

Size and Scope of the

QUEENSLAND RACING INDUSTRY

PREPARED BY IER | JUNE 2026







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KEY FINDINGS

In 2024/25 the Queensland racing industry was responsible for **generating over \$2.5 billion in value added contribution** to the Queensland economy – **52% of which directly benefits regional economies**

DIRECT SPENDING IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Direct Expenditure ¹	\$1,455.5m	\$169.3m	\$259.4m	\$1,884.3m

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Value Added ²	\$1,934.1m	\$222.9m	\$348.4m	\$2,505.4m
% of Industry Value Added	77%	9%	14%	100%
Total Household Income ³	\$1,060.4m	\$122.4m	\$197.2m	\$1,380.0m
Total FTE Employment	10,813	1,234	1,947	13,994

In 2024/25, the Queensland racing industry generated total direct spending of \$1,884.3 million. This expenditure was responsible for creating a direct value added impact (in terms of wages, salaries and profits) of \$929.8 million. However, the flow-on effects linked to this expenditure increase the size of the industry's value added contribution to more than \$2.5 billion.

More than half of the total value added impact occurred in regional areas of Queensland, with the Gold Coast (14.7%), Darling Downs - Maranoa (7.4%) and Ipswich (6.3%) regions representing the largest regional areas of racing related economic activity.

The economic output generated by the Queensland racing industry was directly responsible for sustaining 6,608 full time equivalent (FTE) jobs across the state. When flow-on employment impacts are considered, the total FTE impact generated by the Queensland racing industry rose to 13,994 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.

¹ 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.

² 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

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





Of the **13,994 FTE jobs sustained** by the Queensland racing industry over **47% 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 2024/25, over 771,300 attendances were recorded at thoroughbred, harness and greyhound race meetings in Queensland. Approximately 75% of these attendances were made at racecourses outside Brisbane, with the Gold Coast (15.3%), Darling Downs (9.6%) and Sunshine Coast (8.9%), 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 48,700 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 more than 7,900 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 **31 race meetings held in Queensland** every week providing live entertainment to **over 771,300 attendees**

AT A GLANCE

RACING ACTIVITY

120 Racing Clubs

THOROUGHBRED	111
HARNESS	4
GREYHOUND	5

1,388 TAB Race Meetings

THOROUGHBRED	451
HARNESS	295
GREYHOUND	642

215 Non-TAB Race Meetings

THOROUGHBRED	214
HARNESS	1
GREYHOUND	0

14,440 Total Races

THOROUGHBRED	4,574
HARNESS	2,558
GREYHOUND	7,308

771,327 Attendances

THOROUGHBRED	633,206
HARNESS	64,204
GREYHOUND	73,917

2,818 Live Foals/ Pups Bred

THOROUGHBRED	1,654
HARNESS	249
GREYHOUND	915

14,750 Horses and Greyhounds in Training

THOROUGHBRED	9,574
HARNESS	1,096
GREYHOUND	4,080





AT A GLANCE

THE PEOPLE

1,340 Breeders

THOROUGHBRED	783
HARNESS	186
GREYHOUND	371

27,684 Owners

THOROUGHBRED	22,439
HARNESS	798
GREYHOUND	4,447

2,037 Trainers

THOROUGHBRED	1,170
HARNESS	245
GREYHOUND	622

4,654 Racing Club & Industry Staff

THOROUGHBRED	4,055
HARNESS	210
GREYHOUND	389

4,697 Staff employed by participants

THOROUGHBRED	3,714
HARNESS	266
GREYHOUND	718

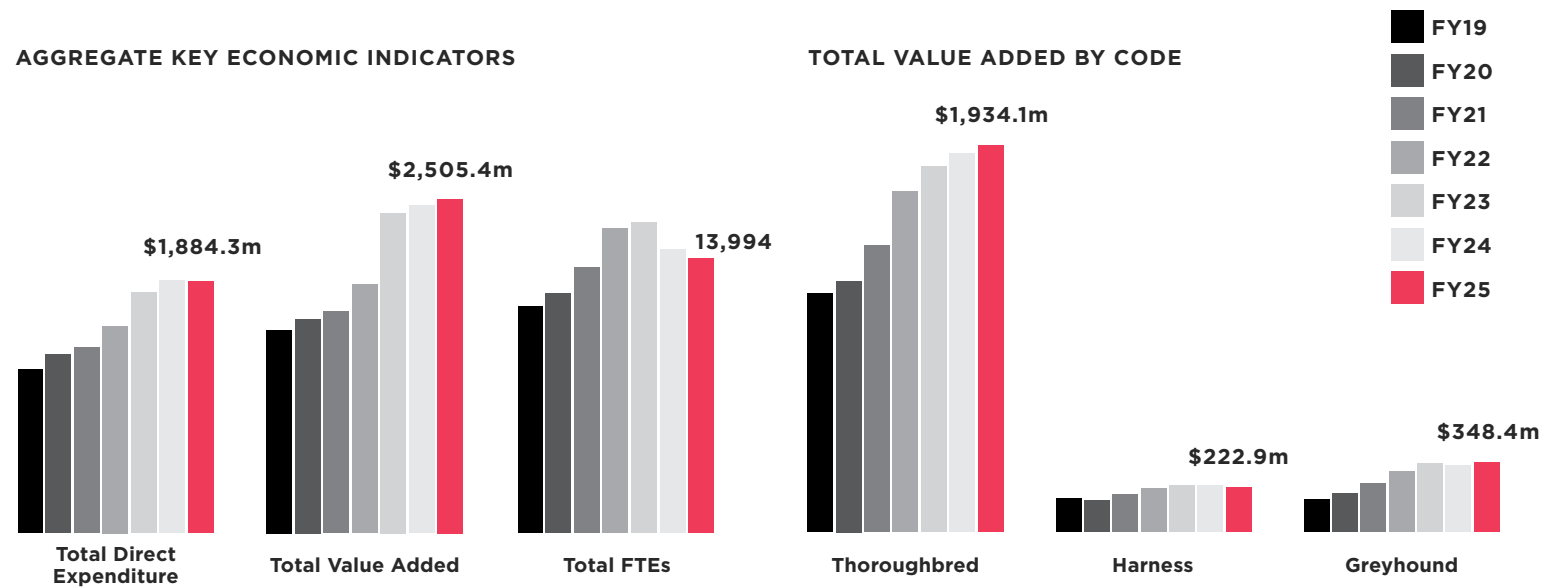
There are **close to 48,700 roles occupied** in the Queensland racing industry as an **employee, participant or volunteer**. Almost **80% of these participants** in racing are in **regional communities**

352 Jockeys & Drivers

THOROUGHBRED	204
HARNESS	148

7,918 Volunteers

THOROUGHBRED	6,077
HARNESS	841
GREYHOUND	1,000



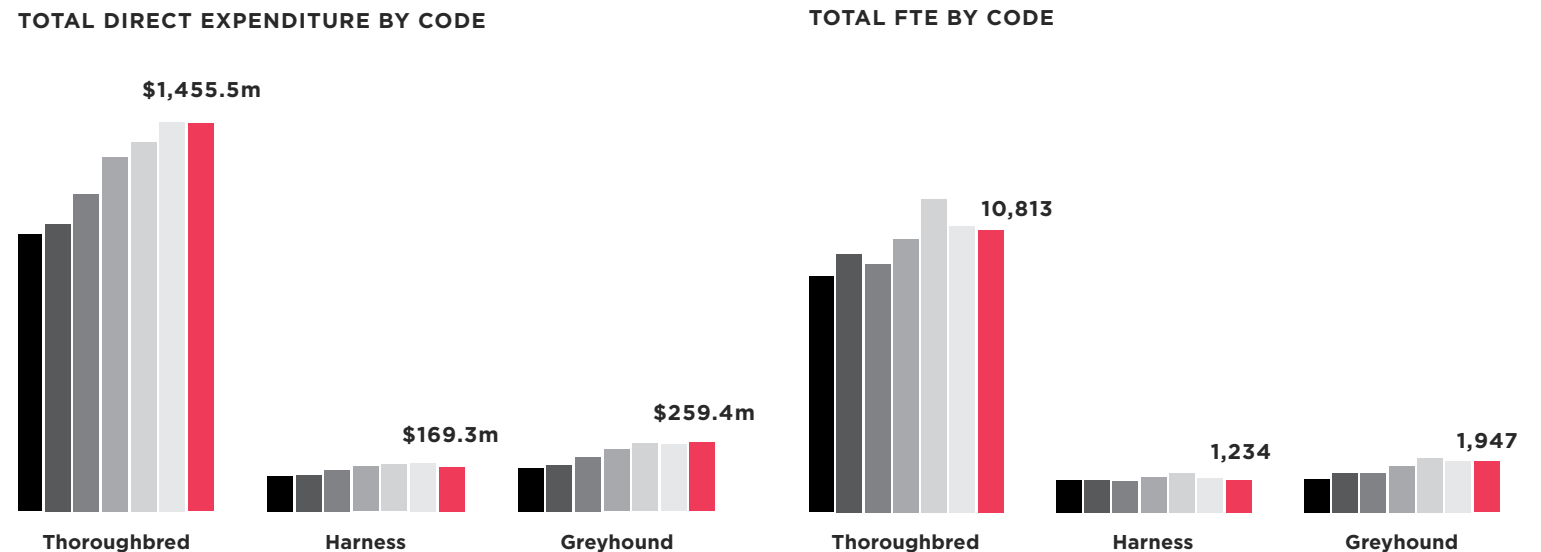
Historical snapshot

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 2018/19.

When comparing the overall results for the racing industry in Queensland it is evident that although overall direct expenditure and value added contribution has grown year-on-year, in 2024/25 the number of FTE jobs experienced a decline due to macro-economic factors.

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.





INTRODUCTION

In July 2025, 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 for the 2023/24 racing year.

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 roles occupied (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:

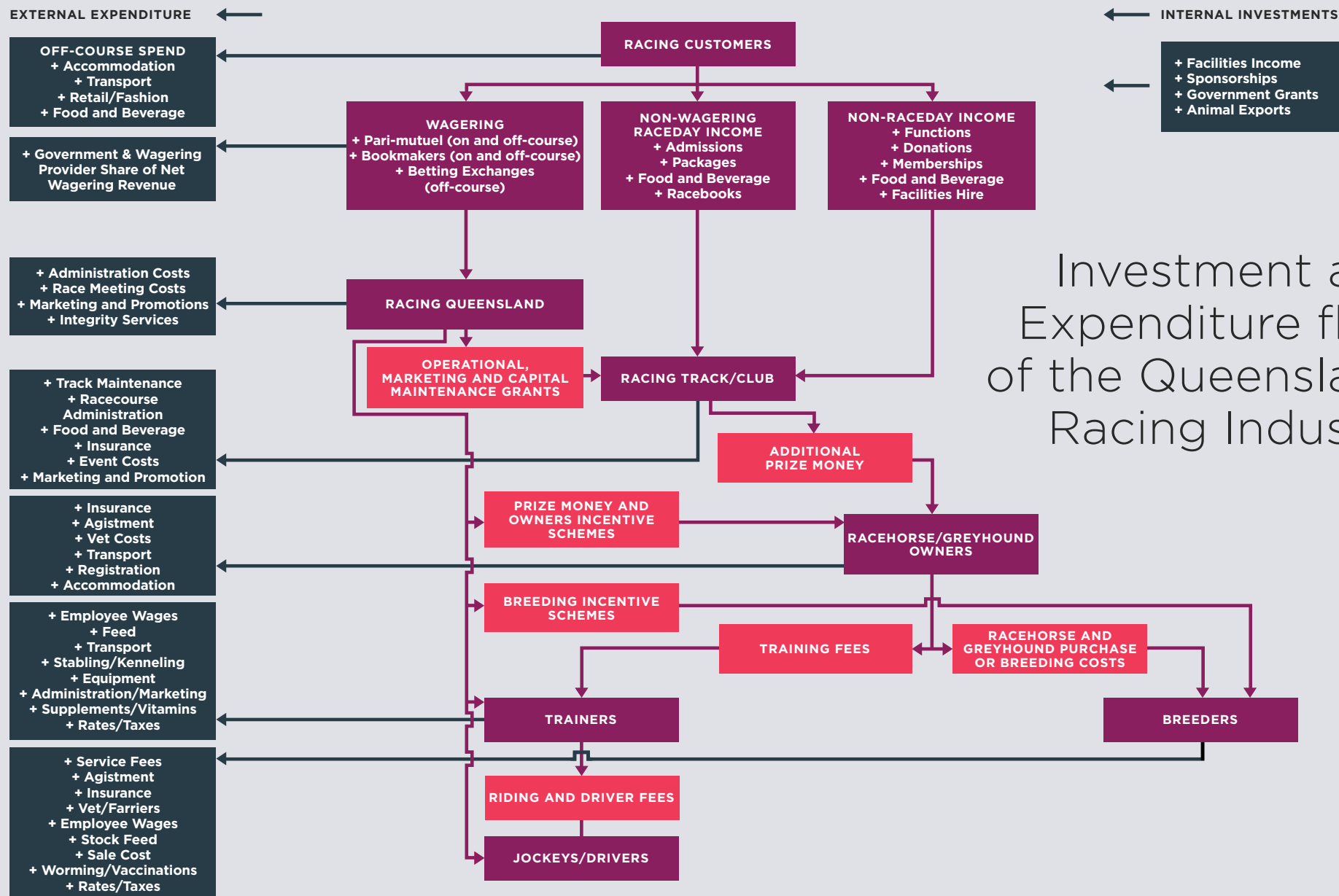
- a. R9114 - Sport and Physical Recreation Administration,
- b. R9121 - Horse and Dog Racing Activities,
- c. R9129 - Training and Racing Activities,
- d. R9209 - Other Gambling (Racing).

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. This study is based on the 2023/24 national input output tables.

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.





ECONOMIC IMPACTS

The Queensland racing industry is responsible for **generating close to \$1.9 billion in expenditure** in Queensland. Close to two thirds of this expenditure was **generated in regional parts of the state.**

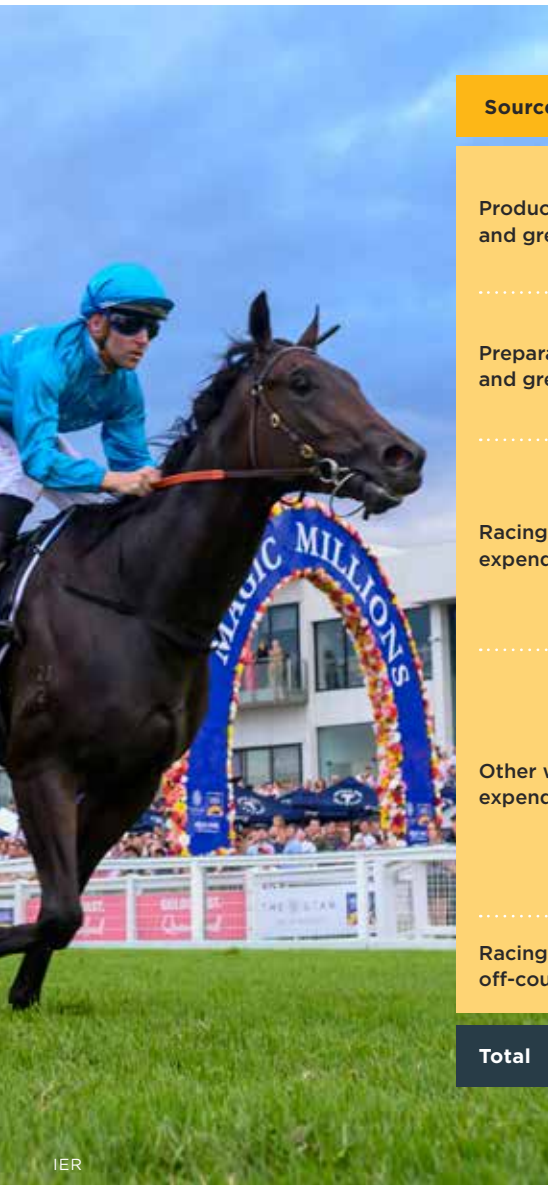
Direct Spending by the Queensland racing industry

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 2024/25 the Queensland racing industry generated \$1.9 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).



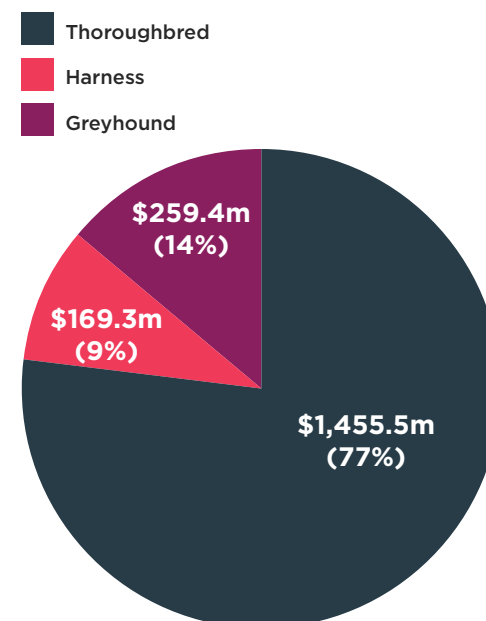


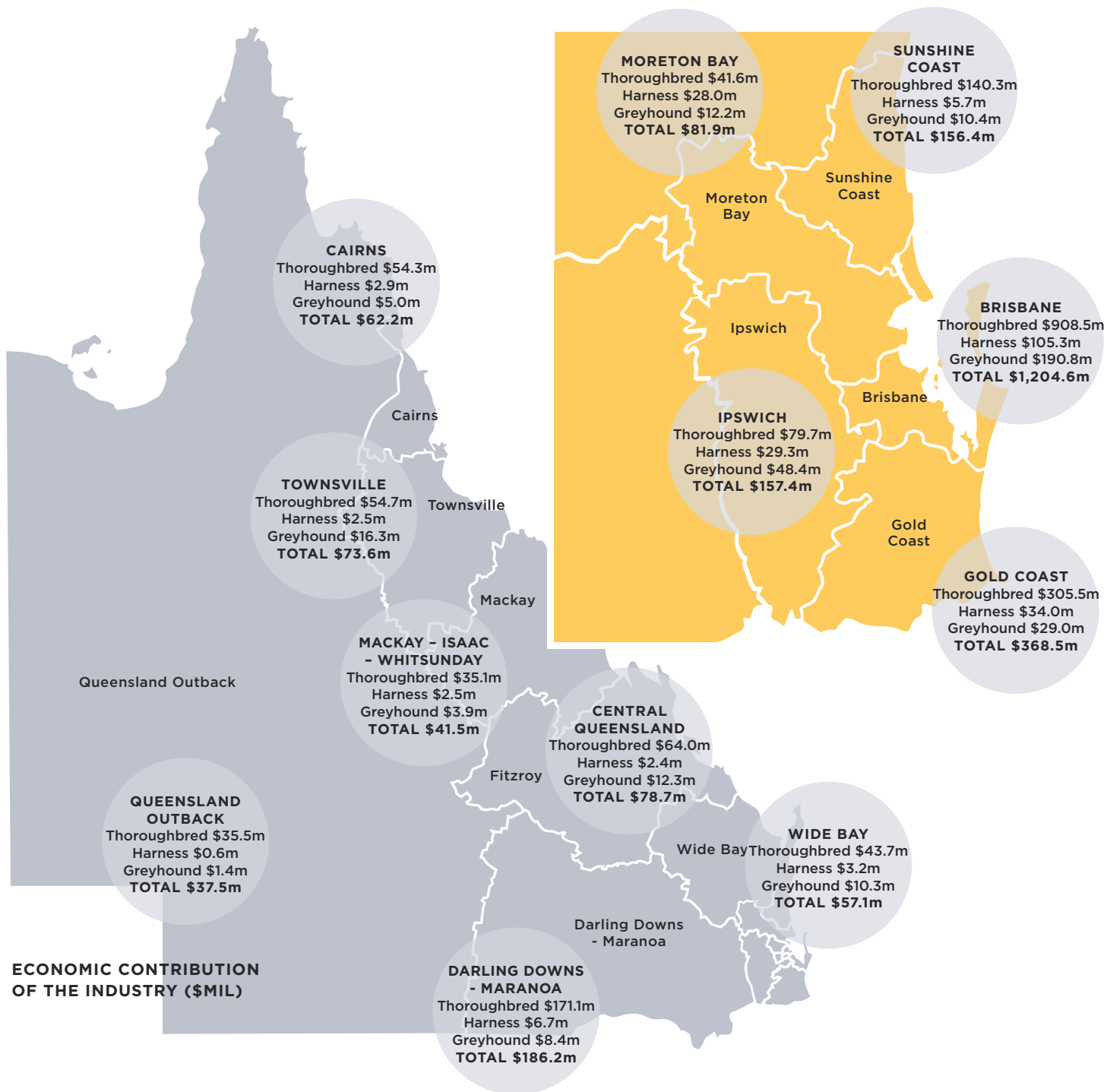
The breakdown of final expenditures is outlined below:

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	\$139.3m	7.4%
Preparation of racing horses and greyhounds (training)	+ private investment + prize money + industry bonuses & incentives	\$437.0m	23.2%
Racing club & industry expenditure	+ wagering product fees + raceday revenues + sponsorship & membership + non-raceday revenues + nominations	\$637.0m	33.8%
Other wagering operator expenditure	+ Net Wagering Revenues from QLD Racing Product and QLD Resident Wagering on Imported Product	\$592.0m	31.4%
Racing customer expenditure off-course	+ private investment	\$79.1m	4.2%
Total		\$1,884.3m	

Thoroughbred racing is responsible for generating three quarters of the final expenditures. More than 67% of this expenditure was in regional parts of the state. Harness racing is responsible for generating 9% of the final expenditures. Close to two thirds of this expenditure was in regional parts of the state. Greyhound racing is responsible for generating over 14% of the final expenditures. Close to 57% of this expenditure is in regional parts of the state.

DIRECT SPENDING BY CODE (\$MIL)





Economic Contribution of the Industry

The Queensland racing industry is responsible for generating a real gross value added contribution of \$2,505.4 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).



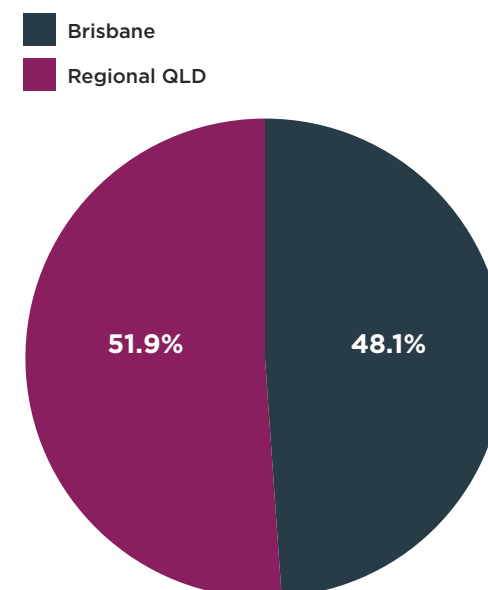
Generally, the level of economic activity will not always proportionally follow the final expenditures, as regional areas generally have higher import penetrations than metropolitan areas – i.e. a lot of the expenditure is on product imported from the metropolitan area. As such, the model takes into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

When considering the value added contribution of \$2,505.4 million generated by the Queensland racing industry, it is important to note that it is made up of:

- ✦ Direct value added (\$929.8 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 (\$1575.6 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 ANZSIC Industry classification sectors identified within the input output table. The calculation of the indirect (induced) effects, which are allocated to the industry in which the impact occurs, is undertaken by running an impact assessment, and tracing the whole of economy effect of the expenditure patterns linked to the racing industry.

QUEENSLAND RACING INDUSTRY ECONOMIC IMPACT BY REGION



Participants in the Queensland racing industry

The concept of 'participation in racing' is broader than simply considering those employed in the industry. Participants include employees, 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 31,000 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 7,918 volunteer roles occupied, in which individuals provide their time and skills

TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	783	186	371	1,340
Owners	22,439	798	4,447	27,684
Trainers	1,170	245	622	2,037
Racing Club & Industry Staff (FT, PT, Casual)	4,055	210	389	4,654
Breeders Staff	674	93	281	1,048
Stable/Kennel Employees	3,040	173	437	3,650
Jockeys & Drivers	204	148	0	352
Racing club volunteers	3,875	29	25	3,929
Volunteers assisting participants	2,202	812	975	3,989
Total	38,442	2,693	7,547	48,682

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

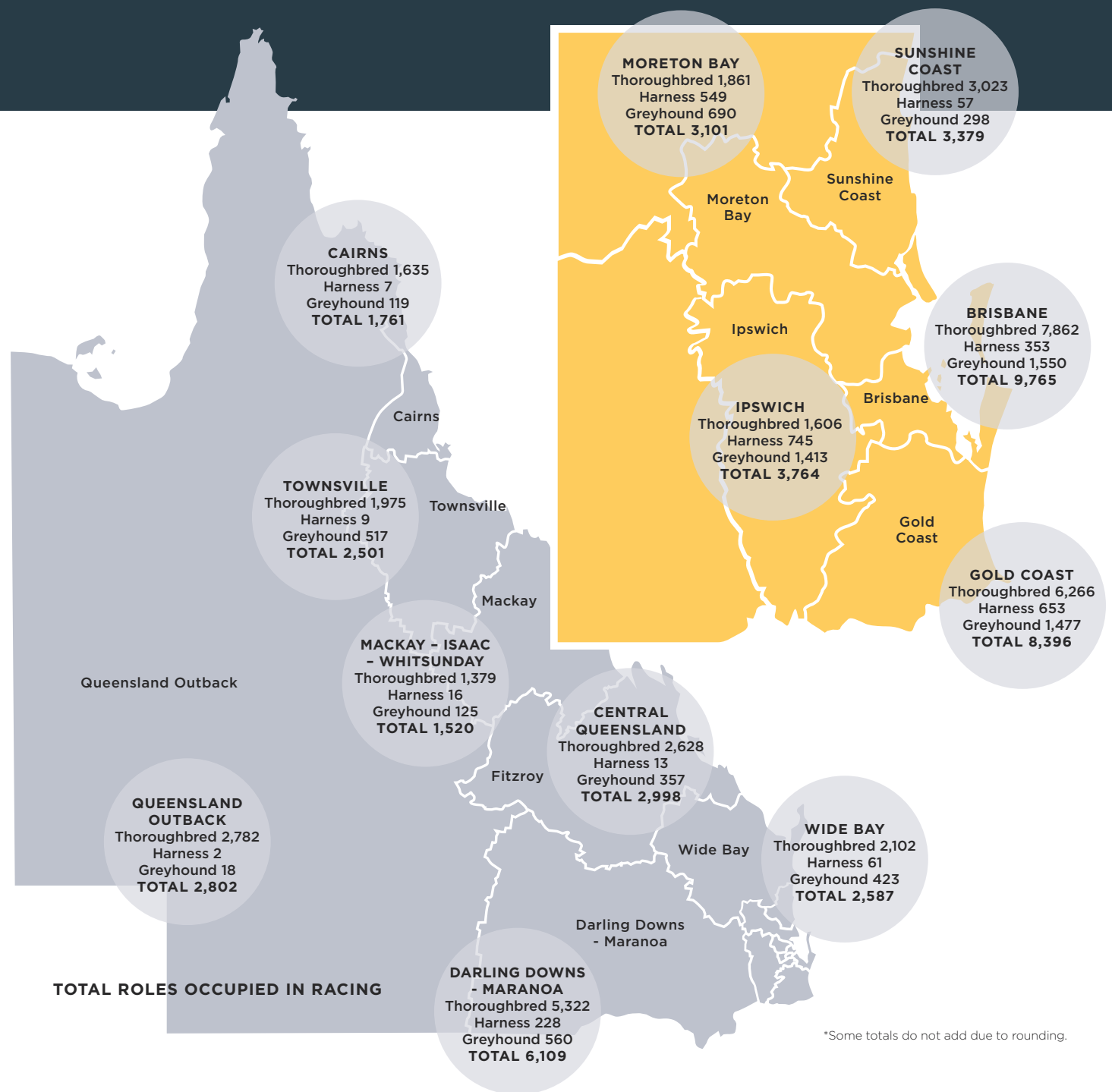
*Racing Club & Industry staff includes:

- 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)

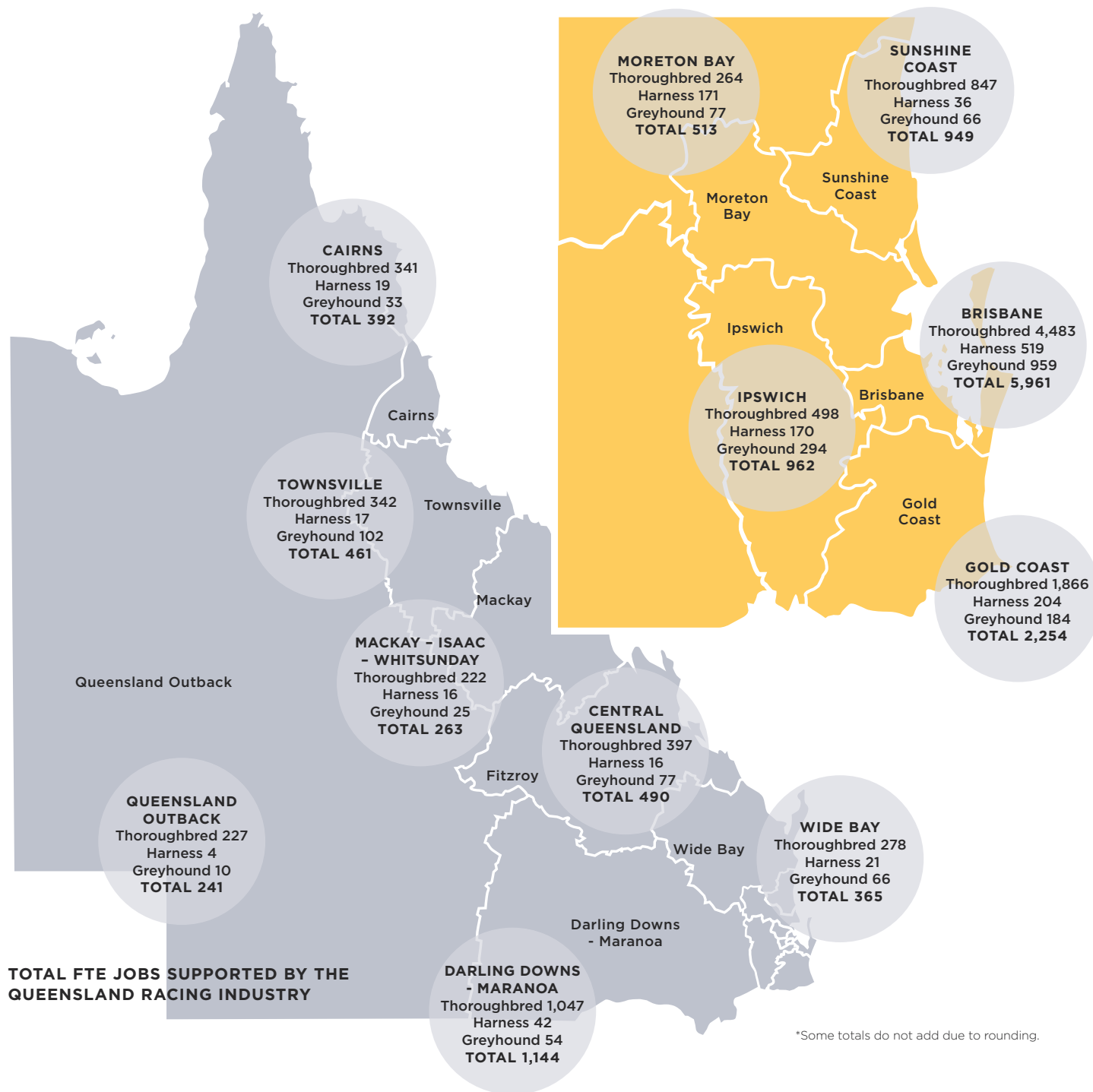
in a variety ways within the industry. In the participant space, this often includes family members - for many of whom, this family connection goes back many generations.

In total, there are 48,682 roles occupied in the Queensland racing industry as a participant, employee or volunteer. Close to 80% 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 2024/25, the economic activity generated by the Queensland racing industry directly sustained 6,608 full-time equivalent positions in Queensland. In addition to the direct employment impact, the activities of the racing industry also help to sustain a further 7,386 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Queensland racing industry was 13,994 FTE jobs.

The FTE positions that are sustained by the Queensland racing industry resulted in close to \$1,380.0 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.

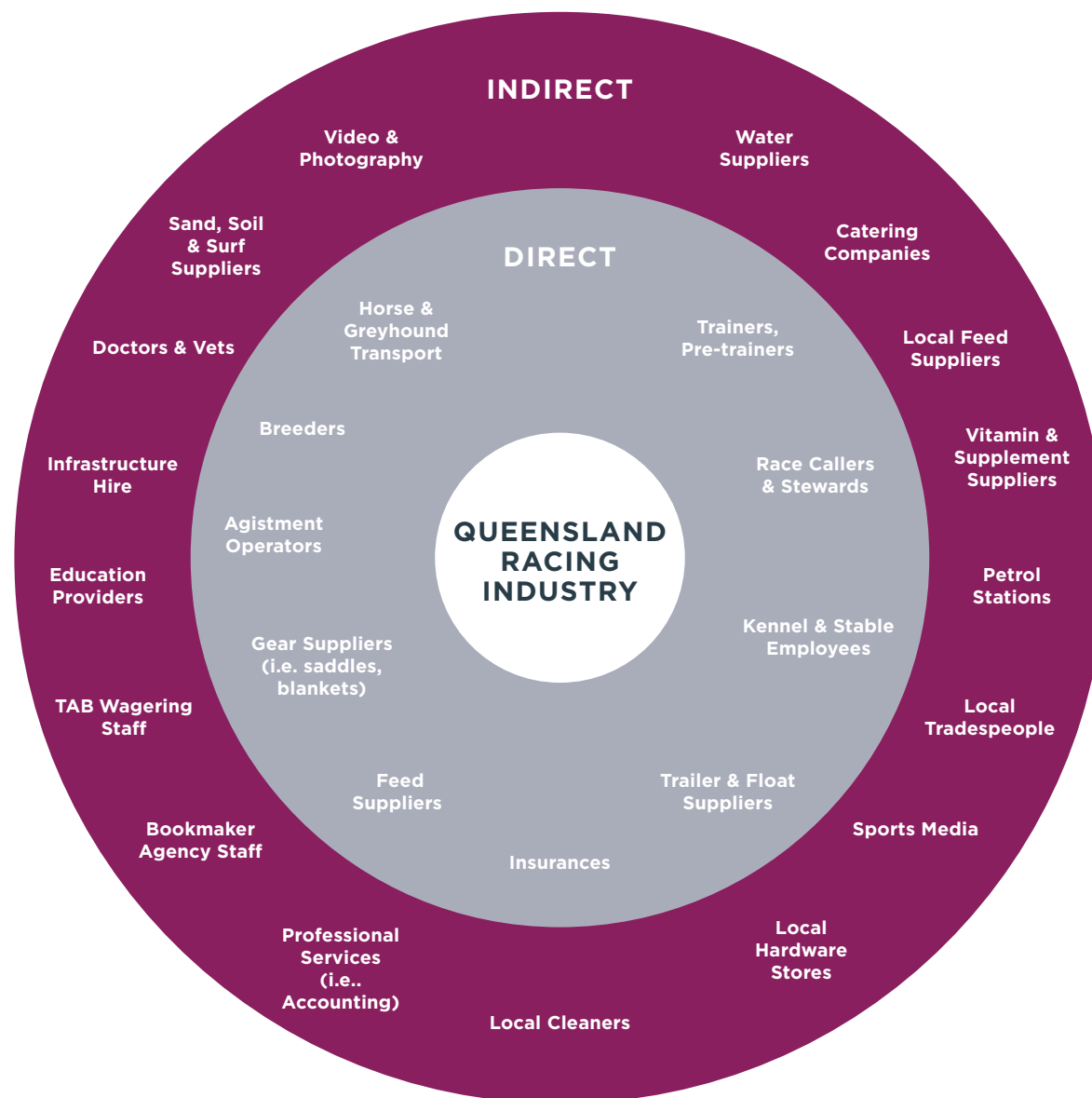
The Supplier Network

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

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

ANZSIC Sector	Key Impacts	Driven by
Professional, scientific & technical services	+ Direct value added - \$157.7m + Direct FTE jobs - 885	+ veterinary services + scientific research services + management & related consulting services
Other gambling services	+ Direct value added - \$120.9m + Direct FTE jobs - 1,012	+ bookmaker operation + gambling activity
Sport and recreation	+ Direct value added - \$79.0m + Direct FTE jobs - 635	+ breeding, training and racing activity





Case study

LEAP TO FAME - QUEENSLAND'S CHAMPION ON THE INTERNATIONAL STAGE

Queensland's Leap To Fame stands as one of the most prolific standardbred winners in harness racing, elevating the state's profile on both the national and international harness racing stage. Trained and based in Queensland, the champion pacer has built a remarkable career defined by sustained elite performance, major race victories and record-breaking achievements.

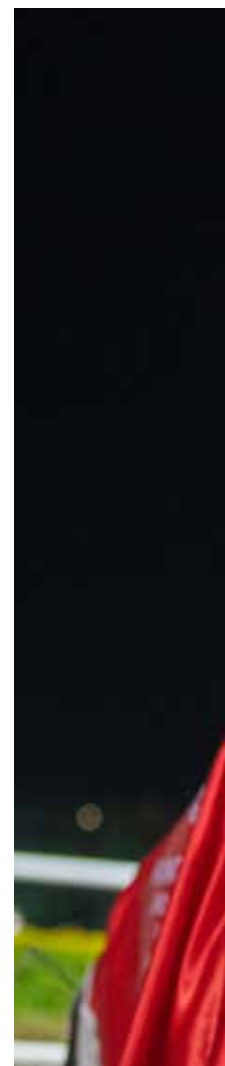
Across his career, Leap To Fame has amassed more than \$6 million in earnings, becoming the first Australasian pacer to reach this milestone. His race record highlights exceptional consistency, with a win rate close to 80% and an extraordinary ability to perform at the highest level across Australia and New Zealand. His 2025 season alone delivered 16 wins from 22 starts and more than \$1.7 million in prizemoney, underlining his dominance in open-class competition.

A dual Inter Dominion champion, Leap To Fame has secured multiple major feature victories, including a standout performance in the \$NZ1 million Race by Betcha at Cambridge - widely regarded as one of the most remarkable wins of his career. These achievements demonstrate

not only his racing ability but also the capacity for Queensland-trained horses to compete and succeed in the most prestigious events in the sport.

His impact has been further recognised through a series of high-profile awards. Leap To Fame has been named Queensland Harness Horse of the Year on four occasions and has claimed three Australian Horse of the Year titles, placing him alongside some of the greatest standardbreds in Australasian history.

Leap To Fame's success reinforces Queensland's role as a producer of elite harness racing talent. His career showcases how a locally trained horse can achieve national prominence, drive industry engagement and contribute significantly to the scale and reputation of the sport.





RACING'S PARTICIPANTS HORSES AND GREYHOUNDS

The Breeding Industry

NUMBER OF BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	18	0	2	20
Central Queensland	65	1	16	82
Darling Downs - Maranoa	188	18	32	238
Gold Coast	161	52	81	294
Ipswich	44	46	117	207
Mackay - Isaac - Whitsunday	18	2	2	22
Moreton Bay	36	36	36	107
Queensland - Outback	10	0	0	10
Sunshine Coast	52	7	11	70
Townsville	29	0	22	51
Wide Bay	45	4	26	75
Total Regional Queensland	666	166	345	1,177
Brisbane	117	20	26	163
Total	783	186	371	1,340

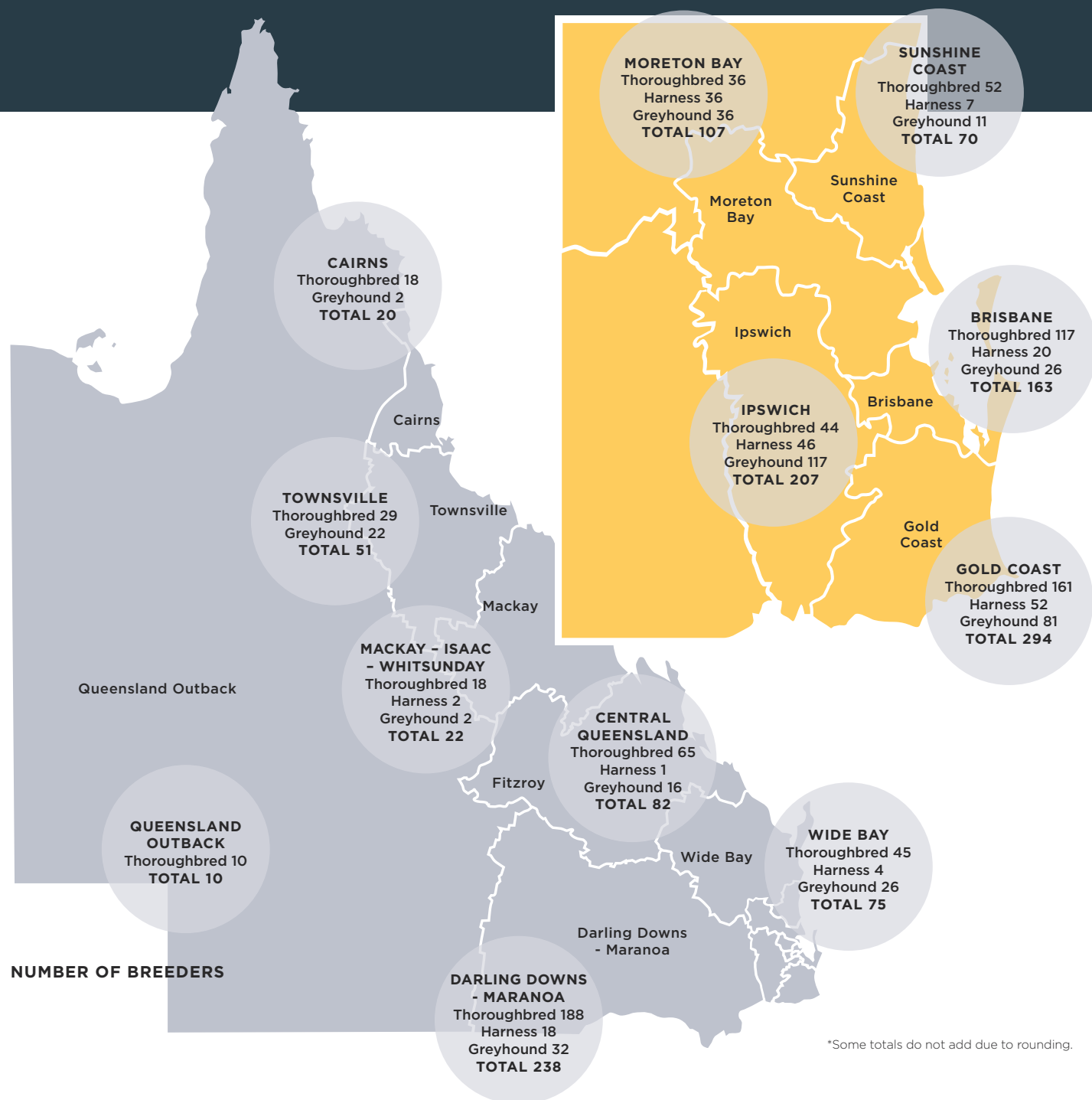
*Includes part owners of broodmares/breeding females and stallions/sires

NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	16	0	2	18
Central Queensland	56	1	12	69
Darling Downs - Maranoa	162	9	25	195
Gold Coast	138	26	61	225
Ipswich	38	23	89	150
Mackay - Isaac - Whitsunday	16	1	2	18
Moreton Bay	31	18	27	76
Queensland - Outback	9	0	0	9
Sunshine Coast	45	4	8	57
Townsville	25	0	16	41
Wide Bay	39	2	20	61
Total Regional Queensland	573	83	261	917
Brisbane	101	10	19	130
Total	674	93	281	1,048

*Some totals do not add due to rounding.

There are **more than 1,300 individuals** who either breed, or have an ownership interest in a broodmare, broodmatron, stallion or sire. They are supported by **1,048 employees and 1,419 volunteers** – meaning that the industry is supported by **over 3,800 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 1,340 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	14	0	2	16
Central Queensland	52	3	12	67
Darling Downs - Maranoa	150	50	24	225
Gold Coast	128	146	60	335
Ipswich	35	129	88	252
Mackay - Isaac - Whitsunday	14	6	2	22
Moreton Bay	28	100	27	156
Queensland - Outback	8	0	0	8
Sunshine Coast	42	20	8	69
Townsville	23	0	16	39
Wide Bay	36	11	20	67
Total Regional Queensland	532	464	259	1,255
Brisbane	94	51	19	164
Total	626	515	278	1,419

*Some totals do not add due to rounding.

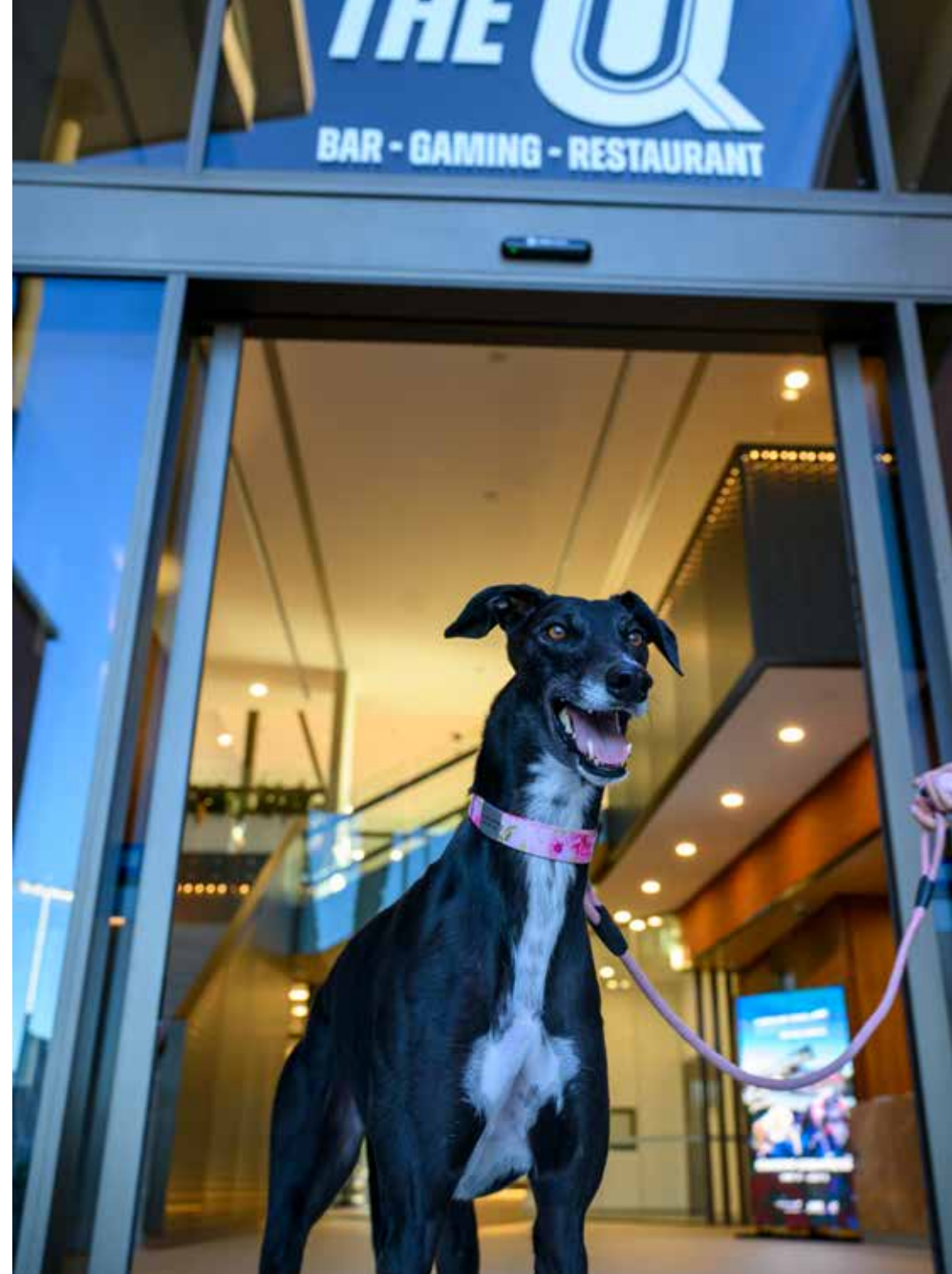




Producing Horses and Greyhounds

NUMBER OF STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Cairns	3	0	0	3
Central Queensland	6	0	0	6
Darling Downs - Maranoa	24	2	0	26
Gold Coast	14	0	3	17
Ipswich	5	2	4	11
Mackay - Isaac - Whitsunday	4	0	1	5
Moreton Bay	0	3	0	3
Queensland - Outback	0	0	0	0
Sunshine Coast	0	0	0	0
Townsville	1	0	3	4
Wide Bay	6	0	0	6
Total Regional Queensland	63	7	11	81
Brisbane	0	0	1	1
Total	63	7	12	82



NUMBER OF BROODMARES/BREEDING FEMALES COVERED

	Thoroughbred	Harness	Greyhound	Total
Cairns	5	0	1	6
Central Queensland	92	2	2	96
Darling Downs - Maranoa	1,476	63	8	1,547
Gold Coast	733	106	26	865
Ipswich	293	130	57	480
Mackay - Isaac - Whitsunday	39	2	3	44
Moreton Bay	44	55	11	110
Queensland - Outback	18	0	0	18
Sunshine Coast	79	10	5	94
Townsville	3	0	5	8
Wide Bay	102	5	5	112
Total Regional	2,885	373	123	3,380
Brisbane	26	64	4	95
Total	2,911	437	127	3,475

NUMBER OF FOALS/PUPS PRODUCED

	Thoroughbred	Harness	Greyhound	Total
Cairns	3	0	12	15
Central Queensland	52	0	56	108
Darling Downs - Maranoa	839	24	77	940
Gold Coast	417	59	156	632
Ipswich	166	59	427	653
Mackay - Isaac - Whitsunday	22	3	24	49
Moreton Bay	25	43	65	134
Queensland - Outback	10	0	0	10
Sunshine Coast	45	6	23	74
Townsville	2	0	26	28
Wide Bay	58	1	36	95
Total Regional	1,639	195	902	2,737
Brisbane	15	54	13	82
Total	1,654	249	915	2,818

*Some totals do not add due to rounding.



COST OF PRODUCING RACEHORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	\$0.2	\$0.0	\$0.1	\$0.3
Central Queensland	\$3.3	\$0.0	\$0.4	\$3.7
Darling Downs - Maranoa	\$64.4	\$1.2	\$0.5	\$66.3
Gold Coast	\$31.7	\$3.0	\$1.0	\$35.7
Ipswich	\$10.6	\$3.0	\$1.9	\$15.5
Mackay - Isaac - Whitsunday	\$1.4	\$0.2	\$0.2	\$1.7
Moreton Bay	\$1.6	\$2.2	\$0.5	\$4.2
Queensland - Outback	\$0.6	\$0.0	\$0.0	\$0.6
Sunshine Coast	\$2.8	\$0.3	\$0.2	\$3.3
Townsville	\$0.1	\$0.0	\$0.2	\$0.3
Wide Bay	\$3.6	\$0.1	\$0.3	\$4.0
Total Regional	\$120.6	\$9.9	\$5.1	\$135.6
Brisbane	\$0.9	\$2.7	\$0.1	\$3.8
Total (m)	\$121.5	\$12.6	\$5.2	\$139.3

*Some totals do not add due to rounding.

Economic Contribution of the Breeding Industry

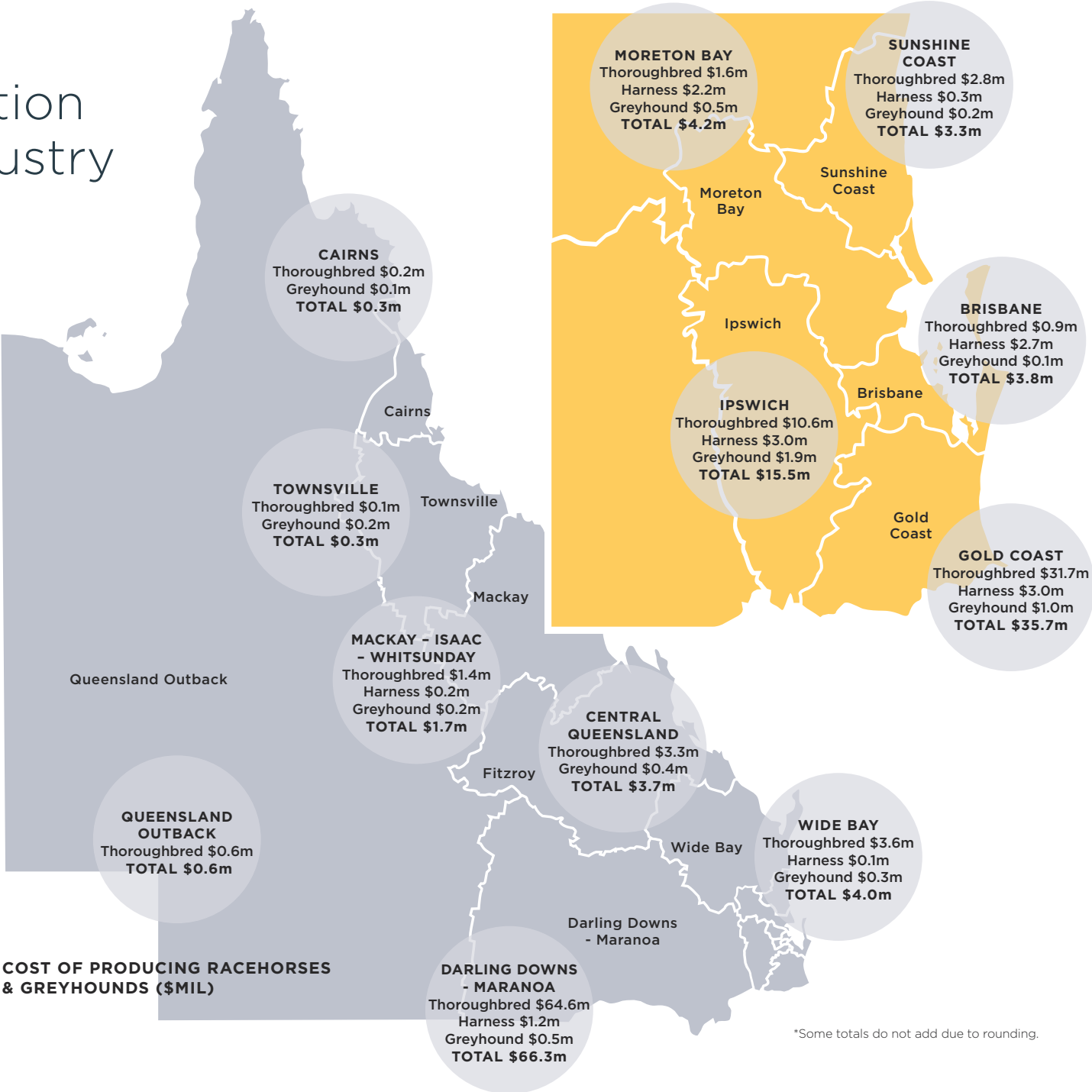
In 2024/25, breeders in the Queensland racing industry spent just over \$139 million on the production of racing stock. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of broodmares, broodmatrons, stallions 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.



*Some totals do not add due to rounding.

Close to 85% of all breeding related expenditure occurs in three Queensland regions. The Darling Downs - Maranoa (47.6%), Gold Coast (25.6%) and Ipswich (11.6%) regions are the most active breeding areas in the state.

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

THOROUGHBRED RACING

In 2024/25, there were 2,911 broodmares covered in Queensland, producing 1,654 foals. This thoroughbred breeding activity is responsible for generating close to \$121.5 million in the production and care of racing stock.

Darling Downs – Maranoa	\$64.6m (53.1%)
Gold Coast	\$31.7m (26.1%)
Ipswich	\$10.6m (8.7%)

HARNESS RACING

In 2024/25 there were 437 broodmares covered in Queensland, producing 249 foals. This standardbred breeding activity is responsible for generating more than \$12.6 million in the production and care of racing stock.

Ipswich	\$3.0m (23.7%)
Gold Coast	\$3.0m (23.7%)
Brisbane	\$2.7m (21.6%)

GREYHOUND RACING

In 2024/25, there were 127 breeding females covered in Queensland, producing 915 pups. This greyhound breeding activity is responsible for generating more than \$5.2 million in the production and care of greyhound racing stock.

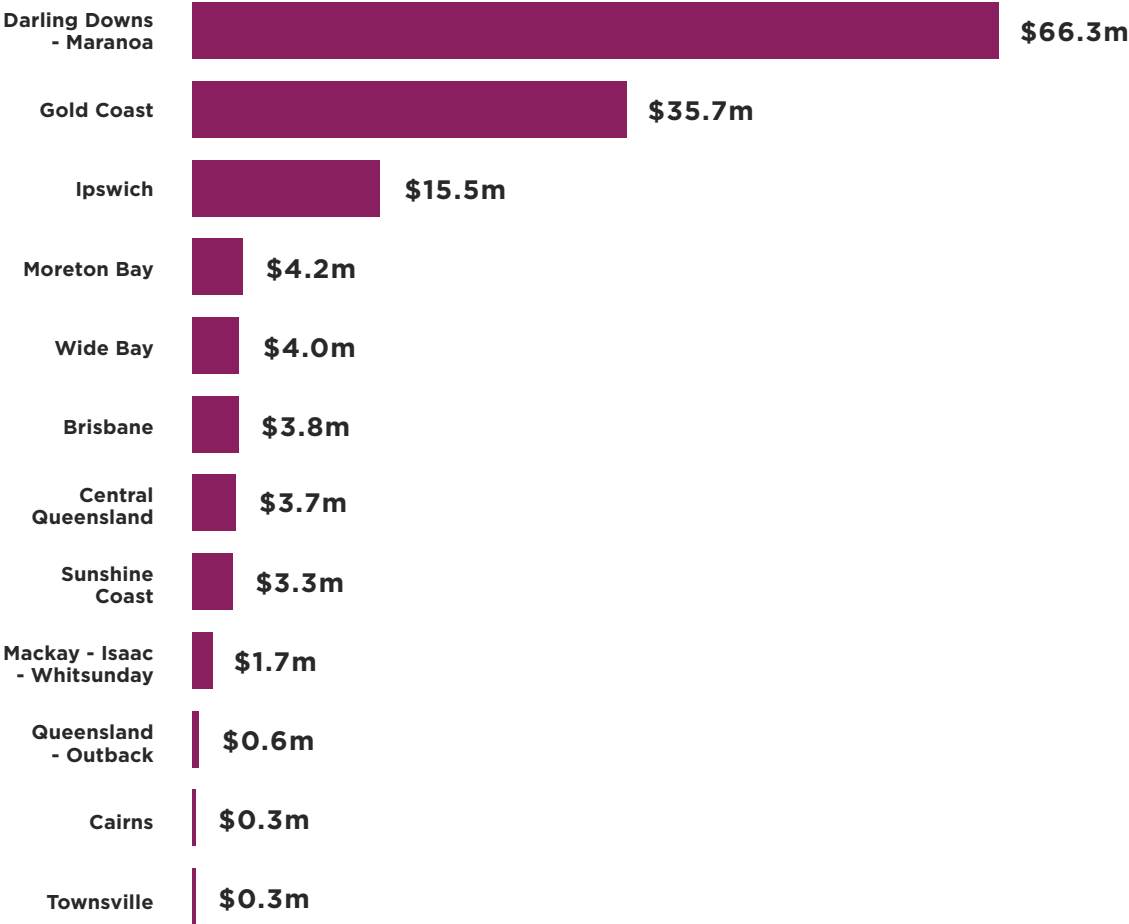
Ipswich	\$1.9m (35.7%)
Gold Coast	\$1.0m (19.5%)
Darling Downs - Maranoa	\$0.5m (9.8%)





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

SUNSHINE COAST THE UNLIKELY HOME OF MELBOURNE CUP CHAMPIONS

The Sunshine Coast has proven to be an unlikely breeding ground for Melbourne Cup champions in recent years.

The last three Melbourne Cup winners – Half Yours, Knight's Choice and Without A Fight – each have their own unique connection to the coastal region which has played an unheralded role in the nation's most prestigious race.

Without A Fight arrived in Australia from Ireland in the spring of 2022 to target the Melbourne Cup, however didn't perform that preparation and was subsequently spelled.

The Anthony and Sam Freedman training partnership are notorious for targeting their horses at the Queensland Racing Carnival each year, with Anthony basing himself at the Sunshine Coast for the 2023 winter.

Without A Fight made his way up to the Sunshine State, based at the Freedman's Caloundra stable where he competed in two races over the Winter Carnival – the Group 3 Lord Mayor's Cup and the Group 2 Q22 – winning both in emphatic fashion.

The winter campaign proved the catalyst for a historic spring preparation, which saw him become the first horse in more than 20 years to complete the Caulfield/Melbourne Cup double.

Local galloper Knight's Choice had always shown some promise on the track, having won a Group 3 race early in his career.

Trained on the Sunshine Coast by John Symons and Shiela Laxon, the gelding was targeted at the race that stops a nation following a consistent winter in Queensland, however no-one could envisage what would happen next.

Competing at the top level throughout the spring, Knight's Choice was unimpressive to say the least and as a result lined up in the Melbourne Cup at near triple-figure odds.

Robbie Dolan, an Irish-born and now Queensland-based jockey who had been making more headlines for his singing exploits, paired up with the rank outsider in the race, and against all odds produced one of the most remarkable victories ever seen on the big stage.

The unbelievable triumph means that Laxon has now started two horses in a Melbourne Cup for two victories, having first claimed the race in 2001 with Ethereal.

Finally, Half Yours made his way to Queensland in the winter of 2025 as a relatively unknown commodity.

The Tony and Calvin McEvoy training partnership only had the one race in mind for the progressive stayer – the Group 3 Caloundra Cup – a race which he duly saluted in with ease.

From there, the stayer announced himself as one of Australia's most promising horses, following in similar footsteps to Without A Fight two years earlier by winning the Caulfield Cup before going on to claim the Melbourne Cup.



Case study

WORLD-CLASS GREYHOUND FACILITY OPENS IN IPSWICH

Arguably the world's most impressive greyhound facility is now up-and-running 40 minutes west of Brisbane.

Constructed with animal welfare at its core, The Q has fast become the envy of greyhound racing jurisdictions across Australia and the world.

Civil earthworks commenced at the Purga site in early 2023, with construction getting underway later in the same year.

By April 2025, the facility hosted its first ever meeting, before its official opening in June that year ahead of the 2025 Queensland Winter Greyhound Carnival.

The Q hosts up to eight meetings a week across its three tracks, positioned as Queensland's world-class home of greyhound racing.

The facility uses the latest best practice standards for greyhound racing safety, including modern cambers and drop-on boxes.

It is also one of the few centres in the world with a straight track, a one-turn track, and a two-turn track to suit the size, age, running gait and athletic abilities of different greyhounds.

Among the amenities established at The Q are:

- + A large one-turn track, two-turn track and straight track;
- + Track radius and surface banking designed to reduce excessive limb forces acting on greyhounds while racing;
- + Implementation of modern cambers and a world-class racing surface;
- + Starting box positioning to reduce interference during race starts, including drop-on boxes where suitable;
- + Construction of best-practice starting boxes incorporating optimum spacing between contestants, grille heights and starting location alignment; and
- + Air-conditioned, sound-attenuated kennels with best practice pre and post racing support services.

Off the track, the club boasts hospitality like no other, with restaurant and bar facilities operating seven days a week, function spaces as well as big screens of wall-to-wall sport inside an air-conditioned area overlooking each of the three tracks.

There is nothing in the world quite like The Q, and it's all right here in the state's south east.



THE TRAINING INDUSTRY

The Training Industry

NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	54	0	8	62
Central Queensland	115	0	29	144
Darling Downs - Maranoa	253	18	49	319
Gold Coast	184	70	129	383
Ipswich	52	92	182	326
Mackay - Isaac - Whitsunday	33	0	7	40
Moreton Bay	32	50	54	136
Queensland - Outback	82	0	1	82
Sunshine Coast	85	2	14	101
Townsville	102	0	60	162
Wide Bay	89	5	48	142
Total Regional	1,080	237	580	1,897
Brisbane	90	8	42	140
Total	1,170	245	622	2,037

NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Cairns	176	0	3	179
Central Queensland	187	0	24	211
Darling Downs - Maranoa	520	15	35	570
Gold Coast	491	48	83	622
Ipswich	157	51	106	314
Mackay - Isaac - Whitsunday	132	0	8	140
Moreton Bay	141	40	50	231
Queensland - Outback	139	0	0	139
Sunshine Coast	335	3	11	349
Townsville	181	1	39	220
Wide Bay	107	3	29	139
Total Regional	2,564	161	388	3,113
Brisbane	475	12	49	536
Total	3,040	173	437	3,650



NUMBER OF VOLUNTEERS ASSISTING TRAINERS

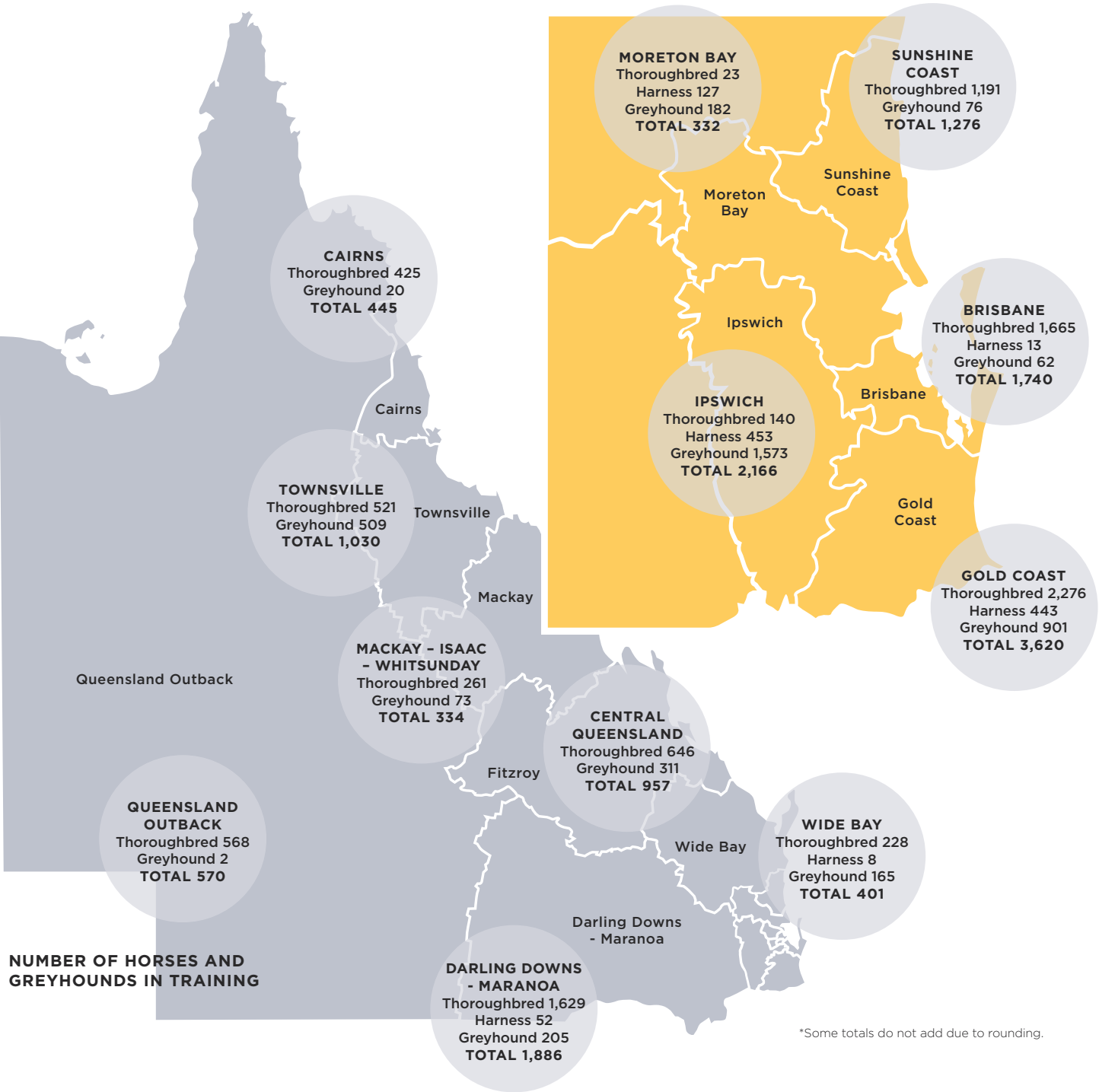
	Thoroughbred	Harness	Greyhound	Total
Cairns	76	0	9	84
Central Queensland	161	0	32	193
Darling Downs - Maranoa	354	21	53	429
Gold Coast	257	84	142	483
Ipswich	73	111	201	384
Mackay - Isaac - Whitsunday	46	0	8	54
Moreton Bay	45	60	59	164
Queensland - Outback	114	0	1	115
Sunshine Coast	119	2	15	136
Townsville	143	0	66	209
Wide Bay	125	6	53	184
Total Regional	1,512	284	638	2,435
Brisbane	63	13	59	135
Total	1,575	297	697	2,569

*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, trialling 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 2024/25 racing season, there were just over 2,000 horse and greyhound trainers providing services to owners in Queensland. These trainers were also supported by more than 2,500 volunteers. The majority of these trainers operate in regional parts of the state.

Overall, there were more than 14,700 racing horses and greyhounds in training in Queensland in 2024/25. The Gold Coast (23.8%), Brisbane (17.4%), and Darling Downs - Maranoa (17.0%) represent the largest areas of thoroughbred training activity. In the Harness and Greyhound racing sectors, both Ipswich and the Gold coast 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	918	4	87	1,009
Central Queensland	1,359	5	223	1,587
Darling Downs - Maranoa	2,213	69	333	2,615
Gold Coast	4,429	172	894	5,495
Ipswich	965	208	617	1,791
Mackay - Isaac - Whitsunday	747	5	92	844
Moreton Bay	1,454	169	411	2,035
Queensland - Outback	578	0	14	592
Sunshine Coast	2,041	16	220	2,277
Townsville	1,099	3	256	1,358
Wide Bay	904	24	191	1,119
Total Regional	16,707	676	3,340	20,723
Brisbane	5,732	122	1,107	6,961
Total	22,439	798	4,447	27,684

*Some totals do not add due to rounding.

NUMBER OF TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,464	0	0	1,464
Central Queensland	2,230	0	6,186	8,416
Darling Downs - Maranoa	5,916	122	0	6,038
Gold Coast	3,671	0	0	3,671
Ipswich	3,331	1,684	19,150	24,165
Mackay - Isaac - Whitsunday	1,729	0	0	1,729
Moreton Bay	615	8,508	0	9,123
Queensland - Outback	753	0	0	753
Sunshine Coast	4,330	0	0	4,330
Townsville	2,253	0	7,916	10,169
Wide Bay	79	0	535	614
Total Regional	26,371	10,314	33,787	70,472
Brisbane	6,633	12,533	21,538	40,704
Total	33,004	22,847	55,325	111,176

NUMBER OF NON-TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	841	0	0	841
Central Queensland	999	0	0	999
Darling Downs - Maranoa	1,628	0	0	1,628
Gold Coast	0	0	0	0
Ipswich	131	0	0	131
Mackay - Isaac - Whitsunday	574	0	0	574
Moreton Bay	48	52	0	100
Queensland - Outback	2,642	0	0	2,642
Sunshine Coast	0	0	0	0
Townsville	414	0	0	414
Wide Bay	1,222	0	0	1,222
Total Regional	8,499	52	0	8,551
Brisbane	0	0	0	0
Total	8,499	52	0	8,551

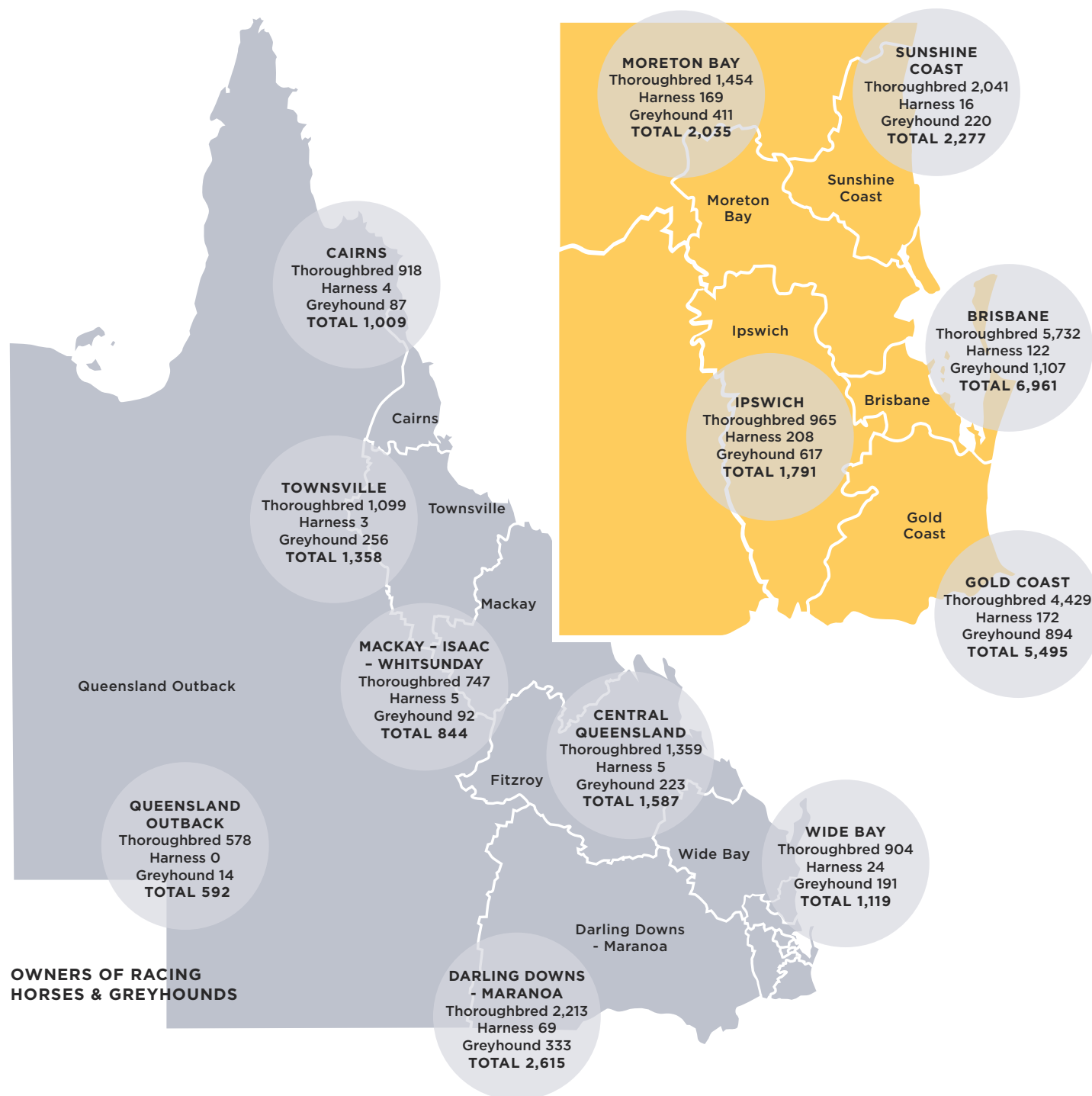
TOTAL RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2,305	0	0	2,305
Central Queensland	3,229	0	6,186	9,415
Darling Downs - Maranoa	7,544	122	0	7,666
Gold Coast	3,671	0	0	3,671
Ipswich	3,462	1,684	19,150	24,296
Mackay - Isaac - Whitsunday	2,303	0	0	2,303
Moreton Bay	663	8,560	0	9,223
Queensland - Outback	3,395	0	0	3,395
Sunshine Coast	4,330	0	0	4,330
Townsville	2,667	0	7,916	10,583
Wide Bay	1,301	0	535	1,836
Total Regional	34,870	10,366	33,787	79,023
Brisbane	6,633	12,533	21,538	40,704
Total	41,503	22,899	55,325	119,727

Owners race for more than \$264 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 2024/25 there were close to 27,700 owners interested in thoroughbred, harness and/or greyhound racing in Queensland. Close to 75% of owners reside in regional areas of Queensland, with Brisbane (25.1%) and the Gold Coast (19.9%) 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 \$437 million** in 2024/25 preparing **racing horses and greyhounds for racing**. The Brisbane and Gold Coast regions account for **over 46% of this economic activity**.

Economic Contribution of the Training Industry

In 2024/25, owners of racehorses and greyhounds trained in Queensland spent almost \$437 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.

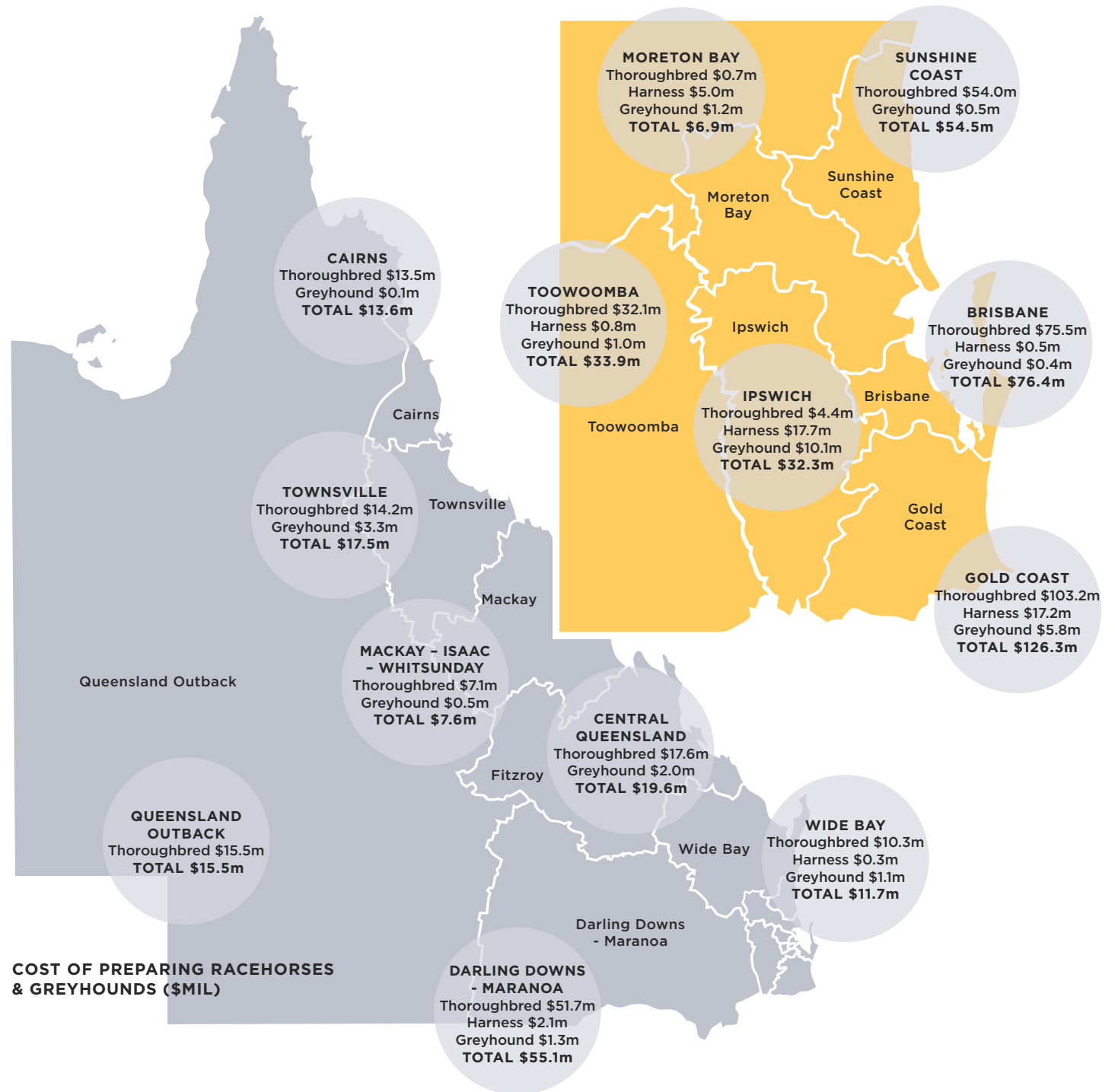
The development of expenditure profiles within each region is based upon the number of racehorses and greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the animal. For instance, expenditure during the education stage of a racehorse 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, more than \$8 of the expenditure on training activities occurs in regional areas of the state. Regionally, Gold Coast (28.9%), Darling Downs - Maranoa (12.6%) and Sunshine Coast (12.5%) make up the largest training areas outside of Brisbane (17.5%).

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

THOROUGHBRED RACING

Thoroughbred training activity is responsible for generating more than \$367.9million in expenditure impacts in Queensland.

Gold Coast	\$103.2m (28.1%)
Brisbane	\$75.5m (20.5%)
Sunshine Coast	\$54.0m (14.7%)

HARNESS RACING

Standardbred training activity is responsible for generating more than \$42.9 million in expenditure impacts in Queensland.

Ipswich	\$17.7m (41.4%)
Gold Coast	\$17.2m (40.2%)
Moreton Bay	\$5.0m (11.7%)

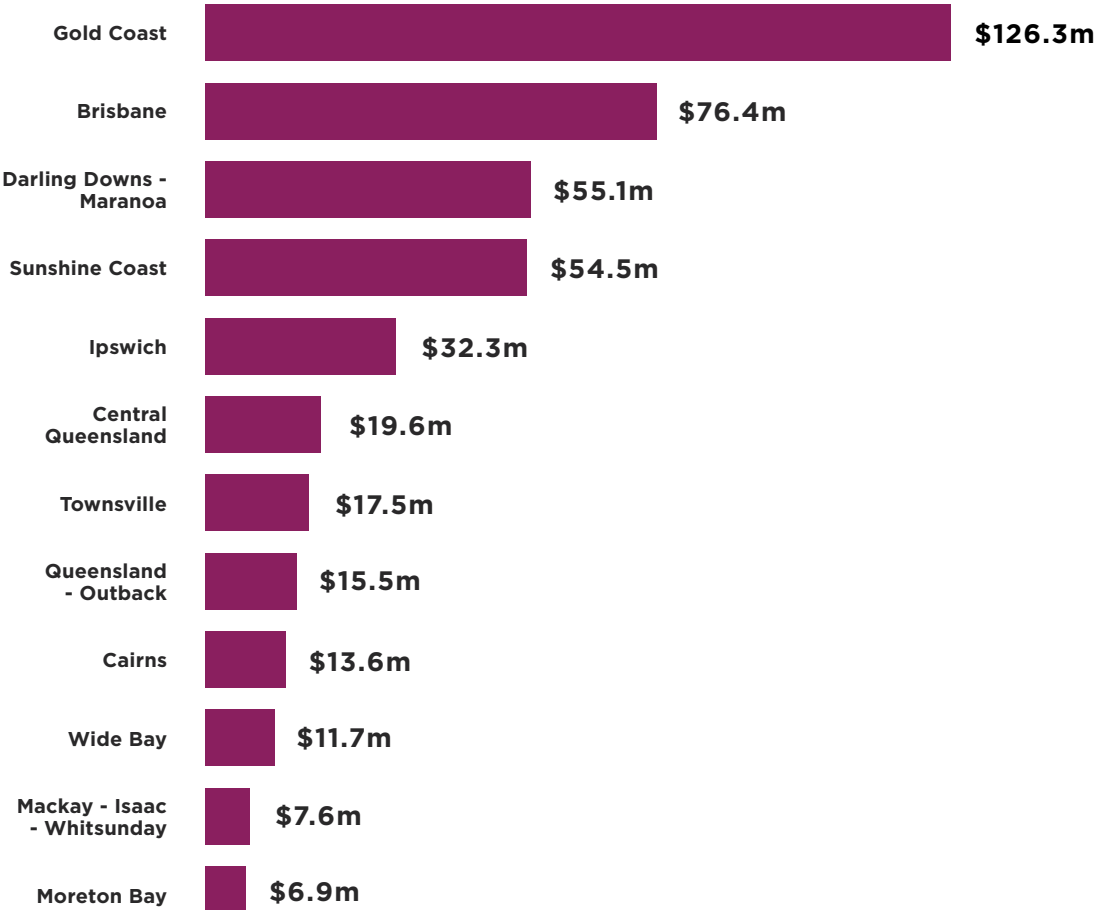
GREYHOUND RACING

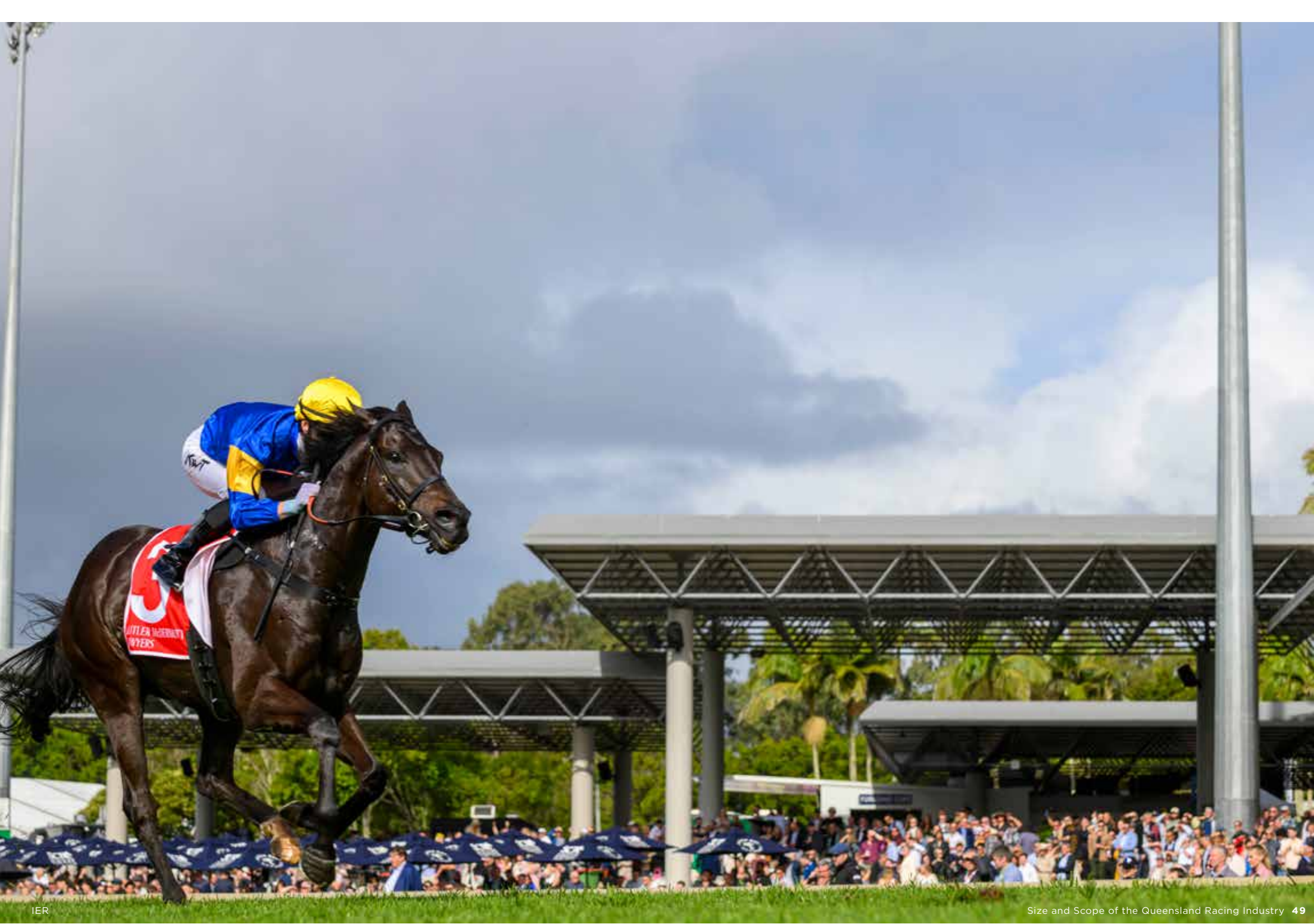
Greyhound training activity is responsible for generating close to \$26.3 million in expenditure impacts in Queensland.

Ipswich	\$10.1m (38.6%)
Gold Coast	\$5.8m (22.1%)
Townsville	\$3.3m (12.5%)

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

QUEENSLAND RACING CARNIVAL - DELIVERING VALUE FOR QUEENSLAND

The Queensland Racing Carnival is one of the State's premier thoroughbred racing events, held annually across South East Queensland between May and July. In 2025, the Carnival featured 10 race meetings hosted by the Brisbane Racing Club, Gold Coast Turf Club, Ipswich Turf Club, Sunshine Coast Turf Club and Tattersall's Racing Club.

Highlight races such as the \$3 million The Star Stradbroke Handicap, \$1.5 million Doomben 10,000 and \$1 million Kingsford-Smith Cup attract high-quality fields and strong interest both nationally and internationally. In 2025, the Queensland Racing Carnival attracted 54,903 attendees, reinforcing its importance within the Queensland racing calendar and its role as a major sporting and social event for the State.

Key Tourism Impacts

An economic impact assessment undertaken in 2025 found that the Queensland Racing Carnival generated significant tourism and economic benefits for Queensland. The Carnival was directly responsible for attracting 6,041 visitors to Queensland, while 19,446 visitors travelled to host regions or extended their stay to attend the event. These visitors generated 28,700 visitor nights, demonstrating a strong contribution to the overnight visitor economy, with more than 50% of overnight visitors staying in luxury accommodation.

In total, the Carnival generated \$21.3 million in direct and incremental expenditure across Queensland, highlighting the importance of major racing events in driving tourism and economic activity and overall, the event delivered \$33.4 million in total expenditure stimulus across host regions (spending by both visitors and local residents).

Attendees also spent an estimated \$9.6 million on fashion and grooming, with nearly half of all attendees purchasing more than one item. In total, 74,170 fashion items were purchased, with shoes, dresses and hats/fascinators among the most popular. Further reinforcing the Carnival's long-term sustainability and growth, more than 90% of attendees indicated they are likely to attend another raceday within the next 12 months, highlighting its role in driving ongoing engagement and building a strong racing customer base in Queensland.

Key Tourism Indicators

Tourism impact	2025
Total Attendance	54,903
Event-related visitors to host regions	19,446
Event-related visitors to Queensland	6,041
Visitor nights generated in Queensland	28,700
Direct in-scope expenditure (Queensland)	\$21.3m





RACING CLUBS, ASSOCIATIONS AND AUTHORITIES

NUMBER OF TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1	0	0	1
Central Queensland	2	0	1	3
Darling Downs - Maranoa	5	1	0	6
Gold Coast	2	0	0	2
Ipswich	1	1	2	4
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
Townsville	1	0	1	2
Wide Bay	0	0	1	1
Total Regional	16	3	3	22
Brisbane	2	1	2	5
Total	18	4	7	29

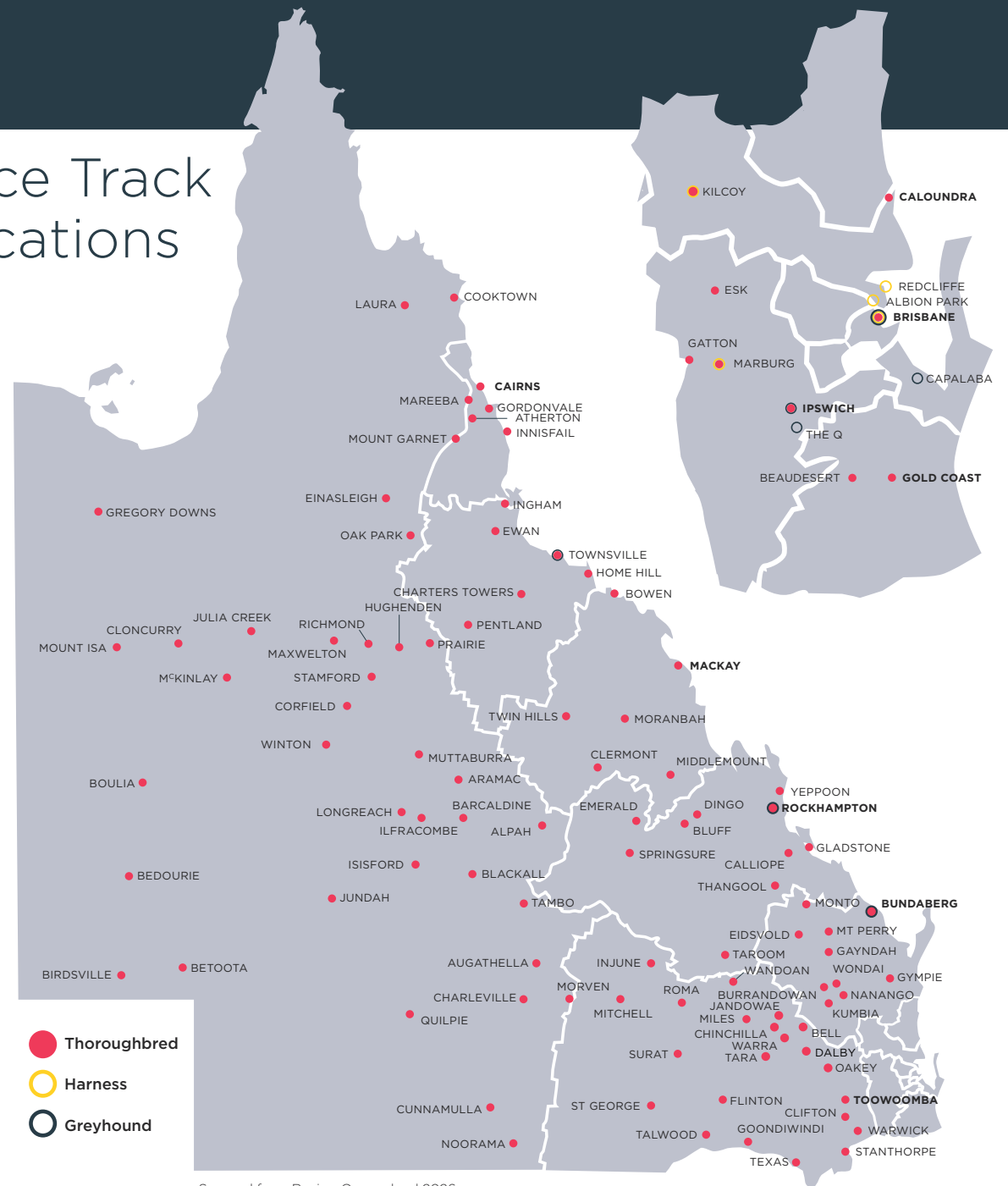
* Note - A TAB club is classified as holding TAB race meetings throughout the racing season.

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
Mackay - Isaac - Whitsunday	5	0	0	5
Moreton Bay	0	0	0	0
Queensland - Outback	33	0	0	33
Sunshine Coast	0	0	0	0
Townsville	7	0	0	7
Wide Bay	10	0	0	10
Total Regional	93	0	0	93
Brisbane	0	0	0	0
Total	93	0	0	93



Race Track Locations



Sourced from Racing Queensland 2026

TOTAL RACE MEETINGS

	Thoroughbred	Harness	Greyhound	Total
Cairns	45	0	0	45
Central Queensland	66	0	79	145
Darling Downs - Maranoa	115	2	0	117
Gold Coast	52	0	0	52
Ipswich	47	25	218	290
Mackay - Isaac - Whitsunday	41	0	0	41
Moreton Bay	9	117	0	126
Queensland - Outback	83	0	0	83
Sunshine Coast	59	0	0	59
Townsville	43	0	86	129
Wide Bay	30	0	7	37
Total Regional	590	144	390	1,124
Brisbane	75	152	252	479
Total	665	296	642	1,603

TOTAL RACES

	Thoroughbred	Harness	Greyhound	Total
Cairns	292	0	0	292
Central Queensland	407	0	848	1,255
Darling Downs - Maranoa	792	15	0	807
Gold Coast	374	0	0	374
Ipswich	360	196	2,492	3,048
Mackay - Isaac - Whitsunday	276	0	0	276
Moreton Bay	67	1,002	0	1,069
Queensland - Outback	454	0	0	454
Sunshine Coast	446	0	0	446
Townsville	303	0	1,014	1,317
Wide Bay	156	0	75	231
Total Regional	3,927	1,213	4,429	9,569
Brisbane	647	1,345	2,879	4,871
Total	4,574	2,558	7,308	14,440



TOTAL ATTENDANCES

	Thoroughbred	Harness	Greyhound	Total
Cairns	37,094	0	0	37,094
Central Queensland	48,372	0	5,065	53,437
Darling Downs - Maranoa	72,838	850	0	73,688
Gold Coast	117,634	0	0	117,634
Ipswich	29,245	6,030	15,731	51,006
Mackay - Isaac - Whitsunday	27,814	0	0	27,814
Moreton Bay	4,875	24,329	0	29,204
Queensland - Outback	46,356	0	0	46,356
Sunshine Coast	68,821	0	0	68,821
Townsville	35,599	0	6,881	42,480
Wide Bay	26,956	0	511	27,467
Total Regional	515,604	31,209	28,188	575,001
Brisbane	117,602	32,995	45,729	196,326
Total	633,206	64,204	73,917	771,327

*Some totals do not add due to rounding.

NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	816	0	0	816
Central Queensland	1,348	0	30	1,378
Darling Downs - Maranoa	1,852	0	0	1,852
Gold Coast	3,239	0	0	3,239
Ipswich	375	100	0	475
Mackay - Isaac - Whitsunday	223	0	0	223
Moreton Bay	78	128	0	206
Queensland - Outback	2,204	0	0	2,204
Sunshine Coast	2,292	0	0	2,292
Townsville	1,716	0	42	1,758
Wide Bay	970	0	200	1,170
Total Regional	15,113	228	272	15,613
Brisbane	9,309	280	301	9,890
Total	24,422	508	573	25,503





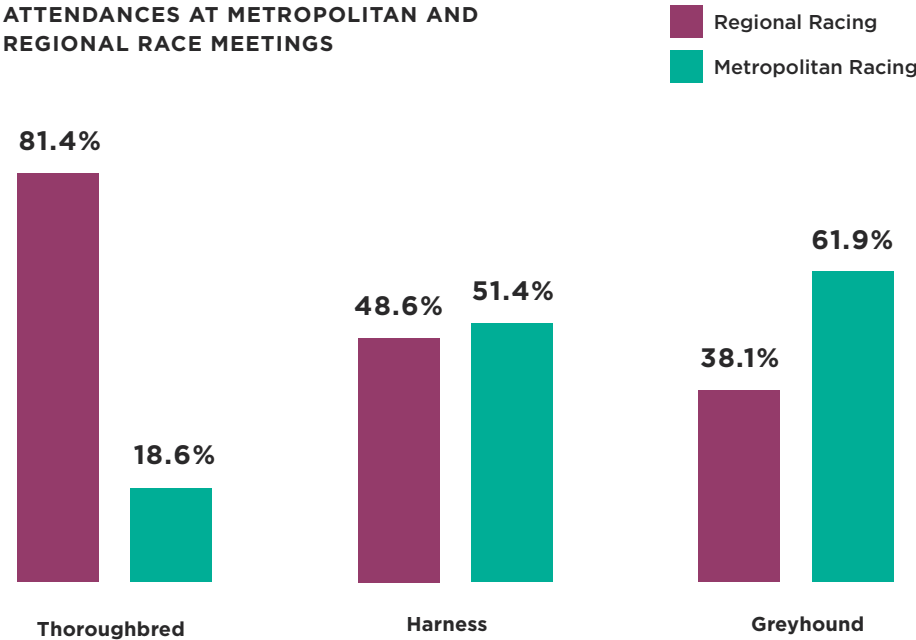
Racing Clubs

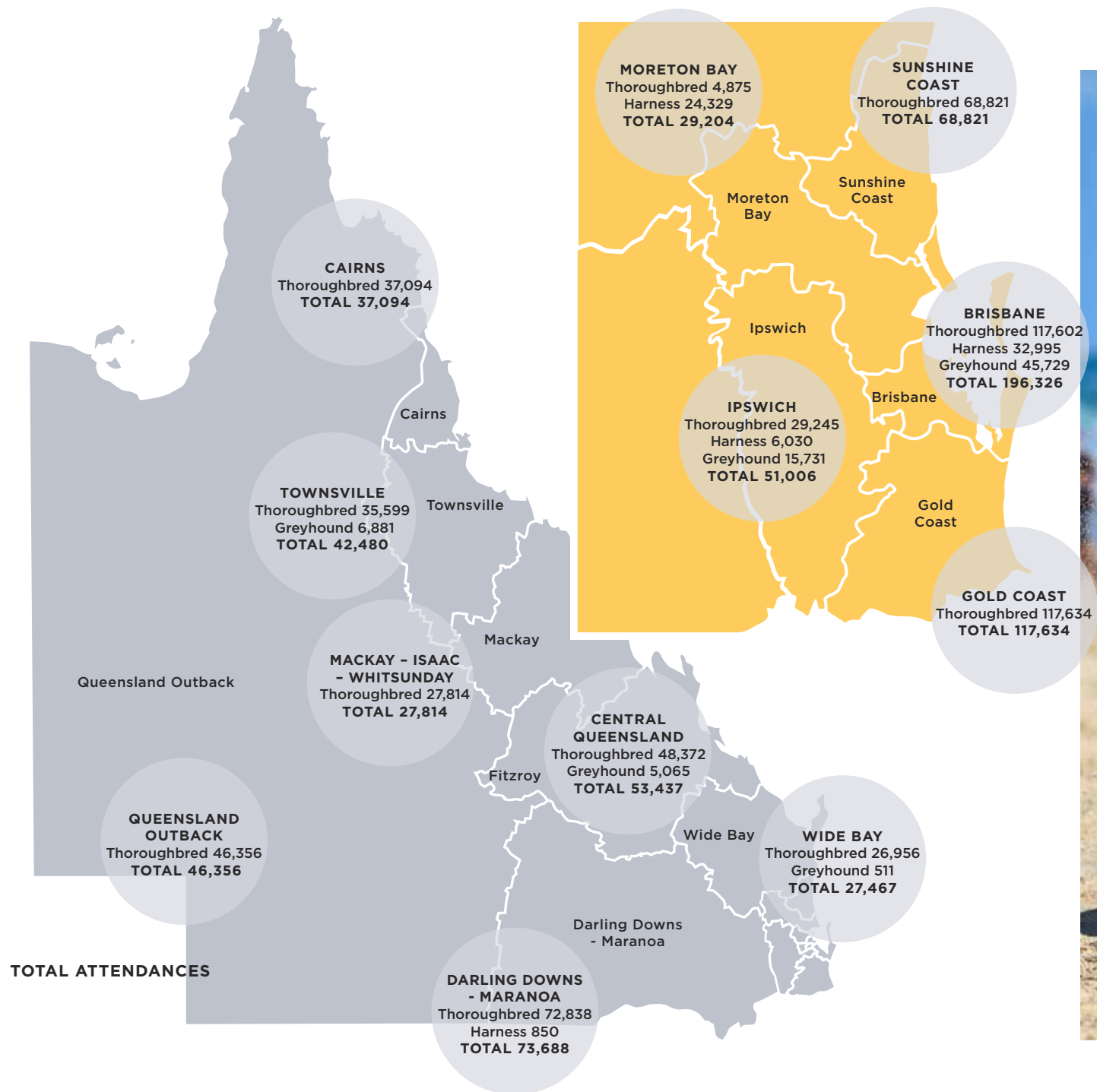
There are 120 racing clubs in Queensland across the three codes of racing. Queensland is unique in the Australian racing landscape with the majority of these racing clubs (93) running non-TAB race meetings. This means that racing at these clubs is not covered by the TAB and instead is driven more so by community involvement and on-course bookmaker wagering.

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 2024/25, there were 1,388 TAB race meetings and a further 215 non-TAB race meetings. These race meetings attracted attendances over 771,300 - 75% of which were in regional areas. Thoroughbred race meetings, in Queensland, attracted a total of 633,206 attendances. Race meetings in Gold Coast (117,634) and the Brisbane (117,602) were responsible for the largest attendance. Harness race meetings attracted 64,204 attendances with race meetings in Brisbane (32,995) and Moreton Bay (24,329) making up the majority of this amount. Greyhound racing attracted attendance of 73,917 with race meetings in Brisbane (45,729) and Ipswich (15,731) making up 83% all attendances.

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







Customer Expenditure Generated by Racing Clubs and Events

In 2024/25 it is estimated that the total expenditure generated by racing customers was more than \$254.8 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.)

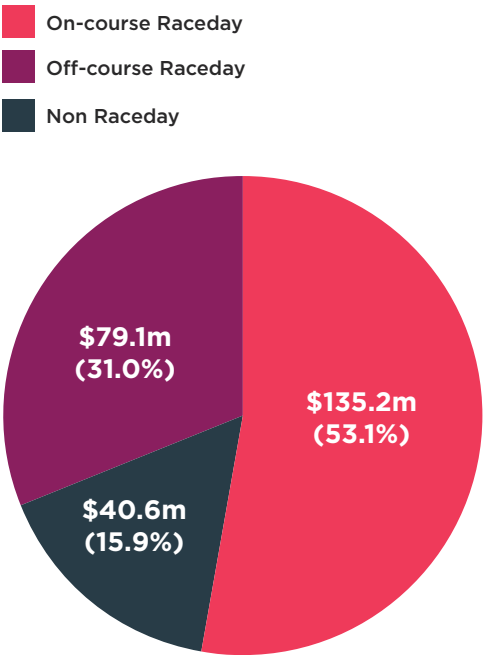
On-course customer expenditure funds the administration, operation and other costs that racing clubs incur.

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**





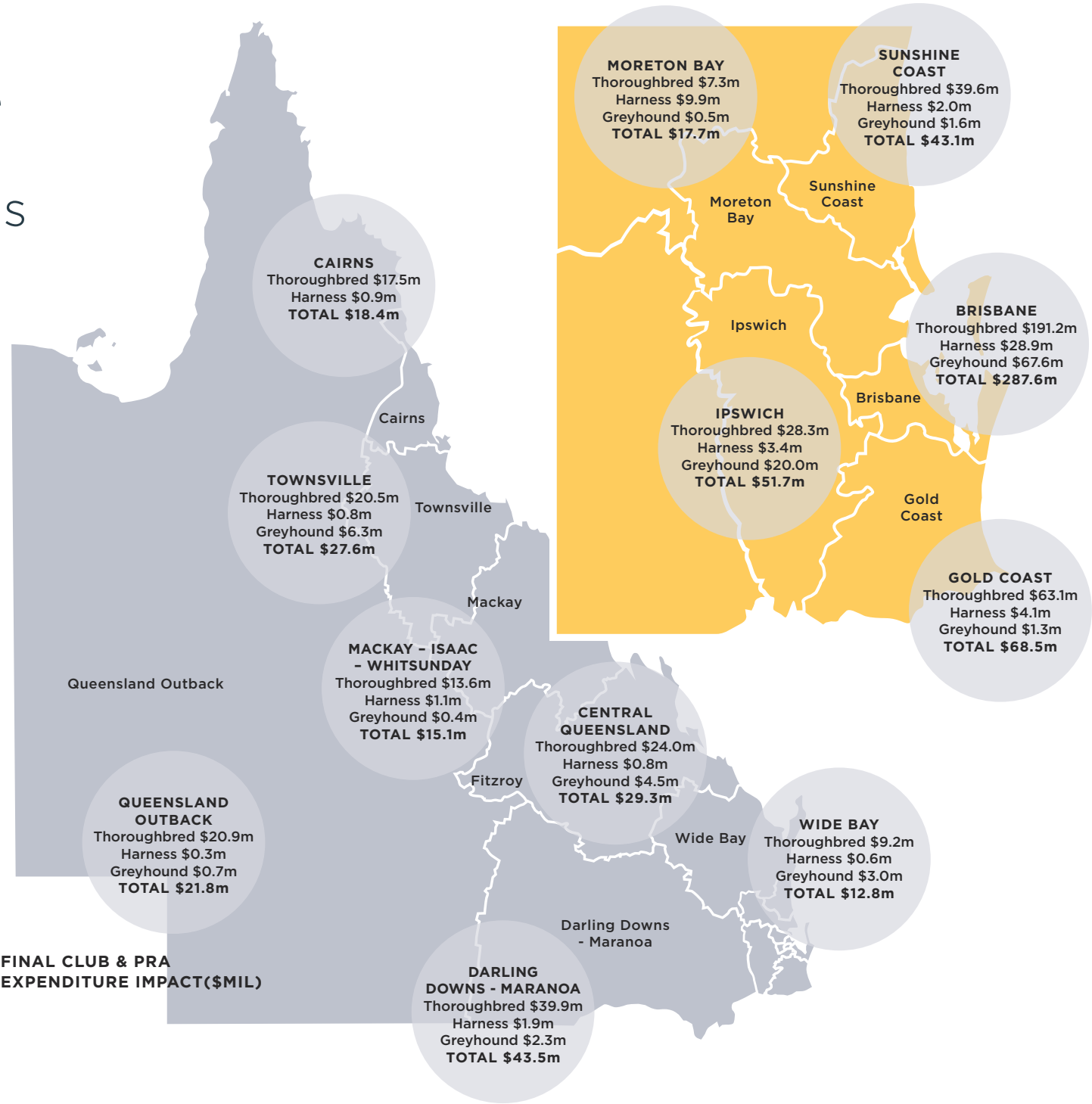
Expenditure by the Principal Racing Authority and Clubs

In 2024/25, Racing Queensland and the 120 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of more than \$637 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

Forty-five percent (\$287.6 million) of this expenditure impact occurred in Brisbane – a result largely driven by the presence of the largest racing clubs (in terms of size and financial impact) as well as the principal racing authority. The Gold Coast (11%) 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 \$14.5 million in prize money on offer. In 2025, the raceday attracted attendances in excess of 21,258 people.

KEY TOURISM IMPACTS

In 2025, an economic impact assessment of the Magic Millions Raceday was undertaken. The study found that the event generated close to \$23.8 million of direct in-scope expenditure for the Queensland economy.

The event was directly responsible for over 7,714 visitors to Queensland – new people to the Gold Coast and Queensland economies. In addition to the impacts associated with the raceday, the bloodstock sales component of the event has great potential to generate economic impacts within the QLD economy. This is particularly the case when a non-QLD buyer purchases a QLD bred racehorse.

The following tables illustrate the key impacts to the State:

Tourism Impact	2021	2022	2023	2024	2025
Event related visitors to the GC (spectators, sponsors and participants)	7,226	9,236	12,883	16,060	13,554
Event related visitors to QLD (spectators, sponsors and participants)	2,947	4,594	7,010	8,604	7,714
Event related expenditure for the QLD economy	\$14.1m	\$15.6m	\$21.9m	\$25.1m	\$23.8m
Event related visitor nights generated in QLD	25,614	28,124	38,074	48,903	43,440

Economic Impact (\$AUD)	2021	2022	2023	2024	2025
Magic Millions Polo and Show Jumping	-	\$3.0m	\$4.7m	\$5.2m	\$5.7m
Magic Millions Raceday	\$16.5m	\$18.3m	\$26.2m	\$28.9m	\$27.5m
Gold Coast Yearling Sale	\$14.6m	\$17.9m	\$21.8m	\$24.7m	\$25.9m
Gold Coast National Sale	\$13.8m	\$16.4m	\$15.2m	\$14.8m	\$14.1m
Total Economic Impact	\$44.9m	\$55.6m	\$67.9m	\$73.7m	\$73.2m

The data presented on this page is prepared by third party researcher, Strategic Facts, on behalf of Tourism & Events Queensland and Magic Millions (Note: in 2021 results have been impacted due to COVID-19 and the Magic Millions Polo did not take place).





Community and Social Benefits

Thoroughbred, harness and greyhound racing in Queensland play a vital role in supporting and sustaining social and community outcomes across the state. Much of this impact is driven through the activities of racing clubs - on both racedays and non-racedays - and through the strong partnerships they maintain with a wide range of community organisations. These contributions enhance both individual wellbeing and broader community connectedness in the regions and towns where racing operates.

The economic activity generated by the Queensland racing industry further complements these social benefits, particularly in regional areas where racing events and facilities promote social cohesion and deliver value to a diverse range of individuals, businesses and community groups.

Racing and non-racing events attract people from all socio-economic backgrounds, age groups and genders. Across Queensland, racing is embedded within communities as a profession, sport, hobby and leisure pursuit.

The industry also contributes positively through the development of social and environmental initiatives that support family participation, volunteerism, health, education, employment and environmental sustainability.

Importantly, maintaining and strengthening the

trust and respect of the communities in which racing clubs operate is critical to the long-term success of the industry. The implementation and effective communication of social and environmental initiatives play an important role in shaping community perceptions, while also protecting and enhancing the image and reputation of racing.

In turn, this strengthens the industry's ability to attract and retain support from customers, corporate partners and government, while also fostering pride and greater satisfaction among internal stakeholders.

As part of this racing industry study, a social impact survey was completed by clubs across each racing code. The findings from this survey provided valuable insights into the scale and nature of the social and environmental benefits generated by the Queensland racing industry.





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

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

CAPACITY BUILDING

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

CHARITABLE SUPPORT

More than 490 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 7,918 individuals provide their skills, time and support to the racing industry as a volunteer

FACILITY SHARING

Close to 235 community and not-for-profit organisations share racing club facilities in Queensland

COMMUNITY

Racing clubs provide an important community for more than 25,500 members and volunteers who are actively engaged in their club. Over 771,000 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 490 community organisations or charities are assisted and supported by racing clubs
- + Close to 235 community organisations share racing club facilities and resources
- + Racing in Queensland currently engage more than 7,900 volunteers who assist in various club, kindred body and industry related roles
- + More than 25,500 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 3,930 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
- + Clean up - set up crews (e.g. collecting cans and bottles for recycling and then donating to charity)
- + Repairs, maintenance of facilities and mowing, watering, spraying, gardening
- + Horse check in and distributing saddlecloths
- + Operating trials

IER found that racing clubs financially assist or support 493 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



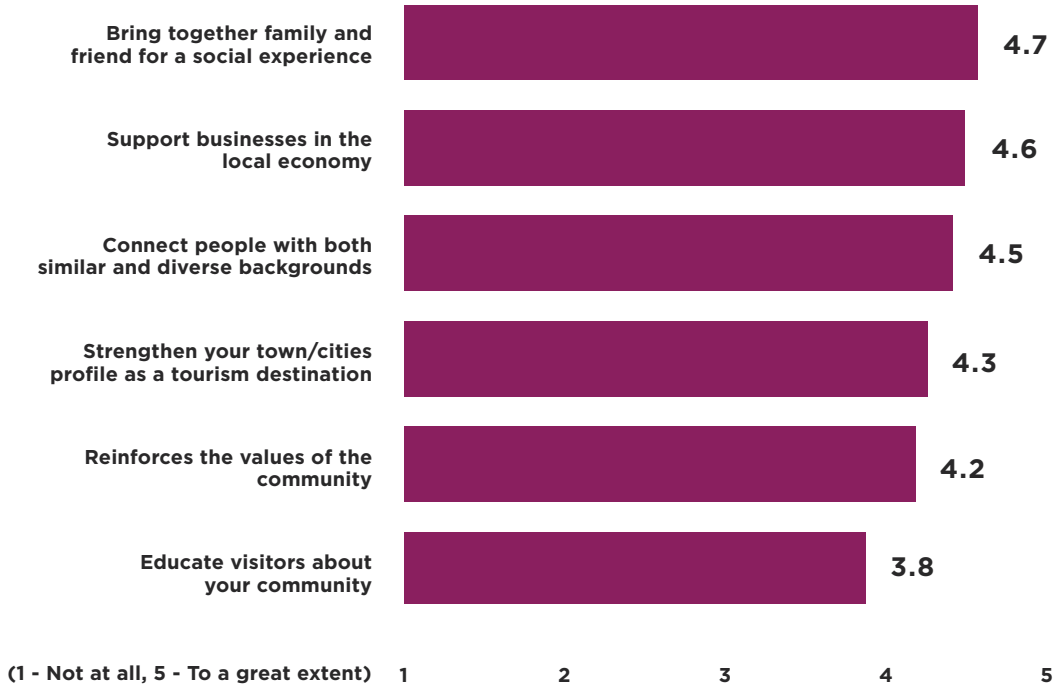
Children's Parents' Association, YoungCare, Give ME 5 for Kids Charity, Wantok Foundation)

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

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

The social impact survey asked clubs how much they believed racing in their town or city has the ability to engage with the community from a social cohesion, education and business perspective. As the chart illustrates, all indicators were positive, particularly significant in the areas of racing's ability to 'bring together family and friends for a social experience' (4.7), to 'support businesses in the local economy' (4.6) and to 'connect people with both similar and diverse backgrounds' (4.5). These indicators illustrate the position that racing clubs see themselves as integral to the fabric of the local community.

COMMUNITY ENGAGEMENT WITH RACING QUEENSLAND





SUPPORTING FAMILY RELATIONSHIPS

The three codes of racing in Queensland are highly proactive in engaging families and communities, with many cup days and themed events providing strong social connections across the state. For many participants - including owners, trainers and breeders - racing is deeply embedded within family businesses, traditions and lifestyle pursuits.

Survey findings identified that racing clubs have increasingly invested in activities, facilities and services that enable families to enjoy a safe and inclusive social day at the races. Many clubs actively promote amenities that encourage family participation and strengthen community relationships.

In regional Queensland, feature racedays often serve as important social gathering points for families and friends. This is particularly evident at smaller clubs that may host only one annual race meeting, typically centred around cup day celebrations. For many rural communities, these events represent not only an important part of the region's history, but also an enduring part of local family traditions and identity.

A number of these racedays incorporate a strong "back to" theme, where former residents return to reconnect with family, friends and their local community. Many regional race meetings also form part of broader community festivals and celebrations, including events such as the Julia Creek Dirt n Dust Festival and the Barcaldine Tree of Knowledge Festival.

Racing clubs have also continued to enhance on-course facilities and family-focused initiatives to improve the overall raceday experience. Clubs commonly provide amenities such as parent rooms, baby change facilities, children's clubs, playgrounds and dedicated family or children's zones. The survey highlighted a range of positive initiatives developed across the industry, with all clubs offering attractions, activities or services that support attendance and participation by children and families. 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 two-thirds 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:

- + Thong throwing competitions
- + Jumping castles, water slides and rock climbing
- + Teddy bears picnic
- + 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 - particularly those located in regional and rural Queensland - often have limited use requirements for their facilities outside scheduled race meetings. As a result, many clubs actively support their local communities by making their venues, infrastructure and resources available for both temporary and ongoing community use.

The majority of racing clubs engage with a broad range of community organisations, including sporting clubs, Rotary and Lions clubs, emergency services, schools, local councils and agricultural or show societies, through the shared use of facilities and resources.

This community support role is especially significant in rural and regional areas, where racing club facilities frequently serve as important community assets. In many instances, venues have been utilised extensively for community events, public gatherings and emergency or crisis response purposes, reinforcing the important role racing clubs play in supporting regional resilience and social connectedness.

Some of the 235 organisations which share facilities and resources with clubs include:

- + Disability Services
- + Country women's associations, historical societies
- + Animal clubs (equestrian, rodeo, campdraft, canine clubs, polocrosse, cow clubs, gymkhanas, camels etc.)
- + Rotary, Lions and Menshed
- + 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 are critical to the ongoing growth, sustainability and success of all three racing codes across Queensland.

Beyond supporting industry capability, education and training initiatives also deliver important social and community benefits. Both metropolitan and regional communities experience positive outcomes through industry partnerships, workforce development programs and welfare initiatives supported by the racing industry.

Racing Queensland delivers a broad range of education and training programs designed to equip industry participants with the skills and knowledge required to advance their professional development, while also creating pathways for individuals seeking to enter the industry. In 1995,

the Racing Queensland Industry Training Centre was established to support the training needs of the thoroughbred, harness and greyhound racing codes across the state.

Today, Racing Queensland continues to deliver nationally recognised training as a Registered Training Organisation (RTO), operating from the Deagon Racecourse training facility. Training opportunities are provided through traineeship and apprenticeship pathways for stablehands, advanced stable staff, trackwork riders, jockeys and stable forepersons. These programs combine practical experience with formal theoretical training, providing participants with valuable industry skills and career development opportunities.

Racing clubs and industry participants also provide significant employment opportunities across Queensland, engaging staff on a full-time, part-time and casual basis. Club employees support a wide range of operational and administrative functions associated with both raceday and non-raceday activities.

As part of their commitment to delivering positive experiences for participants, patrons and the broader community, racing clubs have also implemented a range of initiatives focused

on customer service, workforce development, community engagement and participant welfare.

- + Clubs have individuals participating in further education, career development and training programs each year
- + All racing clubs encourage responsible gambling
- + 18% 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 15% of 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 have a long and celebrated history, with the sport playing an important cultural, social and economic role in communities across the state for almost 175 years. The heritage and historical significance of racing remain deeply embedded within many regional towns and metropolitan centres, with racecourses continuing to serve as important community landmarks and gathering places.

Racing clubs throughout Queensland actively recognise and preserve this history through the promotion of significant anniversaries, champion participants and notable racing achievements. These traditions contribute to a strong sense of local identity and community pride, while reinforcing racing's enduring place within Queensland's social fabric.

Thoroughbred racing in Queensland dates back to 17 July 1843, when the first official meeting of the Moreton Bay Race Club was held at Coopers Plains. The event, conducted over three days, featured the Brisbane Town Plate as its premier race. Racing soon expanded throughout the state, with meetings established at New Farm, Ipswich, Dalby and many other regional centres as communities developed.

Queensland has since produced some of Australia's most celebrated racing figures, including Bruce McLachlan, Mick Dittman and George Moore, along with champion horses such as Bernborough, Gunsynd, Strawberry Road, Vo Rogue and Buffering, all of which have become synonymous with Australian racing history.

Greyhound racing also has deep historical roots in Queensland, beginning with the first coursing meeting held at Allora on the Darling Downs in 1893. The sport expanded steadily during the early 20th century, with racing later conducted at venues including Eagle Farm and the Brisbane Cricket Ground. Over time, greyhound racing became firmly established across Queensland, producing champion greyhounds such as Flying Amy and Bogie Leigh.

Harness racing commenced in Queensland in 1876 at the Brisbane Showgrounds before expanding to venues across the state, including Eagle Farm, Albion Park, Redcliffe and numerous regional centres. The code has produced many notable champions, including Leap to Fame, Destreos, Paleface Adios and Cane Smoke, whose achievements remain significant milestones within Australasian harness racing history.

Today, the rich history and traditions of the three racing codes continue to contribute to Queensland's cultural identity, connecting generations of participants, patrons and communities throughout the state.

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

- + Industry awards and Halls of Fame to acknowledge horses/greyhounds, participants and associates
- + Club acknowledgement of participants - signage and plaques around club grounds
- + Publishing and contributions to history books written about the Clubs and/or regional area
- + Promoting club and feature race anniversaries e.g. 150th and 100th Cup or Club anniversaries
- + Promotion of history through on-course museums and history nights
- + Restoration of memorabilia (e.g. trophies donated back to the club)
- + Use of social media to promote club history
- + Dedicated calendar with racing stories of the past
- + Promotion of history through local museums, statues, local papers, radio and websites
- + Recognising heroes of the sport on dedicated racedays (e.g. Heritage Raceday)
- + Promotions in racebook, honour boards and historical photographs and newspaper clippings
- + Heritage listing buildings on-course
- + Memorial races

REGIONAL SUMMARIES

Brisbane

- + The population of the Brisbane region is 1,454,997 (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 \$1,204.6 million in value added contribution to Gross State Product. This equates to 48.1% 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 5,961 full-time equivalent (FTE) jobs in the region.
- + There are close to 9,770 roles occupied in the racing industry in Brisbane.

RACING CLUBS IN THE REGION

Thoroughbred

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

Harness

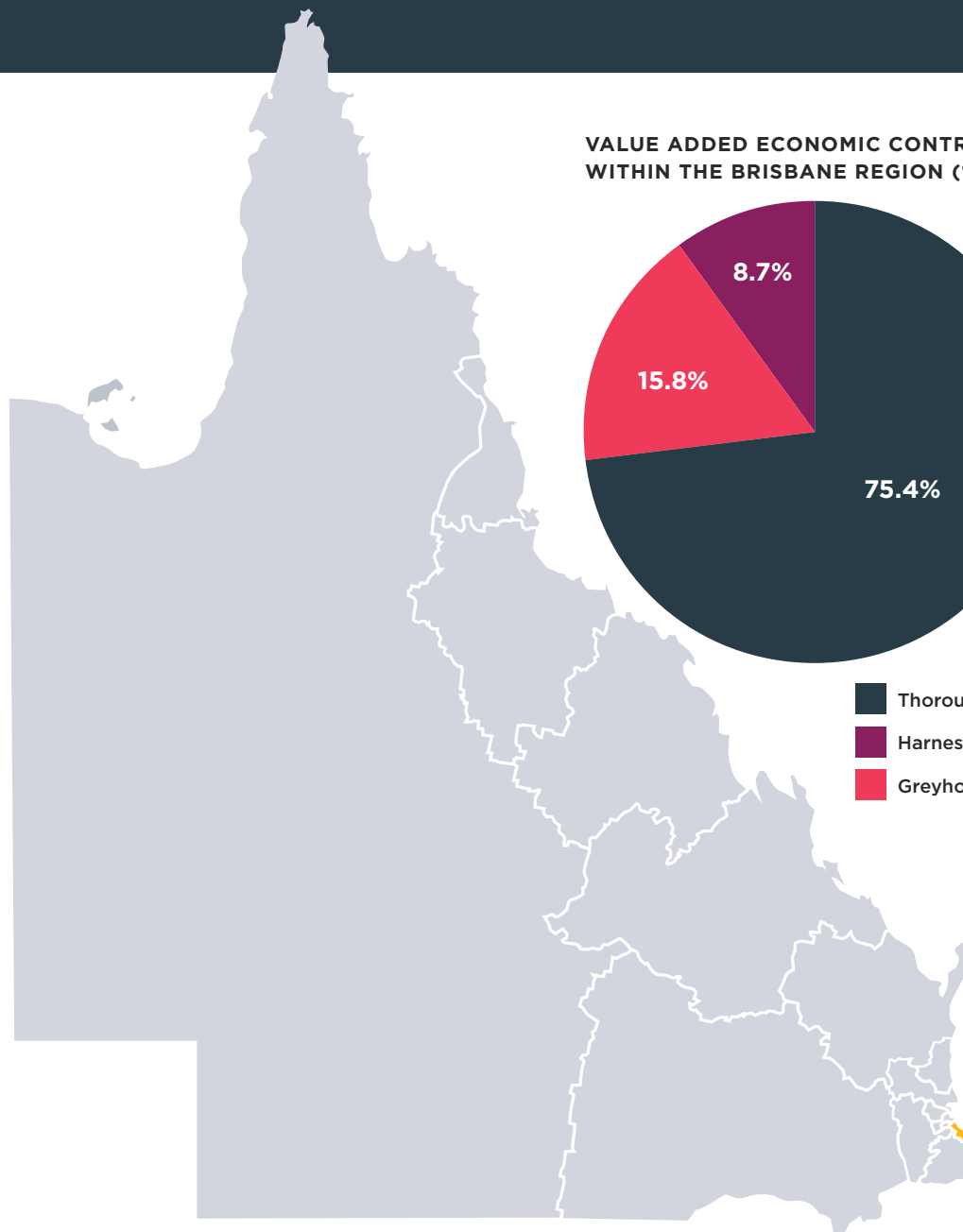
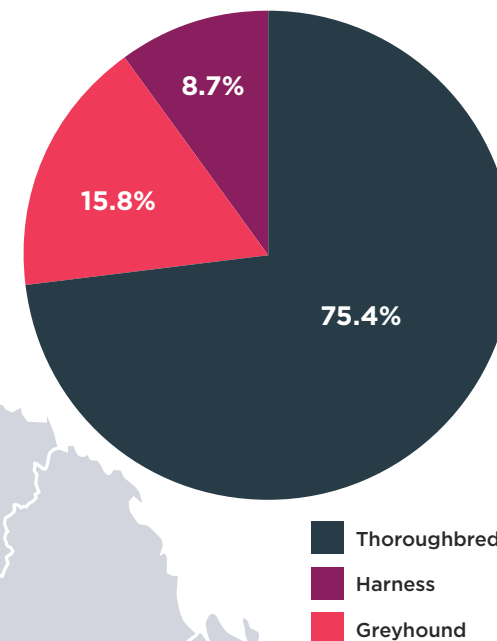
- + Albion Park Harness Racing Club

Greyhound

- + Queensland Greyhound Racing Club
- + Capalaba Greyhound Racing Club

The racing industry in the **Brisbane region is responsible for generating \$1,204.6 million in value added** contribution to gross state product. This represents **48.1% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE BRISBANE REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$467.7m	\$59.2m	\$111.7m	\$638.6m
Total value added	\$908.5m	\$105.3m	\$190.8m	\$1,204.6m
Full-time equivalent employment	4,483	519	959	5,961

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	15	54	13	82
Horses and greyhounds in training	1,665	13	62	1,740

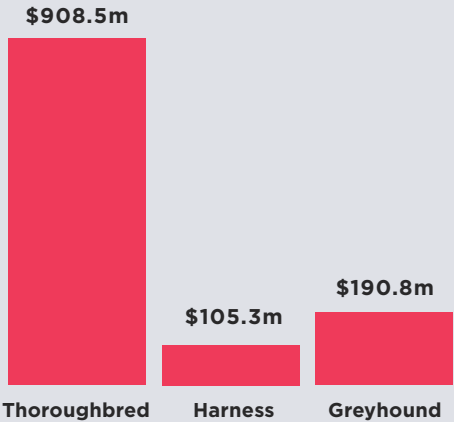
TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	117	20	26	163
Owners	5,732	122	1,107	6,961
Trainers	90	8	42	140
Breeders staff	101	10	19	130
Stable/Kennel employees	475	12	49	536
Racing Club & industry staff (FT, PT, casual)	1,131	105	221	1,457
Jockeys, drivers & apprentices	36	2	0	38
Racing club volunteers	22	10	8	40
Volunteers assisting participants	157	64	78	299
Total roles occupied in the Brisbane region	7,862	353	1,550	9,765

*Some totals do not add due to rounding.

Race meetings in the Brisbane region attracted attendances of **196,326** or **25.5% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE BRISBANE REGION



AT A GLANCE

5 Racing Clubs

THOROUGHBRED	2
HARNESS	1
GREYHOUND	2

479 Race Meetings

THOROUGHBRED	75
HARNESS	152
GREYHOUND	252

4,871 Races

THOROUGHBRED	647
HARNESS	1,345
GREYHOUND	2,879

9,890 Racing Club Members

THOROUGHBRED	9,309
HARNESS	280
GREYHOUND	301

196,326 Attendances

THOROUGHBRED	117,602
HARNESS	32,995
GREYHOUND	45,729

*Some totals do not add due to rounding

Cairns

- + The population of the Cairns region is 271,408 (Australian Bureau of Statistics).
- + There are a total of seven (7) racing clubs operating in the region which are all thoroughbred clubs.
- + The racing industry in the Cairns region is responsible for generating close to \$62.2 million in value added contribution to Gross State Product. This equates to 2.5% 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 392 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,760 roles occupied in the racing industry in Cairns.

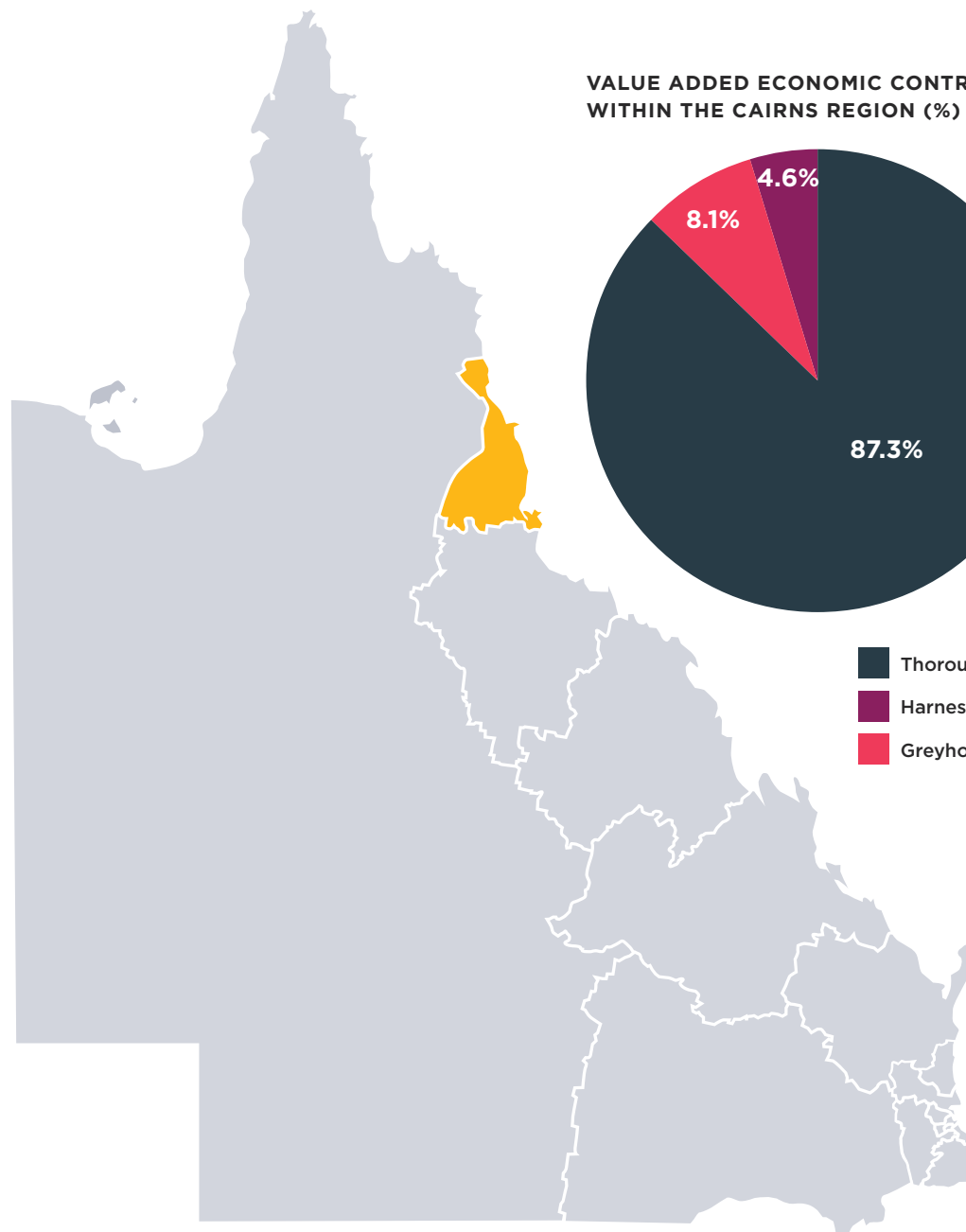
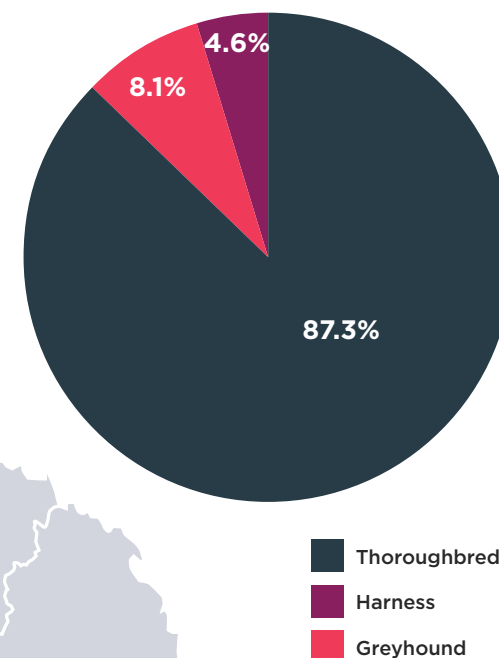
RACING CLUBS IN THE REGION

Thoroughbred

- + Atherton Turf Club
- + Cairns Jockey 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 \$62.2 million in value added** contribution to gross state product. This represents **2.5% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CAIRNS REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$50.3m	\$2.6m	\$4.6m	\$57.5m
Total value added	\$54.3m	\$2.9m	\$5.0m	\$62.2m
Full-time equivalent employment	341	19	33	392

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	3	0	12	15
Horses and greyhounds in training	425	0	20	445

TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	18	0	2	20
Owners	918	4	87	1,009
Trainers	54	0	8	62
Breeders staff	16	0	2	18
Stable/Kennel employees	176	0	3	179
Racing Club & industry staff (FT, PT, casual)	205	3	6	214
Jockeys, drivers & apprentices	7	0	0	7
Racing club volunteers	151	0	0	151
Volunteers assisting participants	90	0	10	100
Total roles occupied in the Cairns region	1,635	7	119	1,761

*Some totals do not add due to rounding.

Race meetings in the Cairns region attracted attendances of **37,094** or **4.8%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE CAIRNS REGION



AT A GLANCE

7 Racing Clubs

THOROUGHBRED 7

45 Race Meetings

THOROUGHBRED 45

292 Races

THOROUGHBRED 292

816 Racing Club Members

THOROUGHBRED 816

37,094 Attendances

THOROUGHBRED 37,094

*Some totals do not add due to rounding

Central Queensland

- + The population of the Central Queensland region is 244,220 (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 \$78.7 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 490 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,000 roles occupied in the racing industry in Central Queensland.

The racing industry in the **Central Queensland region** is responsible for generating **\$78.7 million in value added** contribution to gross state product. This represents **3.1% of the industry total.**

RACING CLUBS IN THE REGION

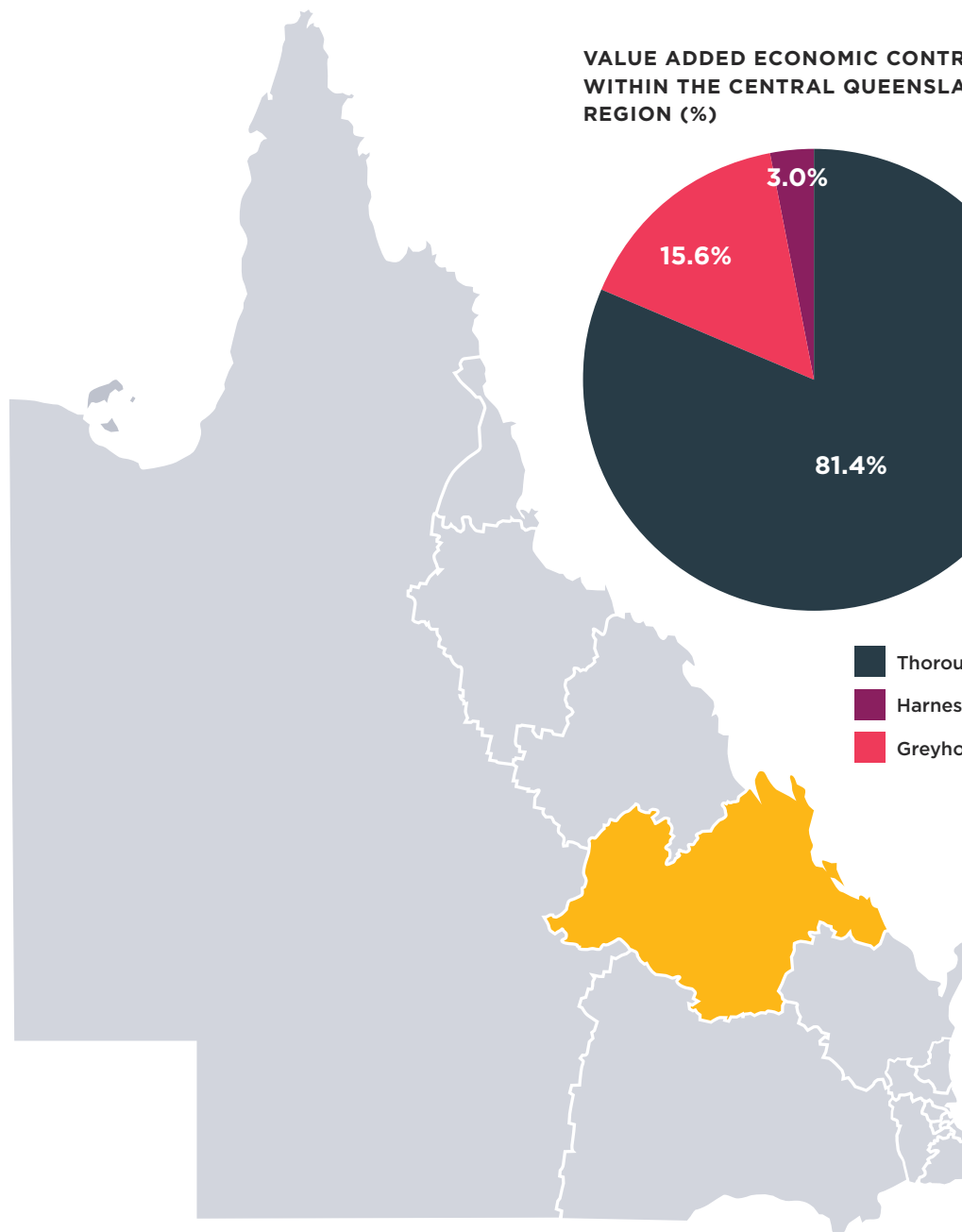
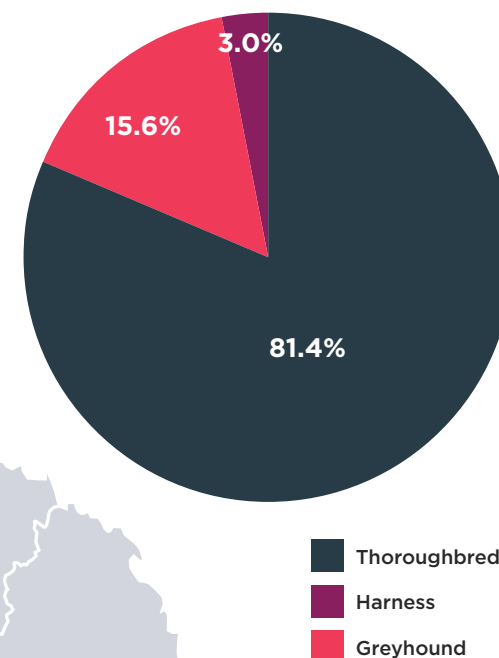
Thoroughbred

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

Greyhound

- + Rockhampton Greyhound Racing Club

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$63.3m	\$2.4m	\$12.2m	\$77.9m
Total value added	\$64.0m	\$2.4m	\$12.3m	\$78.7m
Full-time equivalent employment	397	16	77	490

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	52	0	56	108
Horses and greyhounds in training	646	0	311	957

TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	65	1	16	82
Owners	1,359	5	223	1,587
Trainers	115	0	29	144
Breeders staff	56	1	12	69
Stable/Kennel employees	187	0	24	211
Racing Club & industry staff (FT, PT, casual)	177	3	6	187
Jockeys, drivers & apprentices	12	0	0	12
Racing club volunteers	444	0	3	447
Volunteers assisting participants	213	3	44	260
Total roles occupied in the Central Queensland region	2,628	13	357	2,998

*Some totals do not add due to rounding.

Race meetings in the Central Queensland region attracted attendances of **53,437** or **6.9%** 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

145 Race Meetings

THOROUGHBRED	66
GREYHOUND	79

1,255 Races

THOROUGHBRED	407
GREYHOUND	848

1,378 Racing Club Members

THOROUGHBRED	1,348
GREYHOUND	30

53,437 Attendances

THOROUGHBRED	48,372
GREYHOUND	5,065

*Some totals do not add due to rounding

Darling Downs - Maranoa

- + The population of the Darling Downs - Maranoa & Toowoomba region is 309,876 (Australian Bureau of Statistics).
- + There are a total of twenty-seven (27) racing clubs operating in the region, twenty-six (26) of which are thoroughbred clubs, and one (1) a harness racing club.
- + The racing industry in the Darling Downs-Maranoa region is responsible for generating more than \$186.2 million in value added contribution to Gross State Product. This equates to 7.4% 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 1,144 full-time equivalent (FTE) jobs in the region.
- + There are more than 6,100 roles occupied in the racing industry in Darling Downs-Maranoa.

The racing industry in the **Darling Downs-Maranoa region** is responsible for generating **\$186.2 million** in **value added** contribution to gross state product. This represents **7.4%** of the industry total.

RACING CLUBS IN THE REGION

Thoroughbred

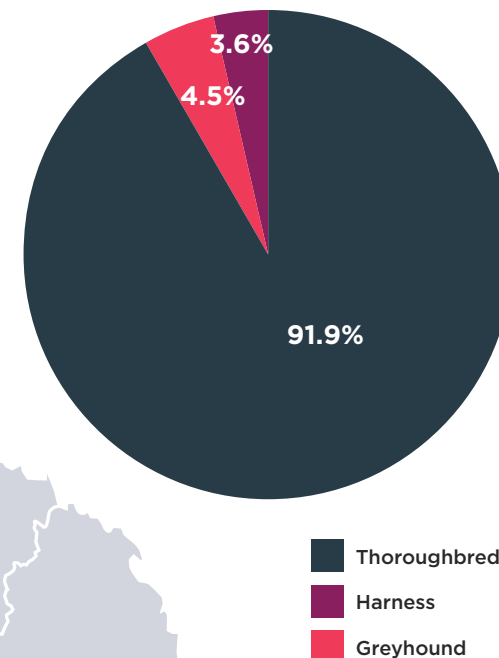
- + Bell Race Club Inc.
- + Chinchilla Race Club Inc.
- + Clifton Jockey Club Inc.
- + Dalby & Northern Downs Jockey Club Inc.
- + Dalby Amateur Picnic Race Club
- + Flinton Race Club
- + Goondiwindi & McIntyre Picnic Race Club Inc.
- + Goondiwindi Race Club Inc.
- + Injune Race Club
- + Jandowae Race Club Inc.
- + Lockyer Valley Turf Club
- + 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.
- + Toowoomba Turf Club Inc.
- + Wandoan Diggers Race Club Inc.
- + Warra Race Club
- + Warwick Turf Club

Harness

- + The Darling Downs Harness Racing Club Inc.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$182.0m	\$7.3m	\$9.2m	\$198.4m
Total value added	\$171.1m	\$6.7m	\$8.4m	\$186.2m
Full-time equivalent employment	1,047	42	54	1,144

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	839	24	77	940
Horses and greyhounds in training	1,629	52	205	1,886

TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	188	18	32	238
Owners	2,213	69	333	2,615
Trainers	253	18	49	319
Breeders staff	162	9	25	195
Stable/Kennel employees	520	15	35	570
Racing Club & industry staff (FT, PT, casual)	773	16	9	798
Jockeys, drivers & apprentices	32	13	0	45
Racing club volunteers	676	0	0	676
Volunteers assisting participants	504	71	78	653
Total roles occupied in the Darling Downs - Maranoa region	5,322	228	560	6,109

*Some totals do not add due to rounding.

Race meetings in the Darling Downs - Maranoa region attracted attendances of **73,688** or **9.6%** of total attendances at race meetings in Queensland.

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



AT A GLANCE

27 Racing Clubs

THOROUGHBRED	26
HARNESS	1

117 Race Meetings

THOROUGHBRED	115
HARNESS	2

807 Races

THOROUGHBRED	792
HARNESS	15

1,852 Racing Club Members

THOROUGHBRED	1,852
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73,688 Attendances

THOROUGHBRED	72,838
HARNESS	850

*Some totals do not add due to rounding

Gold Coast

- + The population of the Gold Coast region is 708,085 (Australian Bureau of Statistics).
- + There are two (2) thoroughbred racing clubs operating in the region.
- + The racing industry in the Gold Coast region is responsible for generating close to \$368.5 million in value added contribution to Gross State Product. This equates to 14.7% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 2,254 full-time equivalent (FTE) jobs in the region.
- + There are close to 8400 roles occupied in the racing industry in Gold Coast.

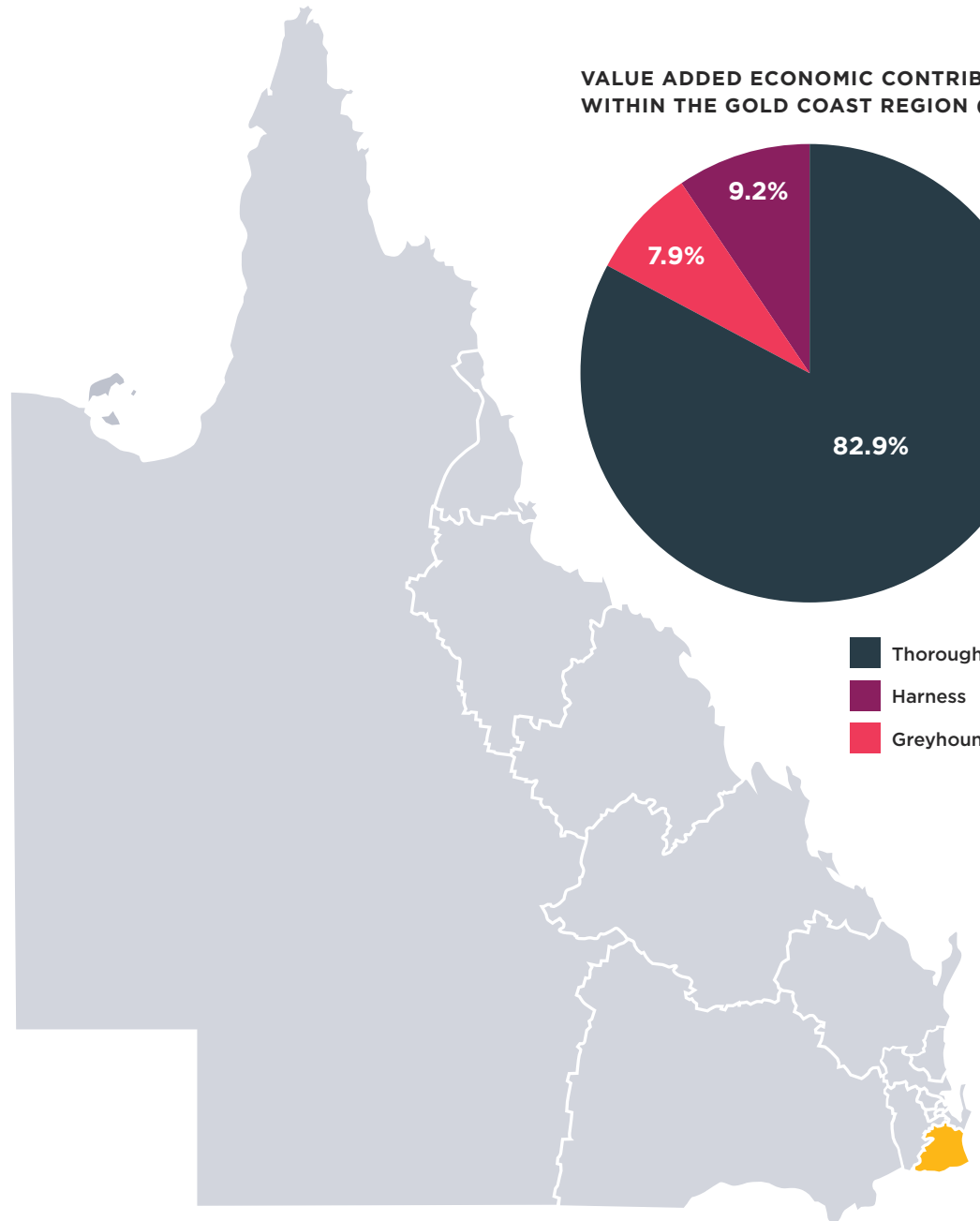
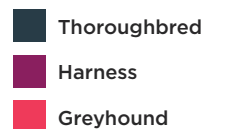
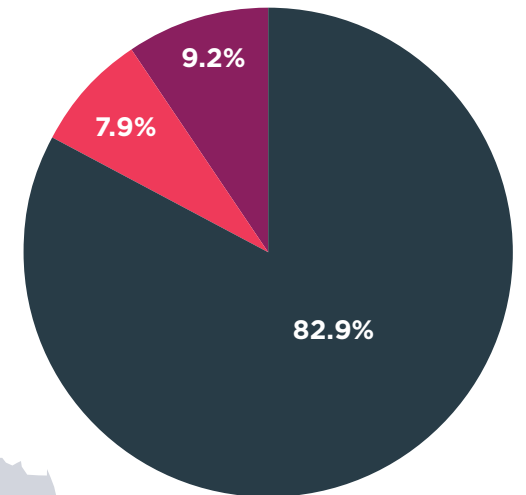
The racing industry in the **Gold Coast region** is responsible for generating **\$368.5 million in value added** contribution to gross state product. This represents **14.7% of the industry total.**

RACING CLUBS IN THE REGION

Thoroughbred

- + Gold Coast Turf Club Ltd.
- + Beudesert Hiberian Race Club Inc.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$278.2m	\$31.6m	\$26.5m	\$336.2m
Total value added	\$305.5m	\$34.0m	\$29.0m	\$368.5m
Full-time equivalent employment	1,866	204	184	2,254

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	417	59	156	632
Horses and greyhounds in training	2,276	443	901	3,620

TOTAL ROLES OCCUPIED IN RACING

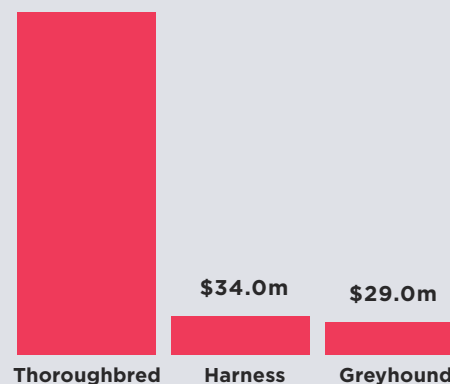
	Thoroughbred	Harness	Greyhound	Total
Breeders	161	52	81	294
Owners	4,429	172	894	5,495
Trainers	184	70	129	383
Breeders staff	138	26	61	225
Stable/Kennel employees	491	48	83	622
Racing Club & industry staff (FT, PT, casual)	424	10	28	462
Jockeys, drivers & apprentices	45	45	0	90
Racing club volunteers	9	0	0	9
Volunteers assisting participants	386	230	202	818
Total roles occupied in the Gold Coast region	6,266	653	1,477	8,396

*Some totals do not add due to rounding.

Race meetings in the Gold Coast region attracted attendances of **117,634** or **15.3% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE GOLD COAST REGION

\$305.5m



AT A GLANCE

2 Racing Clubs

THOROUGHBRED 2

52 Race Meetings

THOROUGHBRED 52

374 Races

THOROUGHBRED 374

3,239 Racing Club Members

THOROUGHBRED 3,239

117,634 Attendances

THOROUGHBRED 117,634

*Some totals do not add due to rounding

Ipswich

- + The population of the Ipswich region is 419,370 (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) harness racing club and one (1) greyhound racing club.
- + The racing industry in the Ipswich region is responsible for generating close to \$157.4 million in value added contribution to Gross State Product. This equates to 6.3% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 962 full-time equivalent (FTE) jobs in the region.
- + There are over 3,760 roles occupied in the racing industry in Ipswich.

The racing industry in the Ipswich region is responsible for generating \$157.4 million in value added contribution to gross state product. This represents 6.3% of the industry total.

RACING CLUBS IN THE REGION

Thoroughbred

- + Esk Jockey Club
- + Ipswich Turf Club

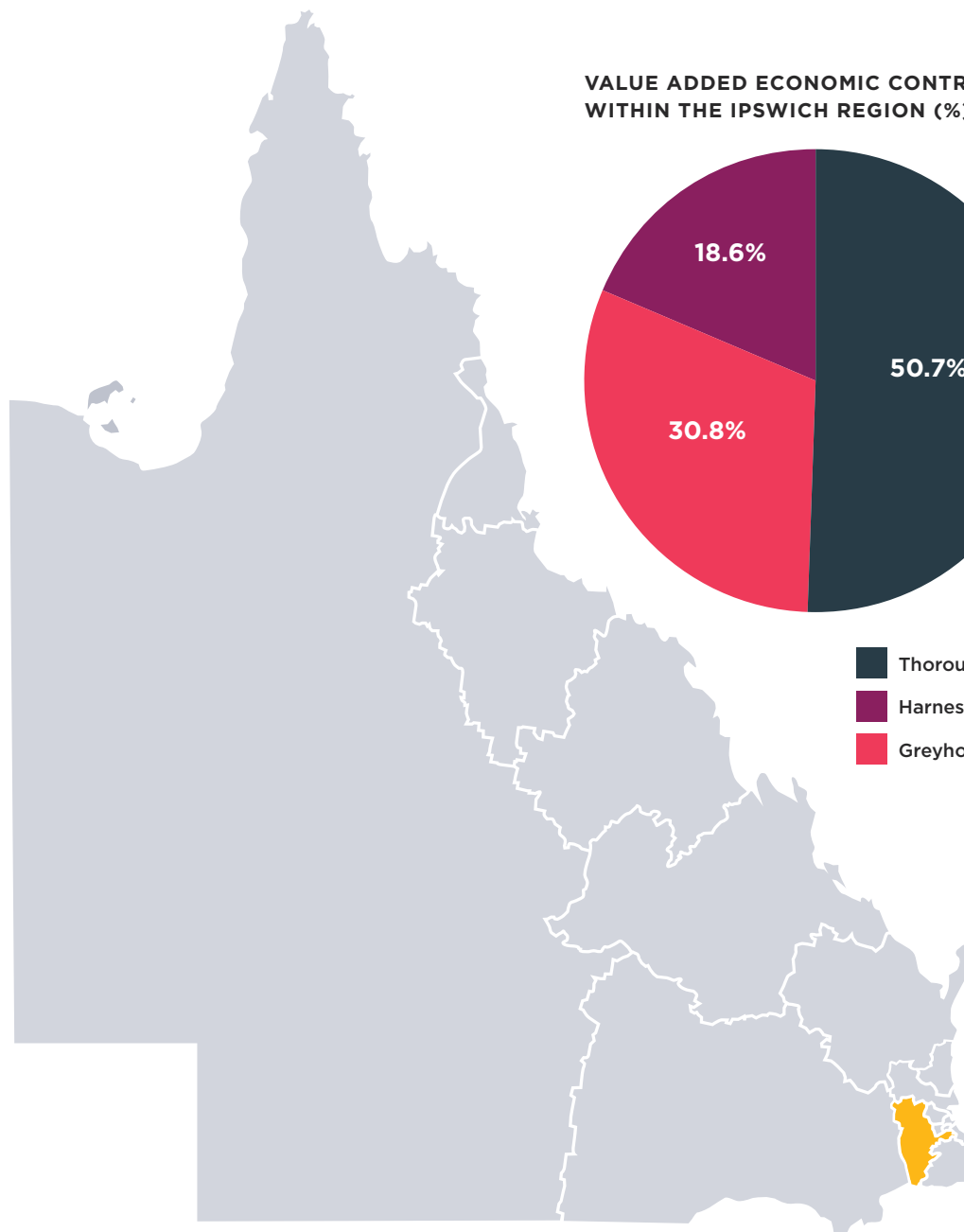
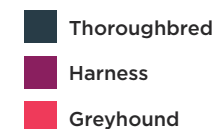
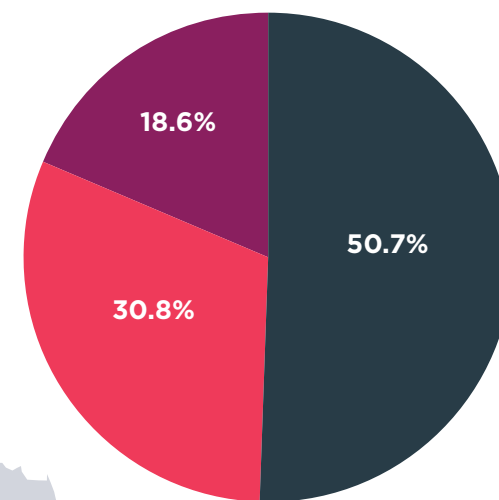
Harness

- + Marburg Harness Racing Assoc Inc

Greyhound

- + Queensland Greyhound Racing Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE IPSWICH REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$70.2m	\$27.4m	\$43.1m	\$140.7m
Total value added	\$79.7m	\$29.3m	\$48.4m	\$157.4m
Full-time equivalent employment	498	170	294	962

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	166	59	427	653
Horses and greyhounds in training	140	453	1,573	2,166

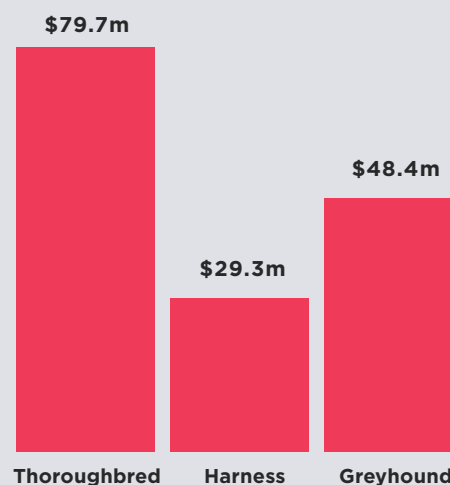
TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	44	46	117	207
Owners	965	208	617	1,791
Trainers	52	92	182	326
Breeders staff	38	23	89	150
Stable/Kennel employees	157	51	106	314
Racing Club & industry staff (FT, PT, casual)	202	12	13	226
Jockeys, drivers & apprentices	7	60	0	67
Racing club volunteers	32	13	0	45
Volunteers assisting participants	108	239	289	636
Total roles occupied in the Ipswich region	1,606	745	1,413	3,764

*Some totals do not add due to rounding.

Race meetings in the Ipswich region attracted attendances of **51,006** or **6.6%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE IPSWICH REGION



AT A GLANCE

4 Racing Clubs

THOROUGHBRED	2
HARNESS	1
GREYHOUND	1

290 Race Meetings

THOROUGHBRED	47
HARNESS	25
GREYHOUND	218

3,048 Races

THOROUGHBRED	360
HARNESS	196
GREYHOUND	2,492

475 Racing Club Members

THOROUGHBRED	375
HARNESS	100

51,006 Attendances

THOROUGHBRED	29,245
HARNESS	6,030
GREYHOUND	15,731

*Some totals do not add due to rounding

Mackay-Isaac-Whitsunday

- + The population of the Mackay-Isaac-Whitsunday region is 193,813 (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 \$41.5 million in value added contribution to Gross State Product. This equates to 1.7% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 263 full-time equivalent (FTE) jobs in the region.
- + There are over 1,500 roles occupied in the racing industry in Mackay-Isaac-Whitsunday.

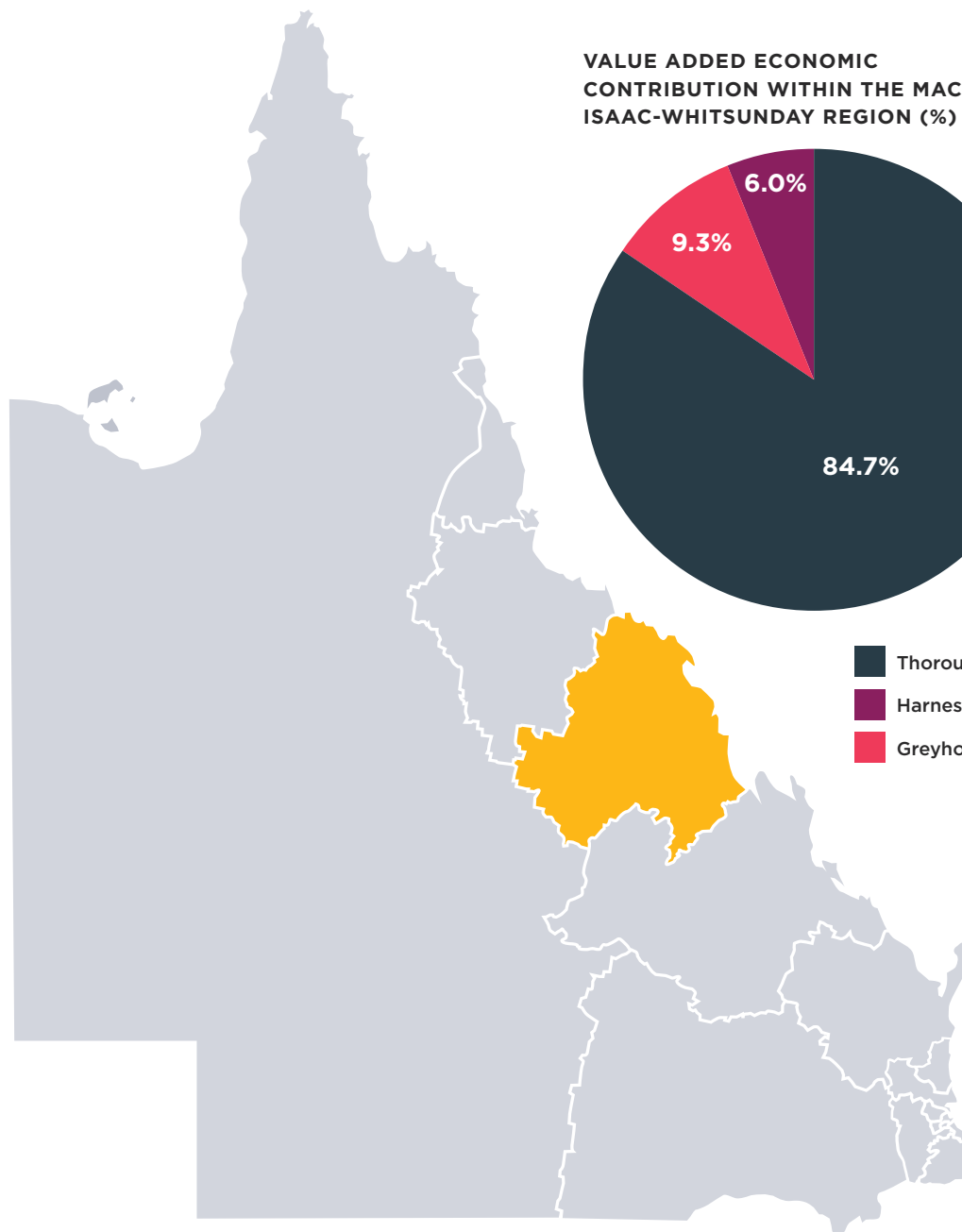
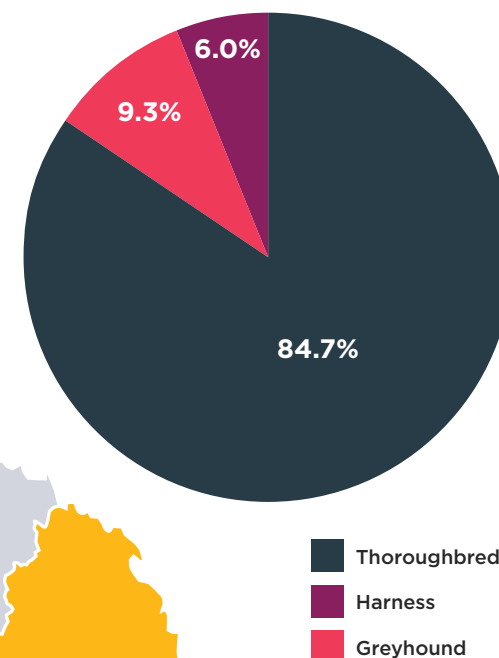
The racing industry in the **Mackay-Isaac-Whitsunday region** is responsible for generating **\$41.5 million in value added** contribution to gross state product. This represents **1.7% of the industry total**.

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.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$35.9m	\$2.5m	\$4.1m	\$42.6m
Total value added	\$35.1m	\$2.5m	\$3.9m	\$41.5m
Full-time equivalent employment	222	16	25	263

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	22	3	24	49
Horses and greyhounds in training	261	0	73	334

TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	18	2	2	22
Owners	747	5	92	844
Trainers	33	0	7	40
Breeders staff	16	1	2	18
Stable/Kennel employees	132	0	8	140
Racing Club & industry staff (FT, PT, casual)	252	3	5	259
Jockeys, drivers & apprentices	2	0	0	2
Racing club volunteers	119	0	0	119
Volunteers assisting participants	61	6	9	75
Total roles occupied in the Mackay-Isaac-Whitsunday region	1,379	16	125	1,520

*Some totals do not add due to rounding.

Race meetings in the Mackay-Isaac-Whitsunday region attracted attendances of **27,814** or **3.6%** 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

41 Race Meetings

THOROUGHBRED 41

276 Races

THOROUGHBRED 276

223 Racing Club Members

THOROUGHBRED 223

27,814 Attendances

THOROUGHBRED 27,814

*Some totals do not add due to rounding

Moreton Bay

- + The population of the Moreton Bay region is 539,000 (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 \$81.9 million in value added contribution to Gross State Product. This equates to 3.3% 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 513 full-time equivalent (FTE) jobs in the region.
- + There are over 3,100 roles occupied in the racing industry in Moreton Bay.

RACING CLUBS IN THE REGION

Thoroughbred

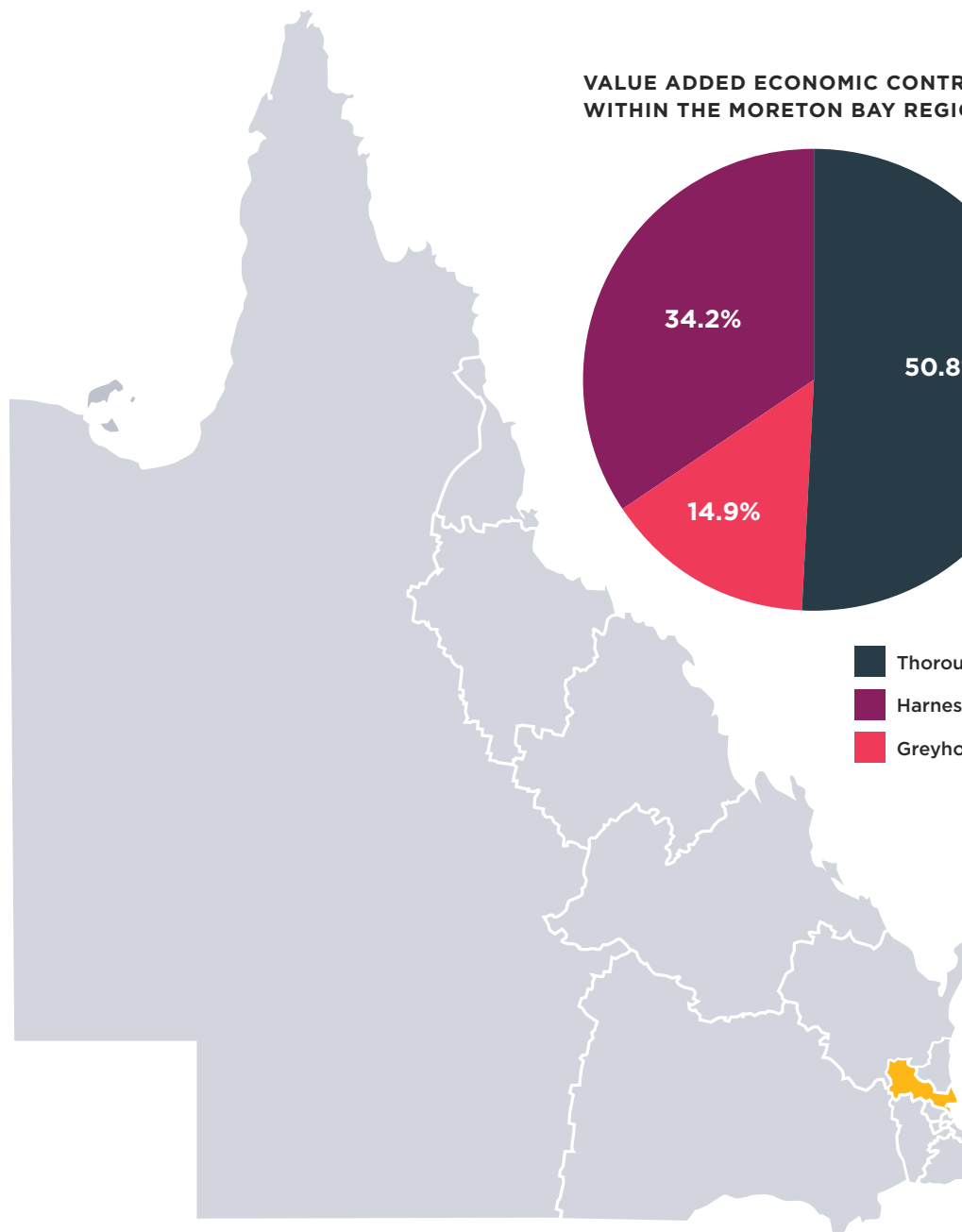
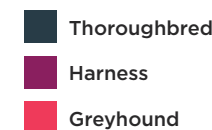
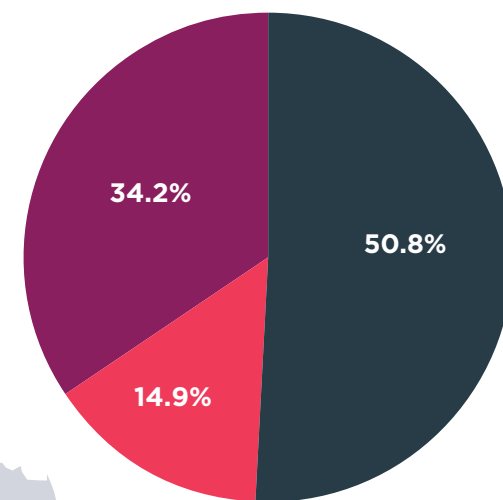
- + Kilcoy Race Club Inc.

Harness

- + Redcliffe Peninsula Harness Racing & Sporting Club Inc.

The racing industry in the **Moreton Bay region** is responsible for generating **\$81.9 million** in **value added** contribution to gross state product. This represents **3.3% of the industry total**.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$37.1m	\$24.9m	\$10.9m	\$72.9m
Total value added	\$41.6m	\$28.0m	\$12.2m	\$81.9m
Full-time equivalent employment	264	171	77	513

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	25	43	65	134
Horses and greyhounds in training	23	127	182	332

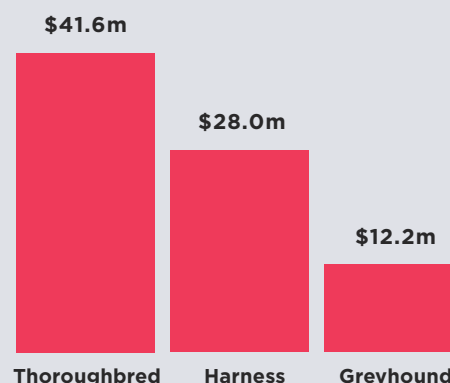
TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	36	36	36	107
Owners	1,454	169	411	2,035
Trainers	32	50	54	136
Breeders staff	31	18	27	76
Stable/Kennel employees	141	40	50	231
Racing Club & industry staff (FT, PT, casual)	61	46	27	134
Jockeys, drivers & apprentices	13	24	0	37
Racing club volunteers	20	6	0	26
Volunteers assisting participants	73	161	86	319
Total roles occupied in the Moreton Bay region	1,861	549	690	3,101

*Some totals do not add due to rounding.

Race meetings in the Moreton Bay region attracted attendances of **29,204** or **3.8%** 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
HARNES	1

126 Race Meetings

THOROUGHBRED	9
HARNES	117

1,069 Races

THOROUGHBRED	67
HARNES	1,002

206 Racing Club Members

THOROUGHBRED	78
HARNES	128

29,204 Attendances

THOROUGHBRED	4,875
HARNES	24,329

*Some totals do not add due to rounding

Queensland Outback

- + The population of the Queensland Outback region is 82,563 (Australian Bureau of Statistics).
- + There are a total of thirty-four (34) 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 \$37.5 million in value added contribution to Gross State Product. This equates to 1.5% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 241 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,800 roles occupied in the racing industry in Queensland - Outback.

The racing industry in the **Queensland - Outback region** is responsible for generating **\$37.5 million** in value added contribution to gross state product. This represents **1.5% of the industry total**.

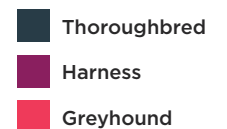
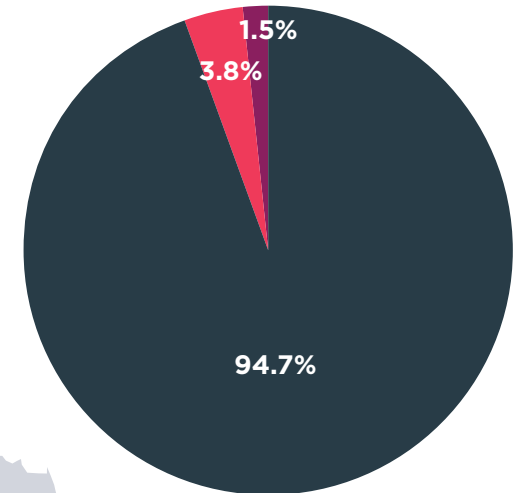
RACING CLUBS IN THE REGION

Thoroughbred

- + Alpha Jockey Club Inc.
- + Aramac Racing Club
- + Augathella Racing Club
- + Barcaldine Racing Club Inc.
- + Barcoo Amateur Race Club Inc.
- + Bedourie Amateur Race Club Inc.
- + Betoota Race Club Inc.
- + Birdsville Race Club Inc.
- + Boulia Turf Club
- + Central Warrego Race Club
- + Cloncurry & District Race Club Inc.
- + Cooktown Amateur Turf Club
- + Corfield Race Club
- + Cunnamulla & District Diggers Race Club Inc.
- + Hughenden Jockey Club Inc.
- + Ilfracombe Picnic Race Club Inc.
- + Isisford Race Club

- + Julia Creek Turf Club
- + Jundah Race Club
- + Maxwellton Race Club
- + McKinlay Race Club
- + Morven Race Club
- + Mt Isa Race Club
- + Muttaborra Amateur Turf Club
- + Noorama Picnic Race Club Inc.
- + North Gregory Turf Club
- + Oak Park Race Club Inc.
- + Prairie Jockey Club
- + Quilpie Diggers' Race Club
- + Richmond Turf Club
- + Stamford Race Club
- + Tambo & District Race Club
- + The Gregory Downs Jockey Club
- + The Longreach Jockey Club Inc.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$47.6m	\$0.8m	\$2.0m	\$50.4m
Total value added	\$35.5m	\$0.6m	\$1.4m	\$37.5m
Full-time equivalent employment	227	4	10	241

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	10	0	0	10
Horses and greyhounds in training	568	0	2	570

TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	10	0	0	10
Owners	578	0	14	592
Trainers	82	0	1	82
Breeders staff	9	0	0	9
Stable/Kennel employees	139	0	0	139
Racing Club & industry staff (FT, PT, casual)	312	2	2	316
Jockeys, drivers & apprentices	8	0	0	8
Racing club volunteers	1,523	0	0	1,523
Volunteers assisting participants	122	0	1	123
Total roles occupied in the Queensland Outback region	2,782	2	18	2,802

*Some totals do not add due to rounding.

Race meetings in the Queensland Outback region attracted attendances of **46,356** or **6.0%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE QUEENSLAND OUTBACK REGION



AT A GLANCE

34 Racing Clubs

THOROUGHBRED 34

83 Race Meetings

THOROUGHBRED 83

454 Races

THOROUGHBRED 454

2,204 Racing Club Members

THOROUGHBRED 2,204

46,356 Attendances

THOROUGHBRED 46,356

*Some totals do not add due to rounding

Sunshine Coast

- + The population of the Sunshine Coast region is 441,508 (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 \$156.4 million in value added contribution to Gross State Product. This equates to 6.2% 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 949 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,380 roles occupied in the racing industry in Sunshine Coast.

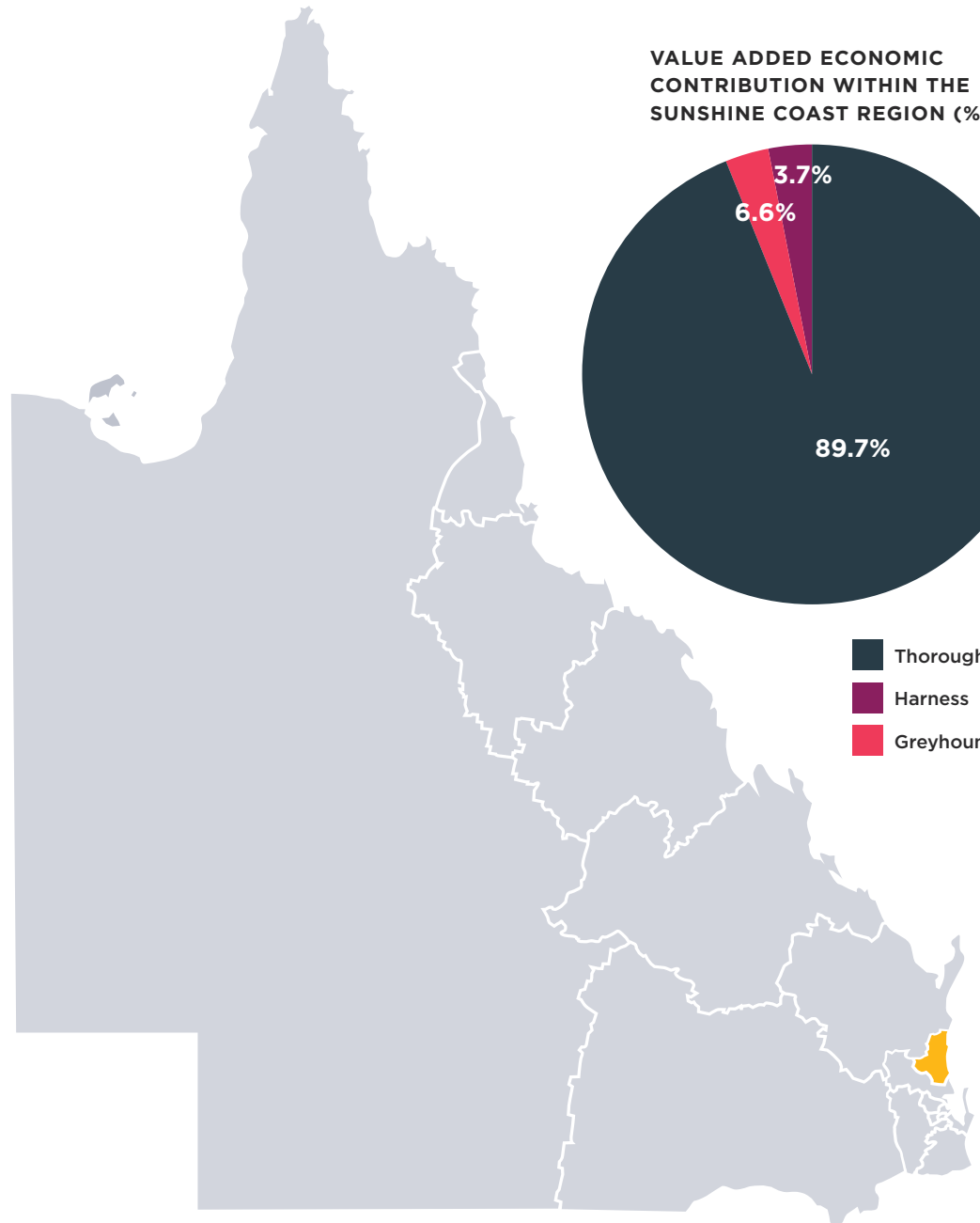
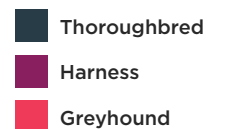
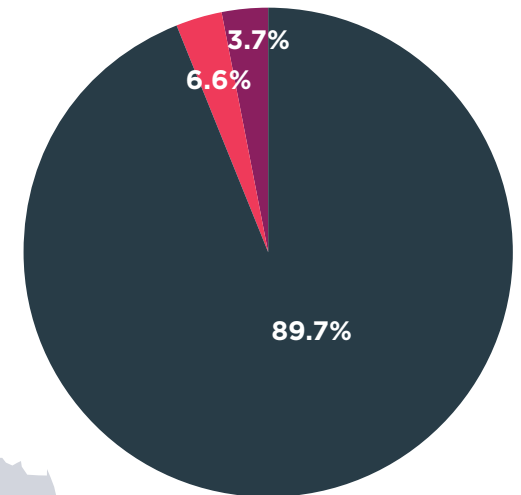
The racing industry in the **Sunshine Coast region** is responsible for generating **\$156.4 million** in **value added** contribution to gross state product. This represents **6.2%** of the industry total.

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	\$127.5m	\$5.1m	\$9.4m	\$142.0m
Total value added	\$140.3m	\$5.7m	\$10.4m	\$156.4m
Full-time equivalent employment	847	36	66	949

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	45	6	23	74
Horses and greyhounds in training	1,191	0	76	1,267

TOTAL ROLES OCCUPIED IN RACING

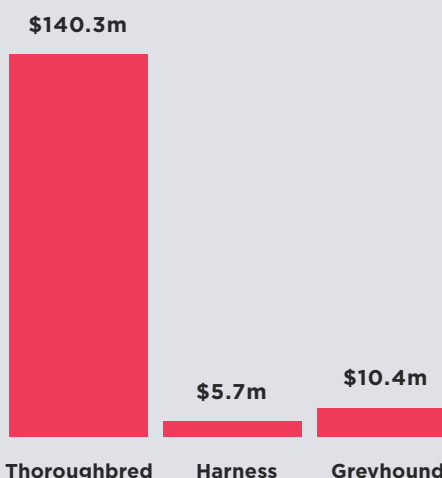
	Thoroughbred	Harness	Greyhound	Total
Breeders	52	7	11	70
Owners	2,041	16	220	2,277
Trainers	85	2	14	101
Breeders staff	45	4	8	57
Stable/Kennel employees	335	3	11	349
Racing Club & industry staff (FT, PT, casual)	278	4	10	291
Jockeys, drivers & apprentices	21	0	0	21
Racing club volunteers	8	0	0	8
Volunteers assisting participants	160	22	24	206
Total roles occupied in the Sunshine Coast region	3,023	57	298	3,379

*Some totals do not add due to rounding.

Race meetings in the Sunshine Coast region

attracted attendances of **68,821** or **8.9% 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

59 Race Meetings

THOROUGHBRED 59

446 Races

THOROUGHBRED 446

2,292 Racing Club Members

THOROUGHBRED 2,292

68,821 Attendances

THOROUGHBRED 68,821

*Some totals do not add due to rounding

Townsville

- + The population of the Townsville region is 249,097 (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 near to \$73.6 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 461 full-time equivalent (FTE) jobs in the region.
- + There are under 2,500 roles occupied in the racing industry in Townsville.

RACING CLUBS IN THE REGION

Thoroughbred

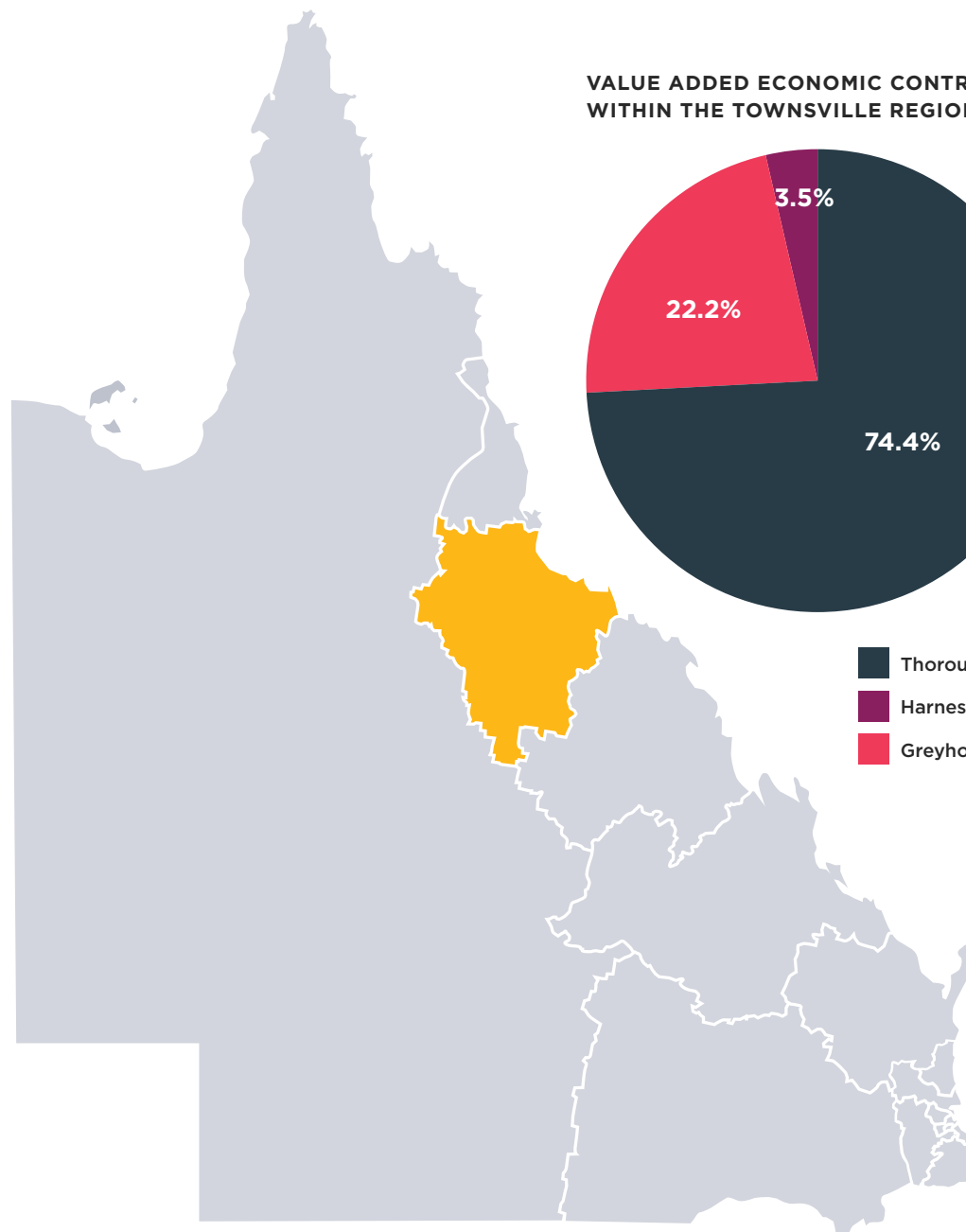
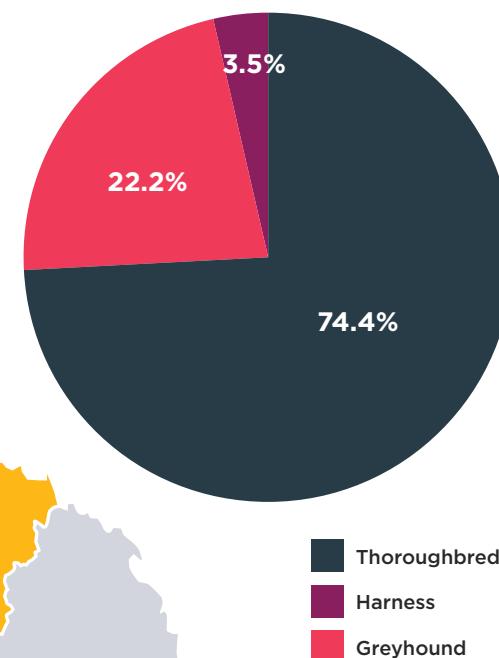
- + Burdekin Race Club Inc.
- + Charter Towers Race Club Inc.
- + Einasleigh Race Club Inc.
- + Ewan Amateur Turf Club Inc.
- + Herbert River Jockey Club Inc.
- + Pentland Race Club Inc.
- + Towers Jockey Club
- + Townsville Turf Club Inc.

Greyhound

- + Townsville Greyhound Racing Club Inc.

The racing industry in the **Townsville region is responsible for generating \$73.6 million in value added** contribution to gross state product. This represents **2.9% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOWNSVILLE REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$52.3m	\$2.4m	\$15.6m	\$70.3m
Total value added	\$54.7m	\$2.5m	\$16.3m	\$73.6m
Full-time equivalent employment	342	17	102	461

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	2	0	26	28
Horses and greyhounds in training	521	0	509	1,030

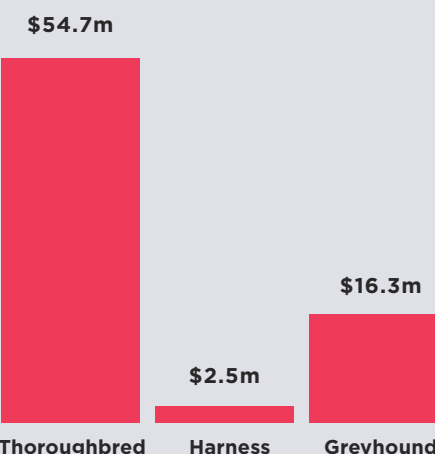
TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	29	0	22	51
Owners	1,099	3	256	1,358
Trainers	102	0	60	162
Breeders staff	25	0	16	41
Stable/Kennel employees	181	1	39	220
Racing Club & industry staff (FT, PT, casual)	88	5	27	120
Jockeys, drivers & apprentices	15	0	0	15
Racing club volunteers	271	0	14	285
Volunteers assisting participants	166	0	83	248
Total roles occupied in the Townsville region	1,975	9	517	2,501

*Some totals do not add due to rounding.

Race meetings in the Townsville region attracted attendances of **42,480** or **5.5% 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

129 Race Meetings

THOROUGHBRED	43
GREYHOUND	86

1,317 Races

THOROUGHBRED	303
GREYHOUND	1,014

1,758 Racing Club Members

THOROUGHBRED	1,716
GREYHOUND	42

42,480 Attendances

THOROUGHBRED	35,599
GREYHOUND	6,881

*Some totals do not add due to rounding

Wide Bay

- + The population of the Wide Bay region is 335,670 (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) a greyhound racing club.
- + The racing industry in the Wide Bay region is responsible for generating more than \$57.1 million in value added contribution to Gross State Product. This equates to 2.3% 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 365 full-time equivalent (FTE) jobs in the region.
- + There are just over 2,600 roles occupied in the racing industry in Wide Bay.

The racing industry in the **Wide Bay region is responsible for generating \$57.1 million in value added** contribution to gross state product. This represents **2.3% of the industry total.**

RACING CLUBS IN THE REGION

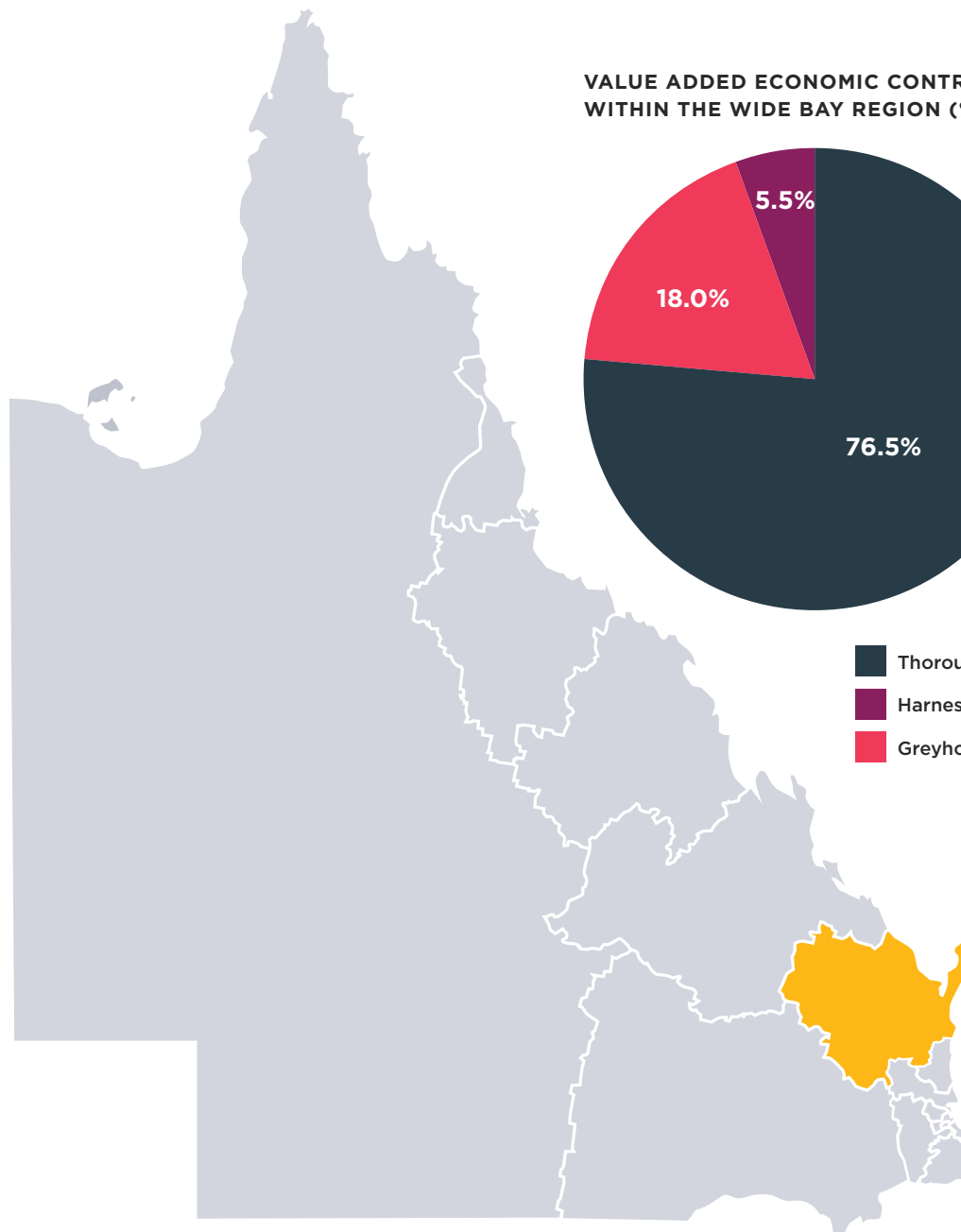
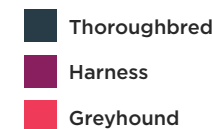
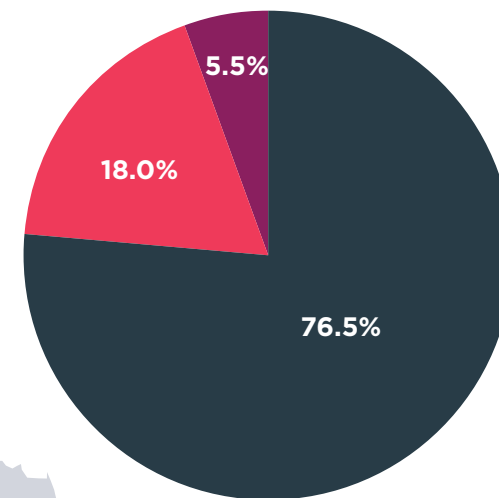
Thoroughbred

- + 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	\$43.4m	\$3.1m	\$10.1m	\$56.7m
Total value added	\$43.7m	\$3.2m	\$10.3m	\$57.1m
Full-time equivalent employment	278	21	66	365

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	58	1	36	95
Horses and greyhounds in training	228	8	165	401

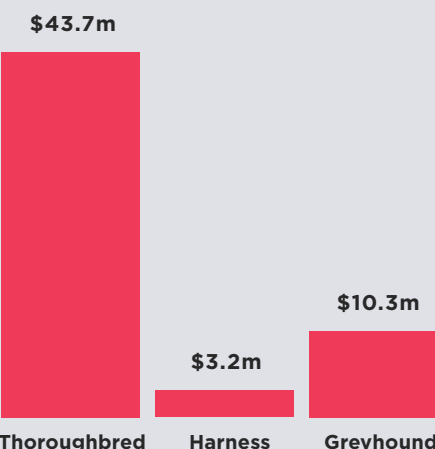
TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	45	4	26	75
Owners	904	24	191	1,119
Trainers	89	5	48	142
Breeders staff	39	2	20	61
Stable/Kennel employees	107	3	29	139
Racing Club & industry staff (FT, PT, casual)	152	2	37	191
Jockeys, drivers & apprentices	6	4	0	10
Racing club volunteers	600	0	0	600
Volunteers assisting participants	161	17	72	250
Total roles occupied in the Wide Bay region	2,102	61	423	2,587

*Some totals do not add due to rounding.

Race meetings in the Wide Bay region attracted attendances of **27,467** or **3.6%** 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

37 Race Meetings

THOROUGHBRED	30
GREYHOUND	7

231 Races

THOROUGHBRED	156
GREYHOUND	75

1,170 Racing Club Members

THOROUGHBRED	970
GREYHOUND	200

27,467 Attendances

THOROUGHBRED	26,956
GREYHOUND	511

*Some totals do not add due to rounding

South East Queensland

- + The population of the South East Queensland region is 3,562,960 (Australian Bureau of Statistics).
- + There are a total of fifteen (15) racing clubs operating in the region, eight (8) of which are thoroughbred clubs, three (3) harness and four (4) greyhound racing clubs.
- + The racing industry in the South East Queensland region is responsible for generating more than \$1,968.7 million in value added contribution to Gross State Product. This equates to 78.6% 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 10,639 full-time equivalent (FTE) jobs in the region.
- + There are 28,404 participants in the racing industry in South East Queensland.

The racing industry in the **South East Queensland region is responsible for generating \$1,968.7 million in value added** contribution to gross state product. This represents **78.6% 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
- + Sunshine Coast Turf Club
- + Tattersall's Racing Club

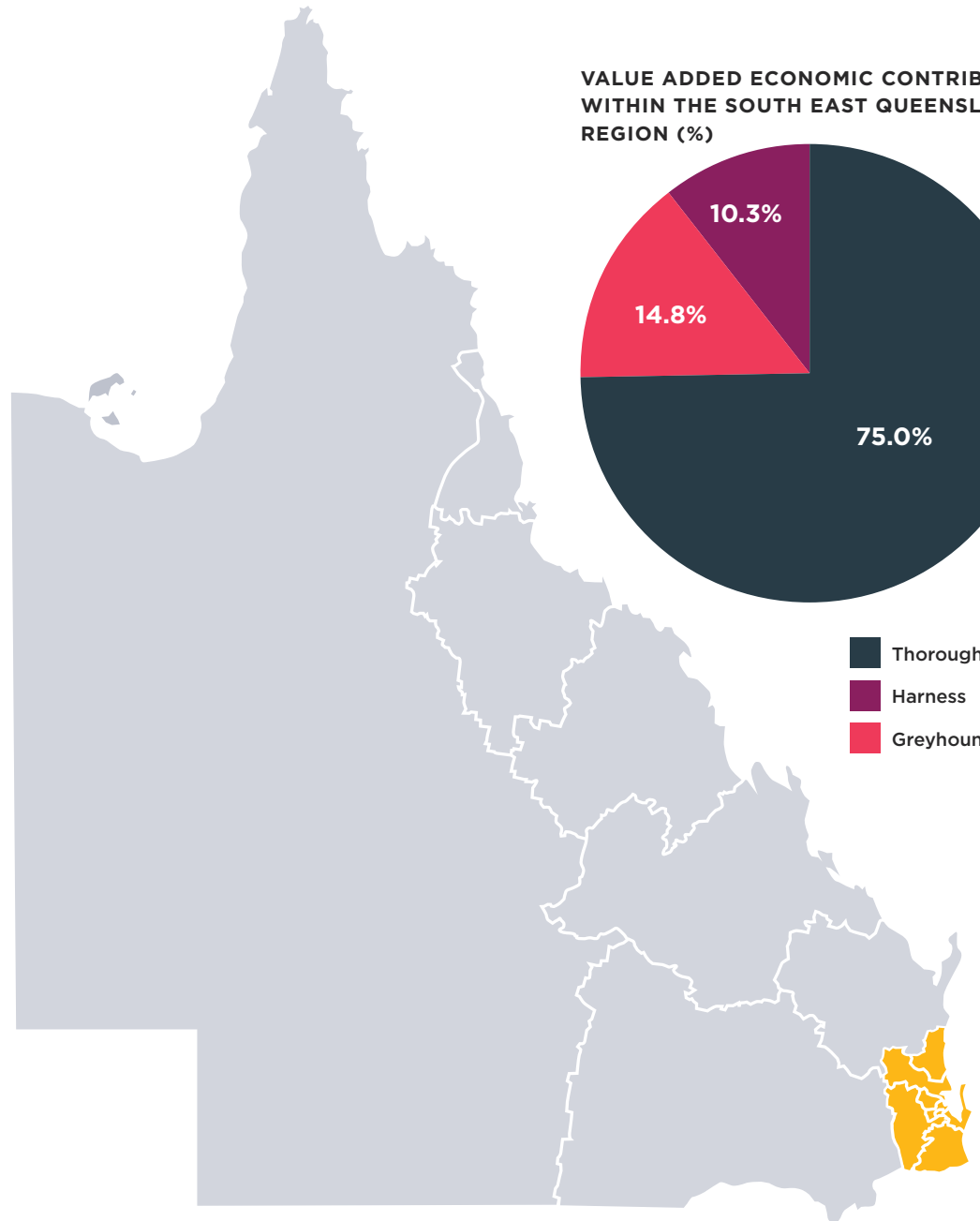
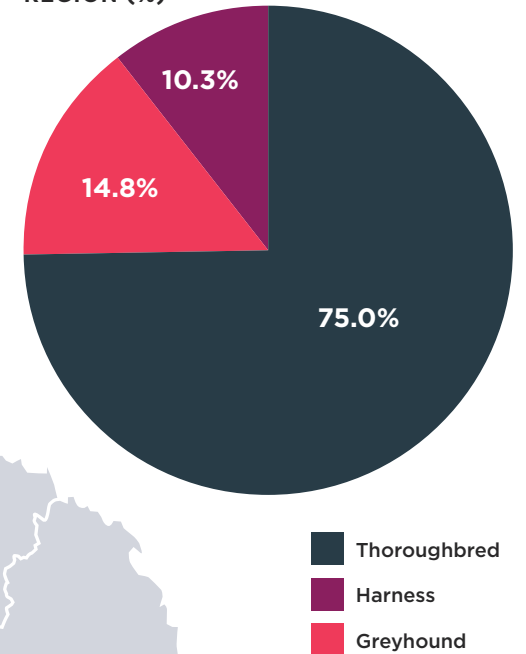
Harness

- + Albion Park Harness Racing Club
- + Marburg Harness Racing Assoc Inc
- + Redcliffe Peninsula Harness Racing and Sporting Club

Greyhound

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

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$980.7m	\$148.2m	\$201.6m	\$1330.4m
Total value added	\$1,475.7m	\$202.2m	\$290.8m	\$1,968.7m
Full-time equivalent employment	7,958	1,101	1,580	10,639

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	668	221	694	1,574
Horses and greyhounds in training	5,295	1,036	2,795	9,126

TOTAL ROLES OCCUPIED IN RACING

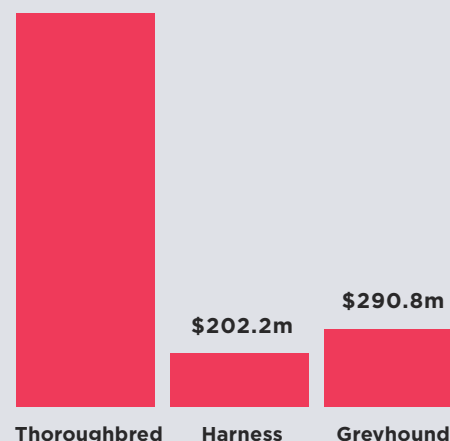
	Thoroughbred	Harness	Greyhound	Total
Breeders	410	161	271	841
Owners	14,621	688	3,250	18,559
Trainers	443	222	420	1,086
Breeders staff	353	81	205	638
Stable/Kennel employees	1,598	154	299	2,052
Racing Club & industry staff (FT, PT, casual)	2,096	175	298	2,569
Jockeys, drivers & apprentices	122	131	0	253
Racing club volunteers	91	29	8	128
Volunteers assisting participants	884	715	678	2,277
Total roles occupied in the South East Queensland region	20,618	2,357	5,429	28,404

*Some totals do not add due to rounding.

Race meetings in the South East Queensland region attracted attendances of **462,991** or **60.0% of total attendances** at race meetings in Queensland.

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

\$1,475.7m



AT A GLANCE

15 Racing Clubs

THOROUGHBRED	8
HARNESS	3
GREYHOUND	4

1,006 Race Meetings

THOROUGHBRED	242
HARNESS	294
GREYHOUND	470

9,808 Races

THOROUGHBRED	1,894
HARNESS	2,543
GREYHOUND	5,371

16,102 Racing Club Members

THOROUGHBRED	15,293
HARNESS	508
GREYHOUND	301

462,991 Attendances

THOROUGHBRED	338,177
HARNESS	63,354
GREYHOUND	61,460

*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 thirty 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
- + 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 Barry Burgan (B Ec (Hons)). 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
- + Size and scope of the South Australian racing industry
- + Size and scope of the Tasmanian racing industry
- + Size and scope of the New South Wales harness racing industry
- + Size and scope of the Australian Football League
- + Size and scope of Thoroughbred racing industry in the Northern Territory
- + Size and scope of the Victorian racing industry
- + Size and scope of the Western Australian racing industry
- + Size and scope of the Asian Racing Federation
- + Size and scope of the South Australian racing industry
- + Economic and social impact study of harness racing in Australia

Barry provides the economic modelling and advisory services to IER.

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

