	79	1,176
Total Regional Queensland	8,544	47	79	8,670
Brisbane	0	0	78	78
<b>Total</b>	<b>8,544</b>	<b>47</b>	<b>157</b>	<b>8,748</b>

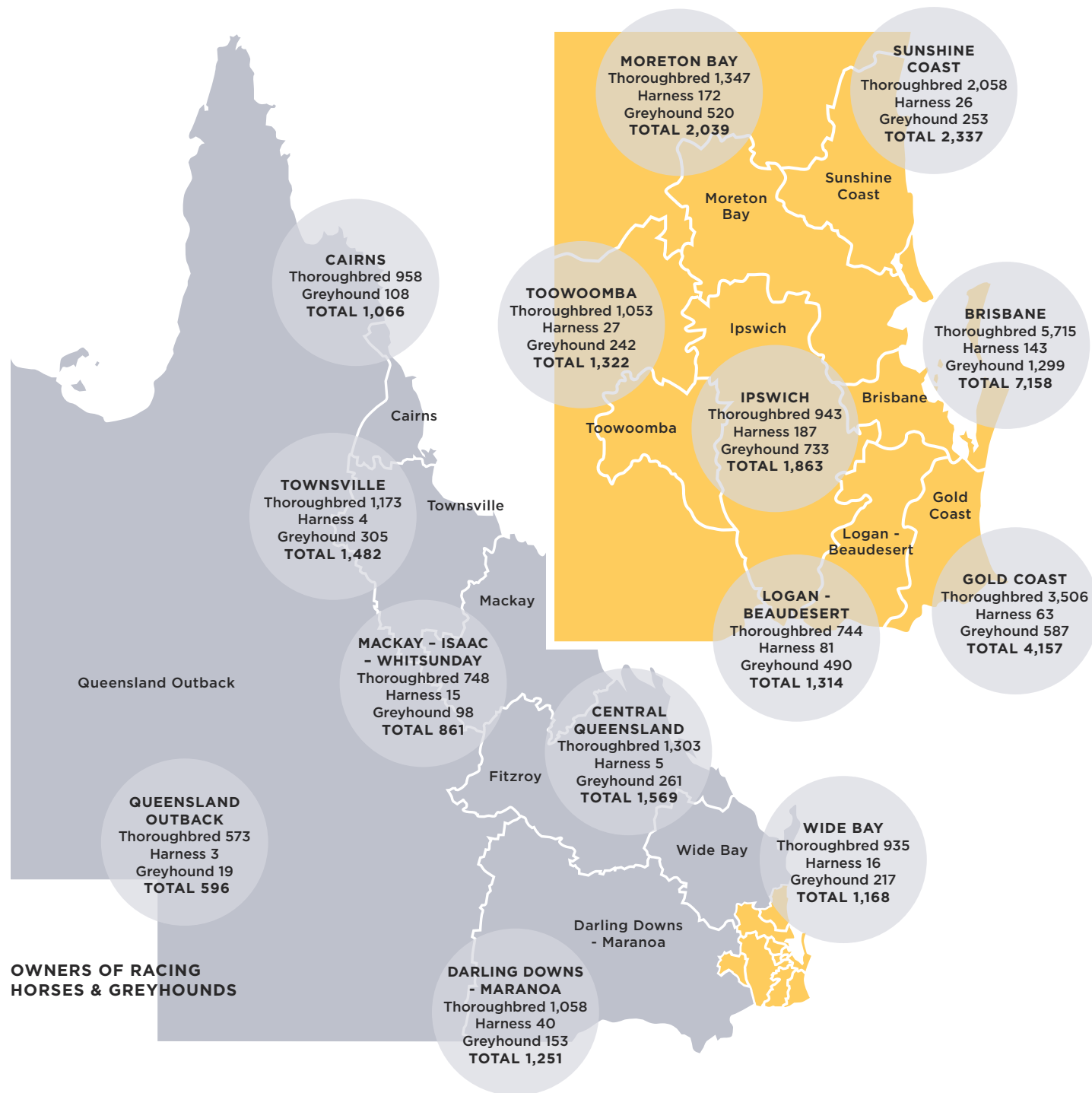
## TOTAL RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2,226	0	0	2,226
Central Queensland	3,376	0	5,798	9,174
Darling Downs - Maranoa	3,152	0	0	3,152
Gold Coast	2,885	0	0	2,885
Ipswich	3,366	1,162	17,360	21,888
Logan - Beaudesert	820	0	0	820
Mackay - Isaac - Whitsunday	2,337	0	0	2,337
Moreton Bay	888	10,732	0	11,620
Queensland - Outback	3,431	0	0	3,431
Sunshine Coast	5,249	0	0	5,249
Toowoomba	4,194	0	0	4,194
Townsville	3,214	0	7,743	10,957
Wide Bay	1,299	0	1,548	2,847
Total Regional Queensland	36,437	11,894	32,449	80,780
Brisbane	6,771	12,765	23,428	42,964
<b>Total</b>	<b>43,208</b>	<b>24,659</b>	<b>55,877</b>	<b>123,744</b>

# Owners race for close to \$244 million in prize money 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 2022/23 there were close to 28,270 owners interested in thoroughbred, harness and/or greyhound racing in Queensland. Close to 75% of owners reside in regional areas of Queensland, with Brisbane (25.4%) and the Gold Coast (14.7%) 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 prize money on offer.



Queensland owners and trainers spent **close to \$387 million** in 2022/23 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 2022/23, owners of racehorses and greyhounds trained in Queensland spent more almost \$387 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.

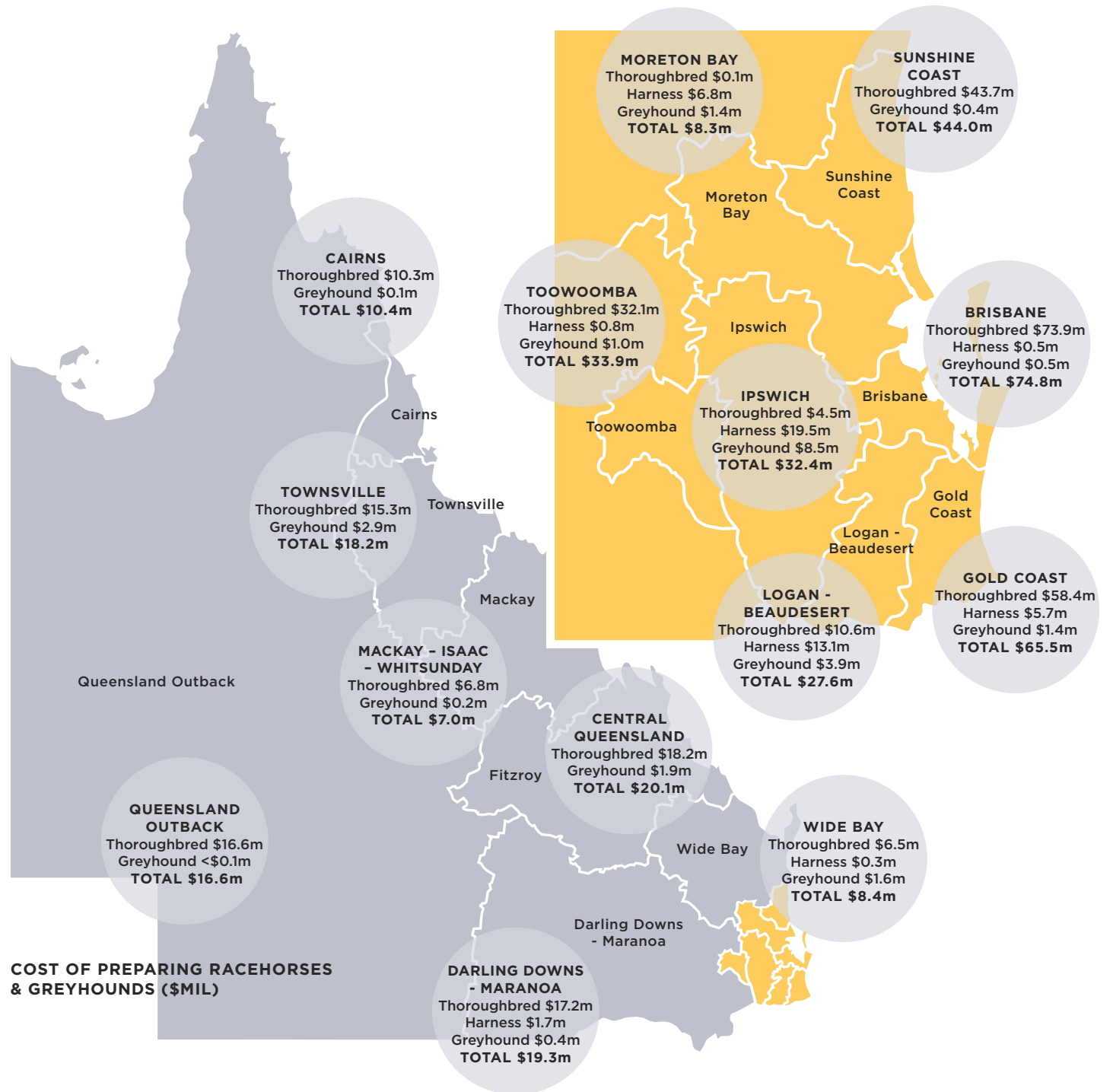
The development of expenditure profiles within each region is based upon the number of racehorses and greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the animal. For instance, expenditure during the education stage of a racehorse 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, for every \$10 spend on training activities, \$8 of the expenditure on training activities occurs in regional areas of the state. Regionally, Gold Coast (16.9%), Sunshine Coast (11.4%) and Toowoomba (8.8%) make up the largest training areas outside of Brisbane (19.4%).

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

**THOROUGHBRED RACING**

Thoroughbred training activity is responsible for generating more than \$314.1 million in expenditure impacts in Queensland.

Brisbane	\$73.9m (23.5%)
Gold Coast	\$58.4m (18.6%)
Sunshine Coast	\$43.7m (13.9%)

**HARNESS RACING**

Standardbred training activity is responsible for generating more than \$48.3 million in expenditure impacts in Queensland.

Ipswich	\$19.5m (40.3%)
Logan-Beaudesert	\$13.1m (27.1%)
Moreton Bay	\$6.8m (14.0%)

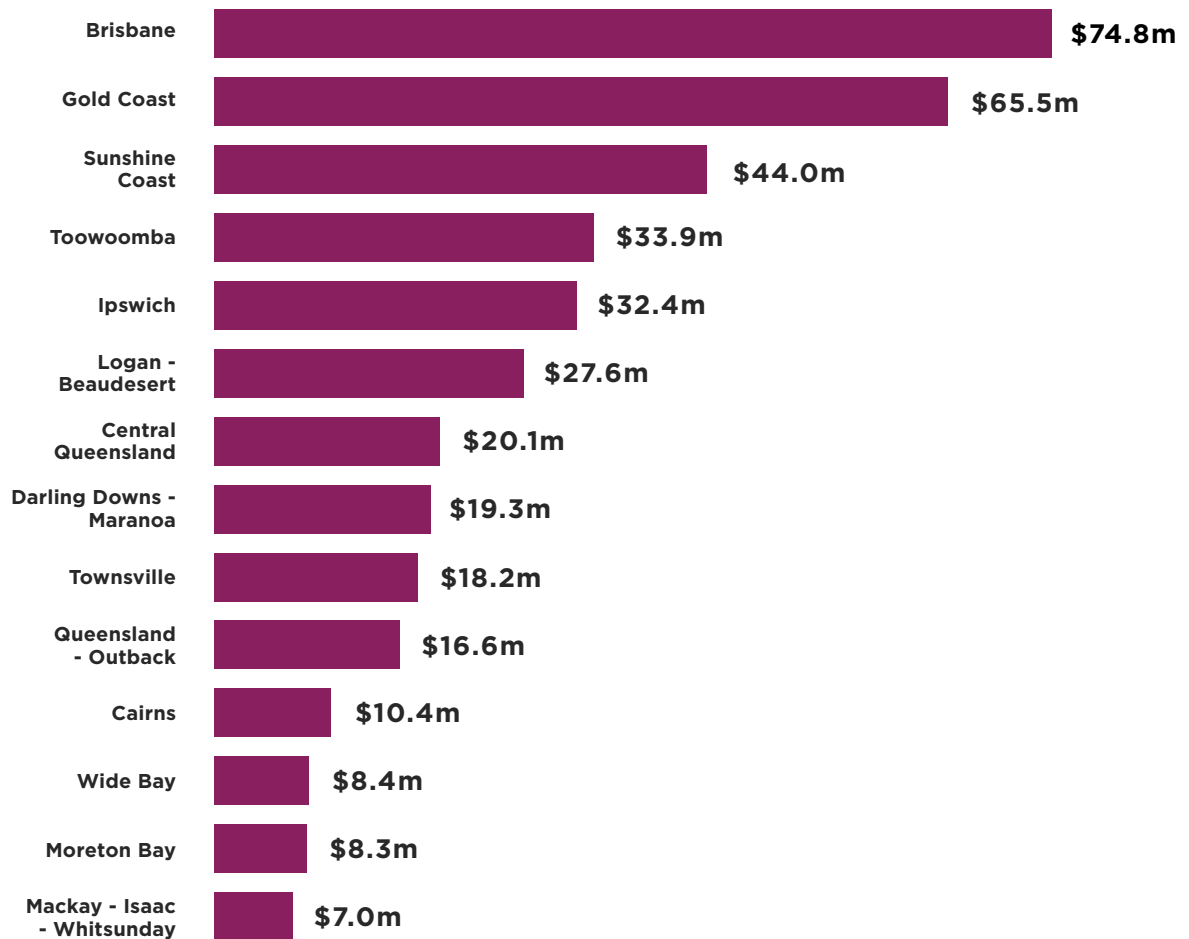
**GREYHOUND RACING**

Greyhound training activity is responsible for generating close to \$24.1 million in expenditure impacts in Queensland.

Ipswich	\$8.5m (35.2%)
Logan-Beaudesert	\$3.9m (16.3%)
Townsville	\$2.9m (12.1%)

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

### **SUNSHINE COAST TURF CLUB RE-USEABLE WASTE MANAGEMENT PROGRAM**



The Sunshine Coast Turf Club is leading the way in sustainable waste management. Since July 2023, horse manure from the on-course stables has been collected daily by JJ Richards and taken to a local composting service at Forest Glen.

The manure, which can be a valuable source of nutrients and organic matter, is then put to good use and transformed into soil or garden mixes.

The SCTC estimates around 120 cubic meters is collected per week, with around 724 tonnes having been transferred to composting since July 2023.

With stabling at Corbould Park housing 384 horses, it is an important service that minimises the amount of waste that is sent to landfill.

A \$7.4 million stabling project was completed in November 2023, with the new facilities accommodating 128 additional horses and including four new barns, walkers and hose down areas.

With that increase in stables, the club estimates at least 1450 tonnes will be sent to a composting service by the 12-month mark.

Additionally, rainwater is collected from the roofs of the stables and stored in tanks onsite, which hold a total of 1.2 megalitres.

This water is then used for washing down horses as well as equine drinking water, saving the club a considerable amount in additional water costs.

The runoff from horse washing and stable floors is also put through a treatment system, which can then be used for the irrigation of grass areas adjacent to the stable complex.

The club has also utilised a collection service which has recycled 13,094 containers (bottles and cans) collected from race days and day to day activities since November 2023.

## Case study

### RACING QUEENSLAND ACCESSIBILITY PROJECTS

Racing Queensland remains committed to providing accessibility and inclusiveness for all, and connecting Queenslanders through great racing, events and the love of our animals. It is vitally important that Queensland's racetracks and facilities are accessible for all patrons, in turn ensuring an increased quality of life, while creating more independence and better social integration.

Around 1 in 6 (18%) people in Australia – or about 4.4 million – have a disability. Last year, RQ completed an audit of numerous of Tier 1 clubs to ensure more people can access Queensland race clubs.

Clubs received these reports in early 2024 in time for funding applications to be prepared ahead of the 2025 financial year. Examples of some accessibility upgrades and changes are as follows.



The Brisbane Racing Club has completed several accessibility upgrades over the past year. They include two additional accessible toilets at the Legends Bar and Derby Bar, amenities at Eagle Farm, three new lifts for grandstands and members' areas at Doomben and Eagle Farm, and provision of two accessibility buggies for use at both courses.

On the Darling Downs, the Toowoomba Turf Club has installed a lift from the ground floor to the Members' Weetwood Room in order to meet accessibility requirements, with feedback following its installation extremely positive.

The Sunshine Coast Turf Club has also installed a lift as part of a multi-million-dollar club-delivered upgrade to the Members' area at Corbould Park, with RQ contributing over \$382,000 to the project.

# RACING CLUBS, ASSOCIATIONS AND AUTHORITIES

## NUMBER OF TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2	0	0	2
Central Queensland	2	0	1	3
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	17	2	4	23
Brisbane	2	1	2	5
<b>Total</b>	<b>19</b>	<b>3</b>	<b>6</b>	<b>28</b>

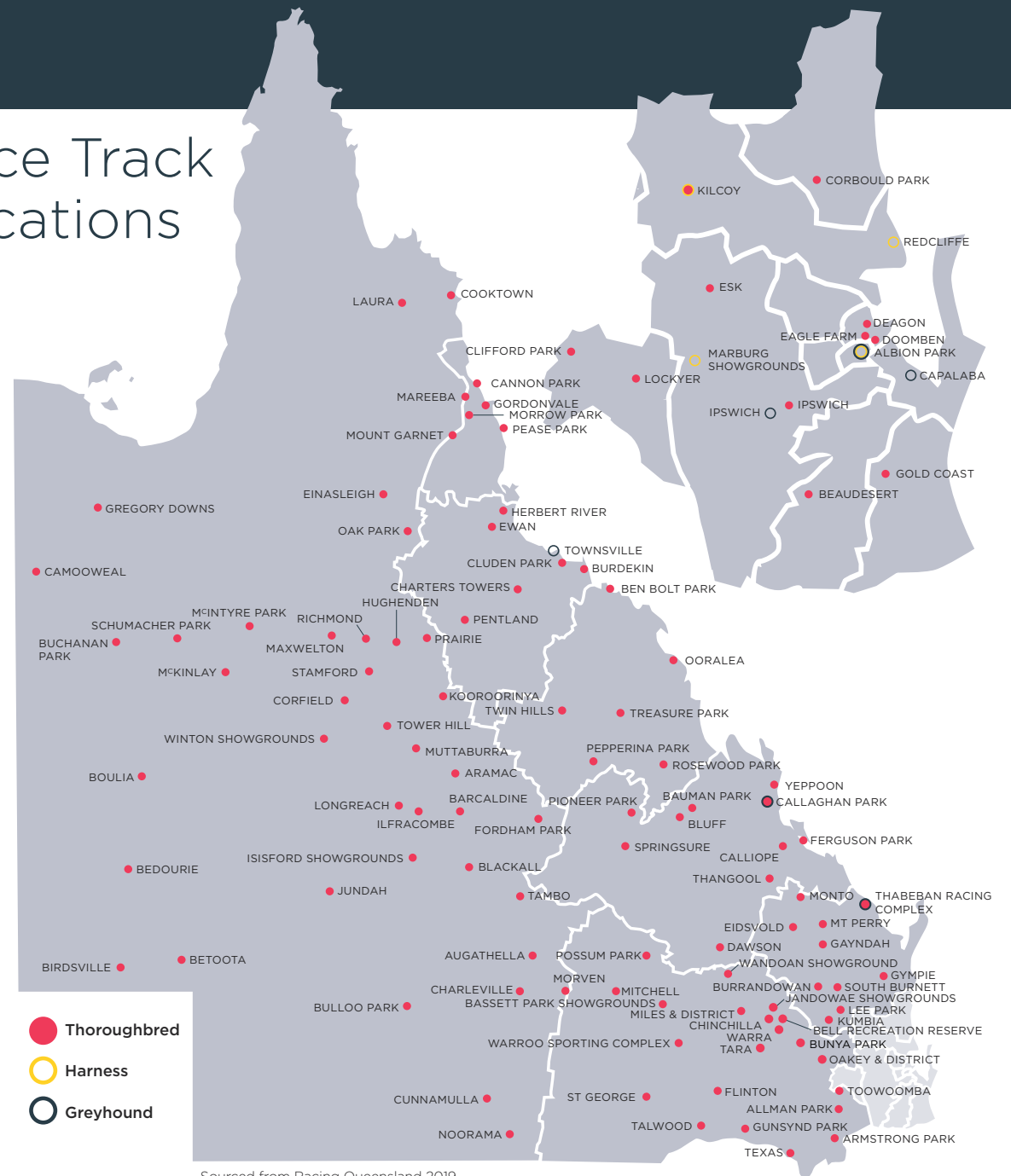
\* Note - A TAB club is classified as holding TAB race meetings throughout the racing season.

## 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



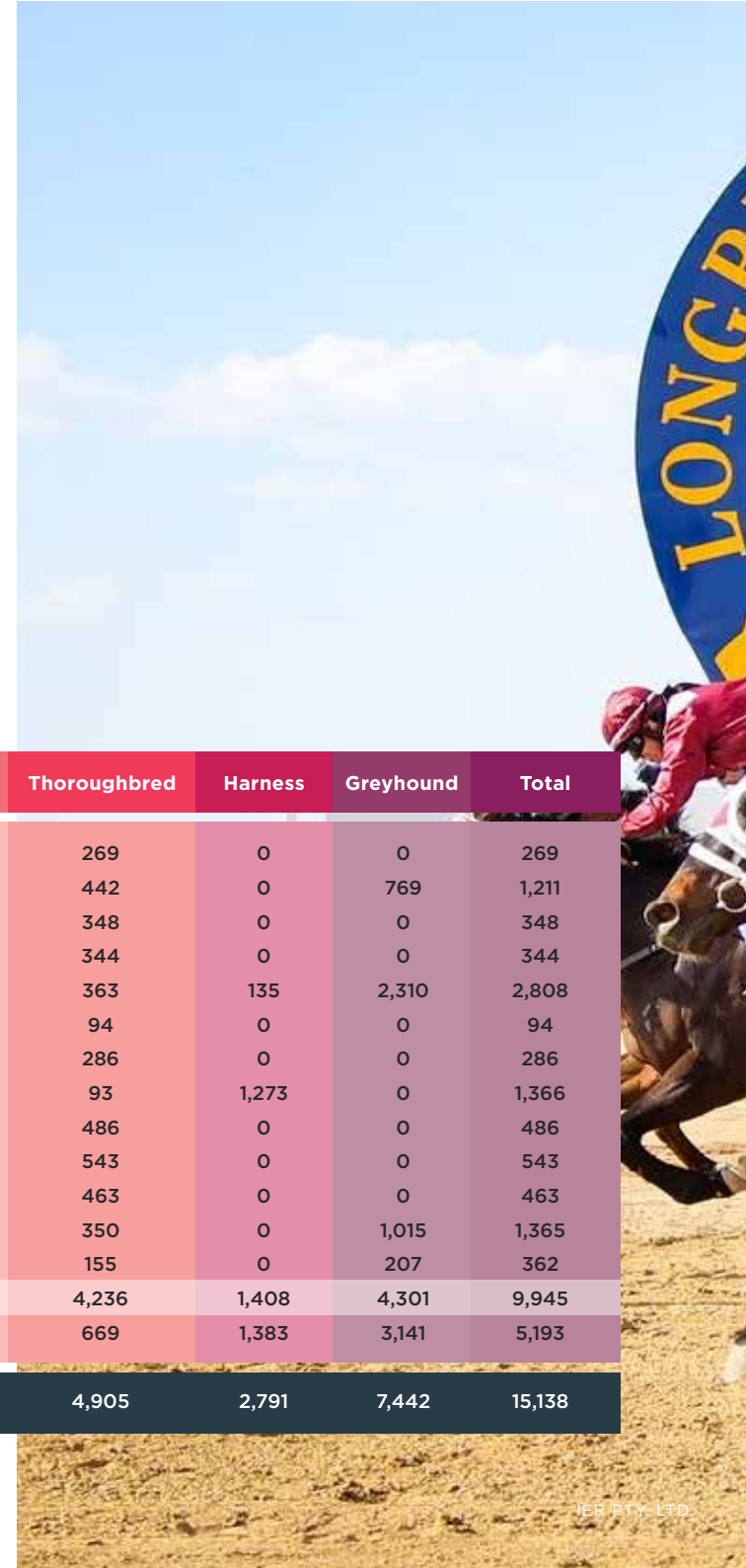
Sourced from Racing Queensland 2019

**TOTAL RACE MEETINGS**

	Thoroughbred	Harness	Greyhound	Total
Cairns	40	0	0	40
Central Queensland	70	0	68	138
Darling Downs - Maranoa	54	0	0	54
Gold Coast	45	0	0	45
Ipswich	45	16	200	261
Logan - Beaudesert	12	0	0	12
Mackay - Isaac - Whitsunday	43	0	0	43
Moreton Bay	12	140	0	152
Queensland - Outback	84	0	0	84
Sunshine Coast	70	0	0	70
Toowoomba	61	0	0	61
Townsville	49	0	90	139
Wide Bay	28	0	22	50
<b>Total Regional Queensland</b>	<b>613</b>	<b>156</b>	<b>380</b>	<b>1,149</b>
Brisbane	77	146	281	504
<b>Total</b>	<b>690</b>	<b>302</b>	<b>661</b>	<b>1,653</b>

**TOTAL RACES**

	Thoroughbred	Harness	Greyhound	Total
Cairns	269	0	0	269
Central Queensland	442	0	769	1,211
Darling Downs - Maranoa	348	0	0	348
Gold Coast	344	0	0	344
Ipswich	363	135	2,310	2,808
Logan - Beaudesert	94	0	0	94
Mackay - Isaac - Whitsunday	286	0	0	286
Moreton Bay	93	1,273	0	1,366
Queensland - Outback	486	0	0	486
Sunshine Coast	543	0	0	543
Toowoomba	463	0	0	463
Townsville	350	0	1,015	1,365
Wide Bay	155	0	207	362
<b>Total Regional Queensland</b>	<b>4,236</b>	<b>1,408</b>	<b>4,301</b>	<b>9,945</b>
Brisbane	669	1,383	3,141	5,193
<b>Total</b>	<b>4,905</b>	<b>2,791</b>	<b>7,442</b>	<b>15,138</b>





#### TOTAL ATTENDANCES

	Thoroughbred	Harness	Greyhound	Total
Cairns	44,006	0	0	44,006
Central Queensland	44,286	0	4,825	49,111
Darling Downs - Maranoa	43,733	0	0	43,733
Gold Coast	112,020	0	0	112,020
Ipswich	33,495	7,180	15,543	56,218
Logan - Beaudesert	440	0	0	440
Mackay - Isaac - Whitsunday	25,716	0	0	25,716
Moreton Bay	6,560	27,380	0	33,960
Queensland - Outback	45,806	0	0	45,806
Sunshine Coast	76,115	0	0	76,115
Toowoomba	40,096	0	0	40,096
Townsville	36,950	0	6,337	43,287
Wide Bay	23,770	0	1,959	25,729
<b>Total Regional Queensland</b>	<b>533,013</b>	<b>34,560</b>	<b>28,664</b>	<b>596,237</b>
Brisbane	135,319	32,137	31,632	199,088
<b>Total</b>	<b>668,332</b>	<b>66,697</b>	<b>60,296</b>	<b>795,325</b>

\*Some totals do not add due to rounding.

## NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,092	0	0	1,092
Central Queensland	1,182	0	46	1,228
Darling Downs - Maranoa	1,343	0	0	1,343
Gold Coast	3,194	0	0	3,194
Ipswich	423	34	129	586
Logan - Beaudesert	10	0	0	10
Mackay - Isaac - Whitsunday	427	0	0	427
Moreton Bay	92	134	0	226
Queensland - Outback	2,284	0	0	2,284
Sunshine Coast	2,348	0	0	2,348
Toowoomba	572	0	0	572
Townsville	1,967	0	104	2,071
Wide Bay	900	0	60	865
<b>Total Regional Queensland</b>	<b>15,834</b>	<b>168</b>	<b>339</b>	<b>16,341</b>
Brisbane	8,779	245	278	9,302
<b>Total</b>	<b>24,613</b>	<b>413</b>	<b>617</b>	<b>25,643</b>







## Racing Clubs

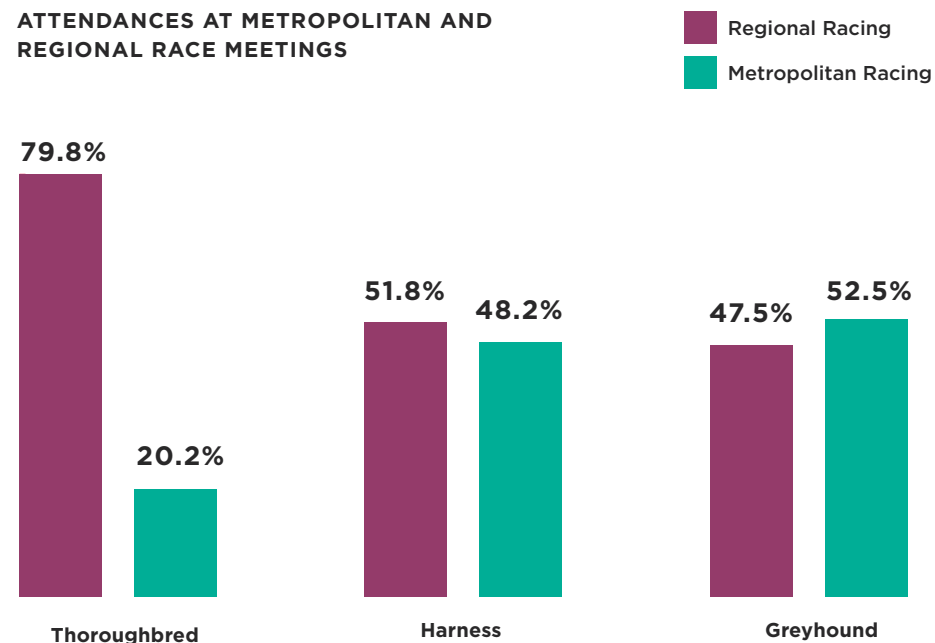
There are 124 racing clubs in Queensland across the three codes of racing. Queensland is unique in the Australian racing landscape with the majority of these racing clubs (96) running primarily non-TAB race meetings. This means that racing at these clubs is not covered by the TAB and instead is driven moreso by community involvement and on-course bookmaker betting.

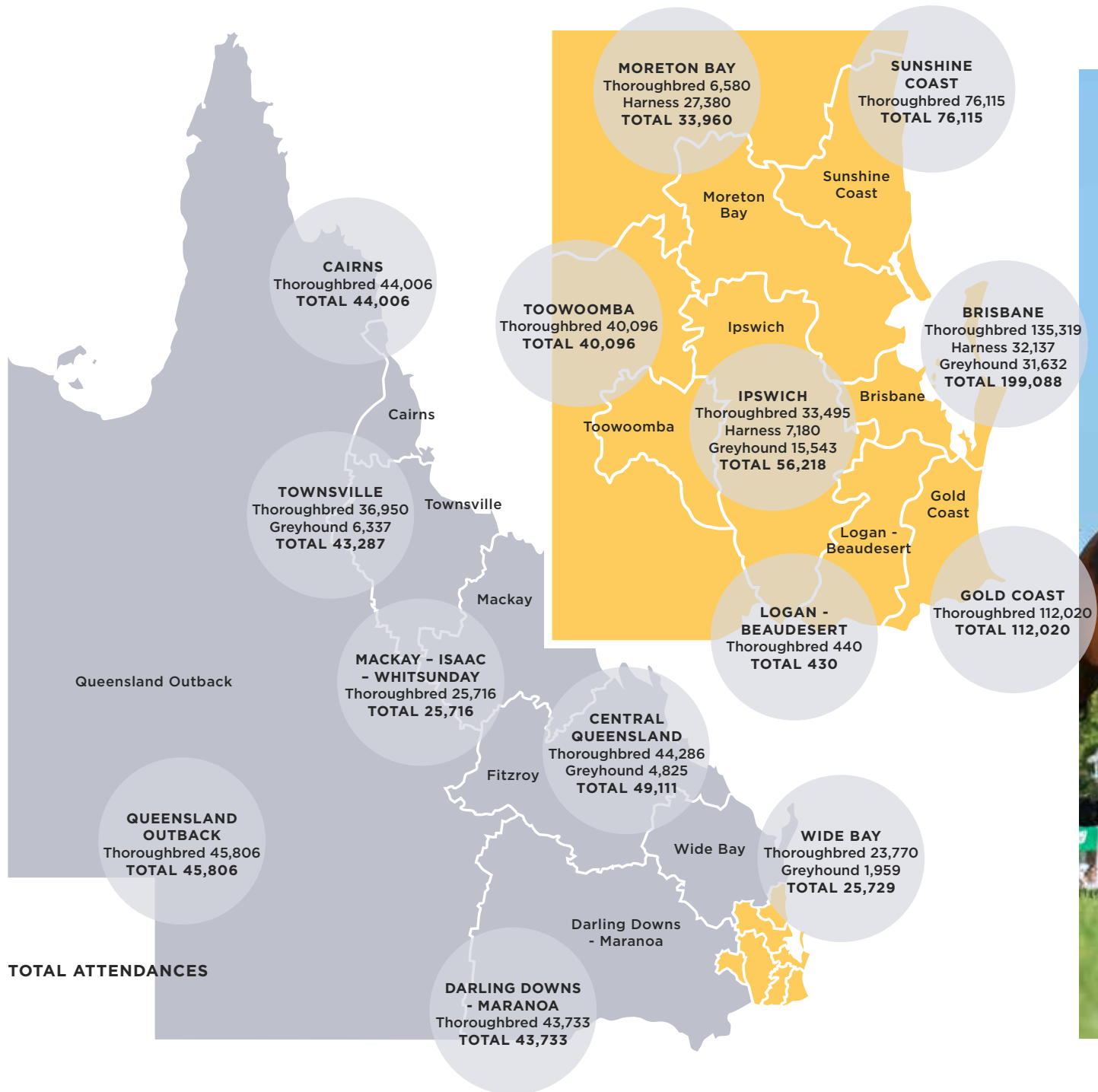
Racing clubs not only provide the opportunity for participants and spectators to participate in the sport of racing, they also provide an important social destination and in many regions, are an important part of the social fabric of the community.

In 2022/23, there were 1,435 TAB race meetings and a further 218 non-TAB race meetings. These race meetings attracted attendances over 795,300 - 75% of which were in regional areas. Thoroughbred race meetings, in Queensland, attracted a total of 668,332 attendances. Race meetings in Brisbane (135,319) and the Gold Coast (112,020) were responsible for the largest attendance. Harness race meetings attracted 66,697 attendances with race meetings in Brisbane (32,137) and Moreton Bay (27,380) making up the majority of this amount. Greyhound racing attracted attendance of 60,296 with race meetings in Brisbane (31,632) and Ipswich (15,443) 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 2022/23 it is estimated that the total expenditure generated by racing customers was close to \$188.7 million, (excluding wagering on the races). Racing’s customers include attendees, sponsors, members, broadcast providers, community groups and participants. Racing customer expenditure can be broadly segmented into the following categories:

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

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

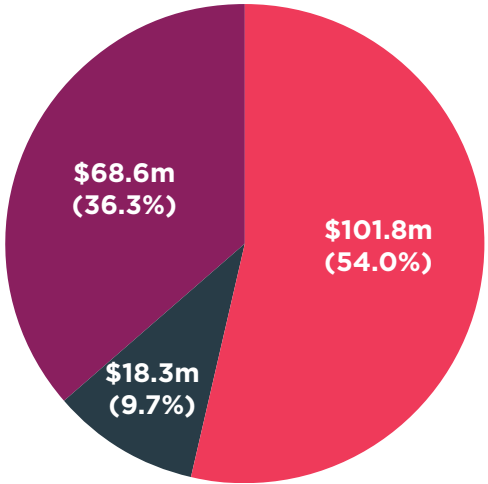
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. Major racing events have long proven their ability to extend the generation of economic stimulus into a broader cross-section of the local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

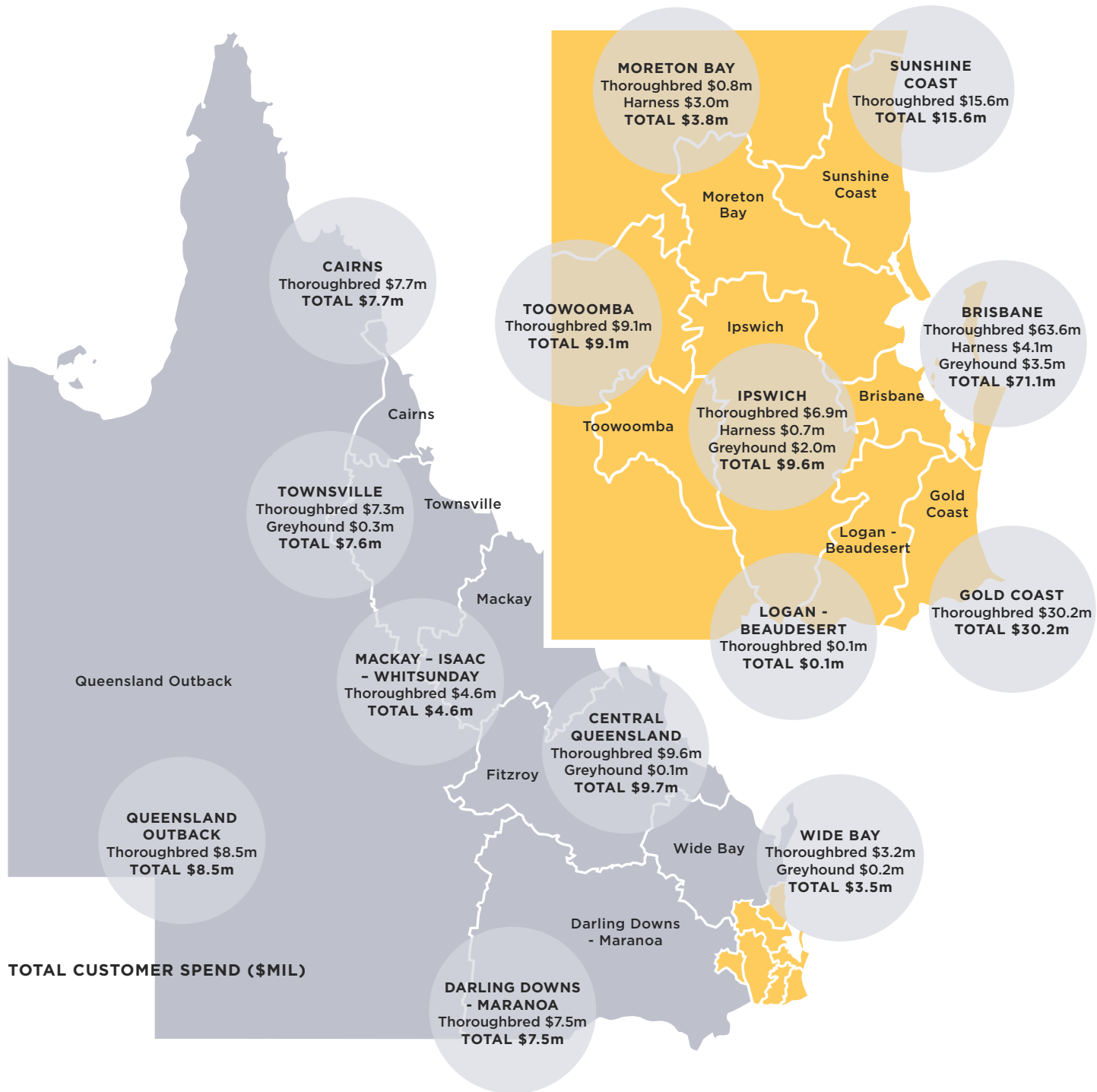
Whilst on-course wagering is the largest component of customer spend, it is analysed in the section relating to wagering.

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

### BREAKDOWN OF RACING CUSTOMER SPENDING

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







# Expenditure by the Principal Racing Authority and Clubs

In 2022/23, Racing Queensland and the 124 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of more than \$609 million in Queensland. This represents the expenditure incurred by these organisations in maintaining tracks, running race meetings, administration, marketing, cost of goods and prize money.

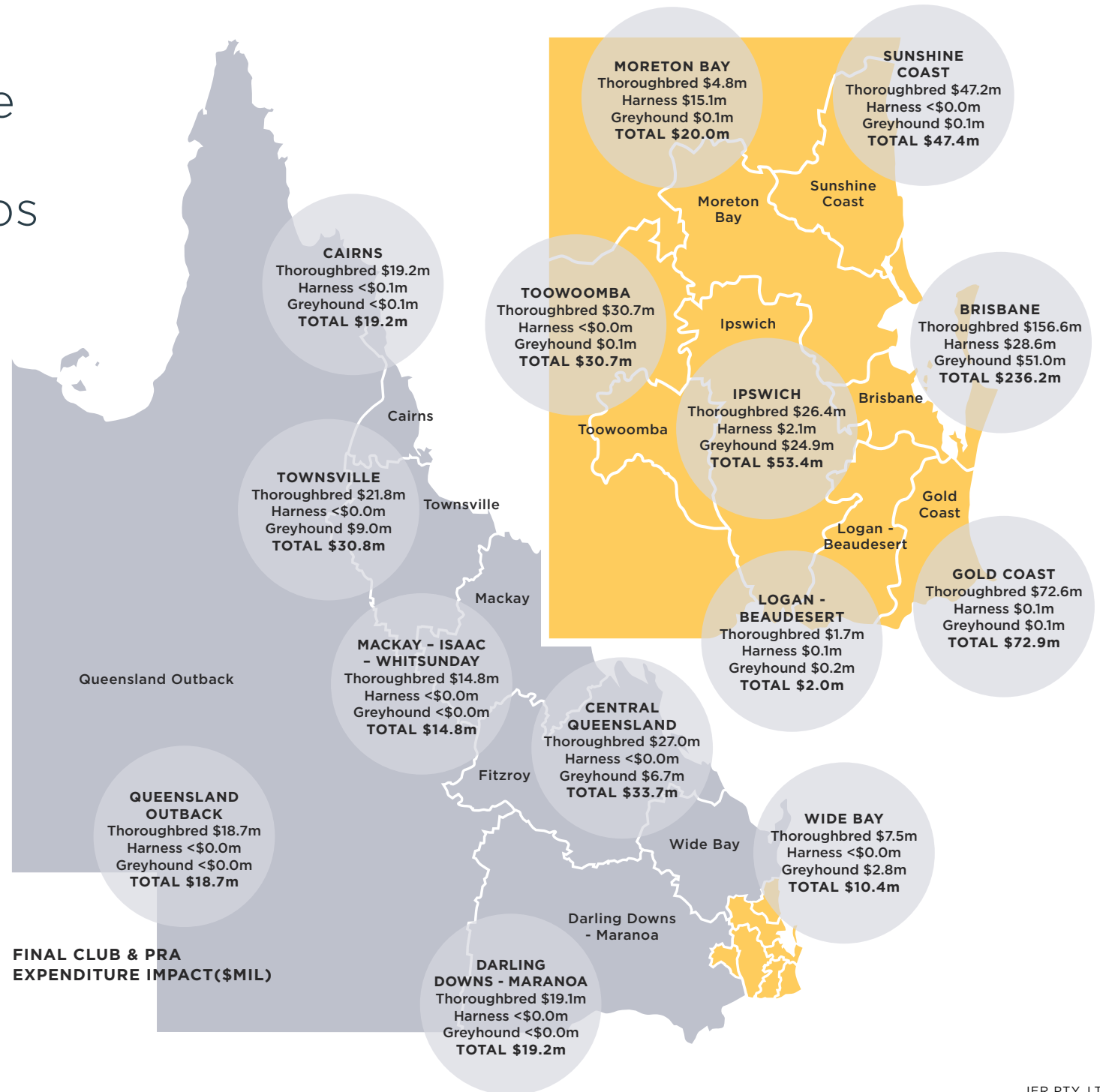
The majority of expenditure generated by the PRA and racing clubs is funded by racing customers. This includes:

- + 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

39% (\$236.2 million) of this expenditure impact occurred in Brisbane - a result largely driven by the presence of the largest racing clubs (in terms of size and financial impact) as well as the principal racing authority. The Gold Coast (12%) generates the next most significant impact with the remainder spread around the State.





# MAJOR EVENT IMPACTS

## Magic Millions Raceday & Sales

### OVERVIEW

The Magic Millions Raceday is one of Australia's richest racedays with more than \$10 million in prize money on offer. In 2023, the raceday attracted attendances in excess of 20,000 people.

The event was directly responsible for over 7,000 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.

### KEY TOURISM IMPACTS

In 2023, an economic impact assessment of the Magic Millions Raceday was undertaken. The study found that the event generated nearly \$22 million of direct in-scope expenditure for the Queensland economy.

The following tables illustrate the key impacts to the State:

Tourism Impact	2019	2020	2021	2022	2023
In-scope visitors (spectators, sponsors and participants)	5,299	5,977	2,947	4,594	7,010
In-scope expenditure for the QLD economy	\$15.0m	\$17.3m	\$14.1m	\$15.6m	\$21.9m
Visitor Nights generated in QLD	26,930	31,528	25,614	28,124	38,074

Economic Impact (\$AUD)	2019	2020	2021	2022	2023
Magic Millions Polo	\$2.3m	\$2.9m		\$3.0m	\$4.7m
Magic Millions Raceday	\$17.4m	\$20.0m	\$16.5m	\$18.3m	\$26.2m
Gold Coast Yearling Sale	\$14.1	\$15.8m	\$14.6m	\$17.9m	\$21.8m
Gold Coast National Sale	\$16.0m	\$10.7m	\$13.8m	\$16.4m	\$15.2m
<b>Total Economic Impact</b>	<b>\$49.8m</b>	<b>\$49.4m</b>	<b>\$44.9m</b>	<b>\$55.6m</b>	<b>\$67.9m</b>

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

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

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







## Community and Social Benefits

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

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

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

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

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

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

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





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

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

### CAPACITY BUILDING

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



### CHARITABLE SUPPORT

Close to 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

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



### FACILITY SHARING

Close to 220 community and not-for-profit organisations share racing club facilities in Queensland



### COMMUNITY

Racing clubs provide an important community for more than 29,700 members and volunteers who are actively engaged in their club. Close to 795,325 attendances are recorded at Queensland race meetings.



## COMMUNITY BUILDING

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

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

- + Close to 570 community organisations or charities are assisted and supported by racing clubs
- + Close to 220 community organisations share racing club facilities and resources
- + Racing in Queensland currently engage more than 8,200 volunteers who assist in various club, kindred body and industry related roles
- + 25,643 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 4,098 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 568 organisations and charities.

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

Just some of the charitable organisations supported by racing include:

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

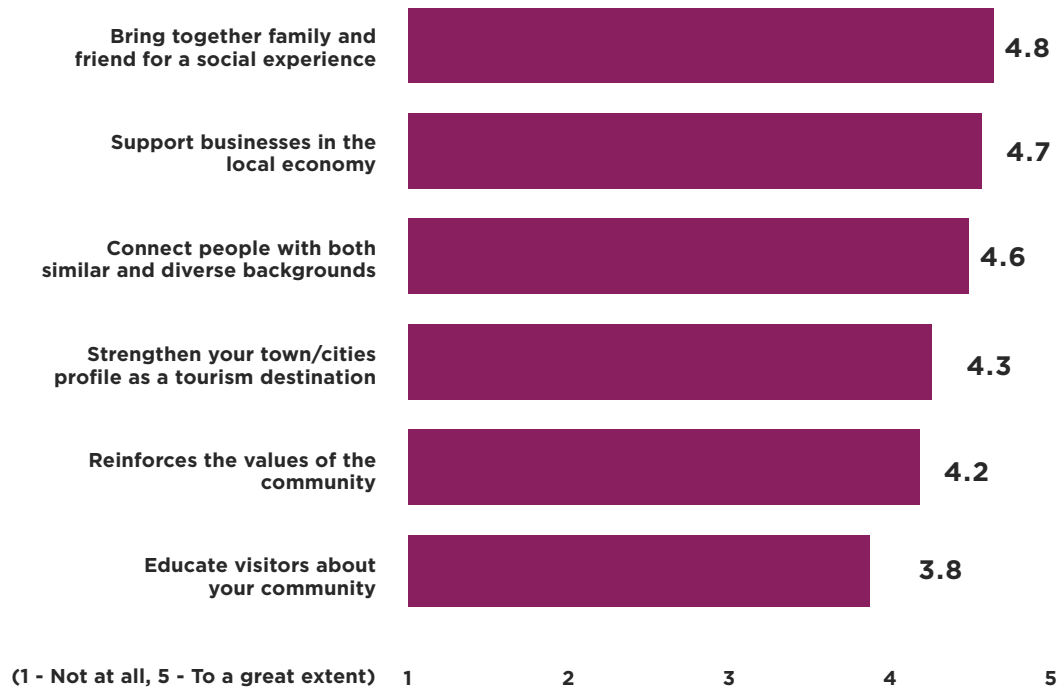


- Children's Parents' Association, YoungCare, Give ME 5 for Kids Charity, Wantok Foundation)
- + Sporting Clubs (e.g. Rugby League, Rowing, Gymnastics, Equestrian Groups, Surf Lifesaving, Netball, Tennis, AFL, Cricket)
  - + Schools (Kindergartens, Pre-School, State schools and colleges)
  - + Rotary,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

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

The social impact survey asked clubs how much they believed racing in their town or city has the ability to engage with the community from a social cohesion, education and business perspective. As the chart illustrates, all indicators were positive, particularly significant in the areas of racing's ability to 'bring together family and friends for a social experience' (4.8), to 'support businesses in the local economy' (4.7) 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
- + Almost all clubs offer events for families and children on special racedays
- + Close to three-quarters of clubs actively involve people from culturally diverse backgrounds

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

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

### SHARING FACILITIES WITHIN THE COMMUNITY

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

Some of the 215 organisations which share facilities and resources with clubs include:

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







## 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.

- + Clubs have individuals participating in further education, career development and training programs each year
- + All racing clubs encourage responsible gambling
- + 17% 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 one third of all clubs have

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

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

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

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

More than one in ten clubs have policies and programs to develop native flora and fauna. Examples include:

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





## CLUB HISTORY AND HERITAGE

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

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

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

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

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

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

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

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



- + Dedicated calendar with racing stories of the past
- + Promotion of history through local museums, statues, local papers, radio and websites
- + Recognising heroes of the sport on dedicated racedays (e.g. Heritage Raceday)
- + Promotions in 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 1,359,098 (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 close to \$1,186.4 million in value added contribution to Gross State Product. This equates to 49.4% 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 6,714 full-time equivalent (FTE) jobs in the region.
- + There are close to 9,700 roles occupied in the racing industry in Brisbane.

#### RACING CLUBS IN THE REGION

##### Thoroughbred

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

##### Harness

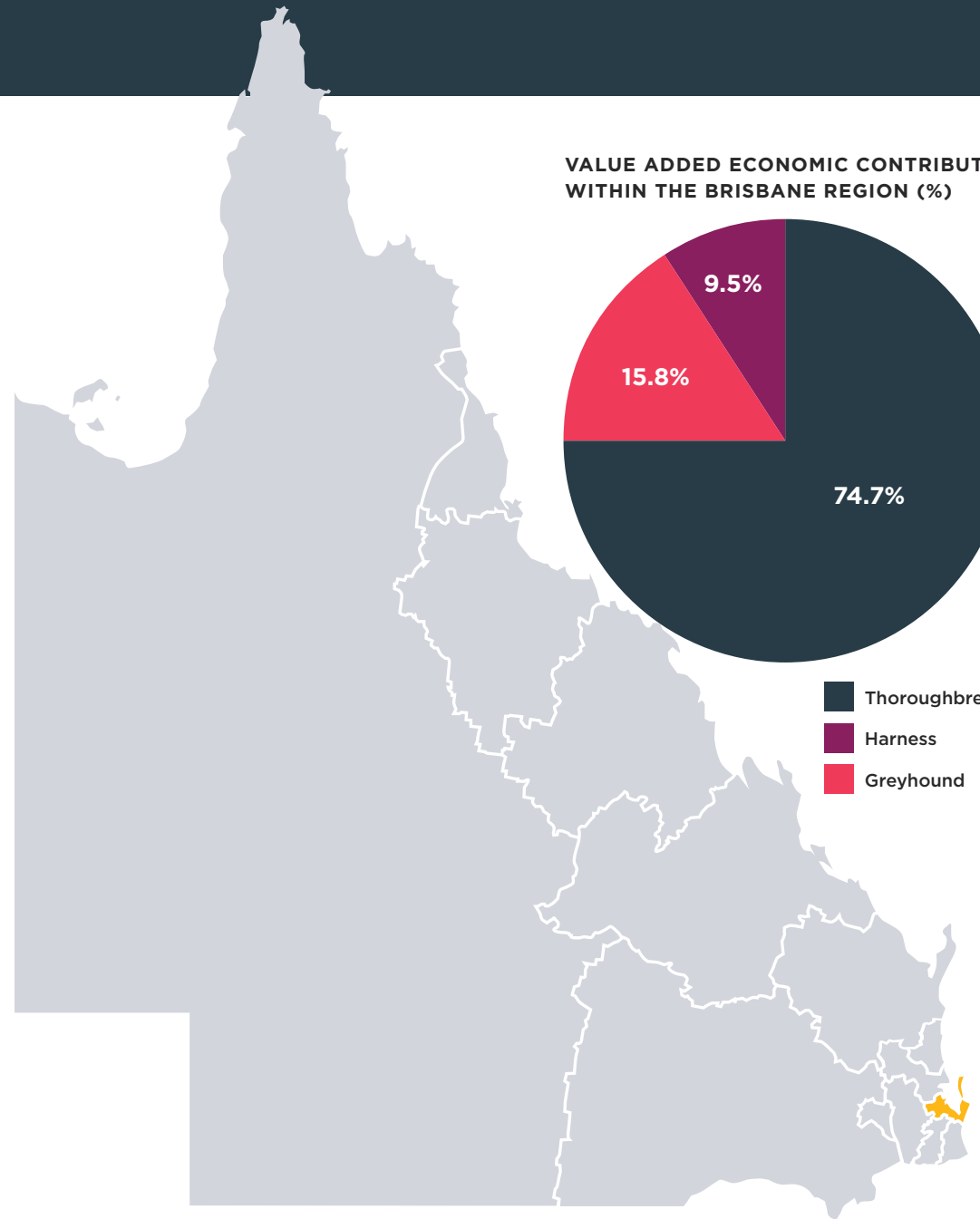
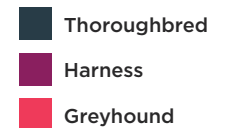
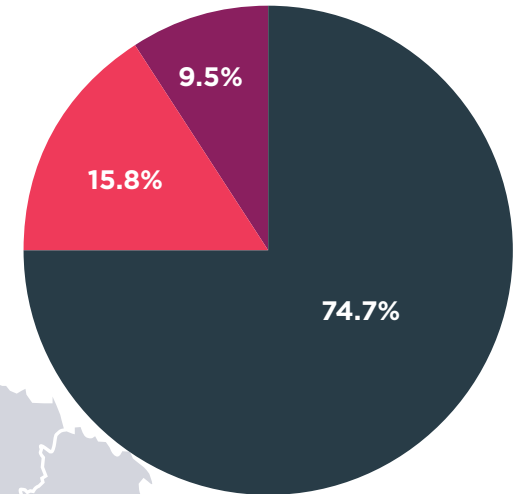
- + Albion Park Harness Racing Club

##### Greyhound

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

The racing industry in the **Brisbane region is responsible for generating \$1,186.4 million in value added** contribution to gross state product. This represents **49.4% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE BRISBANE REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$418.7m	\$60.4m	\$104.9m	\$584.0m
Total value added	\$886.8m	\$112.3m	\$187.2m	\$1,186.4m
Full-time equivalent employment	5,018	636	1,060	6,714

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	13	61	20	94
Horses and greyhounds in training	1,736	11	78	1,825

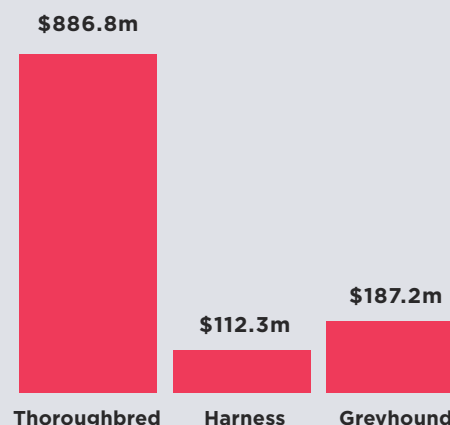
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	138	28	5	172
Owners	5,715	143	1,299	7,158
Trainers	91	10	43	144
Breeders staff	119	14	8	141
Stable/Kennel employees	421	10	46	478
Racing Club & industry staff (FT, PT, casual)	820	138	226	1,184
Jockeys, drivers & apprentices	40	4	0	45
Racing club volunteers	10	9	10	29
Volunteers assisting participants	174	86	66	326
<b>Total roles occupied in the Brisbane region</b>	<b>7,529</b>	<b>444</b>	<b>1,704</b>	<b>9,677</b>

\*Some totals do not add due to rounding.

Race meetings in the Brisbane region attracted attendances of **199,088** or **25.0%** 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
HARNES	1
GREYHOUND	2

### 504 Race Meetings

THOROUGHBRED	77
HARNES	146
GREYHOUND	281

### 5,193 Races

THOROUGHBRED	669
HARNES	1,383
GREYHOUND	3,141

### 9,302 Racing Club Members

THOROUGHBRED	8,779
HARNES	245
GREYHOUND	278

### 199,088 Attendances

THOROUGHBRED	135,219
HARNES	32,137
GREYHOUND	31,632

\*Some totals do not add due to rounding

# Cairns

- + The population of the Cairns region is 260,649 (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 \$58.6 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 453 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,900 roles occupied in the racing industry in Cairns.

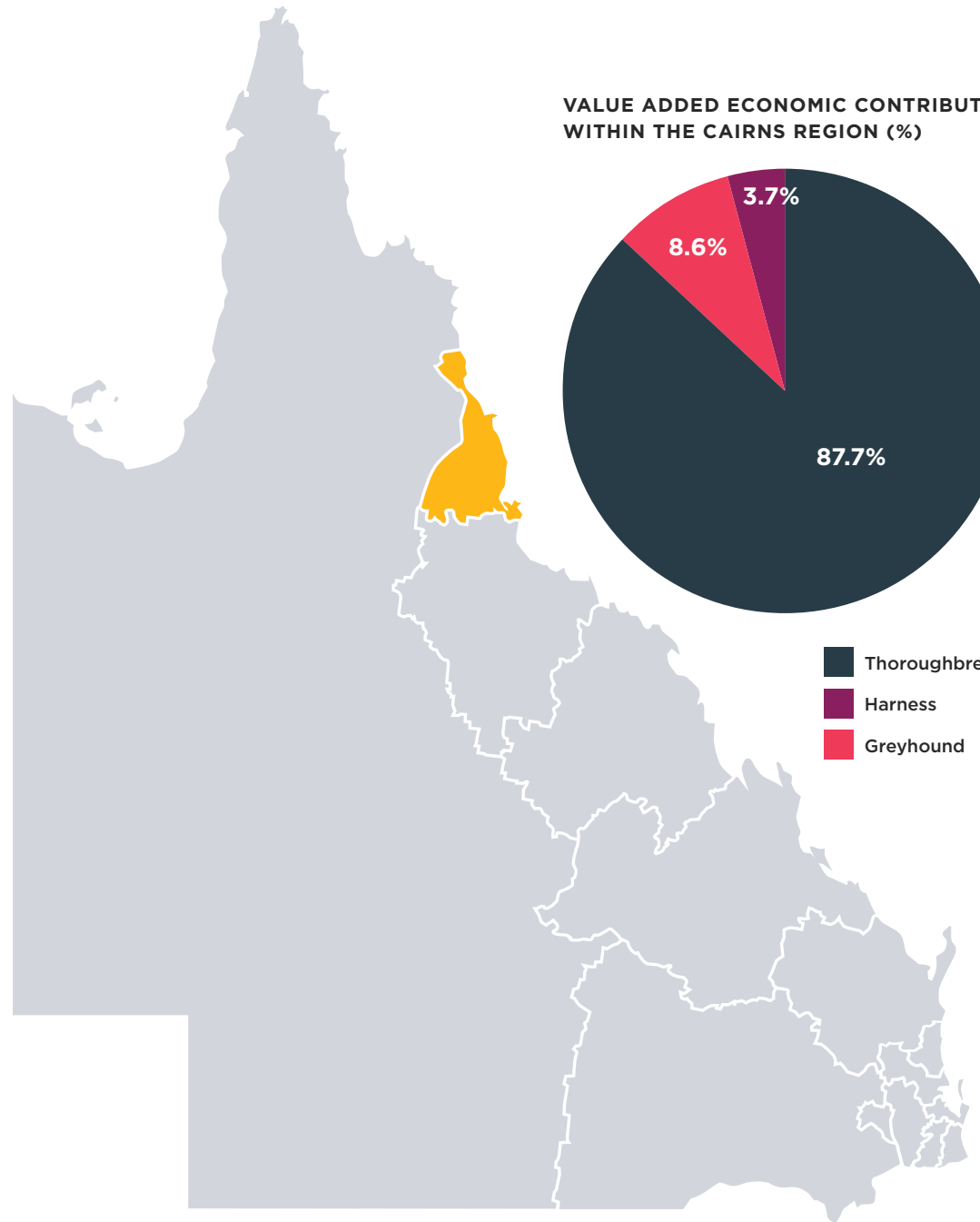
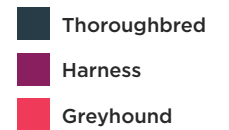
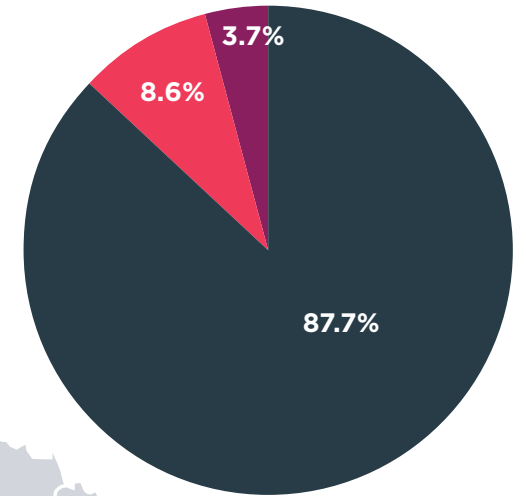
## RACING CLUBS IN THE REGION

### 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 \$58.6 million in value added** contribution to gross state product. This represents **2.4% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CAIRNS REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$49.7m	\$2.2m	\$5.0m	\$56.9m
Total value added	\$51.4m	\$2.2m	\$5.0m	\$58.6m
Full-time equivalent employment	394	18	41	453

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	7	0	1	8
Horses and greyhounds in training	403	0	21	424

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	16	0	0	16
Owners	958	0	108	1,066
Trainers	53	0	11	64
Breeders staff	14	0	0	14
Stable/Kennel employees	181	0	3	184
Racing Club & industry staff (FT, PT, casual)	313	0	0	313
Jockeys, drivers & apprentices	11	1	0	12
Racing club volunteers	133	0	0	133
Volunteers assisting participants	88	0	12	100
<b>Total roles occupied in the Cairns region</b>	<b>1,767</b>	<b>1</b>	<b>134</b>	<b>1,903</b>

\*Some totals do not add due to rounding.

Race meetings in the Cairns region attracted attendances of **44,006** or **5.5%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 8 Racing Clubs

THOROUGHBRED 8

## 40 Race Meetings

THOROUGHBRED 40

## 269 Races

THOROUGHBRED 269

## 1,092 Racing Club Members

THOROUGHBRED 1,092

## 44,006 Attendances

THOROUGHBRED 44,006

\*Some totals do not add due to rounding

# Central Queensland

- + The population of the Central Queensland region is 234,179 (Australian Bureau of Statistics).
- + There are a total of thirteen (13) racing clubs operating in the region, twelve (12) 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 \$68.8 million in value added contribution to Gross State Product. This equates to 2.9% 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 513 full-time equivalent (FTE) jobs in the region.
- + There are more than 3,000 roles occupied in the racing industry in Central Queensland.

## RACING CLUBS IN THE REGION

### Thoroughbred

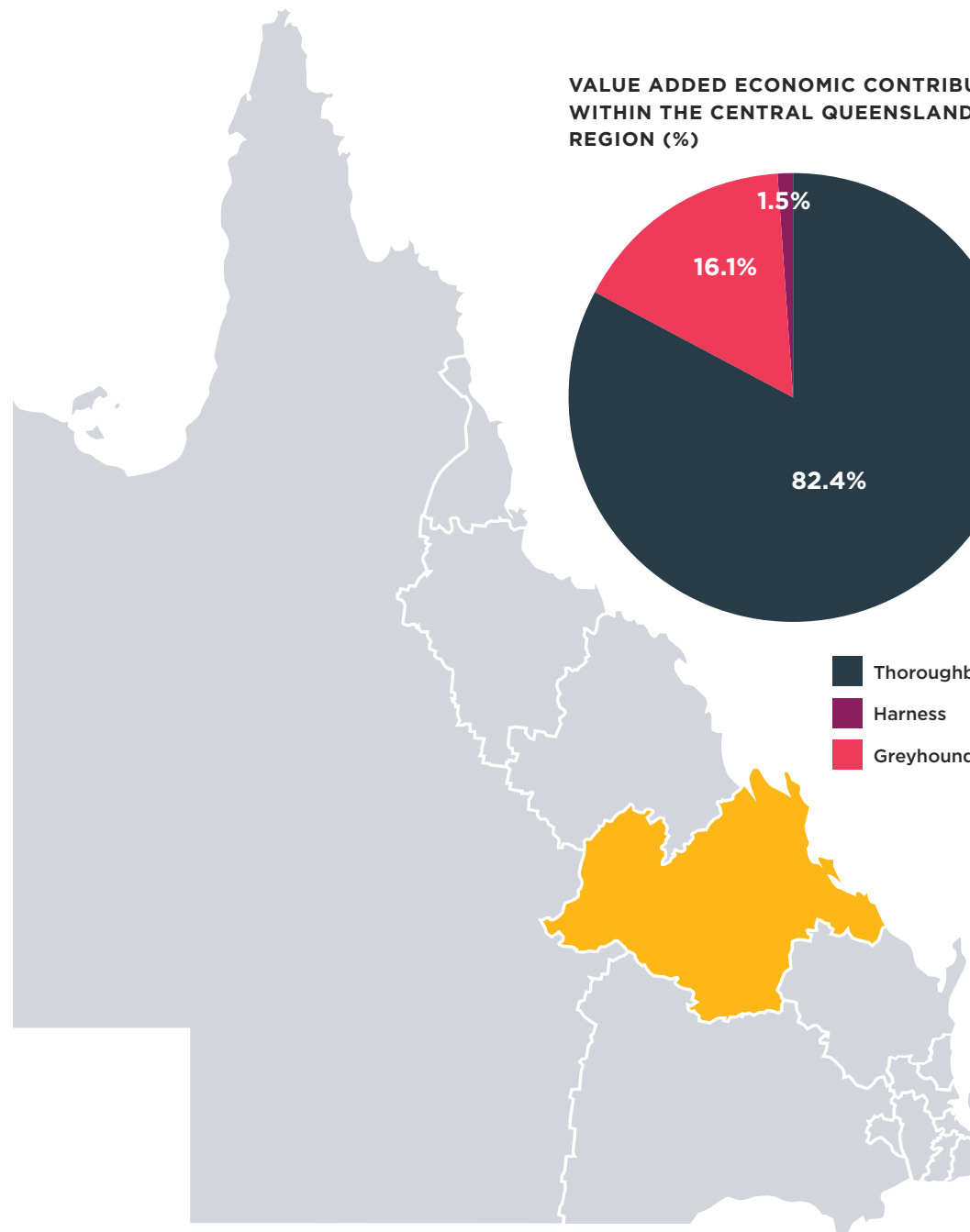
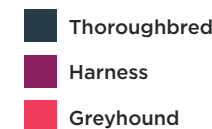
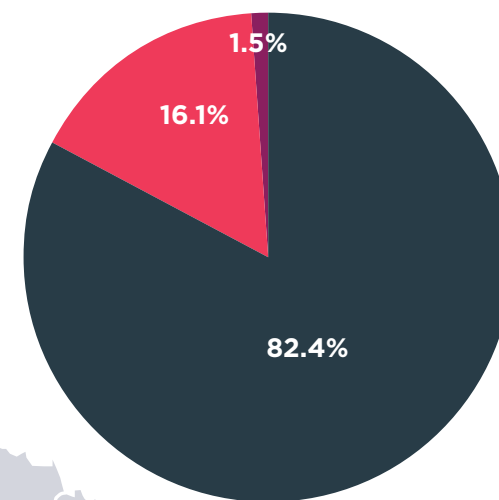
- + Bluff Blackwater Amateur Race Club Inc.
- + Calliope Jockey Club
- + Central Queensland Amateur Racing Club Inc.
- + Dawson Jockey Club
- + Dingo Race Club Inc.
- + Emerald Jockey Club
- + Gladstone Turf Club Inc.
- + Rockhampton Jockey Club Inc.
- + Springsure Jockey Club
- + Springsure St. Patricks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

### Greyhound

- + Rockhampton Greyhound Racing Club

The racing industry in the **Central Queensland region** is responsible for generating **\$68.8 million** in value added contribution to gross state product. This represents **2.9%** of the industry total.

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





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$60.9m	\$1.1m	\$12.0m	\$73.9m
Total value added	\$56.6m	\$1.0m	\$11.1m	\$68.8m
Full-time equivalent employment	422	8	82	513

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	62	0	70	132
Horses and greyhounds in training	712	0	332	1,044

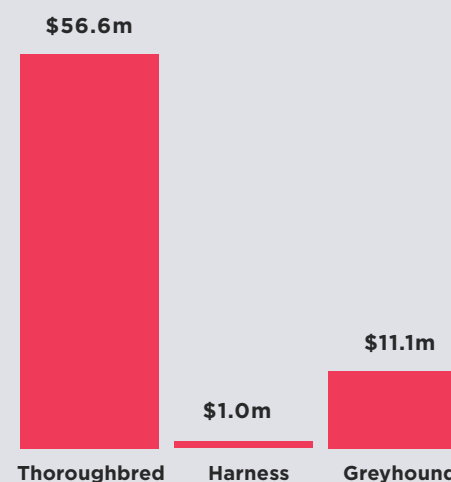
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	75	0	9	84
Owners	1,303	5	261	1,569
Trainers	108	0	29	137
Breeders staff	65	0	13	78
Stable/Kennel employees	171	0	22	193
Racing Club & industry staff (FT, PT, casual)	273	0	34	307
Jockeys, drivers & apprentices	14	0	0	14
Racing club volunteers	396	0	6	402
Volunteers assisting participants	211	0	47	258
<b>Total roles occupied in the Central Queensland region</b>	<b>2,615</b>	<b>5</b>	<b>421</b>	<b>3,041</b>

\*Some totals do not add due to rounding.

Race meetings in the Central Queensland region attracted attendances of **49,111** or **6.2%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 13 Racing Clubs

THOROUGHBRED	12
GREYHOUND	1

## 138 Race Meetings

THOROUGHBRED	70
GREYHOUND	68

## 1,211 Races

THOROUGHBRED	442
GREYHOUND	769

## 1,228 Racing Club Members

THOROUGHBRED	1,182
GREYHOUND	46

## 49,111 Attendances

THOROUGHBRED	44,286
GREYHOUND	4,825

\*Some totals do not add due to rounding

# Darling Downs - Maranoa

- + The population of the Darling Downs - Maranoa region is 131,012 (Australian Bureau of Statistics).
- + There are a total of twenty-four (24) racing clubs operating in the region, which are all thoroughbred clubs.
- + The racing industry in the Darling Downs-Maranoa region is responsible for generating more than \$83.9 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 649 full-time equivalent (FTE) jobs in the region.
- + There are more than 3,600 roles occupied in the racing industry in Darling Downs-Maranoa.

The racing industry in the **Darling Downs-Maranoa region** is responsible for generating **\$83.9 million** in value added contribution to gross state product. This represents **3.5%** of the industry total.

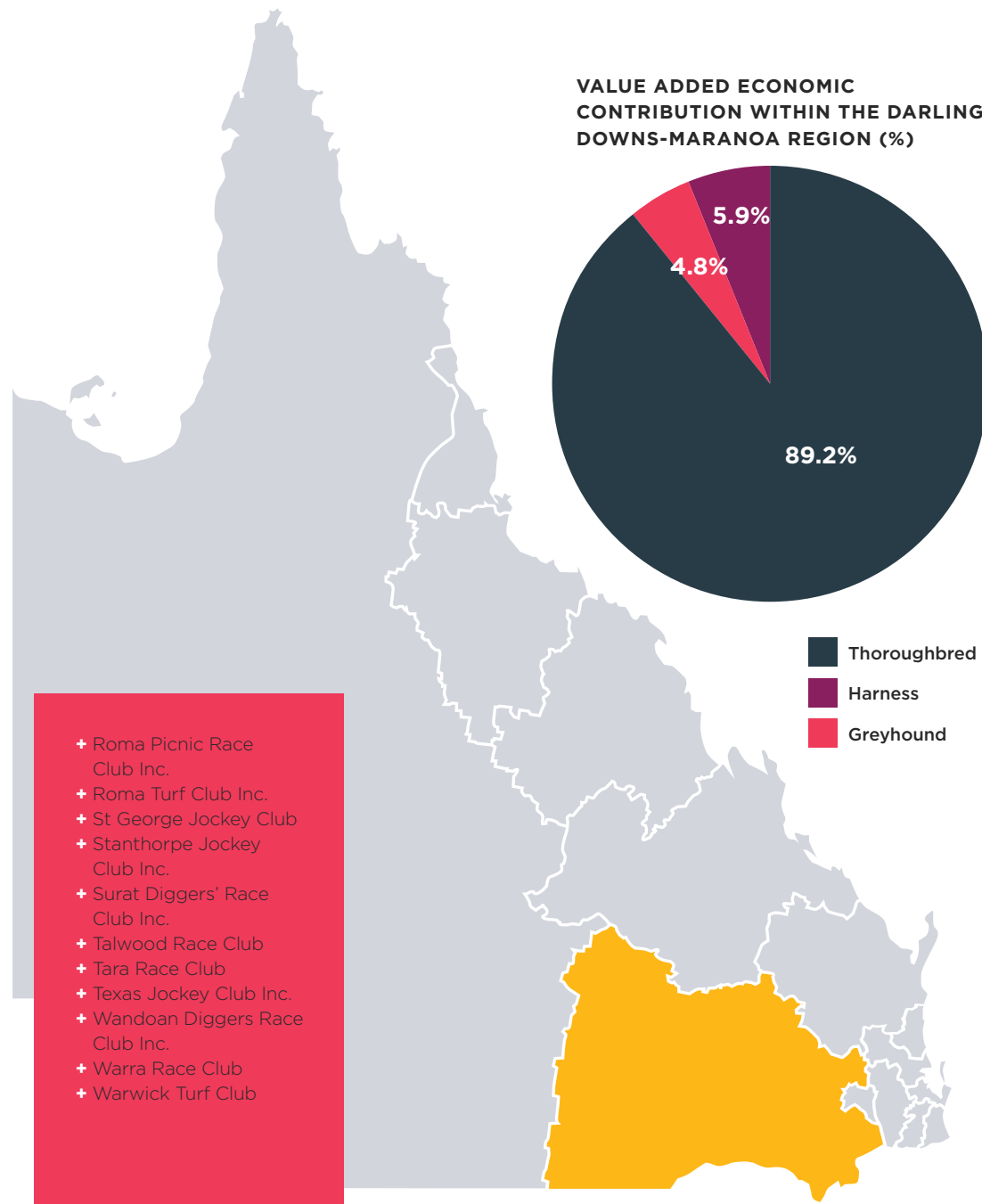
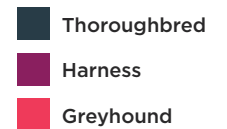
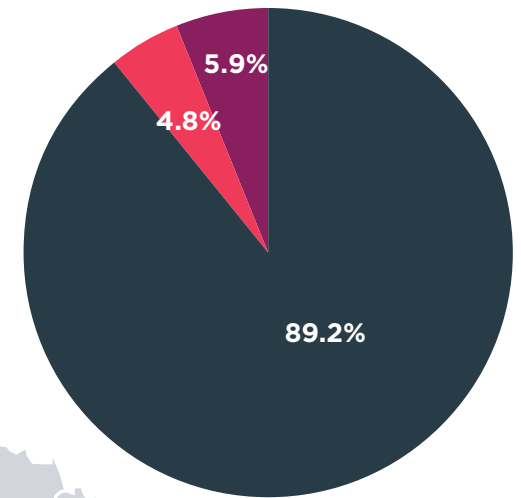
## RACING CLUBS IN THE REGION

### Thoroughbred

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

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

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$90.6m	\$6.0m	\$5.0m	\$101.5m
Total value added	\$74.9m	\$5.0m	\$4.1m	\$83.9m
Full-time equivalent employment	576	39	34	649

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	517	52	29	598
Horses and greyhounds in training	579	38	61	678

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	149	18	5	172
Owners	1,058	40	153	1,251
Trainers	113	9	13	136
Breeders staff	128	9	8	145
Stable/Kennel employees	204	5	5	214
Racing Club & industry staff (FT, PT, casual)	513	0	0	513
Jockeys, drivers & apprentices	14	8	0	22
Racing club volunteers	829	0	0	829
Volunteers assisting participants	277	62	23	362
<b>Total roles occupied in the Darling Downs - Maranoa region</b>	<b>3,285</b>	<b>152</b>	<b>206</b>	<b>3,643</b>

\*Some totals do not add due to rounding.

Race meetings in the Darling Downs - Maranoa region attracted attendances of **43,733** or **5.5%** 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

54 Race Meetings

THOROUGHBRED 54

348 Races

THOROUGHBRED 348

1,343 Racing Club Members

THOROUGHBRED 1,343

43,733 Attendances

THOROUGHBRED 43,733

\*Some totals do not add due to rounding

# Gold Coast

- + The population of the Gold Coast region is 663,216 (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 \$235.5 million in value added contribution to Gross State Product. This equates to 9.8% 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 1,755 full-time equivalent (FTE) jobs in the region.
- + There are more than 5,900 roles occupied in the racing industry in Gold Coast.

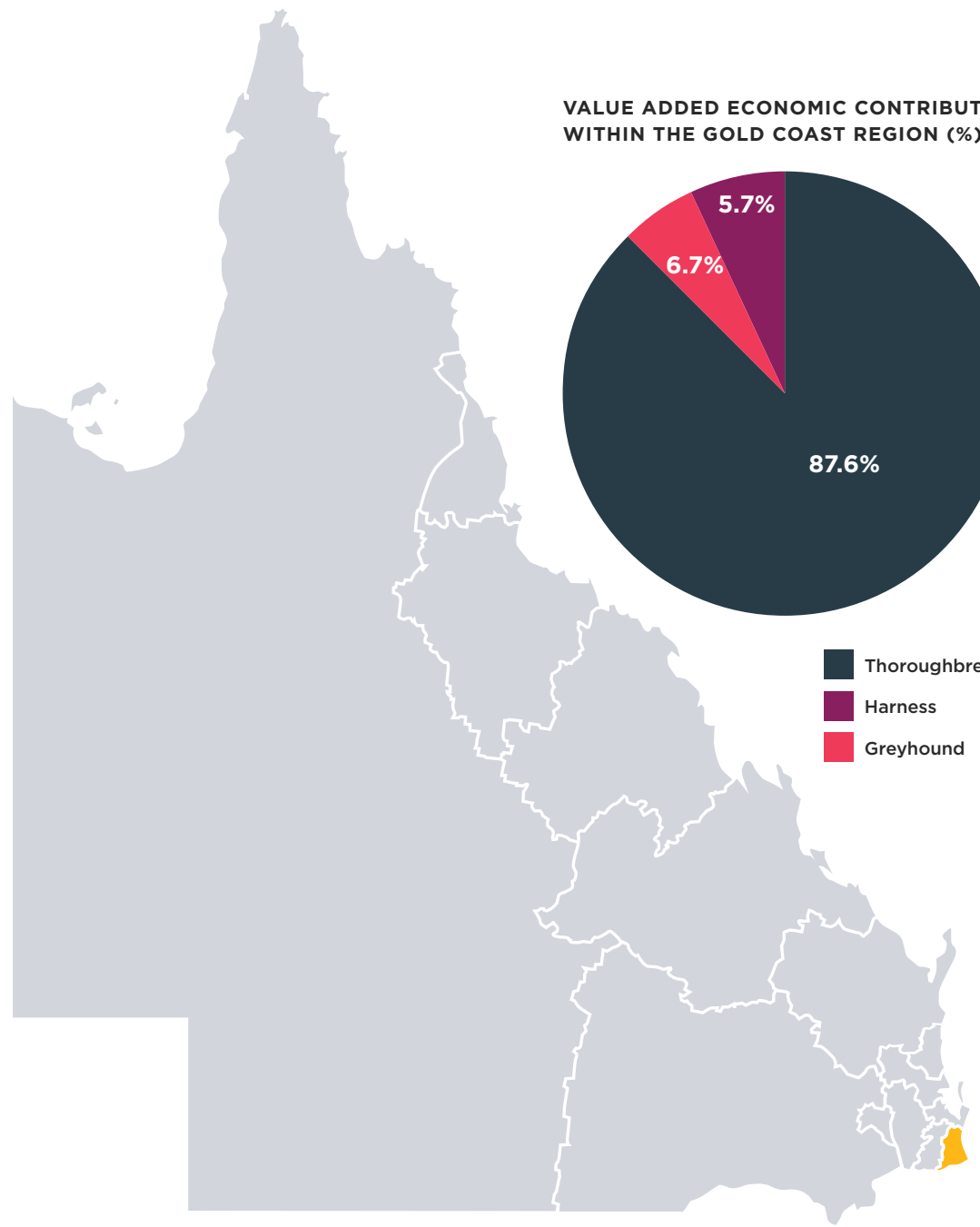
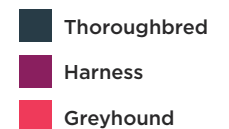
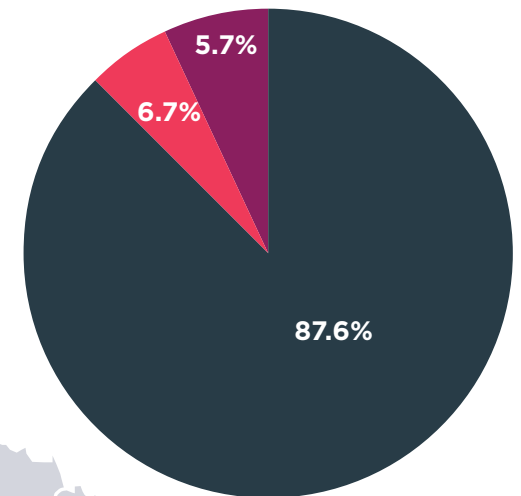
The racing industry in the **Gold Coast region** is responsible for generating **\$235.5 million in value added** contribution to gross state product. This represents **9.8% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Gold Coast Turf Club Ltd

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$192.6m	\$12.9m	\$14.4m	\$219.9m
Total value added	\$206.3m	\$13.5m	\$15.7m	\$235.5m
Full-time equivalent employment	1,531	102	123	1,755

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	143	38	75	256
Horses and greyhounds in training	1,372	130	243	1,745

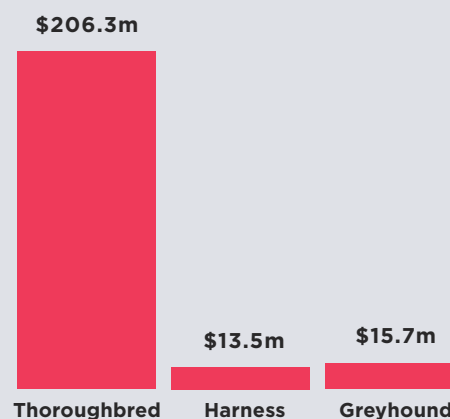
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	136	19	15	170
Owners	3,506	63	587	4,157
Trainers	104	18	28	151
Breeders staff	117	10	22	149
Stable/Kennel employees	330	23	25	378
Racing Club & industry staff (FT, PT, casual)	460	0	1	461
Jockeys, drivers & apprentices	35	11	0	45
Racing club volunteers	9	0	0	9
Volunteers assisting participants	254	76	56	386
<b>Total roles occupied in the Gold Coast region</b>	<b>4,950</b>	<b>220</b>	<b>734</b>	<b>5,905</b>

\*Some totals do not add due to rounding.

Race meetings in the Gold Coast region attracted attendances of **112,020** or **14.1% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

## 1 Racing Clubs

THOROUGHBRED 1

## 45 Race Meetings

THOROUGHBRED 45

## 344 Races

THOROUGHBRED 344

## 3,194 Racing Club Members

THOROUGHBRED 3,194

## 112,020 Attendances

THOROUGHBRED 112,020

\*Some totals do not add due to rounding

# Ipswich

- + The population of the Ipswich region is 384,943 (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 close to \$157.9 million in value added contribution to Gross State Product. This equates to 6.6% 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 1,158 full-time equivalent (FTE) jobs in the region.
- + There are over 4,000 roles occupied in the racing industry in Ipswich.

The racing industry in the Ipswich region is responsible for generating **\$157.9 million in value added** contribution to gross state product. This represents **6.6% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Esk Jockey Club
- + Ipswich Turf Club

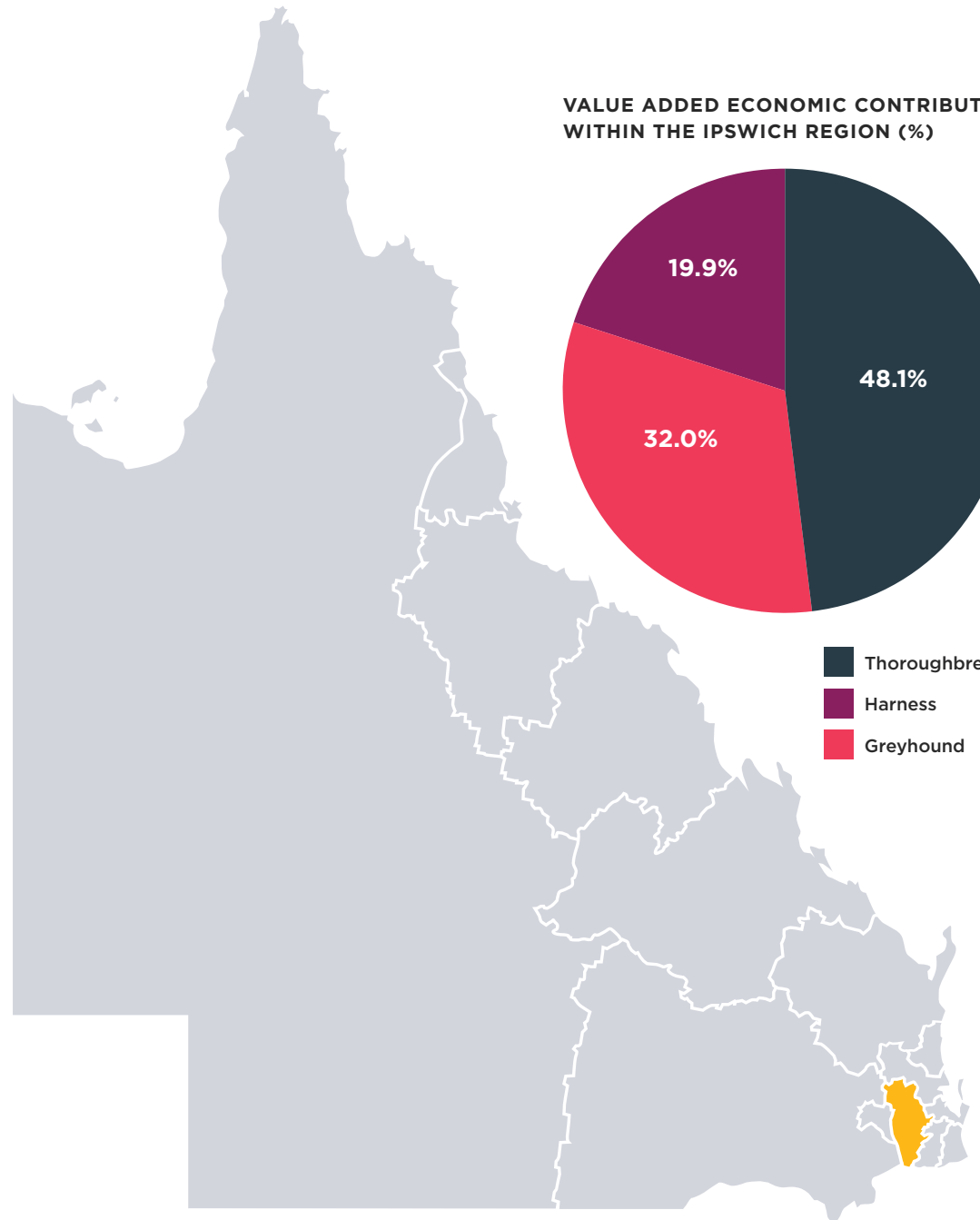
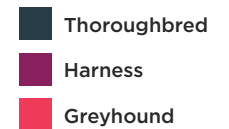
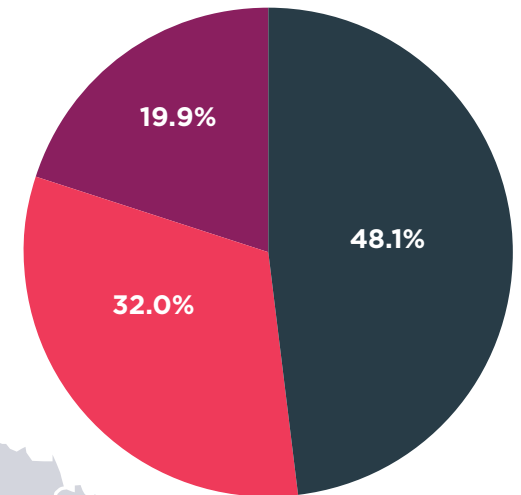
### Harness

- + 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	\$68.5m	\$30.7m	\$45.3m	\$144.6m
Total value added	\$75.9m	\$31.4m	\$50.6m	\$157.9m
Full-time equivalent employment	570	223	365	1,158

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	205	120	515	840
Horses and greyhounds in training	149	447	1,456	2,052

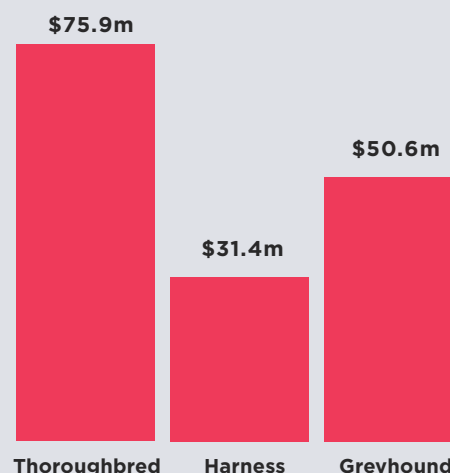
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	54	57	66	177
Owners	943	187	733	1,863
Trainers	45	98	184	327
Breeders staff	46	29	98	173
Stable/Kennel employees	133	47	84	265
Racing Club & industry staff (FT, PT, casual)	232	32	91	355
Jockeys, drivers & apprentices	6	58	0	64
Racing club volunteers	78	21	8	107
Volunteers assisting participants	106	277	311	694
<b>Total roles occupied in the Ipswich region</b>	<b>1,642</b>	<b>806</b>	<b>1,576</b>	<b>4,025</b>

\*Some totals do not add due to rounding.

Race meetings in the Ipswich region attracted attendances of **56,218** or **7.1% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

## 4 Racing Clubs

THOROUGHBRED	2
HARNES	1
GREYHOUND	1

## 261 Race Meetings

THOROUGHBRED	45
HARNES	16
GREYHOUND	200

## 2,808 Races

THOROUGHBRED	363
HARNES	135
GREYHOUND	2,310

## 586 Racing Club Members

THOROUGHBRED	423
HARNES	34
GREYHOUND	129

## 56,218 Attendances

THOROUGHBRED	33,495
HARNES	7,180
GREYHOUND	15,543

\*Some totals do not add due to rounding

# Logan - Beaudesert

- + The population of the Logan - Beaudesert region is 378,294 (Australian Bureau of Statistics).
- + There is one (1) racing club operating in the region, which is a thoroughbred club.
- + The racing industry in the Logan-Beaudesert region is responsible for generating more than \$81.0 million in value added contribution to Gross State Product. This equates to 3.4% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 612 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,500 roles occupied in the racing industry in Logan-Beaudesert.

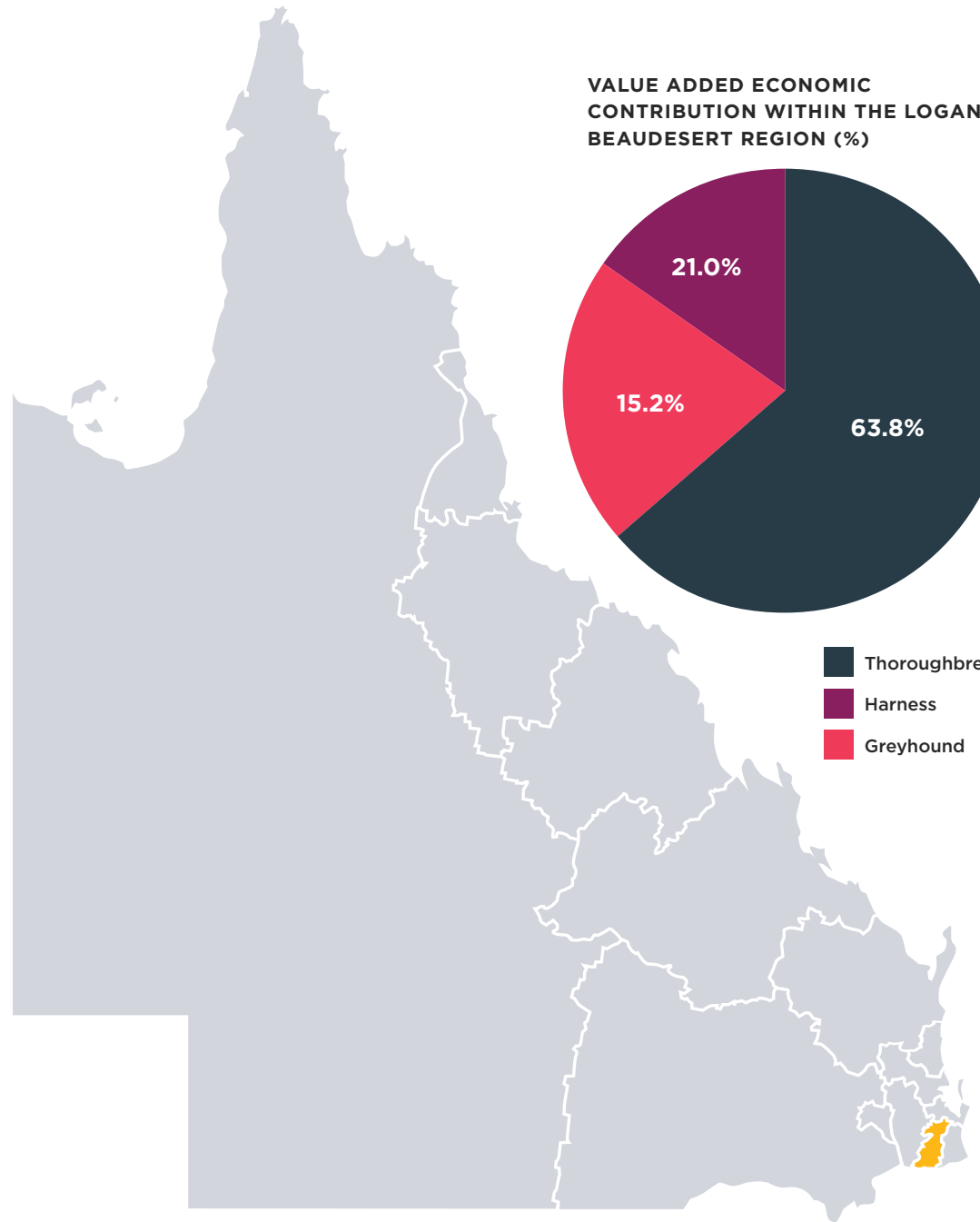
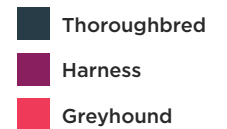
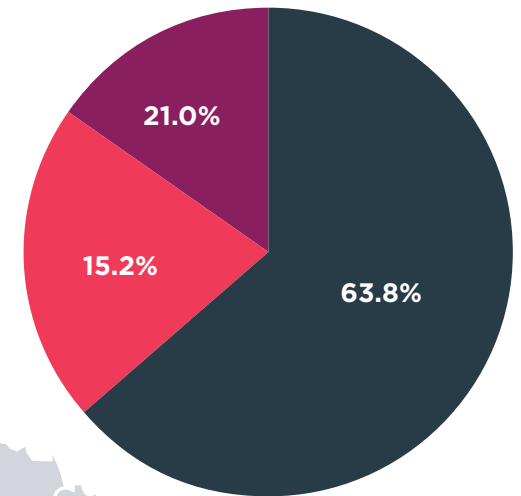
The racing industry in the **Logan-Beaudesert region is responsible for generating \$81.0 million in value added contribution to gross state product. This represents 3.4% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Beaudesert Hibernian Race Club Inc..

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





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$51.4m	\$17.7m	\$12.3m	\$81.4m
Total value added	\$51.7m	\$17.0m	\$12.3m	\$81.0m
Full-time equivalent employment	395	122	94	612

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	277	31	173	482
Horses and greyhounds in training	355	300	676	1,331

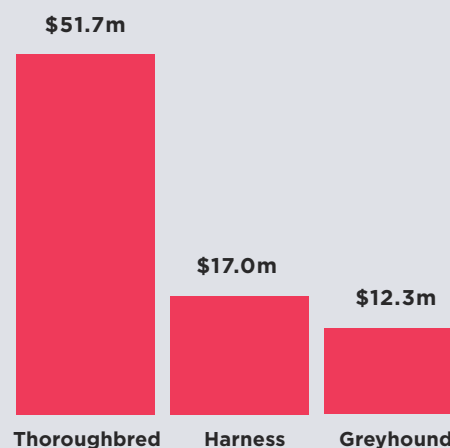
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	64	29	33	126
Owners	744	81	490	1,314
Trainers	59	44	104	207
Breeders staff	55	14	49	118
Stable/Kennel employees	162	32	50	244
Racing Club & industry staff (FT, PT, casual)	20	0	0	20
Jockeys, drivers & apprentices	8	26	0	35
Racing club volunteers	10	0	0	10
Volunteers assisting participants	134	133	168	435
<b>Total roles occupied in the Logan-Beaudesert region</b>	<b>1,256</b>	<b>359</b>	<b>894</b>	<b>2,509</b>

\*Some totals do not add due to rounding.

Race meetings in the Logan-Beaudesert region attracted attendances of **440** or **0.1%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 1 Racing Clubs

THOROUGHBRED 1

## 12 Race Meetings

THOROUGHBRED 12

## 94 Races

THOROUGHBRED 94

## 10 Racing Club Members

THOROUGHBRED 10

## 440 Attendances

THOROUGHBRED 440

\*Some totals do not add due to rounding

# Mackay-Isaac-Whitsunday

- + The population of the Mackay-Isaac-Whitsunday region is 186,215 (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 close to \$35.9 million in value added contribution to Gross State Product. This equates to 1.5% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 281 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,500 roles occupied in the racing industry in Mackay-Isaac-Whitsunday.

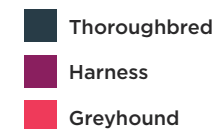
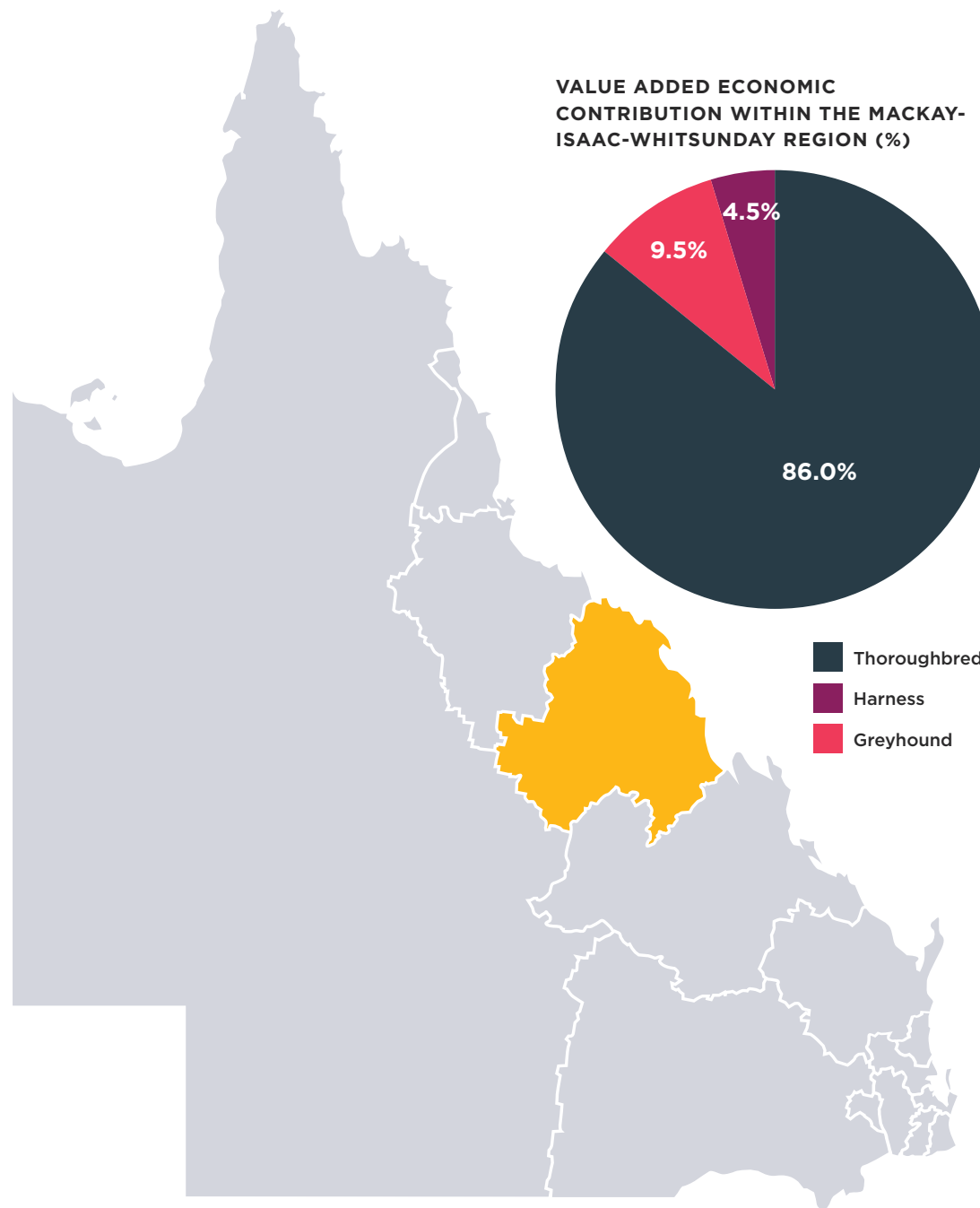
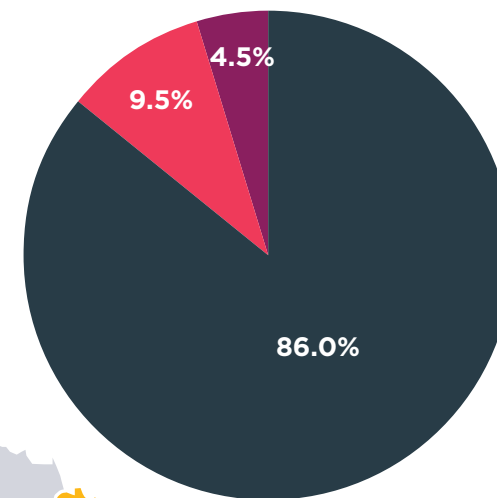
## RACING CLUBS IN THE REGION

### 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 \$35.9 million in value added** contribution to gross state product. This represents **1.5% of the industry total.**

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$36.4m	\$1.8m	\$3.8m	\$41.9m
Total value added	\$30.8m	\$1.6m	\$3.4m	\$35.9m
Full-time equivalent employment	239	13	28	281

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	23	5	19	47
Horses and greyhounds in training	267	0	26	293

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	27	7	0	34
Owners	748	15	98	861
Trainers	31	0	5	36
Breeders staff	23	4	0	27
Stable/Kennel employees	114	1	6	121
Racing Club & industry staff (FT, PT, casual)	193	0	0	193
Jockeys, drivers & apprentices	6	0	0	6
Racing club volunteers	157	0	0	157
Volunteers assisting participants	64	20	6	90
<b>Total roles occupied in the Mackay-Isaac-Whitsunday region</b>	<b>1,364</b>	<b>46</b>	<b>114</b>	<b>1,524</b>

\*Some totals do not add due to rounding.

Race meetings in the Mackay-Isaac-Whitsunday region attracted attendances of **25,716** or **3.2%** 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

43 Race Meetings

THOROUGHBRED 43

286 Races

THOROUGHBRED 286

427 Racing Club Members

THOROUGHBRED 427

25,716 Attendances

THOROUGHBRED 25,716

\*Some totals do not add due to rounding

# Moreton Bay

- + The population of the Moreton Bay region is 503,006 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region, one (1) of which is a thoroughbred club, and one (1) a harness racing club.
- + The racing industry in the Moreton Bay region is responsible for generating almost \$87.0 million in value added contribution to Gross State Product. This equates to 3.6% 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 649 full-time equivalent (FTE) jobs in the region.
- + There are over 3,200 roles occupied in the racing industry in Moreton Bay.

The racing industry in the **Moreton Bay region is responsible for generating \$87.0 million in value added** contribution to gross state product. This represents **3.6% of the industry total.**

## RACING CLUBS IN THE REGION

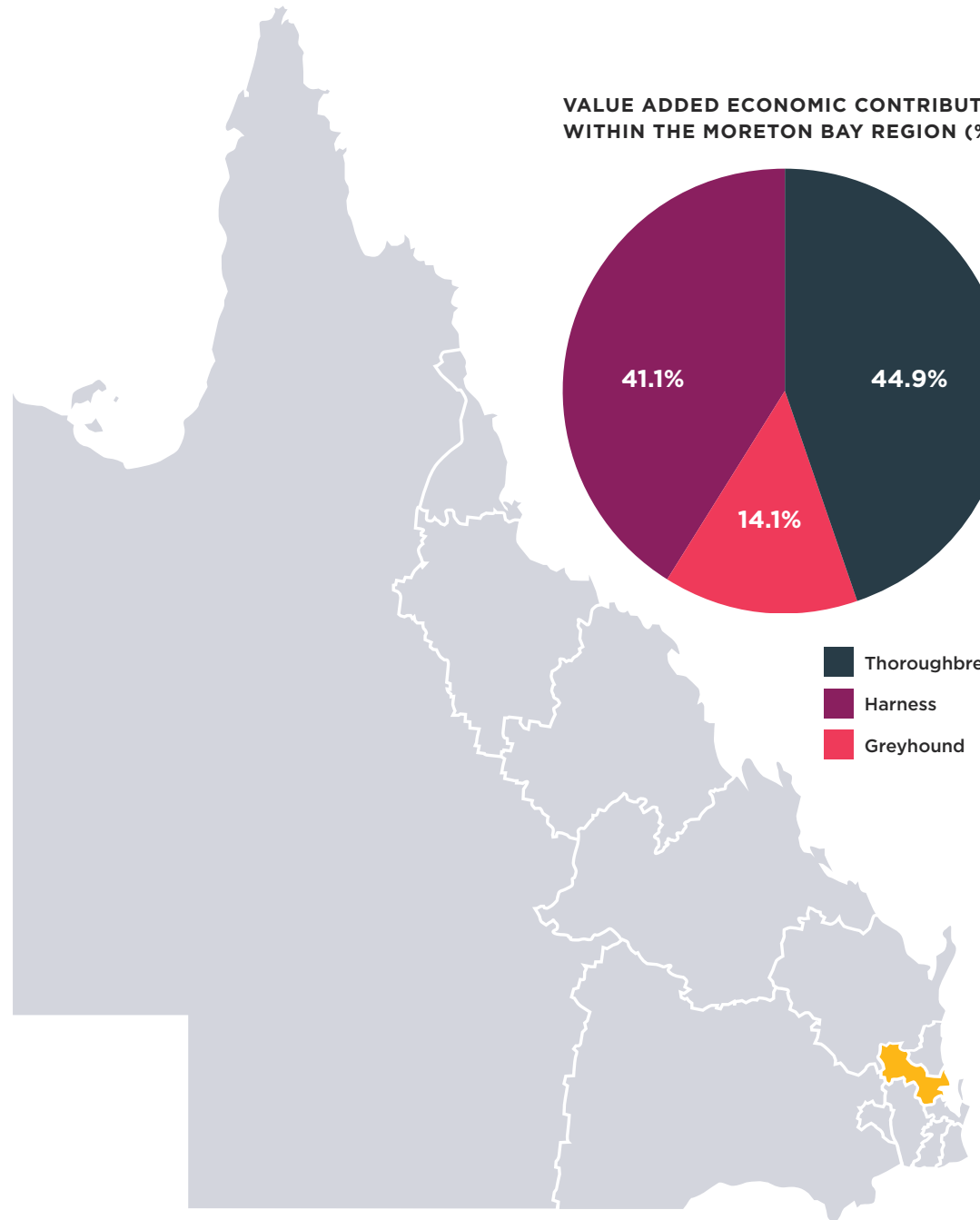
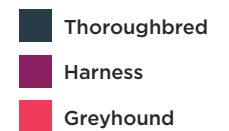
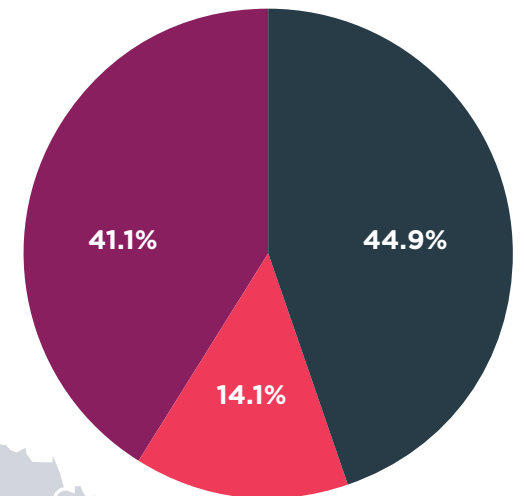
### Thoroughbred

- + 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	\$35.9m	\$32.0m	\$11.4m	\$79.3m
Total value added	\$39.0m	\$35.7m	\$12.2m	\$87.0m
Full-time equivalent employment	301	254	94	649

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	20	70	87	177
Horses and greyhounds in training	5	155	234	394

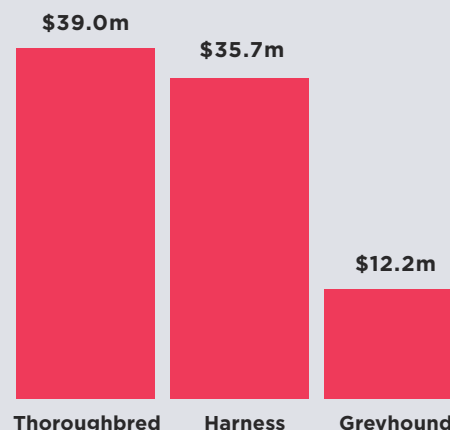
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	49	52	16	117
Owners	1,347	172	520	2,039
Trainers	31	61	66	159
Breeders staff	42	26	24	92
Stable/Kennel employees	148	46	43	236
Racing Club & industry staff (FT, PT, casual)	47	53	5	106
Jockeys, drivers & apprentices	12	26	0	37
Racing club volunteers	13	10	0	23
Volunteers assisting participants	83	219	99	402
<b>Total roles occupied in the Moreton Bay region</b>	<b>1,773</b>	<b>664</b>	<b>773</b>	<b>3,211</b>

\*Some totals do not add due to rounding.

Race meetings in the Moreton Bay region attracted attendances of **33,960** 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

## 152 Race Meetings

THOROUGHBRED	12
HARNESS	140

## 1,366 Races

THOROUGHBRED	93
HARNESS	1,273

## 226 Racing Club Members

THOROUGHBRED	92
HARNESS	134

## 33,960 Attendances

THOROUGHBRED	6,580
HARNESS	27,380

\*Some totals do not add due to rounding

# Queensland Outback

- + The population of the Queensland Outback region is 81,691 (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 \$29.8 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 235 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,200 roles occupied in the racing industry in Queensland - Outback.

The racing industry in the **Queensland - Outback region** is responsible for generating **\$29.8 million in value added** contribution to gross state product. This represents **1.2% of the industry total**.

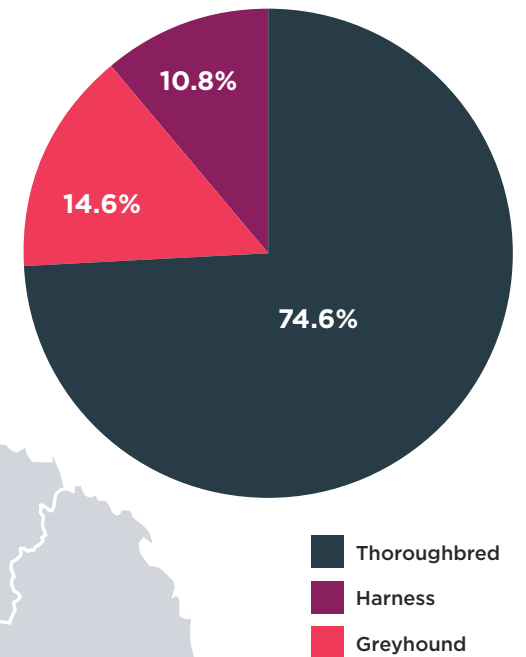
## RACING CLUBS IN THE REGION

### Thoroughbred

- + Alpha Jockey Club Inc.
- + Aramac Racing Club
- + Augathella Racing Club
- + Barcardine 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
- + Oakl 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	\$45.1m	\$0.7m	\$1.5m	\$47.3m
Total value added	\$28.4m	\$0.4m	\$1.0m	\$29.8m
Full-time equivalent employment	223	4	9	235

**ANIMALS**

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	2	0	0	2
Horses and greyhounds in training	650	0	1	651

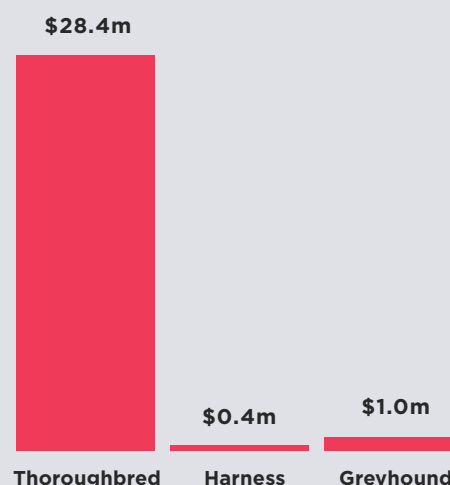
**TOTAL ROLES OCCUPIED IN RACING**

	Thoroughbred	Harness	Greyhound	Total
Breeders	18	0	1	19
Owners	573	3	19	596
Trainers	77	0	1	77
Breeders staff	15	0	1	17
Stable/Kennel employees	132	0	1	133
Racing Club & industry staff (FT, PT, casual)	509	0	0	509
Jockeys, drivers & apprentices	14	0	0	14
Racing club volunteers	1,702	0	0	1,702
Volunteers assisting participants	121	0	2	124
<b>Total roles occupied in the Queensland Outback region</b>	<b>3,161</b>	<b>3</b>	<b>26</b>	<b>3,190</b>

\*Some totals do not add due to rounding.

Race meetings in the Queensland Outback region attracted attendances of **45,806** 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

84 Race Meetings

THOROUGHBRED 84

486 Races

THOROUGHBRED 486

2,284 Racing Club Members

THOROUGHBRED 2,284

45,806 Attendances

THOROUGHBRED 45,806

\*Some totals do not add due to rounding

# Sunshine Coast

- + The population of the Sunshine Coast region is 413,218 (Australian Bureau of Statistics).
- + There is one (1) race club operating in the region and it is a thoroughbred club.
- + The racing industry in the Sunshine Coast region is responsible for generating more than \$145.4 million in value added contribution to Gross State Product. This equates to 6.1% 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 1,072 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,400 roles occupied in the racing industry in Sunshine Coast.

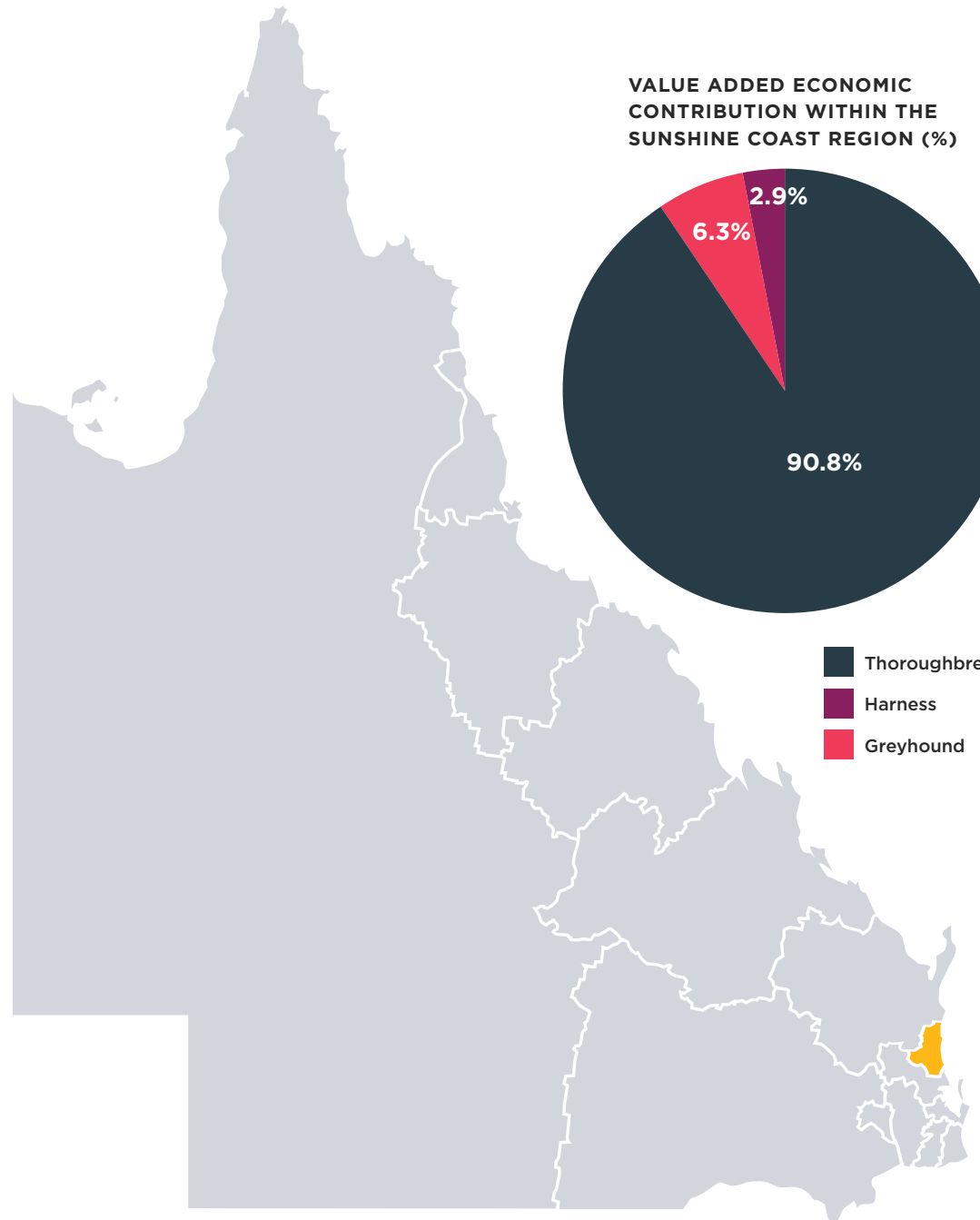
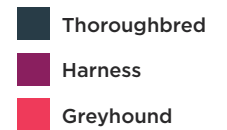
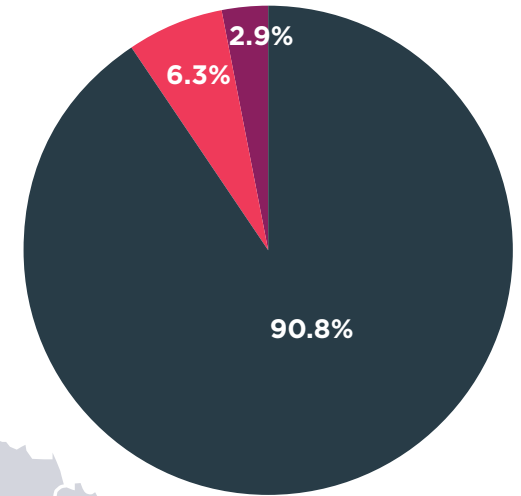
The racing industry in the **Sunshine Coast region** is responsible for generating **\$145.4 million** in value added contribution to gross state product. This represents **6.1%** of the industry total.

## 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	\$125.3m	\$3.9m	\$8.3m	\$137.6m
Total value added	\$132.1m	\$4.3m	\$9.1m	\$145.4m
Full-time equivalent employment	967	34	71	1,072

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	43	11	34	88
Horses and greyhounds in training	1,026	0	62	1,088

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	68	8	5	81
Owners	2,058	26	253	2,337
Trainers	84	2	12	98
Breeders staff	58	4	7	70
Stable/Kennel employees	284	2	11	297
Racing Club & industry staff (FT, PT, casual)	249	0	0	249
Jockeys, drivers & apprentices	24	1	0	25
Racing club volunteers	7	0	0	7
Volunteers assisting participants	172	25	21	218
<b>Total roles occupied in the Sunshine Coast region</b>	<b>3,003</b>	<b>68</b>	<b>310</b>	<b>3,380</b>

\*Some totals do not add due to rounding.

## Race meetings in the Sunshine Coast region

attracted attendances of **76,115** or **9.6%** 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

### 70 Race Meetings

THOROUGHBRED 70

### 543 Races

THOROUGHBRED 543

### 2,348 Racing Club Members

THOROUGHBRED 2,348

### 76,115 Attendances

THOROUGHBRED 76,115

\*Some totals do not add due to rounding

# Toowoomba

- + The population of the Toowoomba region is 167,199 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region, both of which are thoroughbred clubs.
- + The racing industry in the Toowoomba region is responsible for generating more than \$106.7 million in value added contribution to Gross State Product. This equates to 4.4% 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 785 full-time equivalent (FTE) jobs in the region.
- + There are over 2,500 roles occupied in the racing industry in Toowoomba.

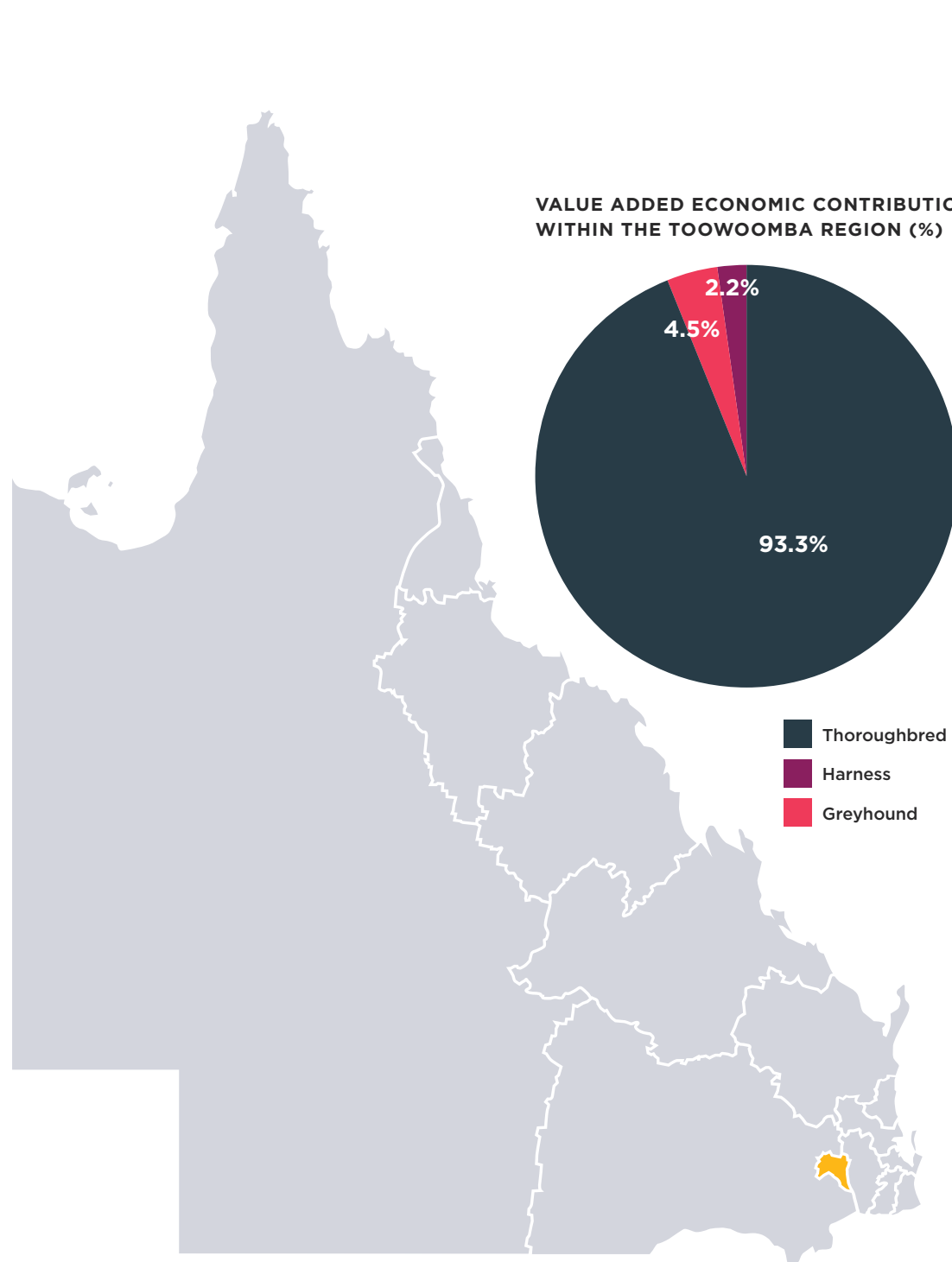
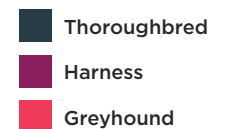
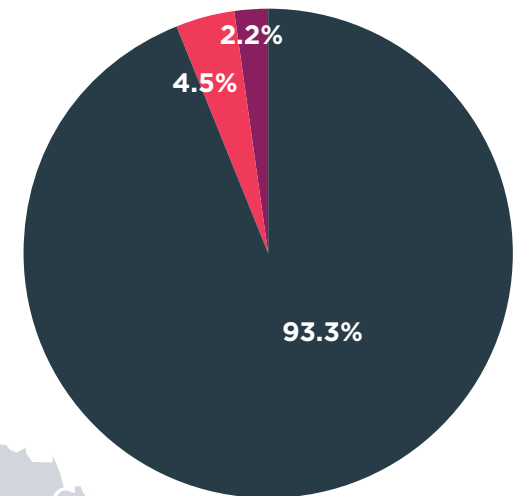
The racing industry in the **Toowoomba region is responsible for generating \$106.7 million in value added** contribution to gross state product. This represents **4.4% of the industry total.**

## 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	\$99.4m	\$2.4m	\$4.9m	\$106.7m
Total value added	\$99.6m	\$2.4m	\$4.8m	\$106.7m
Full-time equivalent employment	729	18	38	785

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	293	5	110	407
Horses and greyhounds in training	1,077	19	172	1,268

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	95	4	12	111
Owners	1,053	27	242	1,322
Trainers	98	8	28	134
Breeders staff	82	2	17	101
Stable/Kennel employees	293	5	23	321
Racing Club & industry staff (FT, PT, casual)	183	0	0	183
Jockeys, drivers & apprentices	15	8	0	22
Racing club volunteers	32	0	0	32
Volunteers assisting participants	213	20	50	283
<b>Total roles occupied in the Toowoomba region</b>	<b>2,064</b>	<b>74</b>	<b>371</b>	<b>2,509</b>

\*Some totals do not add due to rounding.

Race meetings in the Toowoomba region attracted attendances of **40,096** or **5.0%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 2 Racing Clubs

THOROUGHBRED 2

## 61 Race Meetings

THOROUGHBRED 61

## 463 Races

THOROUGHBRED 463

## 572 Racing Club Members

THOROUGHBRED 572

## 40,096 Attendances

THOROUGHBRED 40,096

\*Some totals do not add due to rounding

# Townsville

- + The population of the Townsville region is 240,276 (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 \$75.2 million in value added contribution to Gross State Product. This equates to 3.1% 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 570 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,700 roles occupied in the racing industry in Townsville.

The racing industry in the **Townsville region is responsible for generating \$75.2 million in value added** contribution to gross state product. This represents **3.1% of the industry total.**

## RACING CLUBS IN THE REGION

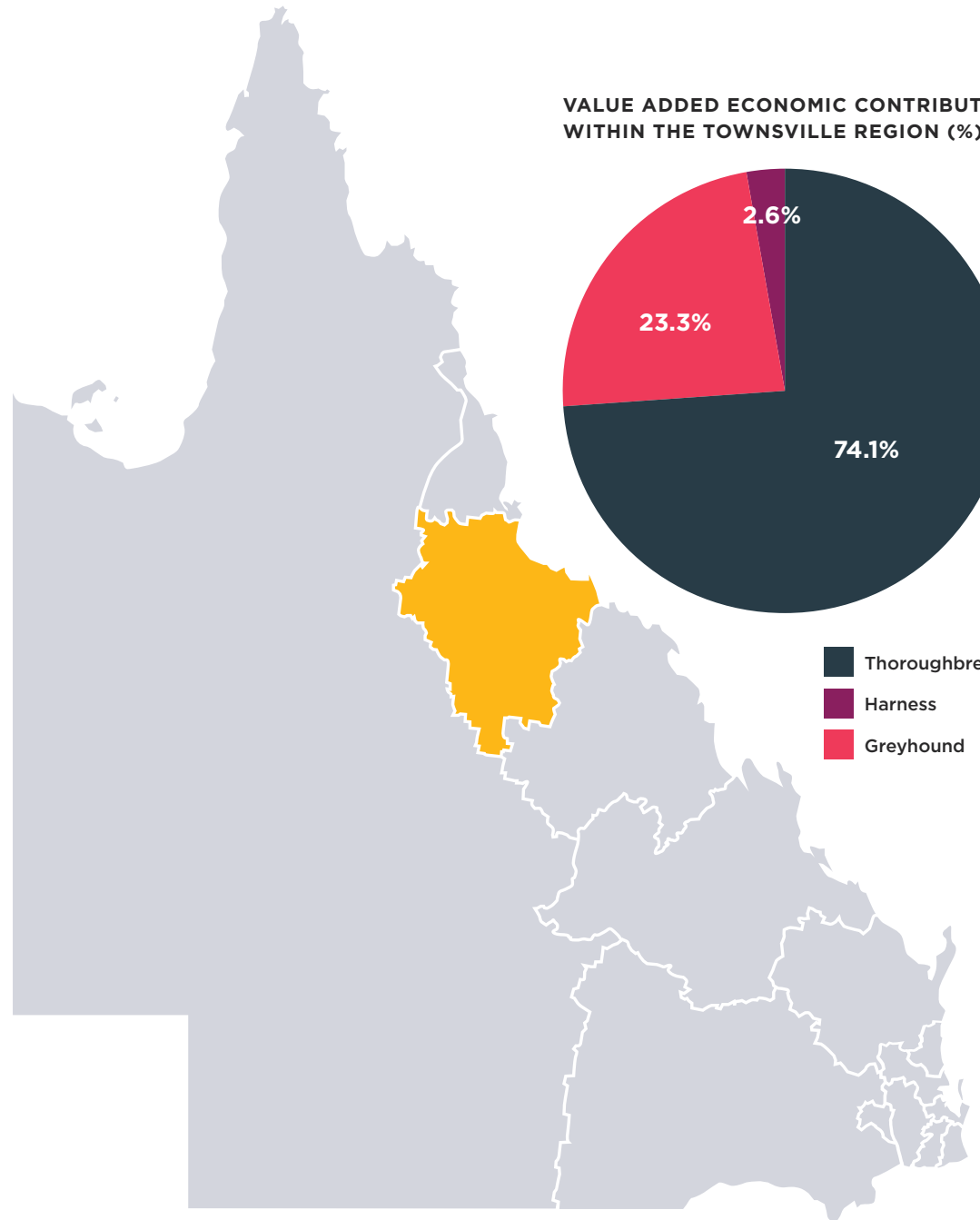
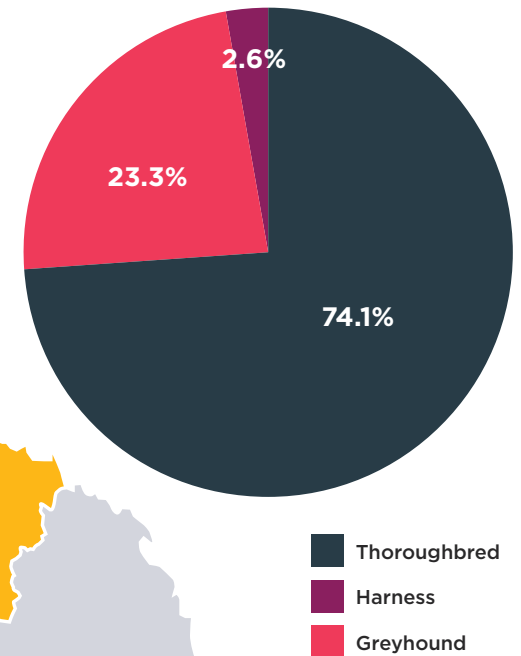
### Thoroughbred

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

### Greyhound

- + Townsville Greyhound Racing Club Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOWNVILLE REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$55.7m	\$2.0m	\$17.2m	\$74.9m
Total value added	\$55.7m	\$2.0m	\$17.5m	\$75.2m
Full-time equivalent employment	423	16	131	570

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	13	0	34	47
Horses and greyhounds in training	600	0	498	1,099

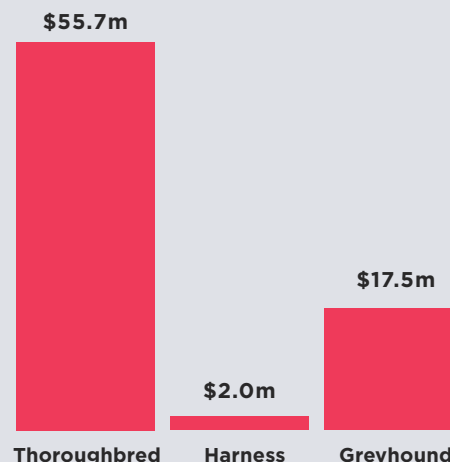
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	28	0	9	37
Owners	1,173	4	305	1,482
Trainers	87	0	64	151
Breeders staff	24	0	13	37
Stable/Kennel employees	186	0	32	218
Racing Club & industry staff (FT, PT, casual)	175	0	51	226
Jockeys, drivers & apprentices	13	0	0	13
Racing club volunteers	275	0	0	283
Volunteers assisting participants	144	0	86	230
<b>Total roles occupied in the Townsville region</b>	<b>2,105</b>	<b>4</b>	<b>567</b>	<b>2,677</b>

\*Some totals do not add due to rounding.

Race meetings in the Townsville region attracted attendances of **43,287** or **5.4% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

## 9 Racing Clubs

THOROUGHBRED	8
GREYHOUND	1

## 139 Race Meetings

THOROUGHBRED	49
GREYHOUND	90

## 1,365 Races

THOROUGHBRED	350
GREYHOUND	1,015

## 2,071 Racing Club Members

THOROUGHBRED	1,967
GREYHOUND	104

## 43,287 Attendances

THOROUGHBRED	36,950
GREYHOUND	6,337

\*Some totals do not add due to rounding

# Wide Bay

- + The population of the Wide Bay region is 317,500 (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 more than \$49.3 million in value added contribution to Gross State Product. This equates to 2.1% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 392 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,500 roles occupied in the racing industry in Wide Bay.

The racing industry in the **Wide Bay region is responsible for generating \$49.3 million in value added** contribution to gross state product. This represents **2.1% of the industry total.**

## RACING CLUBS IN THE REGION

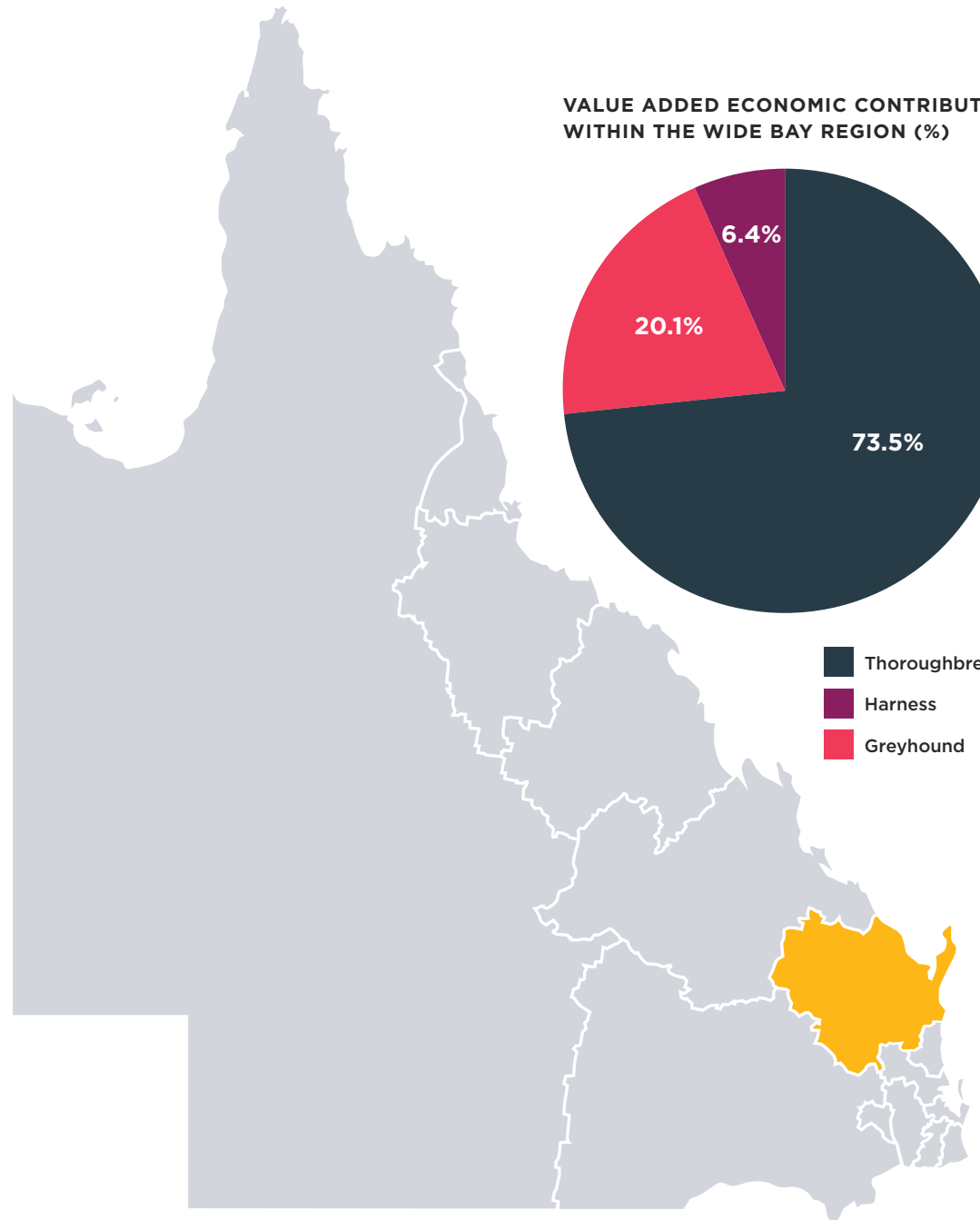
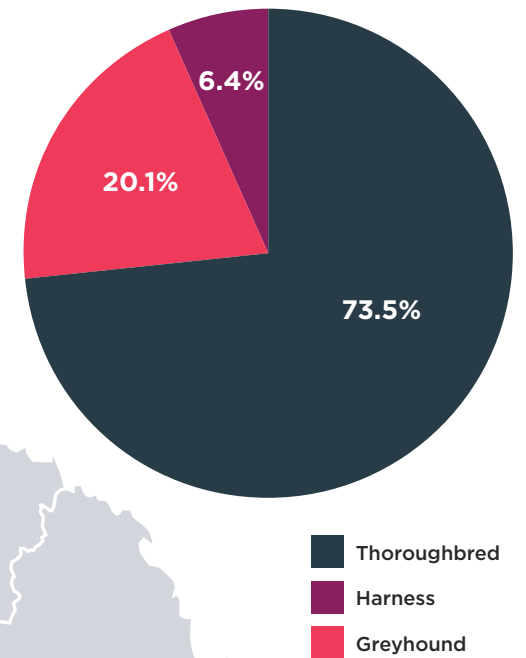
### Thoroughbred

- + 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	\$38.8m	\$3.4m	\$10.6m	\$52.8m
Total value added	\$36.2m	\$3.1m	\$9.9m	\$49.3m
Full-time equivalent employment	288	26	79	392

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	72	9	20	100
Horses and greyhounds in training	254	8	274	536

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	62	9	6	77
Owners	935	16	217	1,168
Trainers	69	7	59	135
Breeders staff	54	4	9	67
Stable/Kennel employees	107	1	30	138
Racing Club & industry staff (FT, PT, casual)	230	1	30	260
Jockeys, drivers & apprentices	9	4	0	13
Racing club volunteers	370	0	5	375
Volunteers assisting participants	147	33	75	254
<b>Total roles occupied in the Wide Bay region</b>	<b>1,983</b>	<b>74</b>	<b>431</b>	<b>2,488</b>

\*Some totals do not add due to rounding.

Race meetings in the Wide Bay region attracted attendances of **25,729** or **3.2% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

## 11 Racing Clubs

THOROUGHBRED	10
GREYHOUND	1

## 50 Race Meetings

THOROUGHBRED	28
GREYHOUND	22

## 362 Races

THOROUGHBRED	155
GREYHOUND	207

## 960 Racing Club Members

THOROUGHBRED	900
GREYHOUND	60

## 25,729 Attendances

THOROUGHBRED	23,770
GREYHOUND	1,959

\*Some totals do not add due to rounding

# South East Queensland

- + The population of the South East Queensland region is 3,868,974 (Australian Bureau of Statistics).
- + There are a total of seventeen (16) racing clubs operating in the region, ten (10) 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 more than \$1,999.9 million in value added contribution to Gross State Product. This equates to 83.3% 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 12,745 full-time equivalent (FTE) jobs in the region.
- + There are more than 31,200 participants in the racing industry in South East Queensland.

The racing industry in the **South East Queensland region is responsible for generating \$1,999.9 million in value added** contribution to gross state product. This represents **83.3% 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

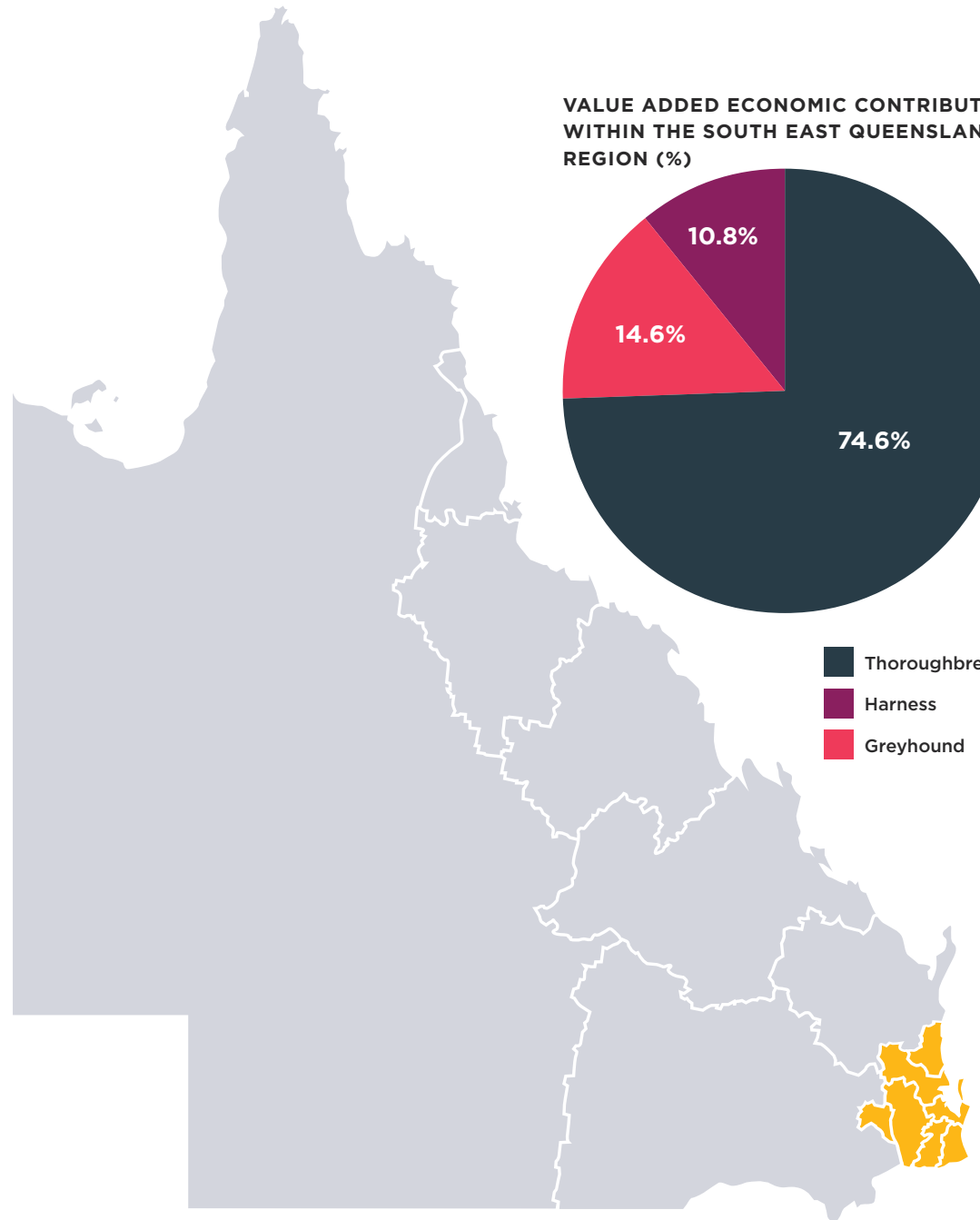
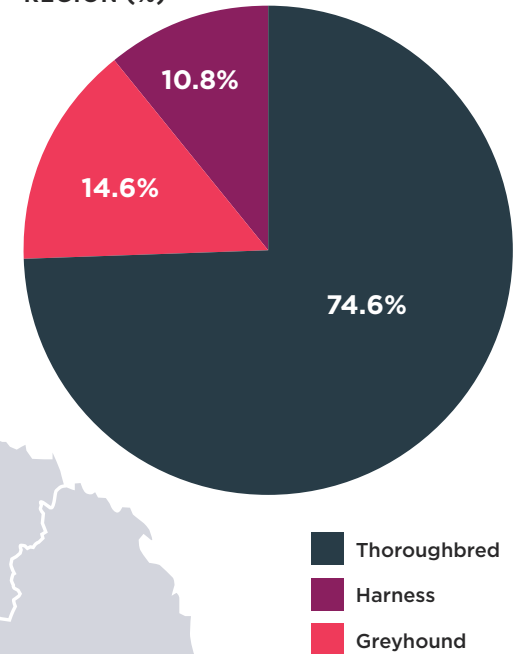
### Harness

- + 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	\$991.9m	\$160.0m	\$201.6m	\$1,353.4m
Total value added	\$1,491.4m	\$216.6m	\$292.0m	\$1,999.9m
Full-time equivalent employment	9,512	1,389	1,844	12,745

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	994	335	1,015	2,344
Horses and greyhounds in training	5,720	1,062	2,921	9,703

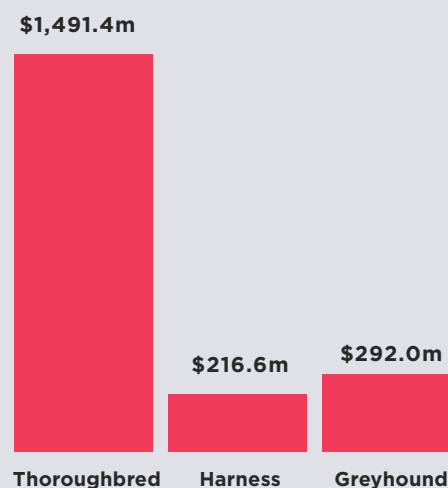
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	604	197	152	953
Owners	15,365	699	4,124	20,188
Trainers	511	242	466	1,219
Breeders staff	520	99	226	845
Stable/Kennel employees	1,771	165	282	2,218
Racing Club & industry staff (FT, PT, casual)	2,011	224	324	2,559
Jockeys, drivers & apprentices	140	134	0	274
Racing club volunteers	159	40	18	217
Volunteers assisting participants	1,136	836	771	2,743
<b>Total roles occupied in the South East Queensland region</b>	<b>22,217</b>	<b>2,635</b>	<b>6,363</b>	<b>31,216</b>

\*Some totals do not add due to rounding.

Race meetings in the South East Queensland region attracted attendances of **517,937** or **65.1%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 16 Racing Clubs

THOROUGHBRED	10
HARNES	3
GREYHOUND	3

## 1,105 Race Meetings

THOROUGHBRED	322
HARNES	302
GREYHOUND	4

## 10,811 Races

THOROUGHBRED	2,569
HARNES	2,791
GREYHOUND	5,451

## 16,238 Racing Club Members

THOROUGHBRED	15,418
HARNES	413
GREYHOUND	407

## 517,937 Attendances

THOROUGHBRED	404,065
HARNES	66,697
GREYHOUND	47,175

\*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 thoroughbred, harness and greyhound racing industry 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 principle racing authority and race 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)
- + 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)
- + Australian Football League

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 New Zealand racing industry (2024)
- + Size and scope of the South Australian racing industry (2023)
- + Size and scope of the Tasmanian racing industry (2023)
- + Size and scope of the New South Wales harness racing industry (2023)
- + Size and scope of the Australian Football League (2022)
- + Size and scope of Thoroughbred racing industry in the Northern Territory (2022)
- + Size and scope of the Victorian racing industry (2021)
- + Size and scope of the Western Australian racing industry (2021)
- + Size and scope of the Asian Racing Federation (2020)
- + Size and scope of the South Australian racing industry (2019)
- + Economic and social impact study of harness racing in Australia (2012)

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



UL

3

NEVER GIVE UP

