

Size and Scope of the

QUEENSLAND RACING INDUSTRY

PREPARED BY IER | JULY 2019







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KEY FINDINGS

In 2017/18 the Queensland racing industry was responsible for **generating more than \$1.5 billion in value added contribution** to the Queensland economy – **43% of which directly benefits regional economies**

DIRECT SPENDING IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Direct Expenditure ¹	\$955.8m	\$133.8m	\$135.5m	\$1,225.1m

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Value Added ²	\$1,193.2m	\$166.2m	\$163.1m	\$1,522.5m
% of Industry Value Added	78.4%	10.9%	10.7%	
Total Household Income ³	\$629.1m	\$86.8m	\$89.5m	\$805.4m
Total FTE Employment	9,035	1,247	1,288	11,570

In 2017/18, the Queensland racing industry generated total direct spending of \$1,225.1 million. This expenditure was responsible for creating a direct value added impact (in terms of wages, salaries and profits) of \$542.7 million. However, the flow-on effects linked to this expenditure increase the size of the industry's value added contribution to over \$1.5 billion.

More than 42% of the total value added impact occurred in regional areas of Queensland, with the Gold Coast (8.0%), Sunshine Coast (5.4%), Ipswich (5.0%), Darling Downs - Maranoa (3.8%) and Central Queensland (2.5%) 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 5,045 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 11,570 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 **11,570 FTE jobs sustained** by the Queensland racing industry around **44% 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 2017/18, more than 832,500 attendances were recorded at thoroughbred, harness and greyhound race meetings in Queensland. More than 71% of these attendances were made at key racecourses, with the Gold Coast (14.0%), Sunshine Coast (8.7%), Ipswich (7.4%) and Cairns (6.5%) representing the largest regions.

Participants are the lifeblood of the racing industry. They provide the investment, time, skills and passion that underpins horse and greyhound racing in the state. In total, there are more than 40,000 individuals who participate in the Queensland racing industry. Many of these people enjoy gainful employment of their specific skillset where they may find limited opportunities otherwise - particularly in the breeding, training and racing related disciplines. Furthermore, many participants hold more than one role within the industry.

The industry is also supported by nearly 7,900 people who volunteer their time and resources. For many of these people, local racing clubs and participants are an important part of their community and provide valuable opportunities to stay active and engage with their community.

There are close to **30 race meetings held in Queensland** every week providing live entertainment to **more than 832,500 attendees**

AT A GLANCE

RACING ACTIVITY

129 Racing Clubs

THOROUGHBRED	118
HARNESS	5
GREYHOUND	6

1,151 TAB Race Meetings

THOROUGHBRED	424
HARNESS	264
GREYHOUND	463

371 Non-TAB Race Meetings

THOROUGHBRED	253
HARNESS	15
GREYHOUND	103

12,362 Total Races

THOROUGHBRED	4,560
HARNESS	2,332
GREYHOUND	5,470

832,579 Attendances

THOROUGHBRED	708,811
HARNESS	72,932
GREYHOUND	50,836

3,392 Live Foals/ Pups Bred

THOROUGHBRED	2,163
HARNESS	304
GREYHOUND	925

12,164 Horses and Greyhounds in Training

THOROUGHBRED	7,793
HARNESS	1,279
GREYHOUND	3,092





AT A GLANCE

THE PEOPLE

1,808 Breeders

THOROUGHBRED	1,263
HARNESS	263
GREYHOUND	282

20,590 Owners

THOROUGHBRED	18,367
HARNESS	865
GREYHOUND	1,358

1,703 Trainers

THOROUGHBRED	826
HARNESS	268
GREYHOUND	609

3,392 Racing Club & Industry Staff

THOROUGHBRED	2,993
HARNESS	109
GREYHOUND	290

4,300 Staff employed by participants

THOROUGHBRED	3,234
HARNESS	275
GREYHOUND	792

There are **more than 40,000 individuals** who are involved in the Queensland racing industry as an **employee, participant or volunteer**. More than **80% of participants** are located outside of metropolitan Queensland

412 Jockeys & Drivers

THOROUGHBRED	216
HARNESS	196

7,852 Volunteers

THOROUGHBRED	5,573
HARNESS	1,104
GREYHOUND	1,175

INTRODUCTION

In March 2019, 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 2015/16.

PURPOSE OF THE STUDY

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

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

STUDY METHODOLOGY

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



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

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

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

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

It is important to note that whilst this report builds on the study that was completed in 2015-16, direct comparisons should be made with caution mainly due to changes in the wagering landscape.

ECONOMIC METHODOLOGY

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

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

- + production (breeding related activities) of racing horses and greyhounds - the expenditure generated by the breeding sector in maintaining breeding animals and producing pups.
- + preparation (training related activities) of horses and greyhounds for racing the expenditure by owners and trainers on training services as well as other non- training related expenses such as major veterinary, transport etc.
- + racing club and industry expenditure - the expenditure generated by racing clubs and

Racing Queensland on running their operations, businesses and events

- + other wagering operator expenditure - the net wagering revenues that flow to the Government (through wagering taxes) as well as expenditure by wagering operators to fund their operations in Queensland
- + racing customer off-track expenditure - expenditure made by racegoers, off-track, as part of their attendance at the races

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

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

2 Categorisation of industry expenditure into ANZSIC classifications The 'racing industry' does not exist within the Australian and New Zealand Standard Industry Classification (ANZSIC) structure. For modelling purposes, it is necessary to allocate direct expenditures to the appropriate industry sectors. The majority of expenditures are classified within their relevant ANZSIC codes. A number of horse and greyhound racing activities are contained within ANZSIC classification R - Arts and Recreation Services, specifically within the following sectors:

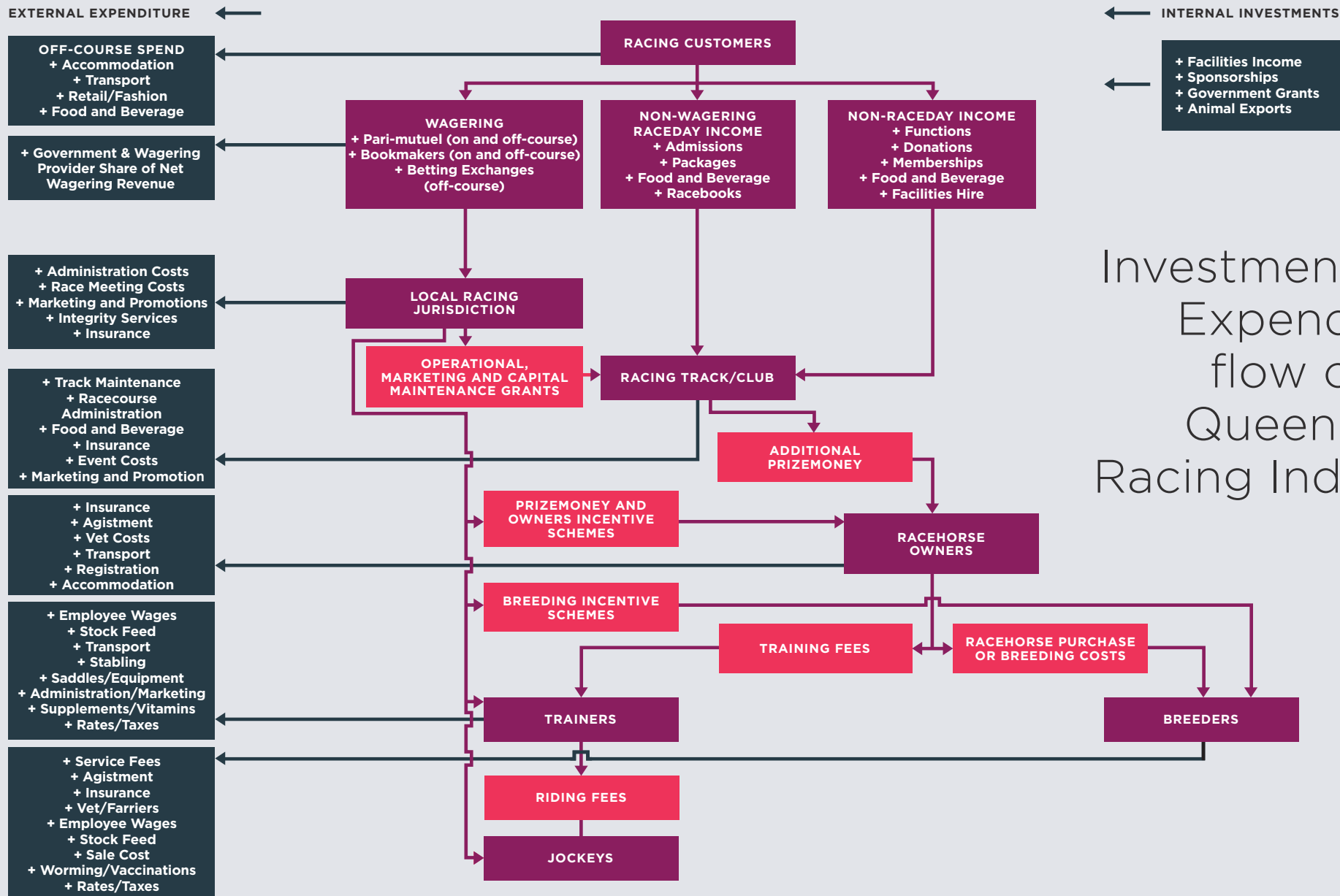
- a. R9114 - Sport and Physical Recreation Administration,
- b. R9121 - Horse and Dog Racing Activities,
- c. R9129 - Training and Racing Activities,
- d. R9209 - Other Gambling (Racing).

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

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

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

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



Investment and
Expenditure
flow of the
Queensland
Racing Industry



ECONOMIC IMPACTS

The Queensland racing industry is responsible for **generating more than \$1.2 billion in expenditure** in Queensland. Almost 60% 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 2017/18, the Queensland racing industry generated more than \$1.2 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).



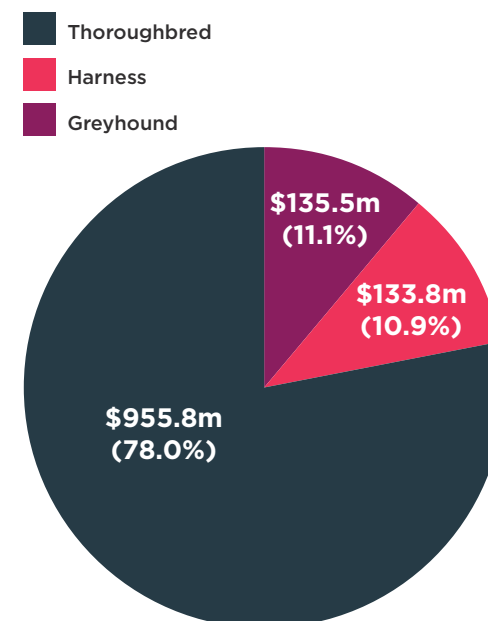


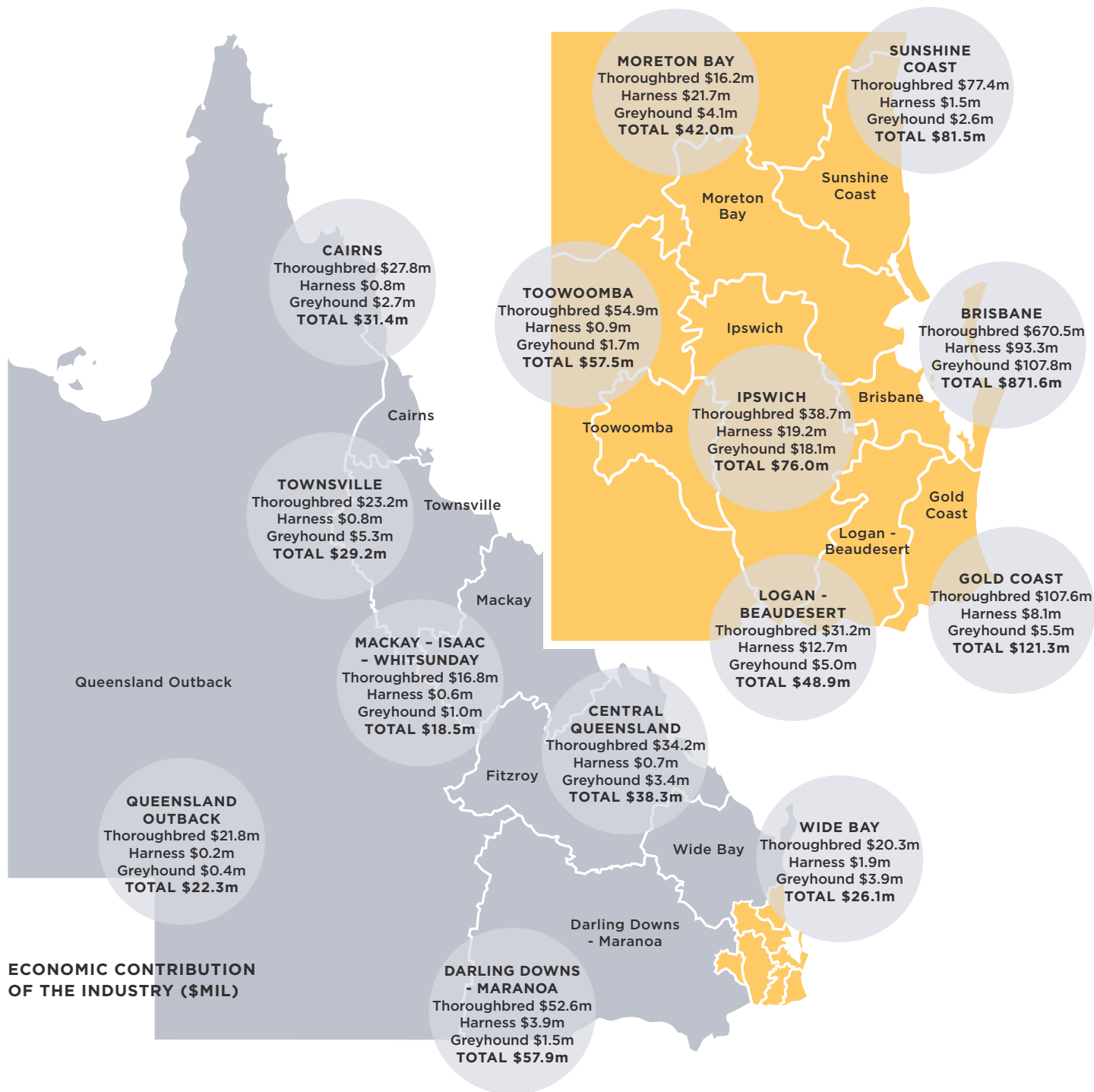
The breakdown of final expenditures is outlined below:

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	\$100.0m	8.2%
Preparation of racing horses and greyhounds (Training)	+ Private investment + Prizemoney + Industry bonuses & incentives	\$274.3m	22.4%
Racing Club & Industry Expenditure	+ Wagering product fees + Raceday revenues + Sponsorship & membership + Non-raceday revenues + Nominations	\$351.4m	28.7%
Other Wagering Operator Expenditure	+ Taxation on wagering revenue generated by the Racing Queensland product + Wagering operator profits on turnover related to the Racing Queensland product	\$433.8m	35.4%
Racing customer expenditure off-course	+ Private investment	\$65.6m	5.4%
Total		\$1,225.1m	

Thoroughbred racing is responsible for generating more than 78% of the final expenditures. More than 60% of this expenditure was in regional parts of the state. Harness racing is responsible for generating more than 10% of the final expenditures. Just over 60% of this expenditure is in regional parts of the state. Greyhound racing is responsible for generating 11% of the final expenditures. More than 47% 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 \$1,523 million for the Queensland economy. Real gross value added is the generally accepted measure of the value of production from economic activity. It is the sum of value added by all industries in a region (in this case, all regions of Queensland). In any period of time, the value added contribution in an industry equates to the value of sales less the value of inputs used in production. This means value added is equal to the income (wages, salaries and profits) generated in the course of production.

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



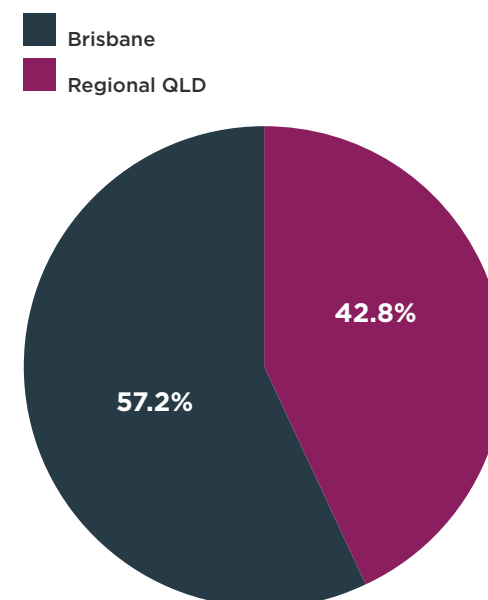
Generally, the level of economic activity will not always proportionally follow the final expenditures, as regional areas generally have higher import penetrations than metropolitan areas – i.e. a lot of the expenditure is on product imported from the metropolitan area. As such, the model takes into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

When considering the value added contribution of \$1,523 million generated by the Queensland racing industry, it is important to note that it is made up of:

- ✦ Direct value added (\$542.7 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 (\$979.9 million) – represents the value added activity (wages, salaries and gross operating surplus) generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this.

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

QUEENSLAND RACING INDUSTRY ECONOMIC IMPACT BY REGION



Participants in the Queensland racing industry

The concept of 'participation in racing' is broader than simply considering those employed in the industry. Participants include employees, 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 gainful 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.

More than 24,100 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 approximately 7,850 individuals who volunteer their time and skills in a variety of roles within the industry. In the participant space, this often includes family members - for many of whom, this family connection goes back many generations.

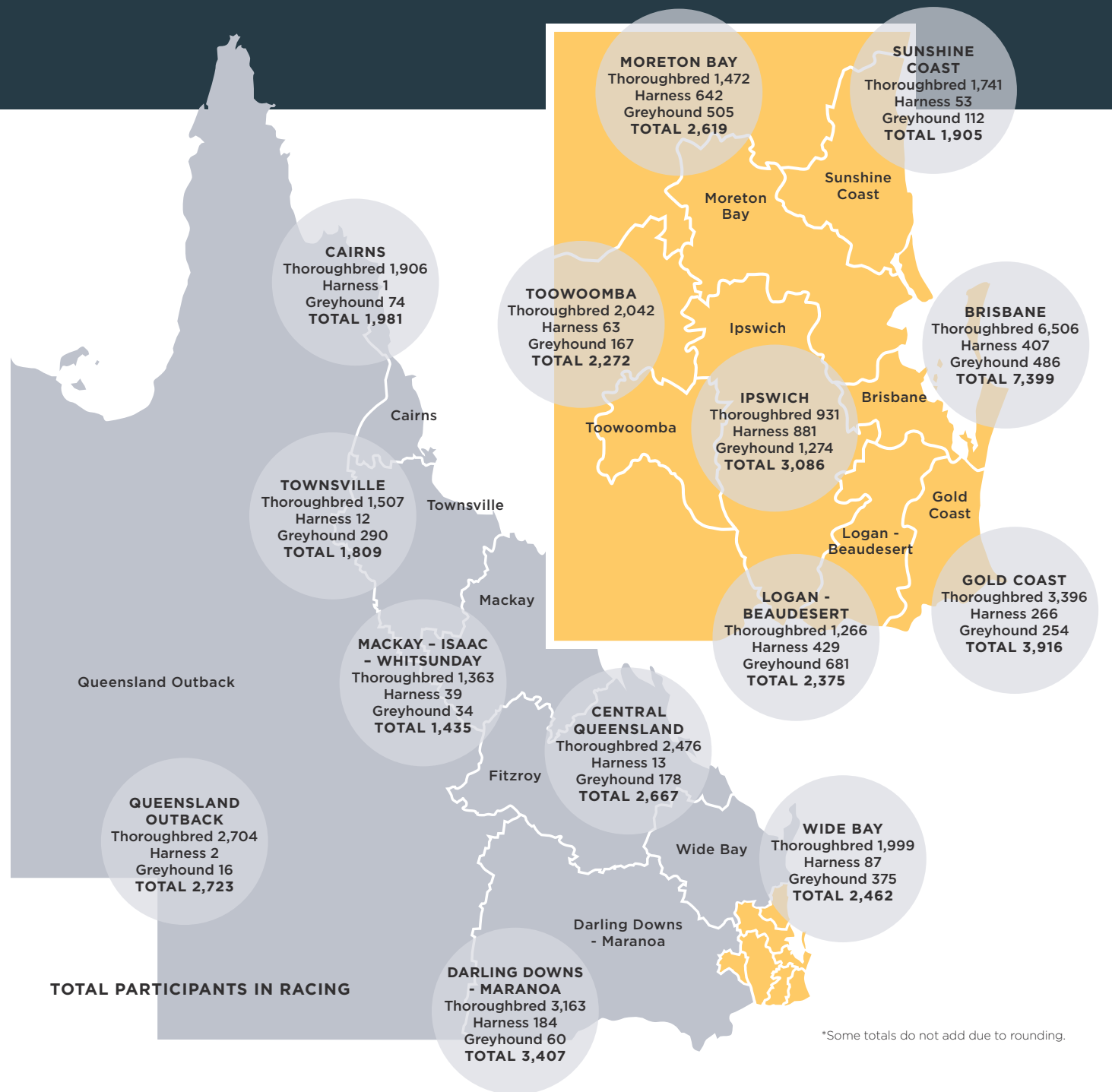
In total, there are 40,057 individuals who participate in the Queensland racing industry as a participant, employee or volunteer. Just under 82% of these participants are in regional parts of the State.

TOTAL PARTICIPANTS IN RACING

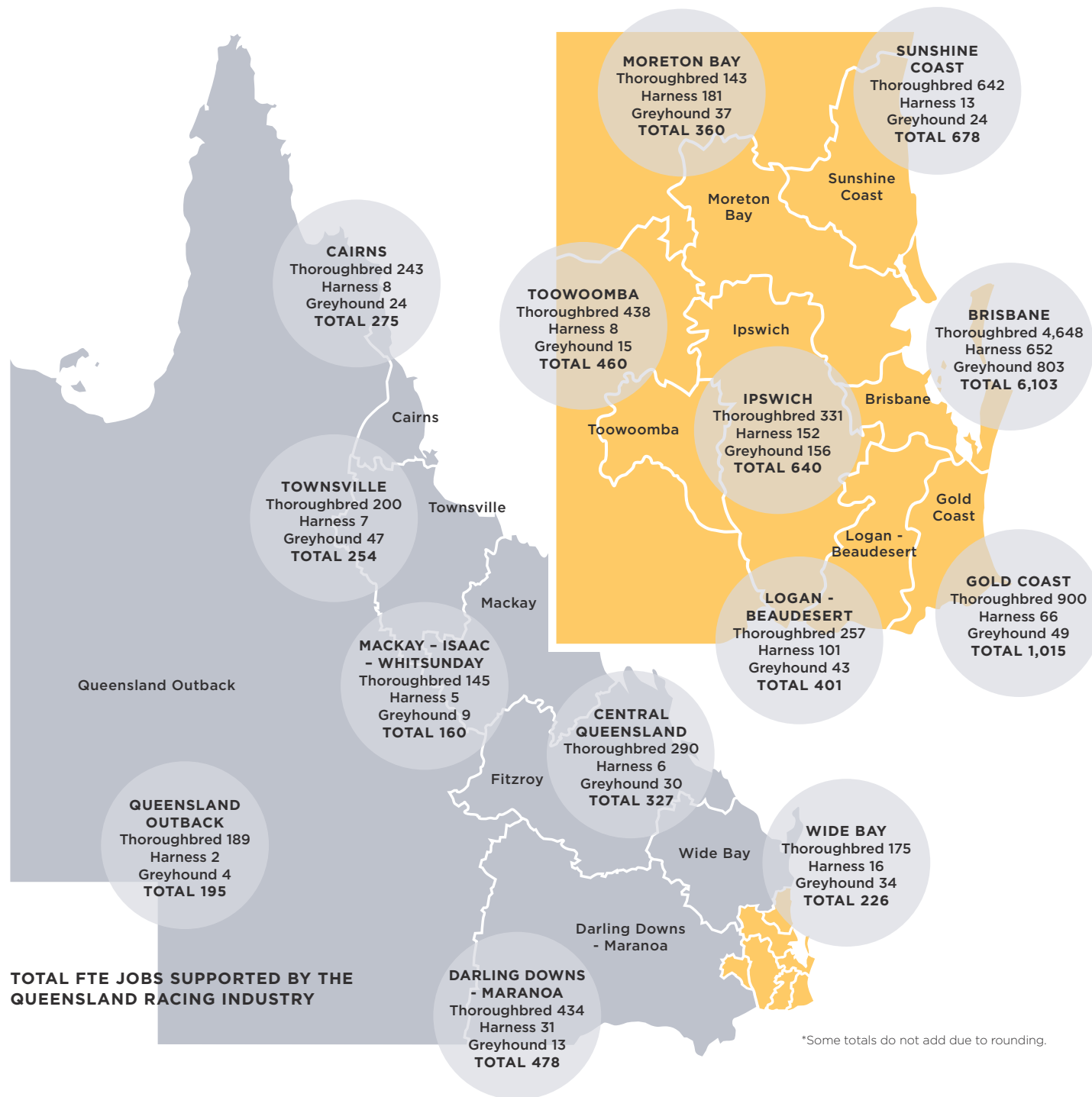
	Thoroughbred	Harness	Greyhound	Total
Breeders	1,263	263	282	1,808
Owners	18,367	865	1,358	20,590
Trainers	826	268	609	1,703
Racing Club & Industry Staff (FT, PT, Casual)	2,993	109	290	3,392
Breeders Staff	1,235	132	183	1,549
Stable/Kennel Employees	1,999	143	609	2,751
Jockeys & Drivers	216	196	0	412
Racing club volunteers	3,341	38	52	3,431
Volunteers assisting participants	2,231	1,066	1,123	4,421
Total	32,471	3,080	4,506	40,057

Note: Volunteer numbers sourced from club and participant survey. Not all clubs provided data.









*Some totals do not add due to rounding.

Employment Generated by Racing in Queensland

There are 8,104 people directly employed in the Queensland racing industry. As outlined earlier, this represents the headcount of full-time, part-time and casual employees of the industry, racing clubs and participants. The Queensland racing industry, like racing industries all over Australia, relies on a large number of part-time and casual roles. As such, the FTE employment is significantly lower than the headcount.

In 2017/18, the economic activity generated by the Queensland racing industry directly sustained 5,045 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 6,525 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Queensland racing industry was 11,570 FTE jobs.

The FTE positions that are sustained by the Queensland racing industry resulted in more than \$805.4 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.

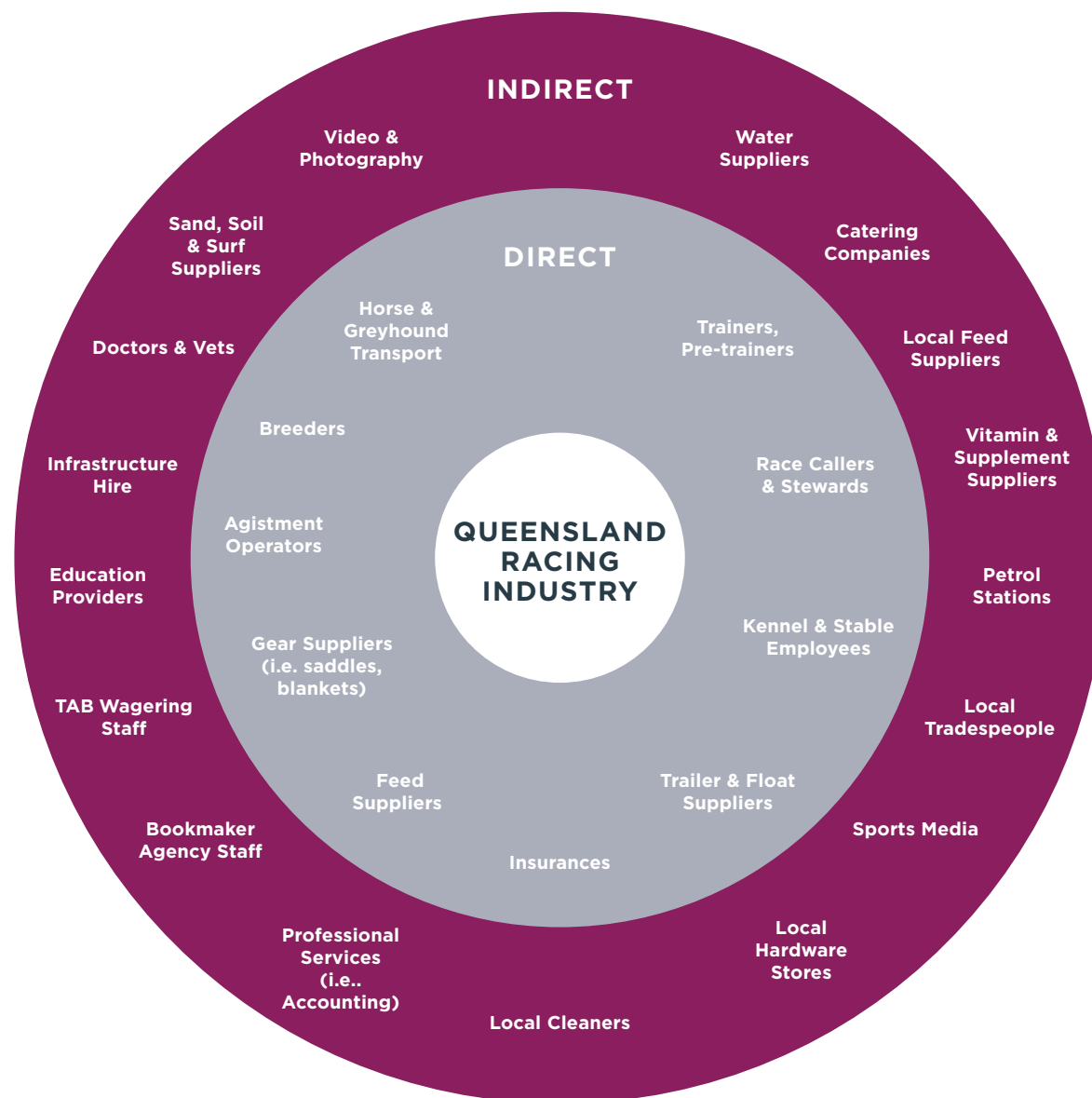
The Supplier Network

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 & Technology Services	+ Total value added - \$211.5m + Total FTE jobs - 1,953	+ Veterinary Services + Scientific Research Services + Management & Related Consulting Services
Gambling Services	+ Total value added - \$105.6m + Total FTE jobs - 1,120	+ Customer wagering on racing
Agriculture, Forestry & Fishing	+ Total value added - \$100.2m + Total FTE jobs - 600	+ Horse Farming/ Breeding





RACING'S PARTICIPANTS AND ANIMALS

The Breeding Industry

NUMBER OF BREEDERS (incl. part owners of broodmares/broodmatrons and stallions/sires)

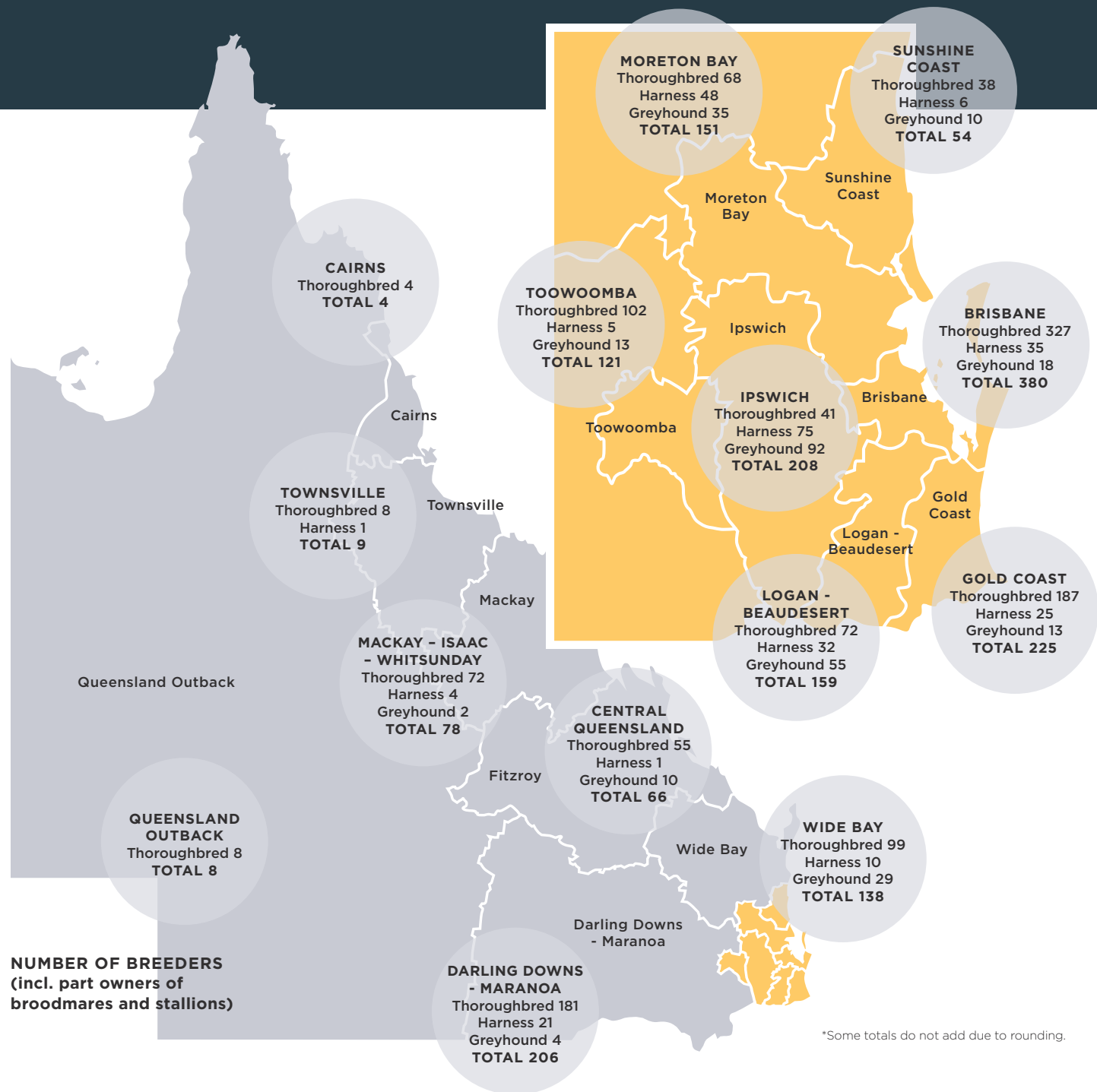
	Thoroughbred	Harness	Greyhound	Total
Cairns	4	0	0	4
Darling Downs - Maranoa	181	21	4	206
Central Queensland	55	1	10	66
Gold Coast	187	25	13	225
Ipswich	41	75	92	208
Logan - Beaudesert	72	32	55	159
Mackay - Isaac - Whitsunday	72	4	2	78
Moreton Bay	68	48	35	151
Queensland - Outback	8	0	0	8
Sunshine Coast	38	6	10	54
Toowoomba	102	5	13	121
Townsville	8	1	0	9
Wide Bay	99	10	29	138
Total Regional Queensland	936	228	264	1,428
Brisbane	327	35	18	380
Total	1,263	263	282	1,808

NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	6	0	0	6
Darling Downs - Maranoa	254	11	3	267
Central Queensland	77	1	6	84
Gold Coast	93	13	8	114
Ipswich	21	38	60	118
Logan - Beaudesert	100	16	36	152
Mackay - Isaac - Whitsunday	101	2	1	104
Moreton Bay	95	24	23	142
Queensland - Outback	12	0	0	12
Sunshine Coast	19	3	6	28
Toowoomba	143	3	9	154
Townsville	12	1	0	12
Wide Bay	138	5	19	162
Total Regional Queensland	1,071	114	171	1,356
Brisbane	164	18	12	193
Total	1,235	132	183	1,549

*Some totals do not add due to rounding.

There are **more than 1,800 individuals** who either breed, or have an ownership interest in a broodmare, broodmatron, stallion or sire. They are supported by **more than 1,540 employees and 2,082 volunteers** – meaning that the industry is supported by **nearly 5,500 people directly involved in breeding activities** across the three codes



The breeding sector provides and replenishes the racing horses and greyhounds for the Queensland racing industry. There are 1,808 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 and the public and private sale of their stock. In the thoroughbred sector, breeders may occasionally also lease shares in a foal. 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	3	0	0	3
Darling Downs - Maranoa	145	59	7	211
Central Queensland	44	3	16	63
Gold Coast	149	63	13	225
Ipswich	33	188	92	313
Logan - Beaudesert	57	90	90	237
Mackay - Isaac - Whitsunday	58	11	3	72
Moreton Bay	54	134	57	246
Queensland - Outback	7	0	0	7
Sunshine Coast	30	15	10	55
Toowoomba	82	14	22	118
Townsville	7	3	0	10
Wide Bay	79	28	48	155
Total Regional Queensland	748	607	360	1,715
Brisbane	261	88	18	367
Total	1,010	694	378	2,082

*Some totals do not add due to rounding.





Producing Racing Animals

NUMBER OF STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Cairns	3	0	1	4
Darling Downs - Maranoa	32	7	0	39
Central Queensland	8	0	0	8
Gold Coast	11	0	8	18
Ipswich	12	5	26	43
Logan - Beaudesert	16	0	11	27
Mackay - Isaac - Whitsunday	5	0	0	5
Moreton Bay	2	1	3	6
Queensland - Outback	1	1	0	2
Sunshine Coast	6	0	0	6
Toowoomba	12	0	4	16
Townsville	1	0	3	4
Wide Bay	16	2	5	23
Total Regional Queensland	124	16	60	200
Brisbane	1	0	7	8
Total	125	16	67	208



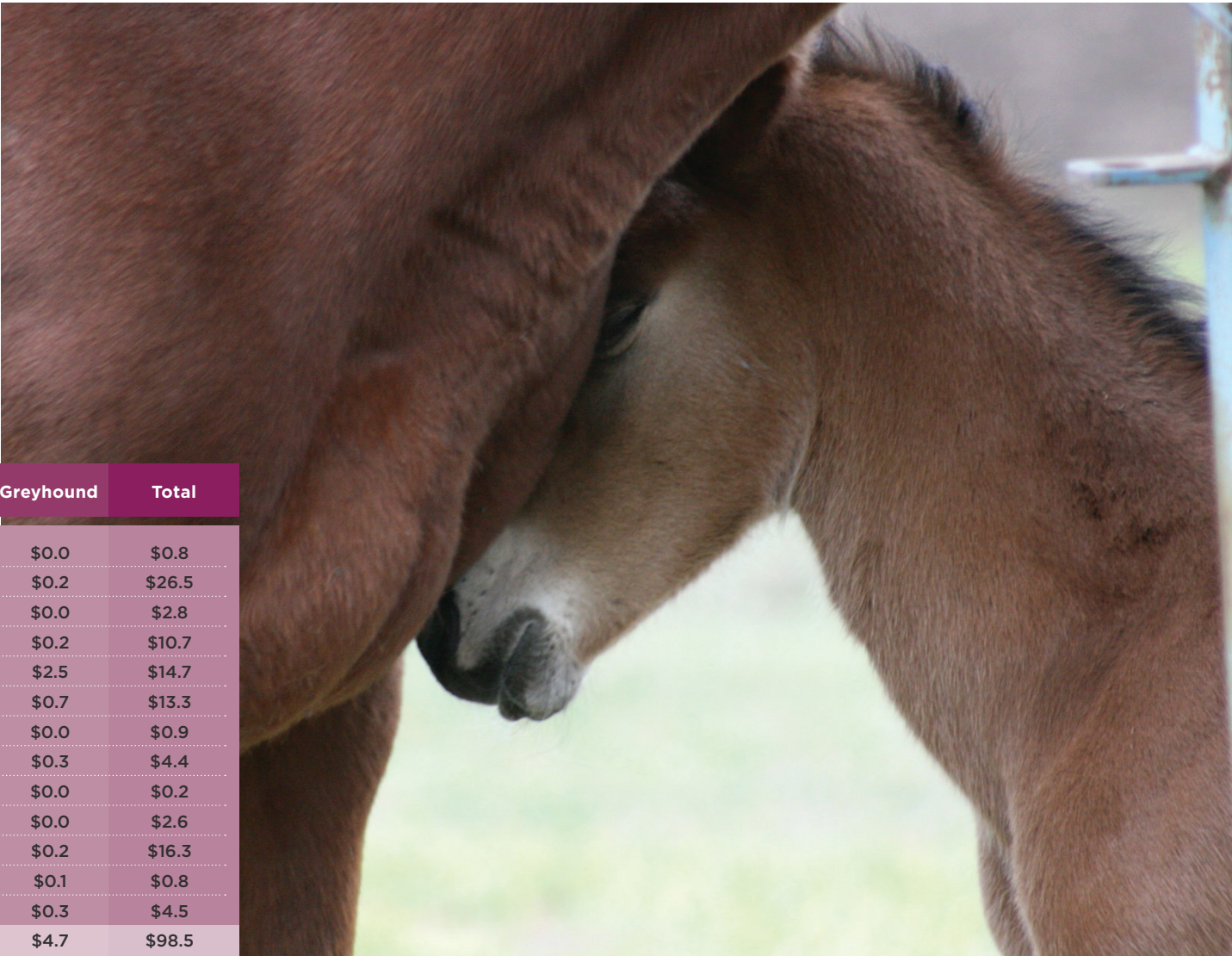
NUMBER OF BROODMARES/MATRONS COVERED

	Thoroughbred	Harness	Greyhound	Total
Cairns	32	2	0	34
Darling Downs - Maranoa	844	85	6	935
Central Queensland	110	0	0	110
Gold Coast	242	31	8	281
Ipswich	348	143	80	572
Logan - Beaudesert	404	33	23	459
Mackay - Isaac - Whitsunday	34	5	0	39
Moreton Bay	79	69	11	159
Queensland - Outback	9	0	0	9
Sunshine Coast	94	13	2	108
Toowoomba	587	5	7	599
Townsville	26	0	5	31
Wide Bay	157	13	10	180
Total Regional Queensland	2,967	399	151	3,516
Brisbane	10	63	3	77
Total	2,977	462	154	3,593

NUMBER OF FOALS/PUPS PRODUCED

	Thoroughbred	Harness	Greyhound	Total
Cairns	23	1	0	25
Darling Downs - Maranoa	613	56	37	706
Central Queensland	80	0	1	81
Gold Coast	176	20	47	243
Ipswich	253	94	481	828
Logan - Beaudesert	293	21	137	452
Mackay - Isaac - Whitsunday	25	4	0	28
Moreton Bay	58	45	65	168
Queensland - Outback	6	0	0	6
Sunshine Coast	68	8	9	86
Toowoomba	427	3	42	472
Townsville	19	0	28	47
Wide Bay	114	9	57	180
Total Regional Queensland	2,156	262	905	3,323
Brisbane	7	42	20	69
Total	2,163	304	925	3,392

*Some totals do not add due to rounding.



COST OF PRODUCING RACEHORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	\$0.8	\$0.0	\$0.0	\$0.8
Darling Downs - Maranoa	\$23.9	\$2.4	\$0.2	\$26.5
Central Queensland	\$2.7	\$0.0	\$0.0	\$2.8
Gold Coast	\$9.9	\$0.5	\$0.2	\$10.7
Ipswich	\$9.3	\$2.9	\$2.5	\$14.7
Logan - Beaudesert	\$12.0	\$0.6	\$0.7	\$13.3
Mackay - Isaac - Whitsunday	\$0.8	\$0.1	\$0.0	\$0.9
Moreton Bay	\$1.9	\$2.1	\$0.3	\$4.4
Queensland - Outback	\$0.2	\$0.0	\$0.0	\$0.2
Sunshine Coast	\$2.3	\$0.2	\$0.0	\$2.6
Toowoomba	\$16.0	\$0.1	\$0.2	\$16.3
Townsville	\$0.6	\$0.0	\$0.1	\$0.8
Wide Bay	\$3.9	\$0.3	\$0.3	\$4.5
Total Regional Queensland	\$84.4	\$9.3	\$4.7	\$98.5
Brisbane	\$0.2	\$1.2	\$0.1	\$1.5
Total	\$84.6	\$10.5	\$4.8	\$100.0

*Some totals do not add due to rounding.

Economic Contribution of the Breeding Industry

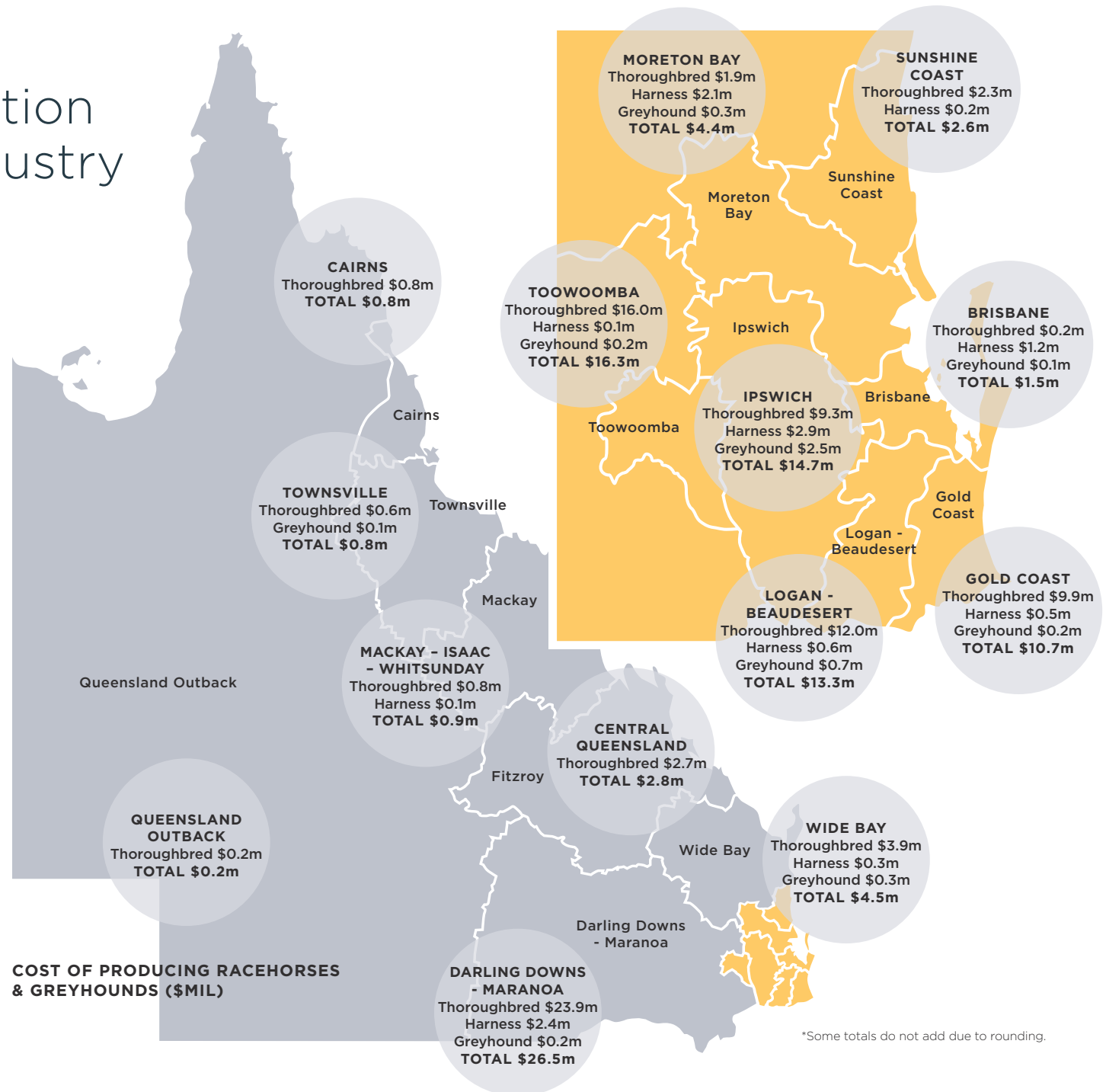
In 2017/18, breeders in the Queensland racing industry spent more than \$100 million on the production of racing stock. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of broodmares, broodmatrons, stallions 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 & 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.



Over 70% of all breeding related expenditure occurs in four Queensland regions. The Darling Downs - Maranoa (26.5%), Toowoomba (16.3%), Ipswich (14.7%) and the Logan - Beaudesert (13.3%) regions are the most active breeding areas in the State.

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

THOROUGHBRED RACING

In 2017/18, there were 2,977 broodmares covered in Queensland, producing 2,163 foals. This thoroughbred breeding activity is responsible for generating more than \$84.6 million in the production and care of racing stock.

Darling Downs – Maranoa	\$23.9m (28.2%)
Toowoomba	\$16.0m (18.9%)
Logan – Beaudesert	\$12.0m (14.1%)

HARNESS RACING

In 2017/18 there were 462 broodmares covered in Queensland, producing 304 foals. This standardbred breeding activity is responsible for generating just over \$10 million in the production and care of racing stock.

Ipswich	\$2.9m (28.0%)
Darling Downs – Maranoa	\$2.4m (22.9%)
Moreton Bay	\$0.3m (7.0%)

GREYHOUND RACING

In 2017/18, there were 154 broodmatrons covered in Queensland, producing 925 pups. This greyhound breeding activity is responsible for generating more than \$4.8 million in the production and care of greyhound racing stock.

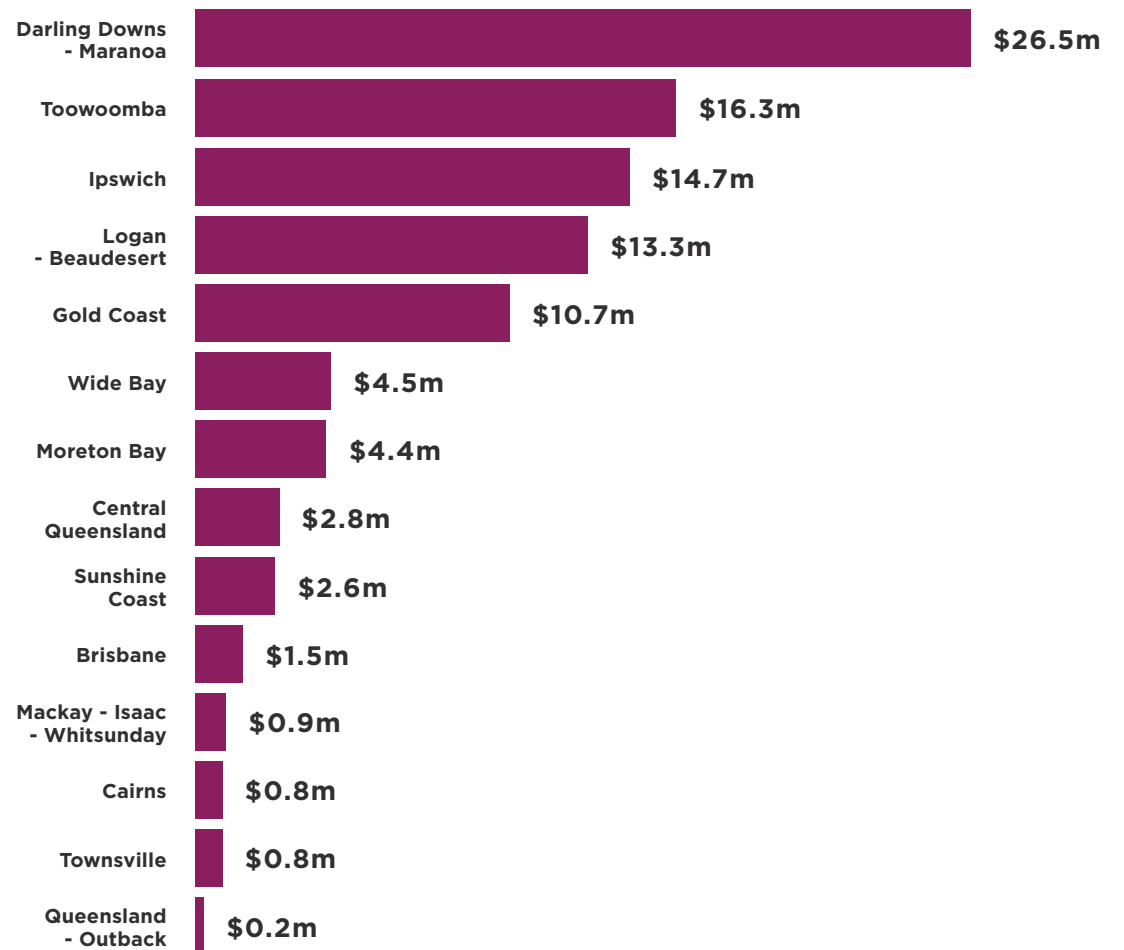
Ipswich	\$2.5m (52.0%)
Gold Coast	\$0.7m (14.8%)
Logan – Beaudesert	\$0.7m (14.8%)





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

EXPENDITURE BY THE BREEDING SECTOR



THE TRAINING INDUSTRY

The Training Industry

NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	45	0	12	57
Darling Downs - Maranoa	80	7	8	96
Central Queensland	93	0	26	119
Gold Coast	90	20	30	140
Ipswich	32	93	160	286
Logan - Beaudesert	45	48	105	198
Mackay - Isaac - Whitsunday	22	0	3	25
Moreton Bay	10	65	80	155
Queensland - Outback	70	1	3	74
Sunshine Coast	66	1	12	79
Toowoomba	85	9	20	114
Townsville	61	0	54	114
Wide Bay	45	8	47	101
Total Regional Queensland	745	253	559	1,557
Brisbane	81	15	50	146
Total	826	268	609	1,703

NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Cairns	108	0	12	120
Darling Downs - Maranoa	173	5	8	186
Central Queensland	173	0	26	199
Gold Coast	220	16	30	266
Ipswich	77	37	160	275
Logan - Beaudesert	87	29	105	221
Mackay - Isaac - Whitsunday	73	2	3	78
Moreton Bay	102	34	80	216
Queensland - Outback	92	0	3	94
Sunshine Coast	180	4	12	196
Toowoomba	206	2	20	227
Townsville	109	0	54	163
Wide Bay	97	3	47	148
Total Regional Queensland	1,698	133	559	2,389
Brisbane	301	10	50	362
Total	1,999	143	609	2,751



NUMBER OF VOLUNTEERS ASSISTING TRAINERS

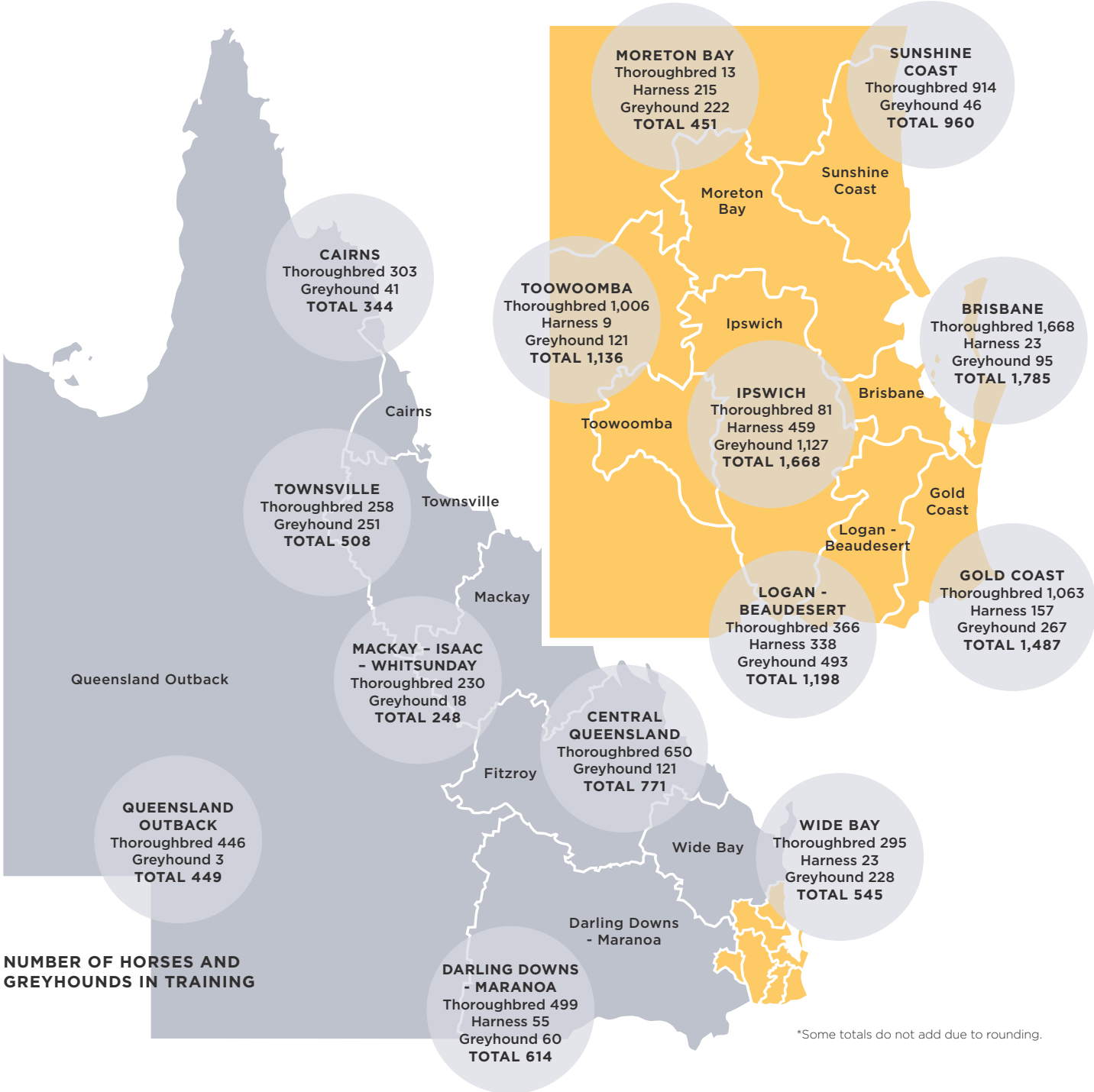
	Thoroughbred	Harness	Greyhound	Total
Cairns	89	0	13	102
Darling Downs - Maranoa	158	9	9	176
Central Queensland	183	0	29	212
Gold Coast	41	31	43	115
Ipswich	15	149	224	388
Logan - Beaudesert	89	58	115	262
Mackay - Isaac - Whitsunday	43	0	3	47
Moreton Bay	19	78	88	185
Queensland - Outback	138	1	3	142
Sunshine Coast	30	2	17	49
Toowoomba	168	11	22	201
Townsville	119	0	59	179
Wide Bay	89	10	52	151
Total Regional Queensland	1,184	348	676	2,208
Brisbane	37	24	70	131
Total	1,222	372	746	2,339

*Some totals do not add due to rounding.

Trainers play an integral role in the racing 'service' industry. Training services generally incorporate education, 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 prizemoney won.

During the 2017/18 racing season, there were more than 1,700 horse and greyhound trainers providing services to owners in Queensland. These trainers were also supported by more 2,300 volunteers. The majority of these trainers operate in regional parts of the State.

Overall, there were more than 12,100 racing horses and greyhounds in training in Queensland in 2017/18. Brisbane (21.4%), the Gold Coast (13.6%) and the Sunshine Coast (12.9%) represent the largest areas of thoroughbred training activity. In the Harness and Greyhound racing industries, Ipswich, Logan - Beaudesert and Moreton Bay make up 79% and 60% of the training activity respectively.



*Some totals do not add due to rounding.





Owners

OWNERS OF RACING HORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,074	1	38	1,113
Darling Downs - Maranoa	1,064	50	21	1,135
Central Queensland	1,449	9	53	1,511
Gold Coast	2,571	77	117	2,765
Ipswich	681	206	309	1,195
Logan - Beaudesert	747	112	175	1,035
Mackay - Isaac - Whitsunday	723	20	18	761
Moreton Bay	1,098	193	142	1,433
Queensland - Outback	605	0	8	613
Sunshine Coast	1,315	22	44	1,381
Toowoomba	984	14	61	1,060
Townsville	831	7	101	940
Wide Bay	696	18	95	809
Total Regional Queensland	13,839	729	1,183	15,751
Brisbane	4,528	136	175	4,839
Total	18,367	865	1,358	20,590

*Some totals do not add due to rounding.

NUMBER OF TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	848	0	238	1,086
Darling Downs - Maranoa	980	0	0	980
Central Queensland	2,466	0	3,377	5,843
Gold Coast	4,672	0	0	4,672
Ipswich	3,225	153	12,467	15,845
Logan - Beaudesert	1,001	0	0	1,001
Mackay - Isaac - Whitsunday	1,490	0	0	1,490
Moreton Bay	435	7,614	0	8,049
Queensland - Outback	0	0	0	0
Sunshine Coast	5,180	0	0	5,180
Toowoomba	3,360	0	0	3,360
Townsville	2,179	0	3,842	6,021
Wide Bay	0	0	0	0
Total Regional Queensland	25,836	7,767	19,924	53,527
Brisbane	4,283	12,833	16,288	33,404
Total	30,119	20,600	36,212	86,931

NUMBER OF NON-TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,098	0	888	1,986
Darling Downs - Maranoa	1,682	52	0	1,734
Central Queensland	1,399	0	0	1,399
Gold Coast	0	0	0	0
Ipswich	170	605	0	775
Logan - Beaudesert	40	0	0	40
Mackay - Isaac - Whitsunday	418	0	0	418
Moreton Bay	0	38	0	38
Queensland - Outback	3,656	0	0	3,656
Sunshine Coast	0	0	0	0
Toowoomba	27	0	0	27
Townsville	694	0	0	694
Wide Bay	1,252	36	1,879	3,167
Total Regional Queensland	10,436	731	2,767	13,934
Brisbane	0	0	2,137	2,137
Total	10,436	731	4,904	16,071

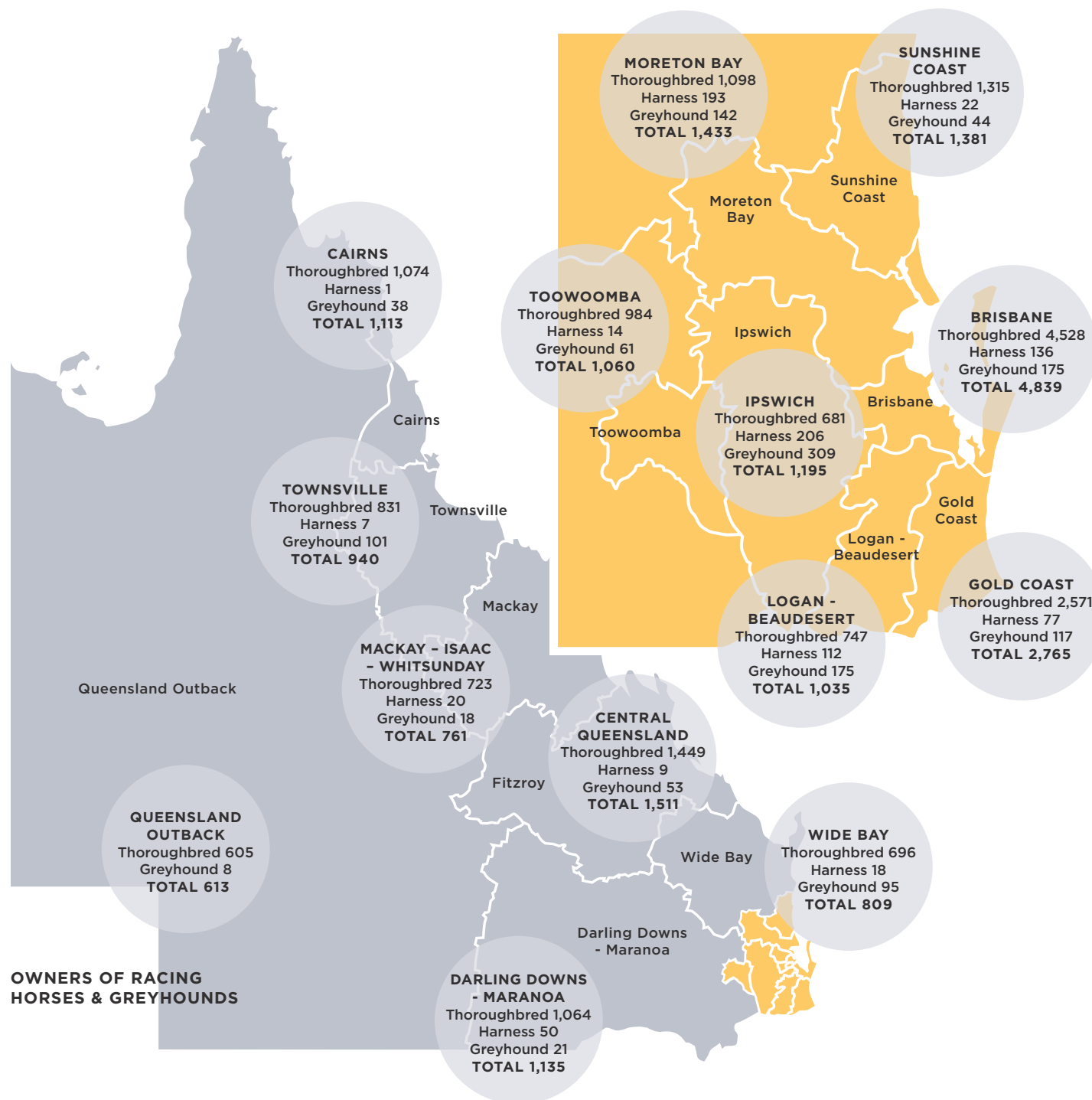
TOTAL RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,946	0	1,126	3,072
Darling Downs - Maranoa	2,662	52	0	2,714
Central Queensland	3,865	0	3,377	7,242
Gold Coast	4,672	0	0	4,672
Ipswich	3,395	758	12,467	16,620
Logan - Beaudesert	1,041	0	0	1,041
Mackay - Isaac - Whitsunday	1,908	0	0	1,908
Moreton Bay	435	7,652	0	8,087
Queensland - Outback	3,656	0	0	3,656
Sunshine Coast	5,180	0	0	5,180
Toowoomba	3,387	0	0	3,387
Townsville	2,873	0	3,842	6,715
Wide Bay	1,252	36	1,879	3,167
Total Regional Queensland	36,272	8,498	22,691	67,461
Brisbane	4,283	12,833	18,425	35,541
Total	40,555	21,331	41,116	103,002

Owners race for more than \$142 million in prizemoney and bonuses that is on offer across the three codes

Owners play a significant role in the funding model of the racing industry. They provide much of the capital outlay and day-to-day funding for the purchase and preparation of racing horses and greyhounds. In 2017/18 there were nearly 21,000 individuals with an ownership interest in thoroughbred, harness and/or greyhound racing in Queensland. More than 75% of owners reside in regional areas of Queensland, with Brisbane (23.5%) and the Gold Coast (13.4%) home to the most significant portion of owners across the three codes.

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



Queensland owners and trainers spent **in excess of \$274 million** in 2017/18 preparing **racing horses and greyhounds for racing**. The Brisbane and Gold Coast regions account for **more than one-third of this economic activity**.

Economic Contribution of the Training Industry

In 2017/18, owners of racehorses and greyhounds trained in Queensland spent more than \$274 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.

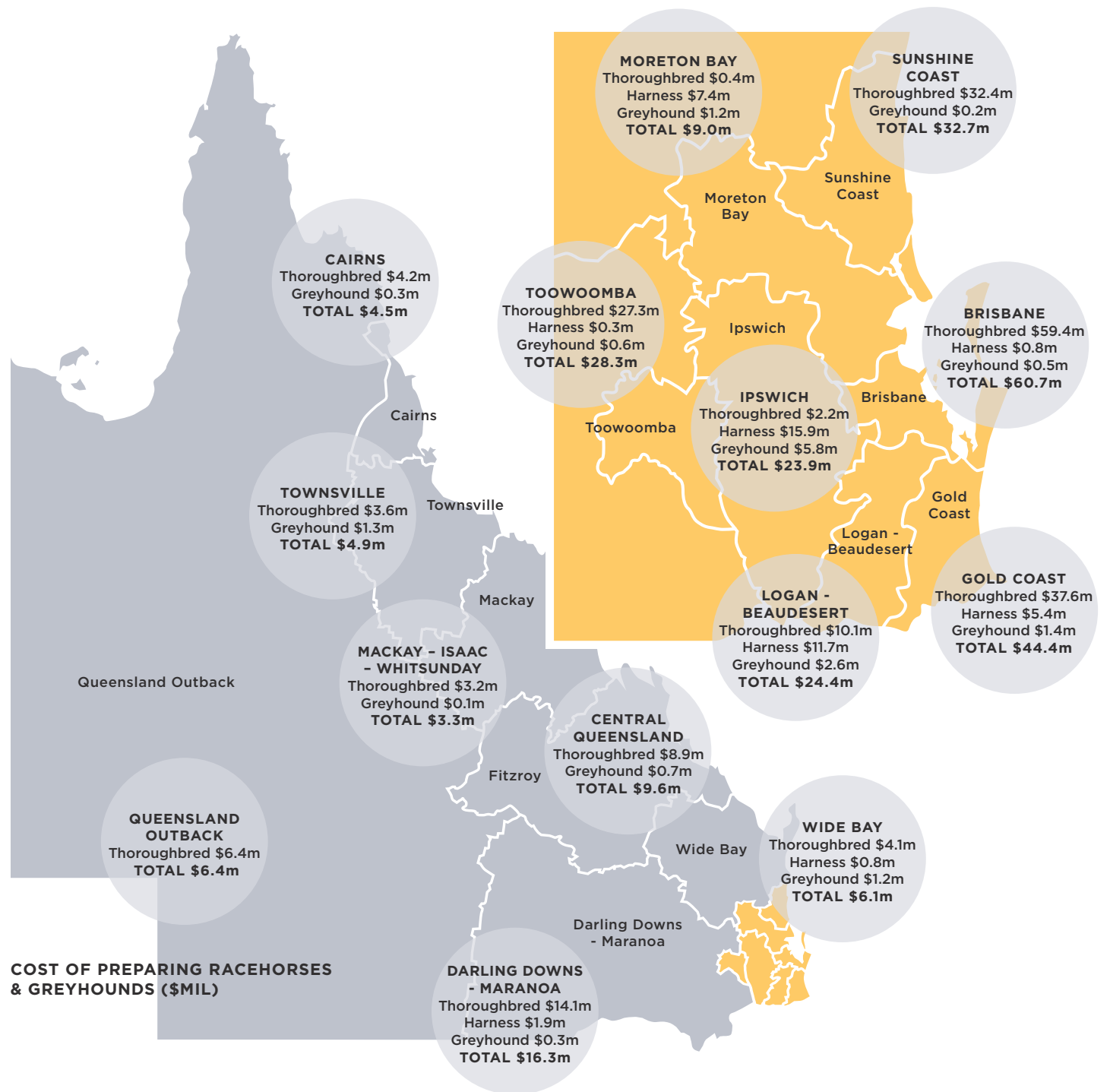
The development of expenditure profiles within each region is based upon the number of racehorses and greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the animal. For instance, expenditure during the education stage of a racehorse 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, almost 78% of the expenditure on training activities occurs in regional areas of the state. Regionally, Gold Coast (16.2%), Sunshine Coast (11.9%) and Toowoomba (10.3%) make up the largest training areas outside of greater Brisbane (22.1%).

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 \$213.8 million in expenditure impacts in Queensland.

Brisbane	\$59.4m (27.8%)
Gold Coast	\$37.6m (17.6%)
Sunshine Coast	\$32.4m (15.2%)

HARNESS RACING

Standardbred training activity is responsible for generating more than \$44.3 million in expenditure impacts in Queensland.

Ipswich	\$15.9m (35.9%)
Logan-Beaudesert	\$11.7m (26.5%)
Moreton Bay	\$7.4m (16.8%)

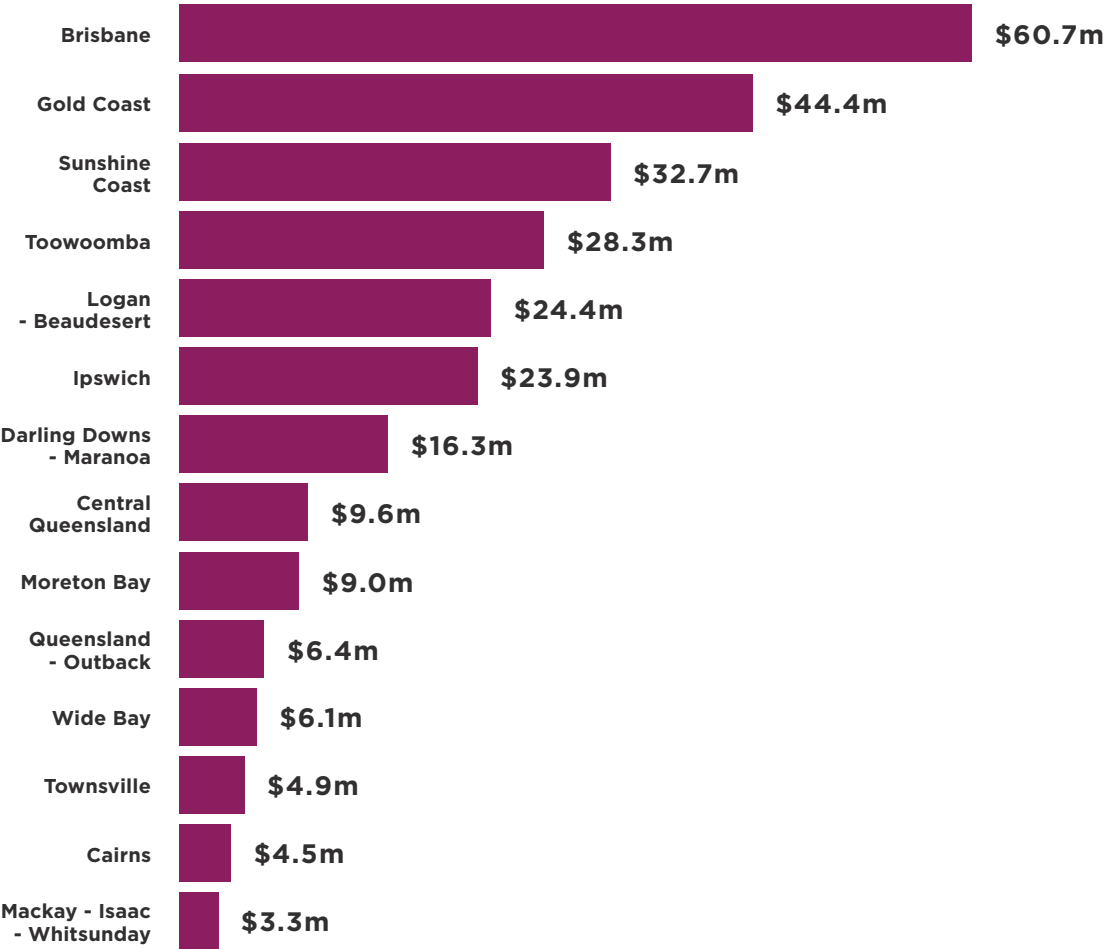
GREYHOUND RACING

Greyhound training activity is responsible for generating more than \$16.2 million in expenditure impacts in Queensland.

Ipswich	\$5.8m (35.7%)
Logan-Beaudesert	\$2.6m (16.1%)
Moreton Bay	\$1.4m (8.4%)

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

EXPENDITURE BY THE TRAINING SECTOR





RACING CLUBS, ASSOCIATIONS AND AUTHORITIES

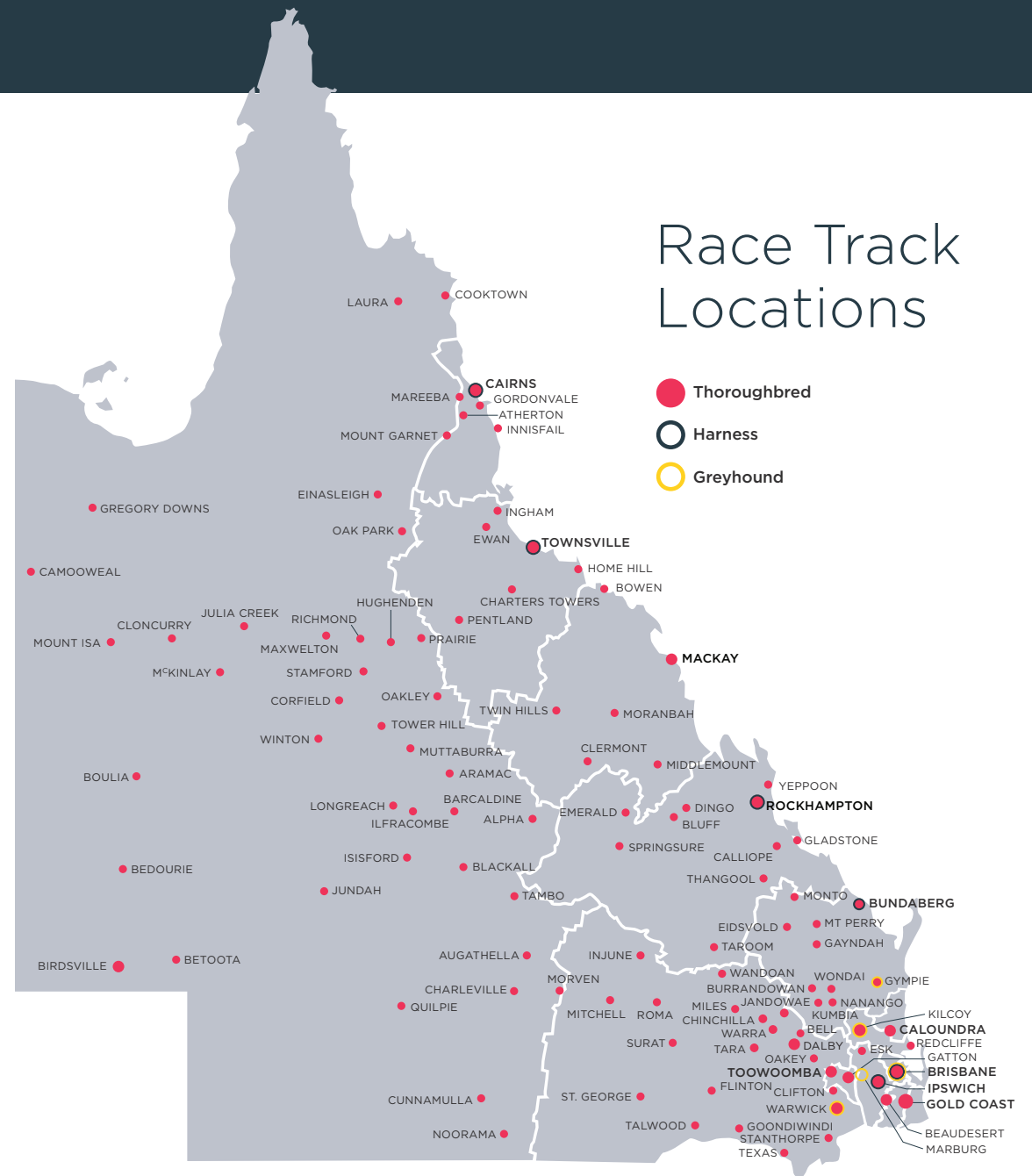
NUMBER OF TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2	0	0	2
Darling Downs - Maranoa	3	1	0	4
Central Queensland	3	0	1	4
Gold Coast	1	1	0	2
Ipswich	1	1	1	3
Logan - Beaudesert	2	0	0	2
Mackay - Isaac - Whitsunday	2	0	0	2
Moreton Bay	1	1	0	2
Queensland - Outback	1	0	0	1
Sunshine Coast	1	0	0	1
Toowoomba	2	0	0	2
Townsville	1	0	1	2
Wide Bay	0	0	1	1
Total Regional Queensland	20	4	4	28
Brisbane	2	1	2	5
Total	22	5	6	33

*Club information is current as at 1/9/2019

NUMBER OF NON-TAB RACING CLUBS

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



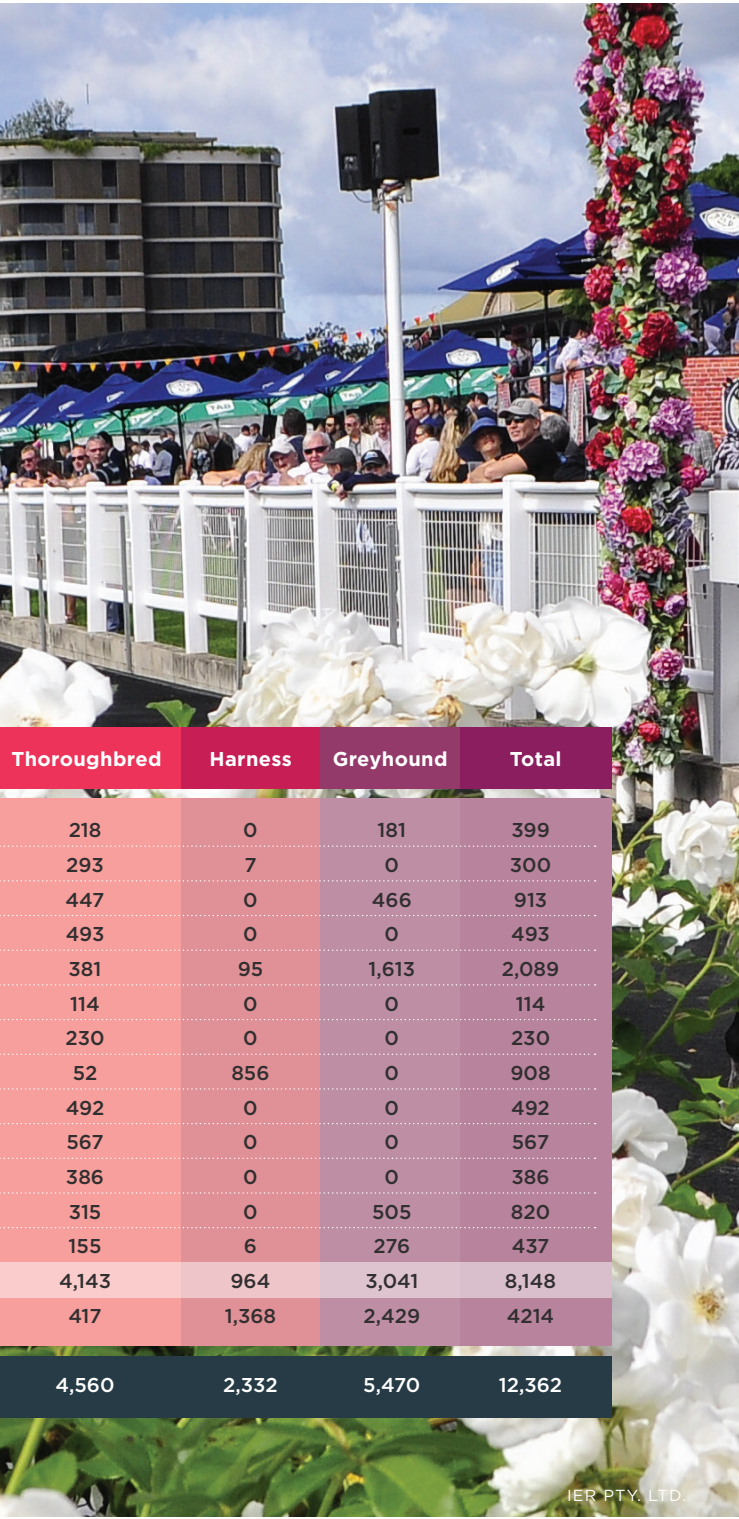
Sourced from Racing Queensland 2019

TOTAL RACE MEETINGS

	Thoroughbred	Harness	Greyhound	Total
Cairns	39	0	31	70
Darling Downs - Maranoa	53	1	0	54
Central Queensland	74	0	50	124
Gold Coast	60	0	0	60
Ipswich	49	13	162	224
Logan - Beaudesert	16	0	0	16
Mackay - Isaac - Whitsunday	35	0	0	35
Moreton Bay	8	107	0	115
Queensland - Outback	90	0	0	90
Sunshine Coast	72	0	0	72
Toowoomba	53	0	0	53
Townsville	49	0	49	98
Wide Bay	30	2	37	69
Total Regional Queensland	628	123	329	1,080
Brisbane	49	156	237	442
Total	677	279	566	1,522

TOTAL RACES

	Thoroughbred	Harness	Greyhound	Total
Cairns	218	0	181	399
Darling Downs - Maranoa	293	7	0	300
Central Queensland	447	0	466	913
Gold Coast	493	0	0	493
Ipswich	381	95	1,613	2,089
Logan - Beaudesert	114	0	0	114
Mackay - Isaac - Whitsunday	230	0	0	230
Moreton Bay	52	856	0	908
Queensland - Outback	492	0	0	492
Sunshine Coast	567	0	0	567
Toowoomba	386	0	0	386
Townsville	315	0	505	820
Wide Bay	155	6	276	437
Total Regional Queensland	4,143	964	3,041	8,148
Brisbane	417	1,368	2,429	4214
Total	4,560	2,332	5,470	12,362





TOTAL ATTENDANCES

	Thoroughbred	Harness	Greyhound	Total
Cairns	51,794	0	2,557	51,794
Darling Downs - Maranoa	46,361	180	0	46,541
Central Queensland	48,165	0	1,998	50,163
Gold Coast	116,819	0	0	116,819
Ipswich	42,740	4,300	14,450	61,490
Logan - Beaudesert	7,644	0	0	7,644
Mackay - Isaac - Whitsunday	23,949	0	0	23,949
Moreton Bay	6,600	18,422	0	25,022
Queensland - Outback	46,963	0	0	46,963
Sunshine Coast	72,839	0	0	72,839
Toowoomba	21,774	0	0	21,744
Townsville	32,896	0	3,487	36,383
Wide Bay	25,961	0	1,900	27,861
Total Regional Queensland	544,475	22,902	24,392	591,769
Brisbane	164,336	50,030	26,444	240,810
Total	708,811	72,932	50,836	832,579

*Some totals do not add due to rounding.



NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	965	0	0	965
Darling Downs - Maranoa	1,567	40	0	1,607
Central Queensland	1,541	0	50	1,591
Gold Coast	66	19	0	85
Ipswich	476	80	128	684
Logan - Beaudesert	80	0	0	80
Mackay - Isaac - Whitsunday	523	0	0	523
Moreton Bay	78	100	0	178
Queensland - Outback	2,543	0	0	2,543
Sunshine Coast	830	0	0	830
Toowoomba	449	0	0	449
Townsville	1,071	0	26	1,097
Wide Bay	594	0	45	639
Total Regional Queensland	10,781	239	249	11,269
Brisbane	8,915	528	110	9,553
Total	19,696	767	359	20,822

Racing Clubs

There are 129 racing clubs in Queensland across the three codes of racing. Queensland is unique in the Australian racing landscape with the majority of these racing clubs (96) running primarily non-TAB race meetings. This means that racing at these clubs is not covered by the TAB and instead is driven more so by community involvement and on-course bookmaker betting.

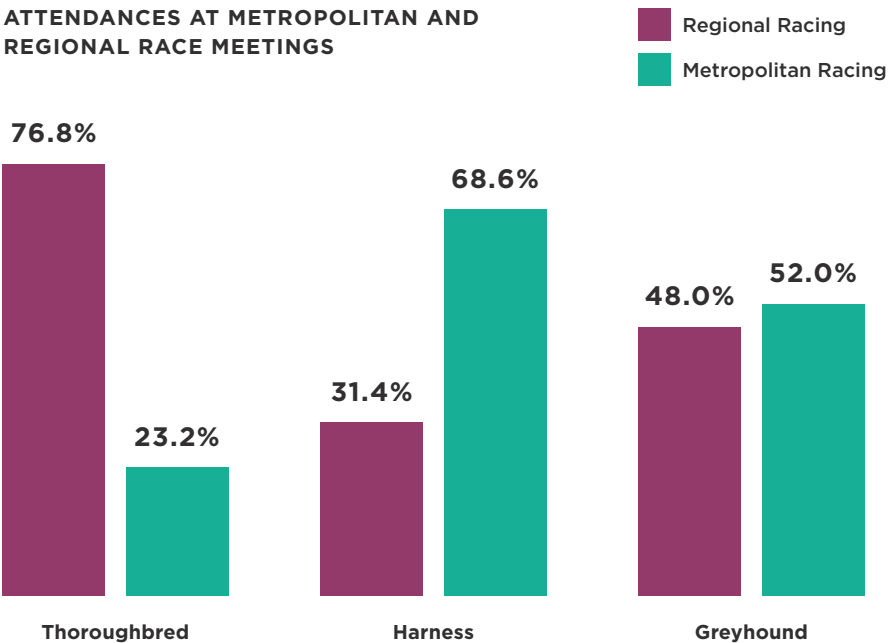
Racing clubs not only provide the opportunity for participants and spectators to participate in the sport of racing, they also provide an important social destination and in many regions, are an important part of the social fabric of the community.

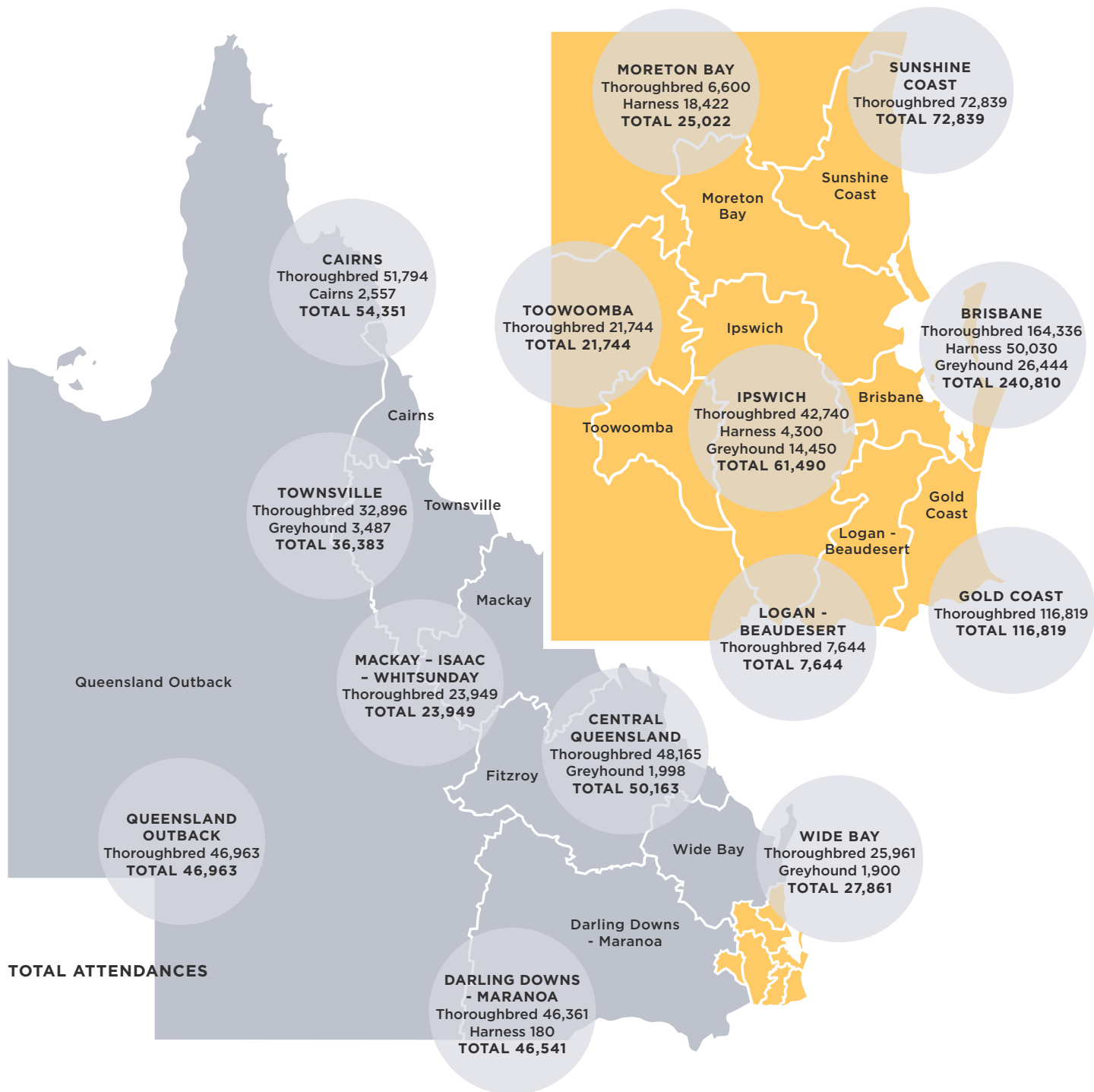
In 2017/18, there were 1,151 TAB race meetings and a further 371 non-TAB race meetings. These race meetings attracted attendances in excess of 832,500 - 71% of which were in regional areas. Thoroughbred race meetings, in Queensland, attracted a total of 708,811 attendances. Race meetings in Brisbane (164,336) and the Gold Coast (116,819) were responsible for the largest attendance. Harness race meetings attracted 72,932 attendances with race meetings in Brisbane (50,030) and Moreton Bay (18,422) making up the majority of this amount.

Greyhound racing attracted attendance of 50,836 with race meetings in Brisbane (26,444) and Ipswich (14,450) making up more than three-quarters of all attendances.

Non-TAB race meetings make up 24.4% of all race meetings in Queensland and contribute 28.1% of all attendances. The thoroughbred code makes up the largest number of non-TAB race meetings in Queensland.

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 2017/18 it is estimated that the total expenditure generated by racing customers was in excess of \$189.4 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.)

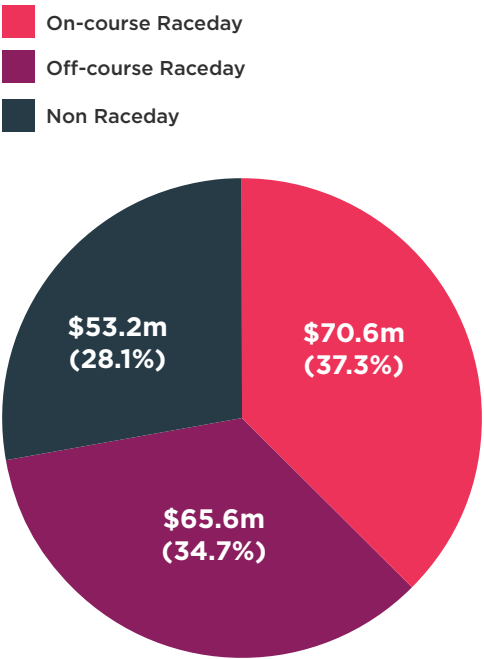
On-course customer expenditure funds the administration, operation and other costs that racing clubs incur.

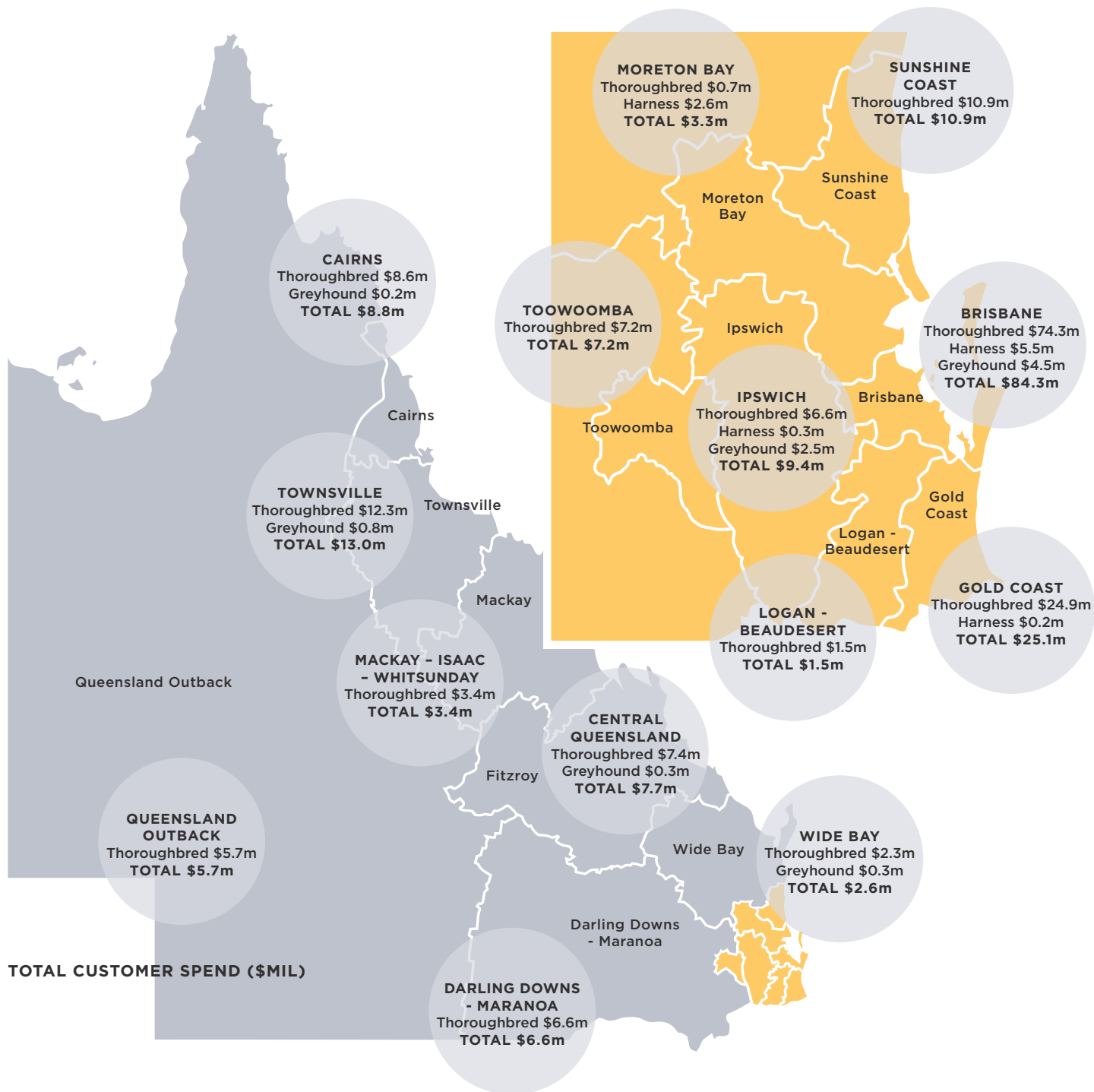
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. Major racing events have long proven their ability to extend the generation of economic stimulus into a broader cross-section of the local 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 dollar is spent off-course. This is more heavily driven by feature race meetings where the links to fashion and retail, as well as larger travel distances for those attending the races, drive spending in the community.

**BREAKDOWN OF RACING
CUSTOMER SPENDING**







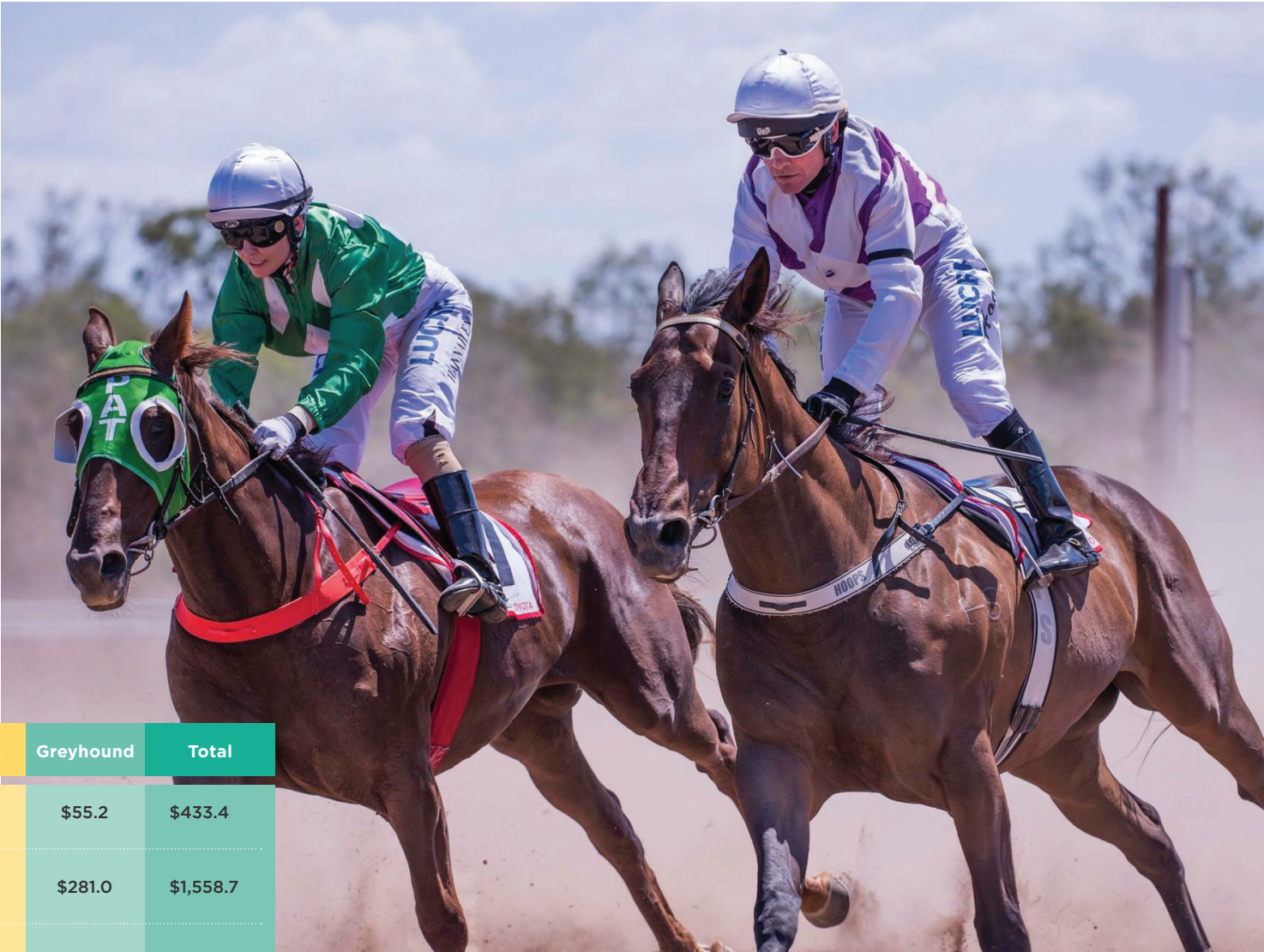
Wagering customers represent one of the key funding sources for the Queensland racing industry. In 2017/18, racing industry funding was generated through the following sources:

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

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

The following table illustrates the total wagering turnover generated in Queensland by code:

(\$MIL)	Thoroughbred	Harness	Greyhound	Total
Wagering on QLD racing product with QTAB	\$336.2	\$42.0	\$55.2	\$433.4
Wagering on Interstate/Overseas racing product with QTAB	\$1,135.4	\$142.3	\$281.0	\$1,558.7
Wagering on QLD racing product with other WSP's	\$2,479.2	\$428.5	\$748.8	\$3,656.5
Total	\$3,950.8	\$612.8	\$1,085.0	\$5,648.6



* The reference to QTAB in this report relates to wagering undertaken with QTAB QLD. Wagering with QTAB in South Australia, Northern Territory and Tasmania are represented in the 'other WSP' category.

More than 60% of all **betting** on Queensland Racing product is on races held in **regional parts of the State.**

Racing in the Ipswich, Gold Coast and Sunshine Coast regions **represent 34.9% of all wagering turnover** on Queensland Racing product.

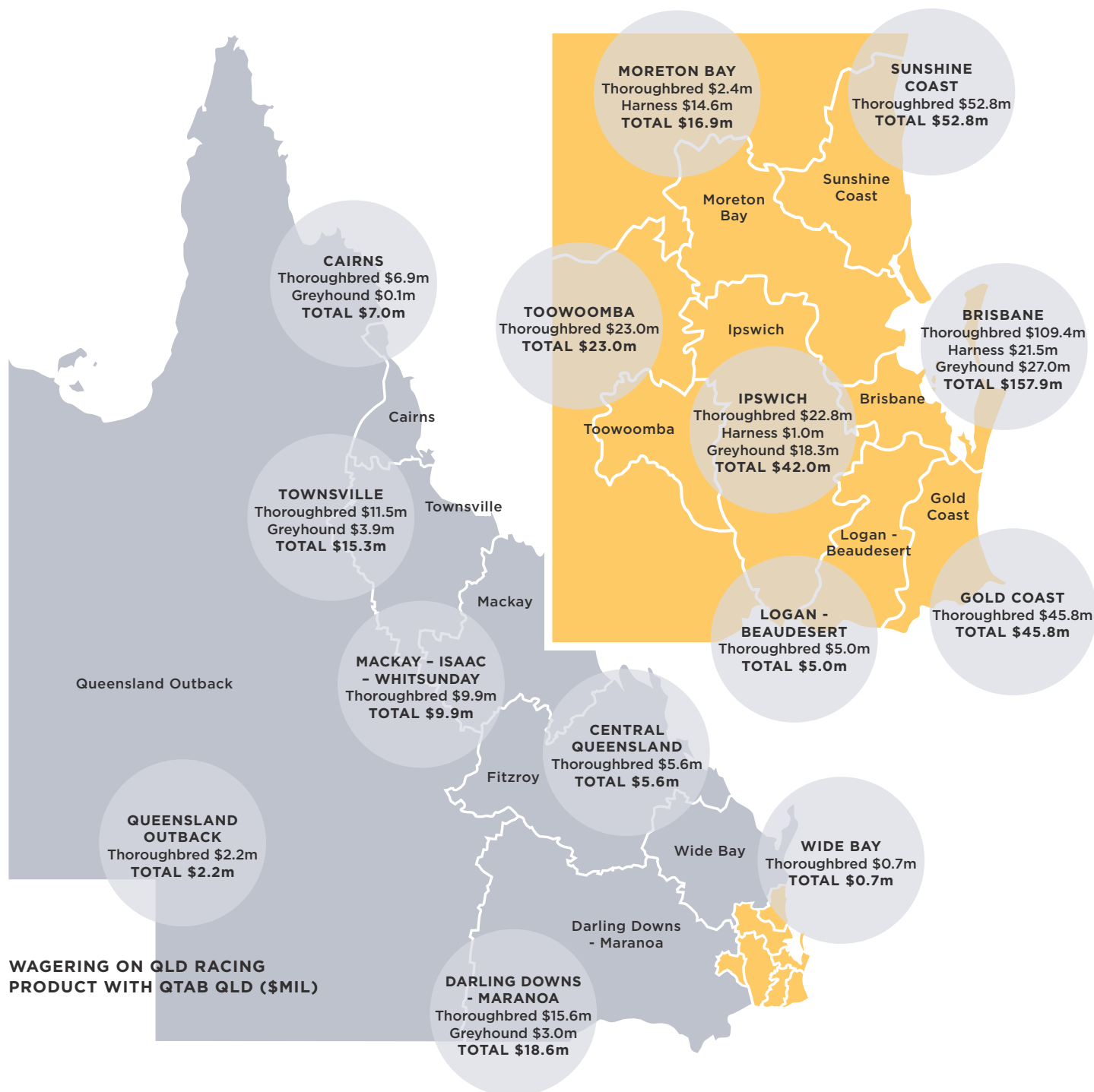
Races held in Queensland generate more than \$433 million in wagering turnover with QTAB QLD.

Brisbane (34.9%), Sunshine Coast (16.8%) and Gold Coast (14.6%) racing account for two-thirds of all thoroughbred wagering on Queensland Racing product with QTAB QLD. These three regions makes up 26.7% of all thoroughbred race meetings held in Queensland.

In the harness racing sector, Brisbane (58.1%) and the Moreton Bay region (39.3%) represent nearly all of the wagering on Queensland harness racing product with QTAB QLD.

The majority of QTAB QLD wagering turnover, on Queensland greyhound racing, occurs in Brisbane (51.7%) and Ipswich (35.0%) where 70% of the greyhound racing activity occurs.

* Note – Turnover is not based on customer location



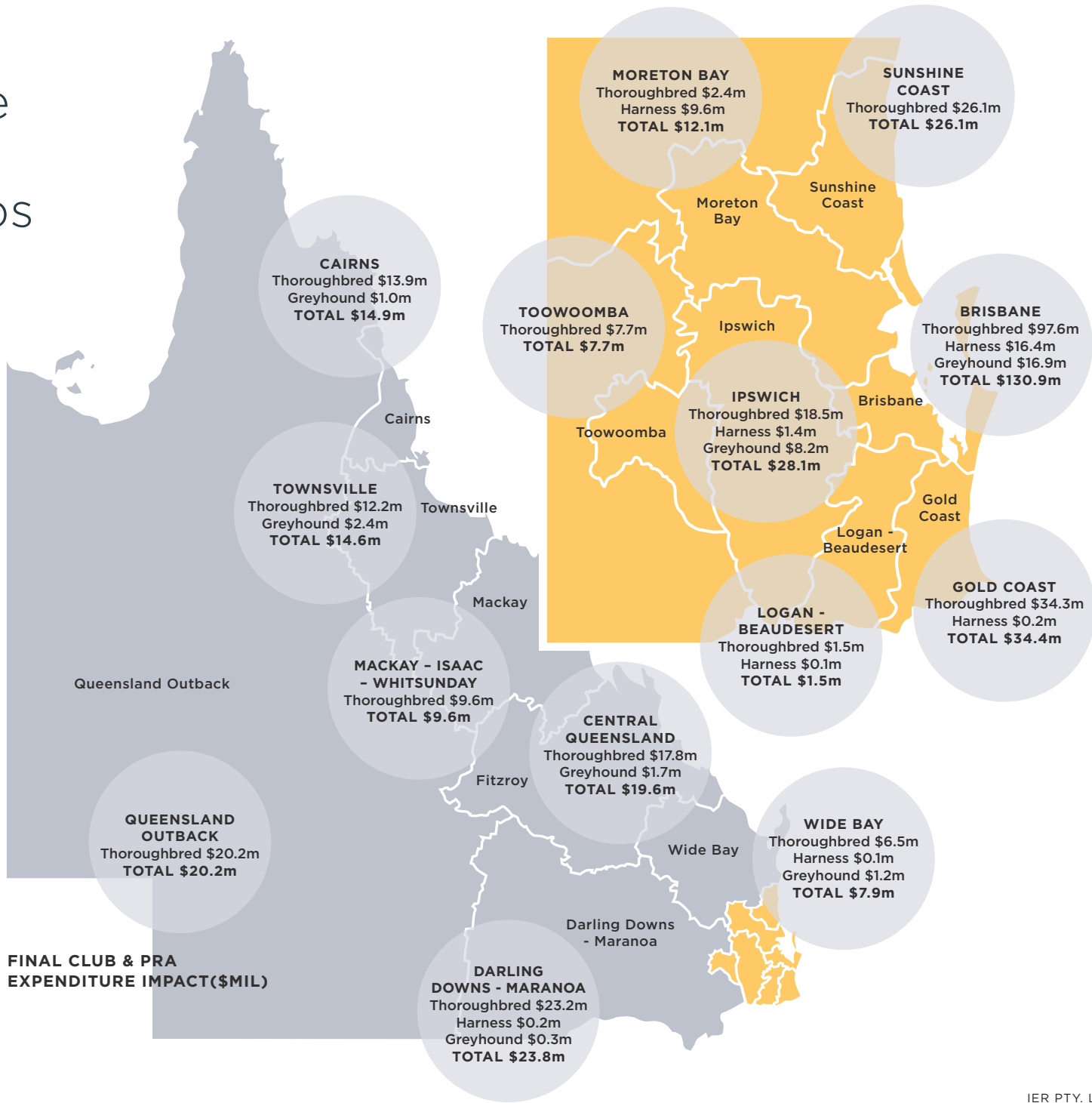
Expenditure by the Principal Racing Authority and Clubs

In 2017/18, Racing Queensland and the 129 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of more than \$351 million in Queensland. This represents the expenditure incurred by these organisations in maintaining tracks, running race meetings, administration, marketing, cost of goods and prizemoney.

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

- The major areas of expenditure, in terms of racing industry operations, include:
- + Track repairs & facilities maintenance
 - + Staff & personnel
 - + Cost of goods
 - + Marketing & promotions
 - + Utilities

Just over 37% (\$131 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 (9.8%) generates the next most significant impact with the remainder spread around the State.





MAJOR EVENT IMPACTS

The racing industry has a long-proven history of being a tourism drawcard, both from a spectator and participant perspective. From a state-wide perspective, major racing events have the ability to generate economic impacts for the State, not only from visiting attendees, but also from visiting participants. Regionally, feature racedays have the capacity to generate expenditure in the overnight visitor economy as towns and regions benefit from the influx of intrastate, interstate and overseas visitors.

There are two key areas in which racing has a unique capacity to generate economic impacts for the State. The nexus between racing, hospitality and fashion is one of the areas in which major racing events have a differentiated (and positive) capacity to generate economic impacts. Additionally, wagering is an important vehicle in generating economic impacts. Major racing events attract broadcast coverage and wagering through interstate and international wagering providers which leads to financial returns for Queensland.

Brisbane Racing Carnival

OVERVIEW

The Brisbane Racing Carnival is one of the key tourism generating racing events on the Queensland calendar. This major event including premier racedays such as the Doomben 10,000, Doomben Cup, Ladies Oaks Day, Stakes Day and the Stradbroke Handicap. In 2019, the Carnival attracted attendances in excess of 40,000, with the Stradbroke Handicap the largest event (15,014) at Eagle Farm. The carnival is a feature of the Australian racing calendar attracting horses, participants and visitors from interstate and overseas.

KEY TOURISM IMPACTS

It is estimated that in 2019 the Carnival generated more than \$9.7 million in economic impact for the Brisbane economy and \$6.8 million for the broader Queensland economy. The Carnival was directly responsible for bringing 3,524 tourists to Queensland – people who were unlikely to have otherwise visited the state.

The outcome of attracting these tourists is the generation of close to 12,500 visitor nights in Queensland. Although the Carnival is held in Brisbane, these tourists spread far and wide, with just over 4,000 of these visitor nights occurring outside Brisbane.



The following table illustrates the key impacts to the State:

Tourism Impact	Measure
Visitors to Queensland (spectators only)	3,524
Economic impact for the QLD economy	\$6.8m
Visitor Nights generated in QLD	12,491
Spend on fashion & retail (all attendees)	\$2.4m

Magic Millions Raceday & Sales

OVERVIEW

The Magic Millions Raceday is one of Australia's richest racedays with more than \$10 million in prizemoney on offer. In 2019, the raceday attracted attendances in excess of 26,930 people.

KEY TOURISM IMPACTS

In 2019, an economic impact assessment of the Magic Millions Raceday was undertaken. The study found that the event generated close to \$15 million of direct in-scope expenditure for the Queensland economy. The event was directly responsible

for bringing nearly 5,300 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.

In terms of the Gold Coast Yearling Sale, more than \$181.1 million was grossed across 901 lots - a new Southern Hemisphere record for a yearling sale.

The following table illustrates the key impacts to the State:

Tourism Impact - Magic Millions Raceday	Measure
In-scope visitors (spectators, sponsors and participants)	5,299
In-scope expenditure for the QLD economy	\$15.0m
Visitor Nights generated in QLD	26,930

Magic Millions Sales figures:

Gross Sales (\$AUD)	2018	2019
Gold Coast Yearling Sale (Jan)	\$169.1m	\$181.1m
Gold Coast National Sale (May)	\$139.4m	\$146.4m



Community and Social Benefits

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

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

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

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

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

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

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





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

- + **Community Building** Building inclusive and welcoming communities featuring powerful collaborative partnerships and relationships
- + **Tourism** Creating major events which increase visitation to towns and communities and provide economic benefit
- + **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



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:

- + Over 600 community organisations or charities are assisted and supported by racing clubs
- + Over 412 community organisations share racing club facilities and resources
- + Racing in Queensland currently engage close to 7,800 volunteers who assist in various club, kindred body and industry related roles
- + 19,283 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 7,693 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, event management etc.)
- + Photo finish, timing, 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 (parking, gate attendants etc.)
- + Fundraising
- + Cleaning duties
- + Repairs, maintenance of facilities and gardening
- + Photographer
- + Operating racing museums

IER found that racing clubs financially assist and support 638 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, Mark Hughes Foundation, Blonde Bandits Rally for Cancer)
- + Children's Charities (Police Boys Youth Club, Bush Kids, Isolated Children's Parents' Association, Dolly's Dream, Starlight Children's Foundation, Early Learning Childhood Centre)

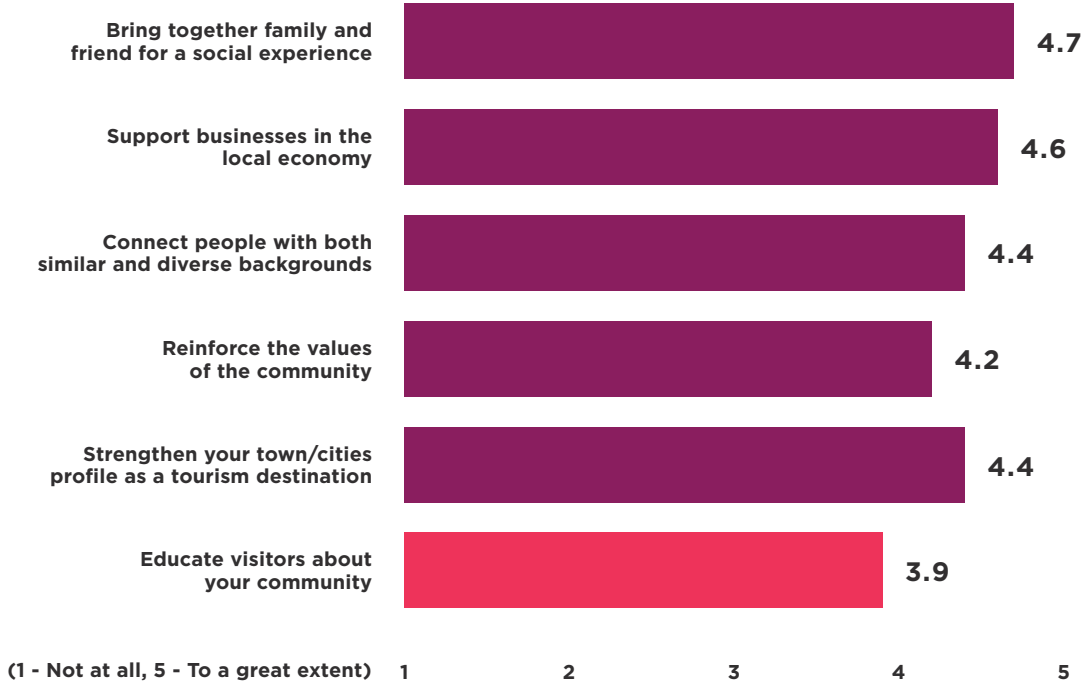


- + Sporting Clubs (e.g. Rugby League and Union, Golf, Gymnastics, Equestrian Groups, BMX Clubs, Boxing and fitness, Surf Lifesaving, Fishing Clubs, Tennis, AFL and Soccer)
- + Schools (Kindergartens, Pre-School, State schools and colleges)
- + Rotary, Lions, Apex and Variety Clubs
- + Hospitals and Health Organisations (e.g. Men's Shed)
- + General Charities (Legacy, Queensland Country Women's Association)
- + National Jockeys Trust
- + Emergency Services (e.g., Flying Doctor Service, Life Flight, Rural Fire Service, Queensland Ambulance Service)
- + 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' (4.4). These indicators illustrate the position that racing clubs see themselves as integral to the fabric of the local community.

COMMUNITY ENGAGEMENT WITH RACING QUEENSLAND





SUPPORTING FAMILY RELATIONSHIPS

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

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

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

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

- + All clubs have complimentary entry and offer some level of free activities for children.
- + Over 93% of clubs offer events for families and children on special racedays
- + Over 72% of clubs actively involve people from culturally diverse backgrounds

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

- + Animal farms and Fireworks
- + Jumping castles and rock climbing
- + Special foot races
- + Christmas and Easter promotions
- + Kid's Fashions on the Field
- + Permanent play areas
- + Lego tents
- + Tug-o-wars, egg and spoon, three legged races
- + Face painting and animal farms
- + Children's rides and amusements
- + Balloon artists
- + Horse sports
- + Special children's clubs
- + Kid's bands
- + Fancy dress themes for children

SHARING FACILITIES WITHIN THE COMMUNITY

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

Some of the 412 organisations which share facilities and resources with clubs include:

- + Regional tourism events
- + Country women's associations
- + Animal clubs (equestrian, rodeo, campdraft, team penning, polocrosse, distance education, dog clubs, Arabian horse clubs etc.)
- + Rotary, APEX and Lions Clubs
- + Show Societies (regional agricultural societies)
- + Shire Councils
- + SES, Rural Fire Associations
- + Schools (primary and high schools)
- + Sporting clubs (rugby league, touch football, golf, gymnasiums, clay target clubs etc.)
- + Car Rallies and the Variety Bash





EDUCATION AND TRAINING

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

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

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

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

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

- + On average, each club has close to one member of their staff currently participating in further education, career development and training programs each year
- + All racing clubs encourage responsible gambling
- + 25% 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.

Over to 58% 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)
- + Watering in off-peak times

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

Examples include:

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





CLUB HISTORY AND HERITAGE

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

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

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

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

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

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

Close to three-quarters 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 (e.g. Gayndah Jockey Club's 150 Years Anniversary Raceday in 2018)
- + Promotion of history through on-course museums



- + 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 art galleries (Ipswich Cup), historical societies, local papers, radio, racebook and websites
- + Recognising heroes of the sport on dedicated racedays (e.g. Heritage Raceday)
- + Promotions in race book, honour boards and historical photographs and newspaper clippings
- + Heritage listing buildings on-course

In recent years, clubs such as Gayndah, Ipswich, Tara, Eidsvold, Rockhampton, Sunshine Coast and Twin Hills have all celebrated special anniversaries of either their club or cup race.

These have included 25th, 50th, 100th, 135th and 150th year celebrations with special racedays

Case study

MARBURG HARNESS LURING FANS BACK ON COURSE

The Marburg trots are a shining example of converting from non-TAB to TAB racing and the ensuing broad benefits for both club and community. In 2018 the Easter Sunday annual meet marked the first time the Marburg Pacing Association (MPA) hosted a TAB race meet, providing a golden opportunity to showcase all that country racing has to offer.

This was marked as Queensland's biggest country trot meet for the year. The MPA officials were pleased with the Easter's TAB-supported meet, and trot columnist Denis Smith reported the crowd as an estimated 800, who turned out in great weather for the time of year for some quality country racing.

With some new volunteer faces and extra attractions, such as 'WINX' memorabilia – and an important visit by the Easter Bunny – fans reportedly went home from the Easter meet a happy bunch. MPA President Scott Neaves sees it as a real opportunity for the club to showcase country racing to the wider Queensland race community. While not quite the harness paradise of the 1970s, the Marburg intends to get fans back on course.

October 2018 brought another string of successful meets for Marburg, such

as the \$10,000 Marathon and Oktoberfest. In total for the 18-19 racing calendar, 14 of the club's meetings were converted to TAB events, covered by Sky Racing. This included a couple of weekday meetings, which resulted in the sourcing of new volunteers to cover others who were unavailable. The new volunteers have greatly helped to share the load throughout the community.

Looking forward, the MPA will aim to establish new events to attract different segments of the community, helping to further spread the word about the trots in Queensland.

The following table provides a summary of Marburg Harness Racing activity:

Activity	Number
Meetings	15
Races	124
Starters	1,029
Wagering Turnover (\$)	\$10,310,861





Case study

GETTING SET FOR ANOTHER 'BATTLE OF THE BUSH'

Queensland's 'Battle of the Bush' race series commenced last year in the state's centre at Cunnamulla, and culminated in an exciting final event at Brisbane's Winter Carnival. Established to showcase bush gallopers' talent from all over, it also aims to provide regional trainers with the opportunity to become known nationally. In 2018 Racing Minister Stirling Hinchliffe highlighted his goal to encourage involvement of owners and trainers from country Queensland in the brilliant Battle of the Bush series.

Sixteen race qualifiers were held for country racers at regional venues across Queensland in 2018. At the inaugural grand finale held at Doomben, it was Mason's Chance who – after travelling many thousands of float kilometres – brought the enviable \$61,000 winner's cheque to Mackay trainer Olivia Cairns.

Racing Queensland's CEO Brendan Parnell emphasised the commitment to providing more opportunities for country racing participants. He described the Battle of the Bush series as a game changer for all participants, owners and racing fans across Queensland who follow their favourites throughout the series to the final.

The Battle of the Bush is on again this year, having commenced in April at Gladstone Turf Club and continuing for two months around the state. Racing Queensland has announced a significant increase in prize money for the TAB series, which will see contenders battle it out for stakes of \$125,000 in the final on 22 June 2019, to be held at Eagle Farm. (1st = \$72,500 plus a \$30,000 QTIS bonus for a Qld bred horse if it wins.)



2018 Battle of the Bush Series

Meeting Date	Venue	Region	Winner	Location
25/4/18	Cunnamulla & District Diggers' Race Club	Downs	Fab's Cowboy	Miles
28/4/18	Emerald Jockey Club	Capricornia	Just Call Me Louie	Rockhampton
5/5/18	Bundaberg Race Club	South East	Emperor Maximilian	Bundaberg
12/5/18	Gordonvale Turf Club	Far North	Man Around Town	Cairns
12/5/18	Longreach Jockey Club	Central West	Kakakenny	Ilfracombe
12/5/18	Mount Isa Race Club	North West	Galea Warrior	Mount Isa
12/5/18	Warwick Turf Club	Eastern Downs	Klammer	Nanango
19/5/18	Burdekin Race Club	Leichhardt	Stellar Knight	Mackay
19/5/18	Central Warrego Race Club	Downs	Timetus	Roma
26/5/18	Thangool Race Club	Capricornia	Exstratum	Miles
26/5/18	Nanango Race Club	South East	Canid	Nanango
2/6/18	Atherton Turf Club	Far North	Man Around Town	Cairns
2/6/18	Bowen Turf Club	Leichhardt	Gingersnap	Mackay
2/6/18	Cloncurry & District Race Club	North West	Drinking Cocktails	Ilfracombe
2/6/18	Goondiwindi Race Club	Eastern Downs	Go Get Sum	Toowoomba
9/6/18	Barcaldine Racing Club	Central West	Mason's Chance	Mackay
23/6/18	Doomben Final		Mason's Chance	Mackay



Case study

STRONG FEMALE PRESENCE DRIVES QUEENSLAND HARNES RACING

Relative to the other racing codes in Queensland, harness racing shows extensive female participation in the training and driving ranks; women now make up almost a third of harness participants in the state.

Most recently this was highlighted by Queensland hosting the Australian Female Drivers Championship, held in March, which brought together the leading female participants from across the country. Racing Queensland Harness Strategy and Development Manager David Brick welcomed Australia's best drivers to Brisbane for a great night of racing, and described it as an enormous celebration of women in harness racing. He pointed out harness racing as a unique sport in that men and women compete on a level playing field, and that women feature as some of the sport's biggest stars.

The night doubled as a close to the 2019 Team Teal campaign, which aims to raise funds for the Women's Cancer Foundation in its fight against ovarian cancer and other gynaecological diseases. World record-holding reinswoman, Kerry Manning, also spoke on the night between her driving commitments.

The strength of females in Queensland harness racing is evidenced by their standings on the Metropolitan Trainers and Drivers premierships. Of the top ten leading trainers in Queensland in the 17-18 season, four were female, including Chantal Turpin who finished third in the standings, while from a driving perspective there were also four in the top ten, including sisters Narissa and Dannielle McMullen.



The following table illustrates a breakdown of the female participants in Harness racing:

	Number	% Overall
Female Trainers	58	22%
Female Drivers	40	20%
Female Owners		47%
Total		30%



Case study

ROMA RACES AND THE CATWALK

Held in November each year, the Roma Cup is one of Queensland's biggest and wealthiest race days west of the dividing range. The entertainment commences on Friday evening and is followed by a huge day of racing and fun on the Saturday. Roma Turf Club's Jackie Erickson has emphasised the benefit of Cup day to the whole community, noting that the cafes in town have their busiest Sunday of the year on the following day.

One annual highlight of the Roma Cup is Fashions on the Field, adding to the event's fabulous atmosphere. Described by organisers as an eclectic combination of class and 'bushie shenanigans', the five categories include: classic

lady; contemporary lady; headwear; fun and funk, and menswear.

Roma Turf Club's racing calendar also features the Picnic Races in March, Easter in the Country races, and Rugby Races in winter. The Club's mission is: To conduct quality thoroughbred racing events in the Roma district, which will not only provide a high standard of sport, entertainment and benefits to the local community, but will improve and promote country racing to a broader audience.

Roma is located about 550 kms west of Brisbane, but for long-distance visitors real country hospitality awaits. Camping facilities and free

buses are available, and everyone who attends is encouraged to Frock Up for the Cup!

In addition to the glitz and glamour of the event, Roma Turf Club president Brett Ashney recalls scenes of comradery and community beyond racing in interview with Matt Sherrington:

"In 2017, the jockeys, after being deprived of the last ride of the day, went for a swim on the sand track, and were seen duck diving into the pools to make the best of some drought breaking rain."

The following table provides a summary of Roma Cup activity:

Activity	Number
Races	8
Horses (Starters)	89
Wagering Turnover (\$)	\$ 3,136,655
Attendance	6,680





Case study

ORIGIN DOGS - A BATTLE BETWEEN TWO STATES

In 2018, the new \$120,000 TAB Origin Greyhound series – promoted by Racing Queensland (RQ) and staged by the Brisbane Greyhound Racing Club (BGRG) – proved to be a highlight of the Winter Greyhound Racing Carnival in Brisbane.

The Origin Greyhound concept brings together the best greyhounds from Queensland (Qld) and New South Wales (NSW) and replicates the rivalry between the two states on the rugby league field within that code's State of Origin series.

In 2019, RQ and the BGRG continued the series with a highly successful meeting at Albion Park on June 6. Based on the success of 2018, prizemoney for the series was boosted to \$150,000.

The Origin Greyhound format comprises the following events:

- ✦ \$60,000 Origin Sprint 520m – four representatives from each of NSW and Qld (\$40k to the winner)
- ✦ \$60,000 Origin Distance 710m – four representatives from each of NSW and Qld (\$40k to the winner)
- ✦ \$30,000 Origin Match Race 520m – one representative of from each of NSW and Qld (\$25k to the winner).

Eligibility for Origin Greyhound requires that, in order to be selected for either team

NSW or team Qld, a greyhound must have been domiciled in the State of selection for at least 76 days out of the 150 days immediately prior to the selection date. Teams are selected by a panel of experts from each state, chaired by a representatives from RQ and Greyhound Racing New South Wales.

Origin Greyhound was programmed to take place one day after the first game of the rugby league series.

Former league legends Terry Hill and Chris Reynolds were appointed as 'coaches' of NSW and Qld greyhound teams and were central figures in the promotional launch and on race night. Origin Greyhound generated significant media attention with much of the coverage on the back of media linking the rugby league and greyhound racing concepts... state vs state, mate vs mate, hound vs hound!

The 2018 series was one two legs to one in favour of Queensland, with NSW reversing that result in 2019.

The Mark Hughes Foundation was linked as a charity partner for the series. This foundation aims to raise much needed funds for brain cancer research, create awareness and support for patients and their families.

Case study

TOOWOOMBA JOCKEY BACK IN THE SADDLE

Following a trackwork fall in 2017 – in which he broke his back – jockey Ben Saunders has had a remarkable recovery and now has a role mentoring apprentices for Racing Queensland.

Two years after becoming a paraplegic, Saunders led the Weetwood field out on horseback, to a crowd ovation – at Toowoomba's Clifford Park Racecourse in April this year; the same venue where his accident happened. Afterwards, Saunders joked that he could get a gig on Winx the week after, and described the experience as enormous and beautiful, as the big crowd cheered. Weetwood winner Robbie Fradd called the moment a special one and noted that great people can't be kept down.

Trainer Dale Groves and fellow paraplegic/former jockey Kristy Banks encouraged Ben back into the saddle earlier this year. Saunders found his return to riding to be enjoyable and a help for his condition, equating it to riding a bike again when the 'seat belt' went on.

Saunders is grateful for the support received and is thankful to all in the racing industry who have aided his recovery. Wade Chisholm – also left paraplegic from the same accident – has had similar support from the Toowoomba racing community, which has done a great deal for both men.





Case study

BUNDY MONDAYS A HIT

Greyhound punters of Bundaberg celebrated earlier this year, upon conversion of racing to full TAB status and national Sky coverage. The Bundaberg Greyhound Racing Club is now TAB-accredited, racing every Monday. Members have waited a long time for this exciting development, described by Racing Queensland's Chief Operating Officer, Adam Wallish, as a watershed moment for the greyhound code in Bundaberg and Queensland.

The benefits are broad for the town and region, centering Bundaberg as a main player in greyhound racing; an industry that continues to thrive in Queensland.

Investment in 2018 enabled grass track resurfacing, a stewards tower, starting boxes and new technological infrastructure. Bundaberg has the only grass circle in the state.

With its first TAB meeting held on 13 May 2019, the Club will host 52 meetings per year – with a Monday timeslot on Sky Racing. Prizemoney for Bundaberg has been increased with the recent funding package declared by Racing Queensland for the greyhound code. A wagering impact of \$37.5m turnover and \$800k revenue is projected per annum.

President of Bundaberg Greyhound Racing Club, David Plummer, believes the TAB status will lead to increased growth in greyhound racing participation, and add to Bundaberg's national recognition. He compared the famous Bundaberg rum that put the region on the map with greyhound racing, which will further elevate this recognition for the town of 'Bundy'.



The following table provides a summary of Bundaberg Greyhound Racing activity:

Activity	Number
Races	70
Starters	518
Average Wagering Turnover Per Meeting	\$817,018

REGIONAL SUMMARIES

Brisbane

- + The population of the Brisbane region is 1,254,209 (2016 Projected Census).
- + 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 almost \$871.6 million in value added contribution to Gross State Product. This equates to 57.2% 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 6,103 full-time equivalent (FTE) jobs in the region.
- + There are almost 7,400 participants in the racing industry in Brisbane.

RACING CLUBS IN THE REGION

Thoroughbred

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

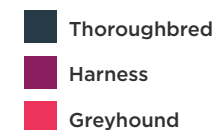
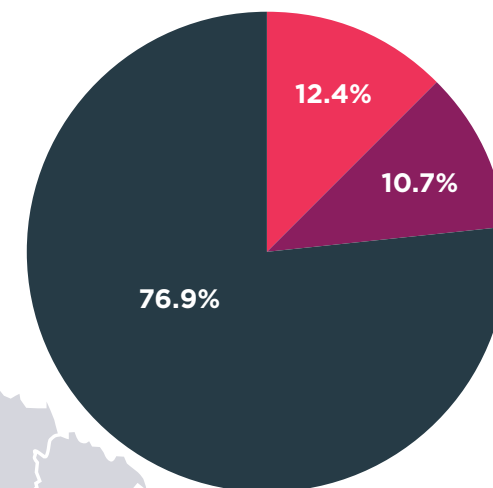
Harness

- + Albion Park Harness Racing Club

Greyhound

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

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE BRISBANE REGION (%)



The racing industry in the **Brisbane region is responsible for generating \$871.6 million in value added** contribution to gross state product. This represents **57.2% of the industry total.**

AT A GLANCE

5 Racing Clubs

THOROUGHBRED	2
HARNESS	1
GREYHOUND	2

442 Race Meetings

THOROUGHBRED	49
HARNESS	156
GREYHOUND	237

4,214 Races

THOROUGHBRED	417
HARNESS	1,368
GREYHOUND	2,429

9,553 Racing Club Members

THOROUGHBRED	8,195
HARNESS	528
GREYHOUND	110

240,810 Attendances

THOROUGHBRED	164,336
HARNESS	50,030
GREYHOUND	26,444

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$375.4m	\$53.4m	\$70.9m	\$499.8m
Total value added	\$670.5m	\$93.3m	\$107.8m	\$871.6m
Full-time equivalent employment	4,648	652	803	6,103

ANIMALS

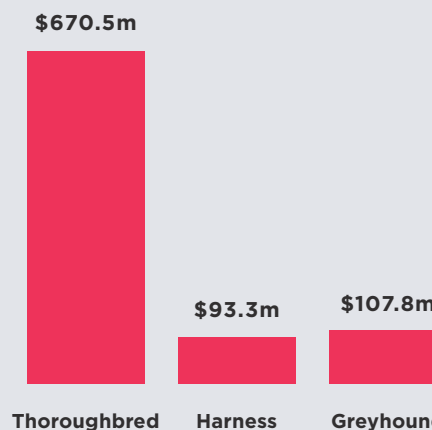
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	7	42	20	69
Horses and greyhounds in training	1,668	23	95	1,785

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	327	35	18	380
Owners	4,528	136	175	4,839
Trainers	81	15	50	146
Breeders staff	164	18	12	193
Stable/Kennel employees	301	10	50	362
Racing Club & industry staff (FT, PT, casual)	750	62	87	899
Jockeys, drivers & apprentices	28	13	0	42
Racing club volunteers	28	7	6	41
Volunteers assisting participants	299	111	88	498
Total participants in the Brisbane region	6,506	407	486	7,399

Race meetings in the **Brisbane region** attracted attendances of **240,810** or **28.9% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE BRISBANE REGION



Cairns

- + The population of the Cairns region is 247,762 (2016 Projected Census).
- + There are a total of eight (8) racing clubs operating in the region which are all thoroughbred clubs.
- + The racing industry in the Cairns region is responsible for generating more than \$31.4 million in value added contribution to Gross State Product. This equates to 2.1% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 275 full-time equivalent (FTE) jobs in the region.
- + There are nearly 2000 participants in the racing industry in Cairns.

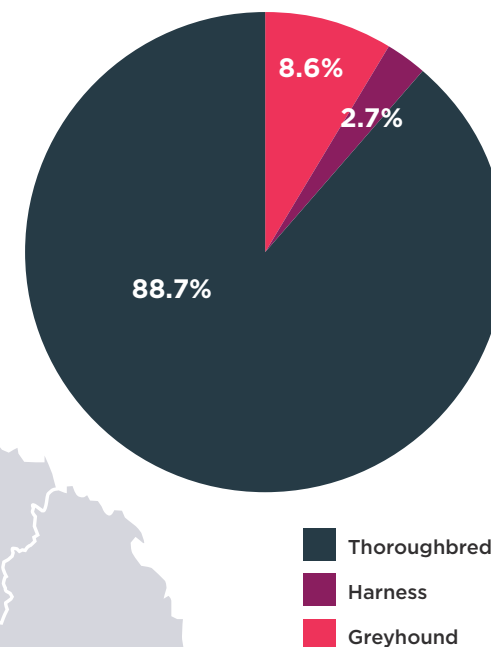
RACING CLUBS IN THE REGION

Thoroughbred

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

The racing industry in the **Cairns region is responsible for generating \$31.4 million in value added** contribution to gross state product. This represents **2.1% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CAIRNS REGION (%)



AT A GLANCE

8 Racing Clubs

THOROUGHBRED 8

70 Race Meetings

THOROUGHBRED 39
GREYHOUND 31

399 Races

THOROUGHBRED 218
GREYHOUND 181

1,033 Racing Club Members

THOROUGHBRED 965
GREYHOUND 68

54,351 Attendances

THOROUGHBRED 51,794
GREYHOUND 2,557

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$30.1m	\$0.9m	\$3.1m	\$34.1m
Total value added	\$27.8m	\$0.8m	\$2.7m	\$31.4m
Full-time equivalent employment	243	8	24	275

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	23	1	0	25
Horses and greyhounds in training	303	0	41	344

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	4	0	0	4
Owners	1,074	1	38	1,113
Trainers	45	0	12	57
Breeders staff	6	0	0	6
Stable/Kennel employees	108	0	12	120
Racing Club & industry staff (FT, PT, casual)	307	0	0	307
Jockeys, drivers & apprentices	15	0	0	15
Racing club volunteers	254	0	0	254
Volunteers assisting participants	92	0	13	105
Total participants in the Cairns region	1,906	1	74	1,981

Race meetings in the Cairns region attracted attendances of **54,351** or **6.5%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE CAIRNS REGION



Darling Downs - Maranoa

- + The population of the Darling Downs - Maranoa region is 128,622 (2016 Projected Census).
- + There are a total of twenty-five (25) racing clubs operating in the region, twenty-four (24) of which are thoroughbred racing clubs with one (1) harness racing club.
- + The racing industry in the Darling Downs-Maranoa region is responsible for generating almost \$57.9 million in value added contribution to Gross State Product. This equates to 3.8% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 478 full-time equivalent (FTE) jobs in the region.
- + There are more than 3,400 participants in the racing industry in Darling Downs-Maranoa.

The racing industry in the **Darling Downs-Maranoa region** is responsible for generating **\$57.9 million** in **value added** contribution to gross state product. This represents **3.8%** of the industry total.

RACING CLUBS IN THE REGION

Thoroughbred

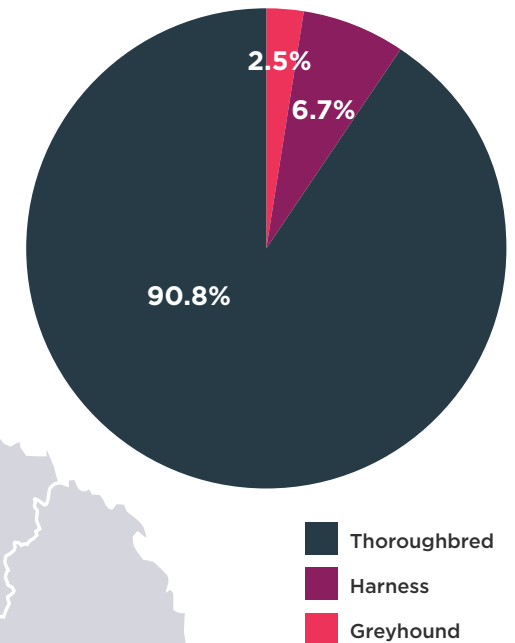
- + Bell Race Club Inc.
- + Chinchilla Race Club Inc.
- + Clifton Jockey Club Inc.
- + Dalby & Northern Downs Jockey Club Inc.
- + Dalby Amateur Picnic Race Club
- + Flinton Race Club
- + Goondiwindi & McIntyre Picnic Race Club Inc.
- + Goondiwindi Race Club Inc.
- + Injune Race Club
- + Jandowae Race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

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

Harness

- + Darling Downs Harness Club

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



AT A GLANCE

25 Racing Clubs

THOROUGHBRED 24
HARNESS 1

54 Race Meetings

THOROUGHBRED 53
HARNESS 1

300 Races

THOROUGHBRED 293
HARNESS 7

1,607 Racing Club Members

THOROUGHBRED 1,567
HARNESS 40

46,541 Attendances

THOROUGHBRED 46,361
HARNESS 180

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$67.8m	\$5.0m	\$2.1m	\$74.9m
Total value added	\$52.6m	\$3.9m	\$1.5m	\$57.9m
Full-time equivalent employment	434	31	13	478

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	613	56	37	706
Horses and greyhounds in training	499	55	60	614

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	181	21	4	206
Owners	1,064	50	21	1,135
Trainers	80	7	8	96
Breeders staff	254	11	3	267
Stable/Kennel employees	173	5	8	186
Racing Club & industry staff (FT, PT, casual)	406	12	0	418
Jockeys, drivers & apprentices	12	6	0	19
Racing club volunteers	689	5	0	694
Volunteers assisting participants	303	68	16	387
Total participants in the Darling Downs-Maranoa region	3,163	184	60	3,407

Race meetings in the Darling Downs-Maranoa region attracted attendances of **46,541** or **5.6%** of total attendances at race meetings in Queensland.

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



Central Queensland

- + The population of the Central Queensland region is 226,314 (2016 Projected Census).
- + There are a total of fourteen (14) racing clubs operating in the region, thirteen (13) of which are thoroughbred clubs, and one (1) a greyhound racing club.
- + The racing industry in the Central Queensland region is responsible for generating more than \$38.3 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 327 full-time equivalent (FTE) jobs in the region.
- + There are nearly 2,700 participants in the racing industry in Central Queensland.

RACING CLUBS IN THE REGION

Thoroughbred

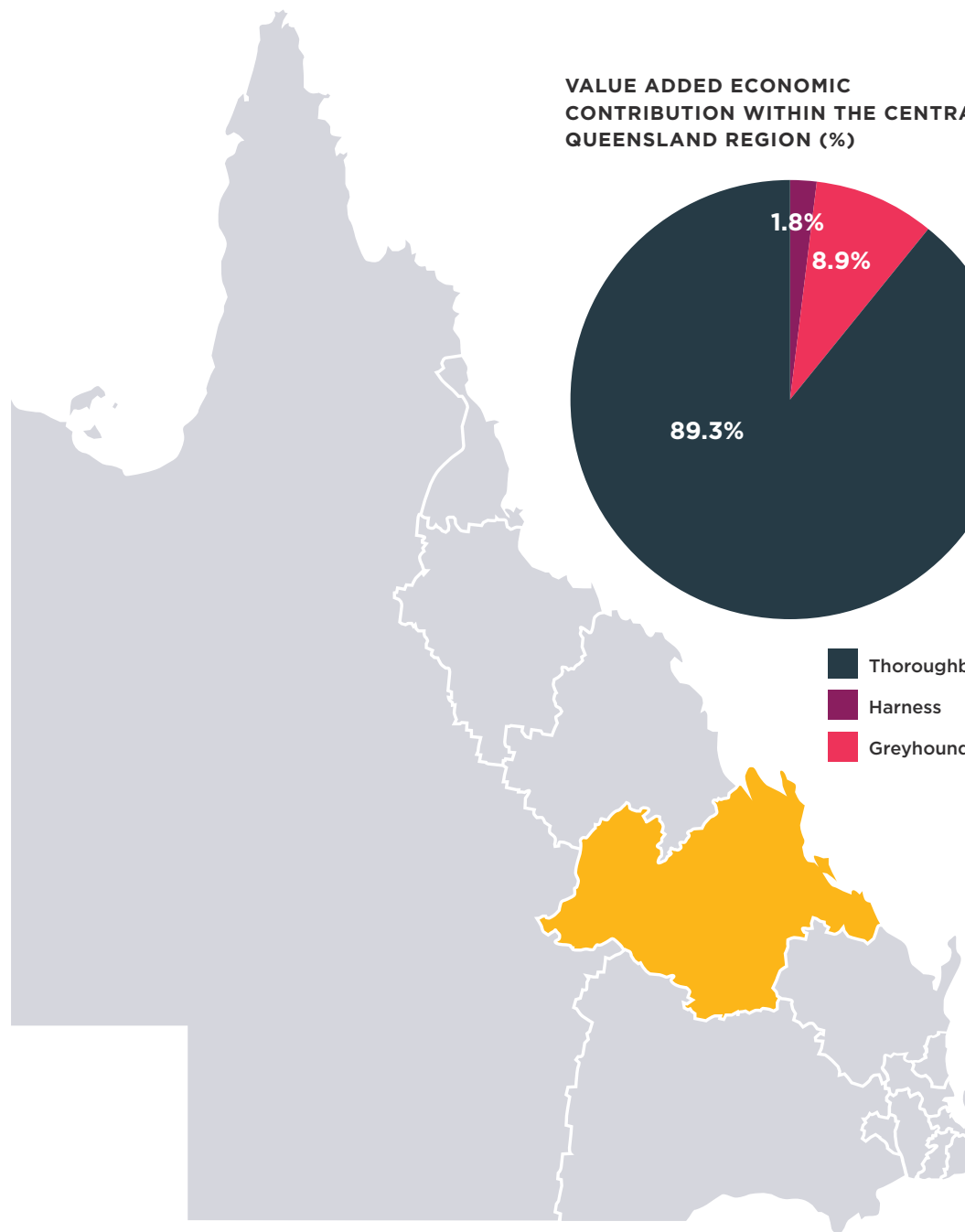
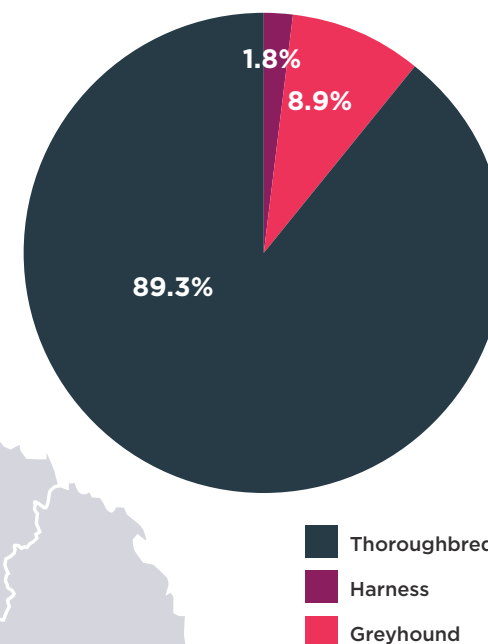
- + Bluff Blackwater Amateur Race Club Inc.
- + Calliope Jockey Club
- + Central Queensland Amateur Racing Club Inc.
- + Dawson Jockey Club
- + Dingo Race Club Inc.
- + Emerald Jockey Club
- + Gladstone Turf Club Inc.
- + Rockhampton Jockey Club Inc.
- + Rockhampton St. Patricks Day Race Club Inc.
-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

Greyhound

- + Rockhampton Greyhound Racing Club

The racing industry in the **Central Queensland region** is responsible for generating **\$38.3 million in value added** contribution to gross state product. This represents **2.5% of the industry total.**

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



AT A GLANCE

14 Racing Clubs

THOROUGHBRED	13
GREYHOUND	1

124 Race Meetings

THOROUGHBRED	74
GREYHOUND	50

913 Races

THOROUGHBRED	447
GREYHOUND	466

1,591 Racing Club Members

THOROUGHBRED	1,541
GREYHOUND	50

50,163 Attendances

THOROUGHBRED	48,165
GREYHOUND	1,998

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$38.9m	\$0.8m	\$4.1m	\$43.8m
Total value added	\$34.2m	\$0.7m	\$3.4m	\$38.3m
Full-time equivalent employment	290	6	30	327

ANIMALS

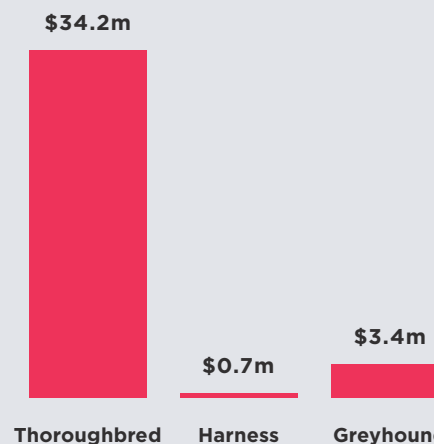
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	80	0	1	81
Horses and greyhounds in training	650	0	121	771

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	55	1	10	66
Owners	1,449	9	53	1,511
Trainers	93	0	26	119
Breeders staff	77	1	6	84
Stable/Kennel employees	173	0	26	199
Racing Club & industry staff (FT, PT, casual)	215	0	12	227
Jockeys, drivers & apprentices	13	0	0	13
Racing club volunteers	173	0	0	173
Volunteers assisting participants	227	3	45	275
Total participants in the Central Queensland region	2,476	13	178	2,667

Race meetings in the Central Queensland region attracted attendances of **50,163** or **6.0%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE CENTRAL QUEENSLAND REGION



Gold Coast

- + The population of the Gold Coast region is 591,570 (2016 Projected Census).
- + There are two (2) racing clubs operating in the region; one (1) harness racing club and one (1) thoroughbred racing club.
- + The racing industry in the Gold Coast region is responsible for generating more than \$121.3 million in value added contribution to Gross State Product. This equates to 8.0% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 1,015 full-time equivalent (FTE) jobs in the region.
- + There are almost 4,000 participants in the racing industry in Gold Coast.

The racing industry in the **Gold Coast region** is responsible for generating **\$121.3 million in value added** contribution to gross state product. This represents **8.0% of the industry total**.

RACING CLUBS IN THE REGION

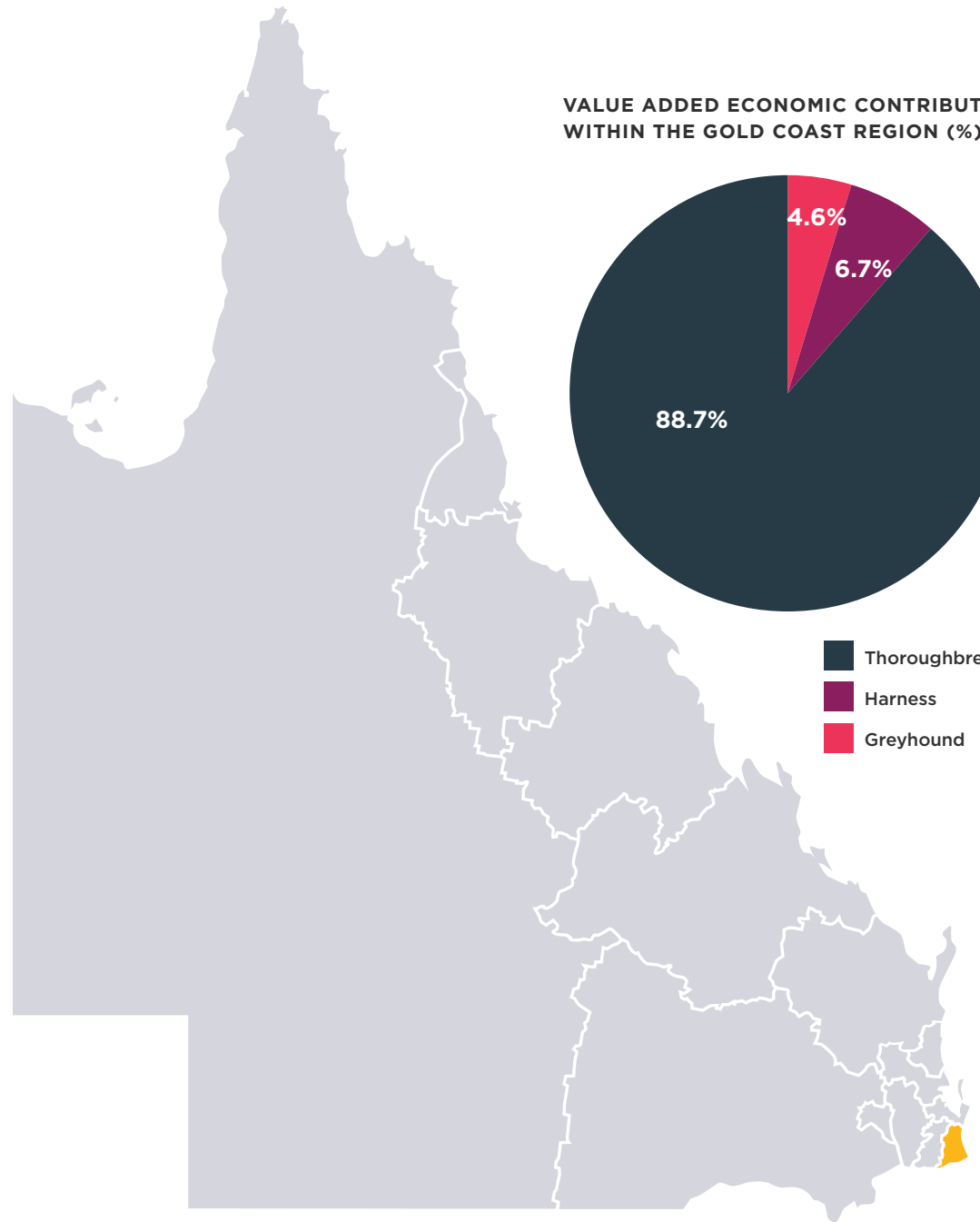
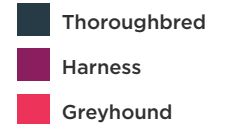
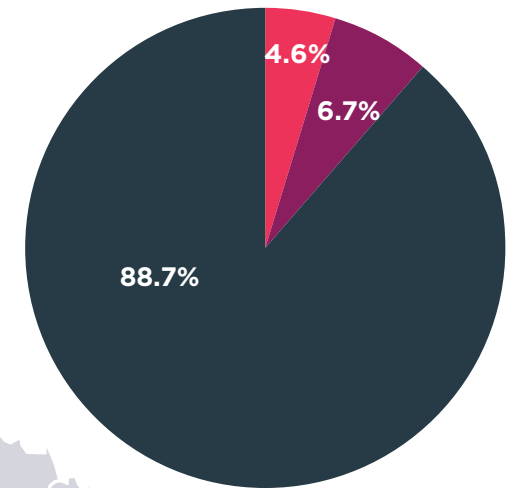
Thoroughbred

- + Gold Coast Turf Club Ltd

Harness

- + Gold Coast Harness Racing Club

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



AT A GLANCE

2 Racing Clubs

THOROUGHBRED 1
HARNESS 1

60 Race Meetings

THOROUGHBRED 60

493 Races

THOROUGHBRED 493

85 Racing Club Members

THOROUGHBRED 66
HARNESS 19

116,819 Attendances

THOROUGHBRED 116,819

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$110.0m	\$8.3m	\$5.8m	\$124.0m
Total value added	\$107.6m	\$8.1m	\$5.5m	\$121.3m
Full-time equivalent employment	900	66	49	1,015

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	176	20	47	243
Horses and greyhounds in training	1,063	157	267	1,487

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	187	25	13	225
Owners	2,571	77	117	2,765
Trainers	90	20	30	140
Breeders staff	93	13	8	114
Stable/Kennel employees	220	16	30	266
Racing Club & industry staff (FT, PT, casual)	6	0	0	6
Jockeys, drivers & apprentices	35	15	0	50
Racing club volunteers	5	7	0	12
Volunteers assisting participants	191	94	55	340
Total participants in the Gold Coast region	3,396	266	254	3,916

Race meetings in the Gold Coast region attracted attendances of **116,819** or **14.0%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE GOLD COAST REGION



Ipswich

- + The population of the Ipswich region is 333,748 (2016 Projected Census).
- + There are a total of four (4) racing clubs operating in the region, two (2) of which are thoroughbred clubs, one (1) a harness racing club and one (1) a greyhound racing club.
- + The racing industry in the Ipswich region is responsible for generating almost \$76.0 million in value added contribution to Gross State Product. This equates to 5.0% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 640 full-time equivalent (FTE) jobs in the region.
- + There are nearly 3,100 participants in the racing industry in Ipswich.

The racing industry in the Ipswich region is responsible for generating \$76.0 million in value added contribution to gross state product. This represents 5.0% of the industry total.

RACING CLUBS IN THE REGION

Thoroughbred

- + Esk Jockey Club
- + Ipswich Turf Club

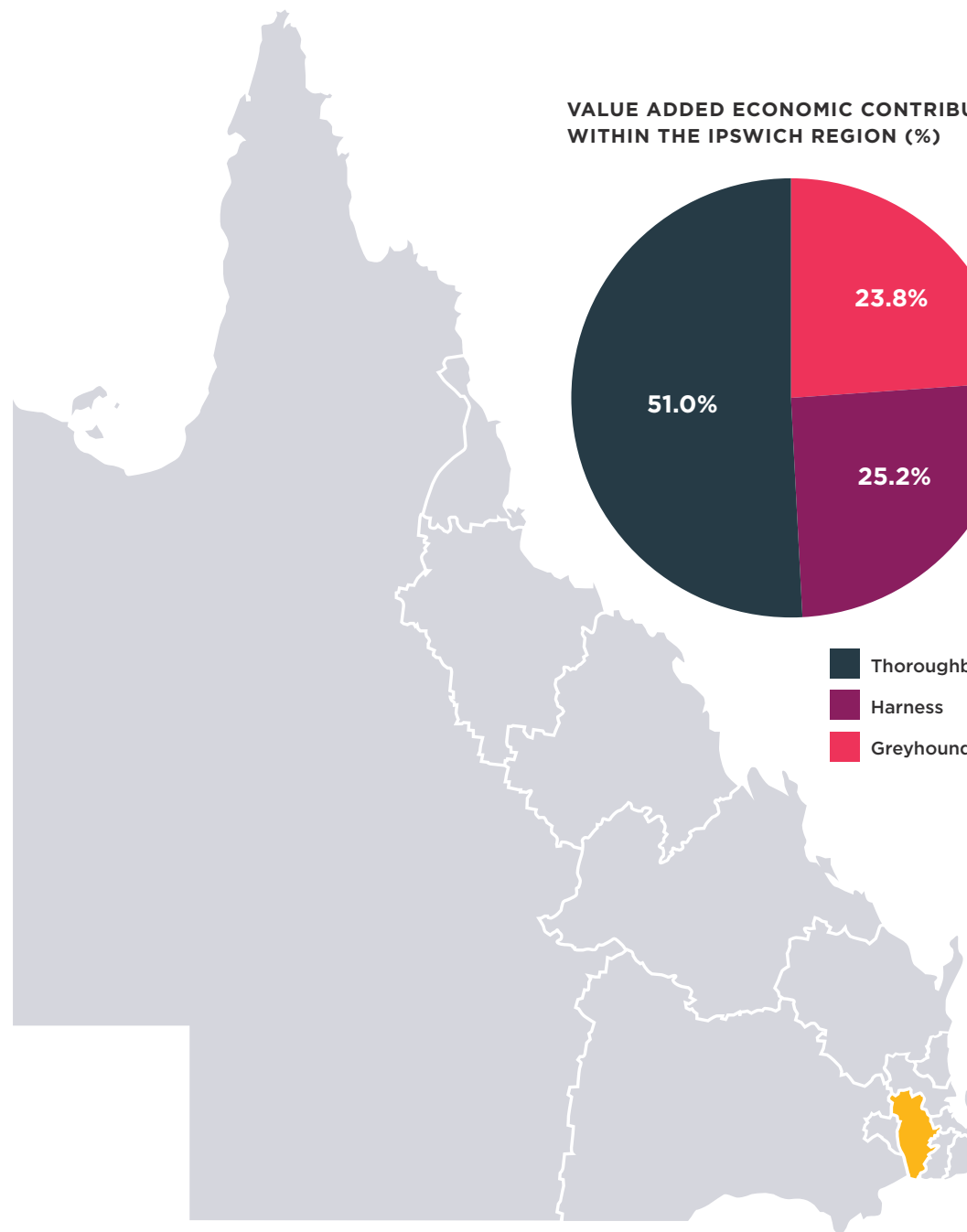
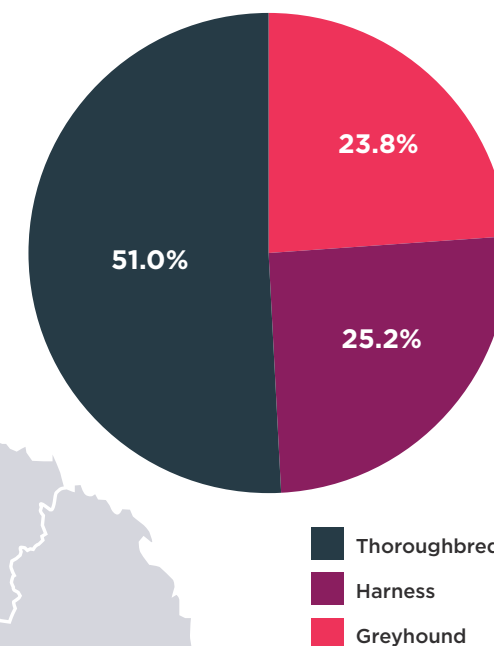
Harness

- + Marburg Pacing Association Inc.

Greyhound

- + Ipswich Greyhound Racing Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE IPSWICH REGION (%)



AT A GLANCE

4 Racing Clubs

THOROUGHBRED	2
HARNESS	1
GREYHOUND	1

224 Race Meetings

THOROUGHBRED	49
HARNESS	13
GREYHOUND	162

2,089 Races

THOROUGHBRED	381
HARNESS	95
GREYHOUND	1,613

684 Racing Club Members

THOROUGHBRED	476
HARNESS	80
GREYHOUND	128

61,490 Attendances

THOROUGHBRED	42,740
HARNESS	4,300
GREYHOUND	14,450

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$43.9m	\$21.7m	\$21.8m	\$87.3m
Total value added	\$38.7m	\$19.2m	\$18.1m	\$76.0m
Full-time equivalent employment	331	152	156	640

ANIMALS

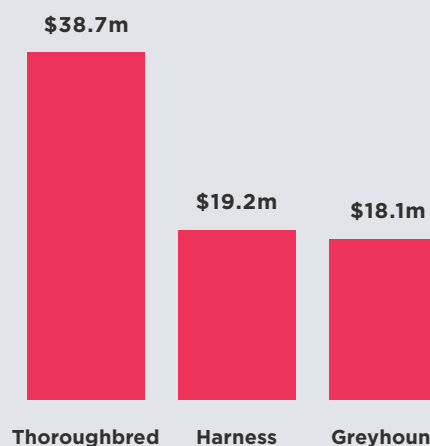
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	253	94	481	828
Horses and greyhounds in training	81	459	1,127	1,668

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	41	75	92	208
Owners	681	206	309	1,195
Trainers	32	93	160	286
Breeders staff	21	38	60	118
Stable/Kennel employees	77	37	160	275
Racing Club & industry staff (FT, PT, casual)	21	8	162	191
Jockeys, drivers & apprentices	6	69	0	75
Racing club volunteers	5	19	15	39
Volunteers assisting participants	48	337	316	701
Total participants in the Ipswich region	931	881	1,274	3,086

Race meetings in the Ipswich region attracted attendances of **61,490** or **7.4%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE IPSWICH REGION



Logan - Beaudesert

- + The population of the Logan - Beaudesert region is 328,027 (2016 Projected Census).
- + There are a total of two (2) racing clubs operating in the region, both of which are thoroughbred clubs.
- + The racing industry in the Logan-Beaudesert region is responsible for generating almost \$48.9 million in value added contribution to Gross State Product. This equates to 3.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 401 full-time equivalent (FTE) jobs in the region.
- + There are nearly 2,400 participants in the racing industry in Logan-Beaudesert.

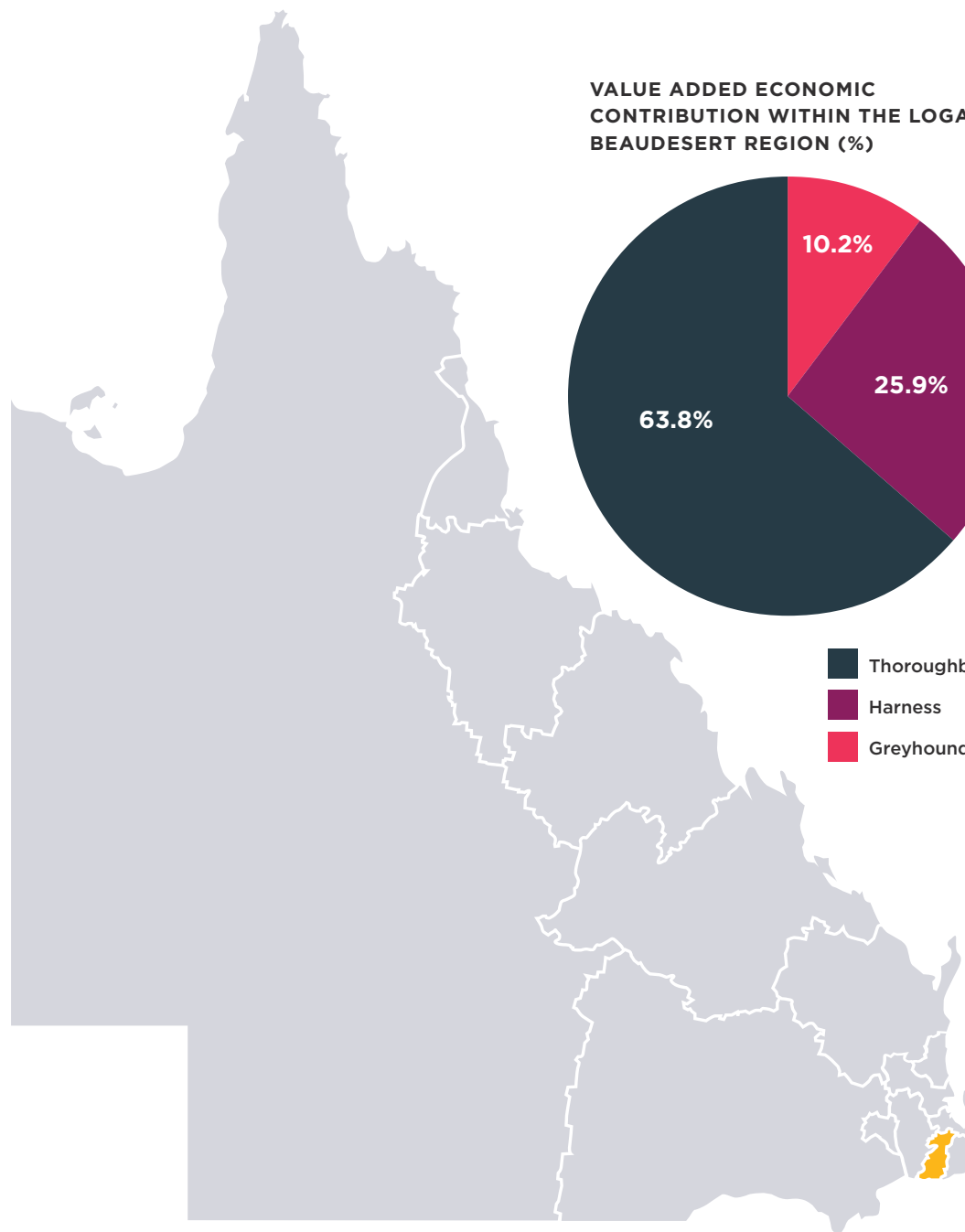
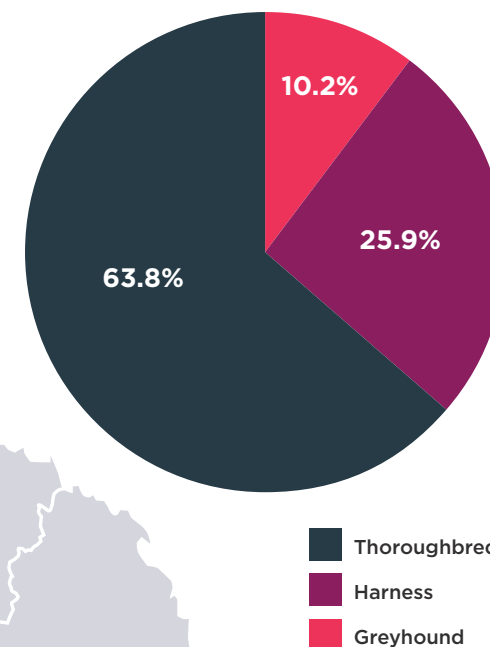
The racing industry in the **Logan-Beaudesert region** is responsible for generating **\$48.9 million** in value added contribution to gross state product. This represents **3.2% of the industry total**.

RACING CLUBS IN THE REGION

Thoroughbred

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

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



AT A GLANCE

2 Racing Clubs

THOROUGHBRED 2

16 Race Meetings

THOROUGHBRED 16

114 Races

THOROUGHBRED 114

80 Racing Club Members

THOROUGHBRED 80

7,644 Attendances

THOROUGHBRED 7,644

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$33.4m	\$13.2m	\$5.6m	\$52.7m
Total value added	\$31.2m	\$12.7m	\$5.0m	\$48.9m
Full-time equivalent employment	257	101	43	401

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	293	21	137	452
Horses and greyhounds in training	366	338	493	1,198

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	72	32	55	159
Owners	747	112	175	1,035
Trainers	45	48	105	198
Breeders staff	100	16	36	152
Stable/Kennel employees	87	29	105	221
Racing Club & industry staff (FT, PT, casual)	21	0	0	21
Jockeys, drivers & apprentices	3	43	0	46
Racing club volunteers	45	0	0	45
Volunteers assisting participants	146	147	206	499
Total participants in the Logan-Beaudesert region	1,266	429	681	2,375

Race meetings in the Logan - Beaudesert region attracted attendances of **7,644** or **0.9%** of total attendances at race meetings in Queensland.

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



Mackay-Isaac-Whitsunday

- + The population of the Mackay-Isaac-Whitsunday region is 173,892 (2016 Projected Census).
- + There are a total of seven (7) 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 almost \$18.5 million in value added contribution to Gross State Product. This equates to 1.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 160 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,400 participants in the racing industry in Mackay-Isaac-Whitsunday.

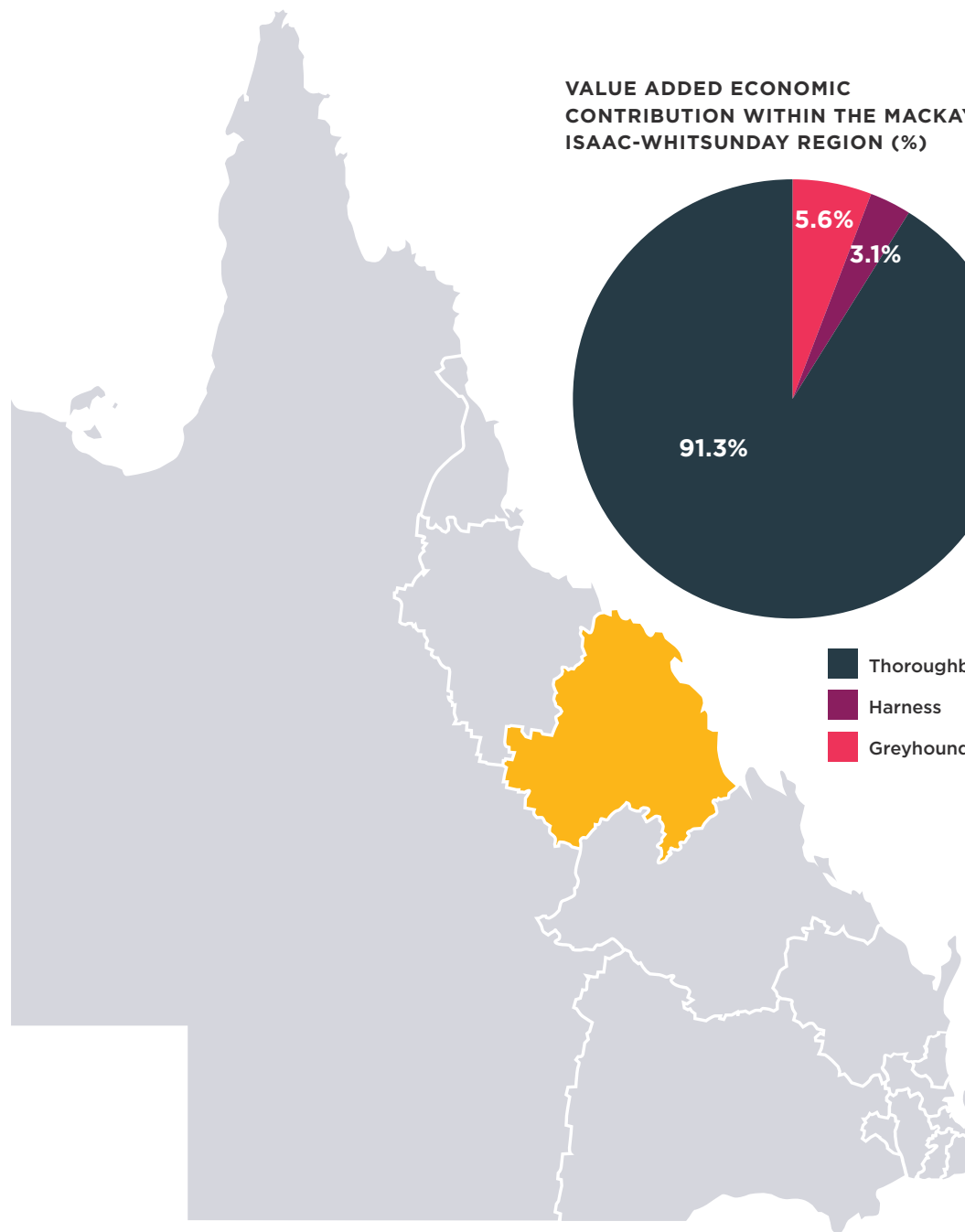
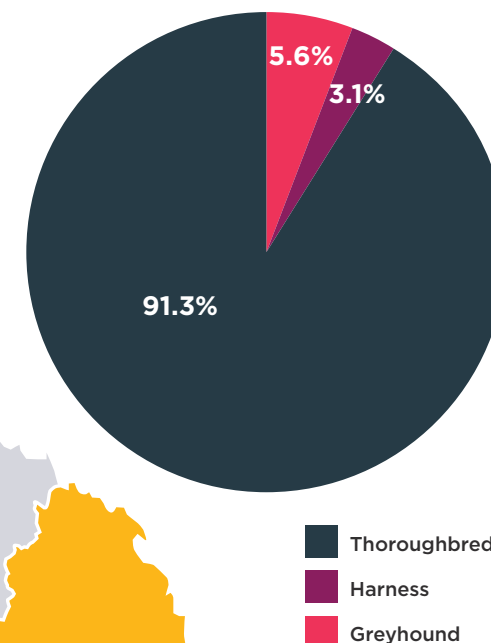
The racing industry in the **Mackay-Isaac-Whitsunday region** is responsible for generating **\$18.5 million in value added** contribution to gross state product. This represents **1.2% of the industry total**.

RACING CLUBS IN THE REGION

Thoroughbred

- + Bowen Turf Club Inc.
- + Clermont Race Club Inc.
- + Mackay-Isaac-Whitsunday Amateur Race Club
- + Mackay-Isaac-Whitsunday Turf Club Inc.
- + Middelmount Race Club
- + Moranbah Race Club
- + Twin Hills Race Club Inc.

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



AT A GLANCE

7 Racing Clubs

THOROUGHBRED 7

35 Race Meetings

THOROUGHBRED 35

230 Races

THOROUGHBRED 230

523 Racing Club Members

THOROUGHBRED 523

23,949 Attendances

THOROUGHBRED 23,949

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$20.4m	\$0.7m	\$1.3m	\$22.4m
Total value added	\$16.8m	\$0.6m	\$1.0m	\$18.5m
Full-time Equivalent employe	145	5	9	160

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	25	4	0	28
Horses and greyhounds in training	230	0	18	248

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	72	4	2	78
Owners	723	20	18	761
Trainers	22	0	3	25
Breeders staff	101	2	1	104
Stable/Kennel employees	73	2	3	78
Racing Club & industry staff (FT, PT, casual)	96	0	0	96
Jockeys, drivers & apprentices	6	0	0	6
Racing club volunteers	169	0	0	169
Volunteers assisting participants	101	11	7	119
Total participants in the Mackay-Isaac-Whitsunday region	1,363	39	34	1,435

Race meetings in the Mackay-Isaac-Whitsunday region attracted attendances of **23,949** or **2.9%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE MACKAY REGION



Moreton Bay

- + The population of the Moreton Bay region is 444,257 (2016 Projected Census).
- + 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 \$42.0 million in value added contribution to Gross State Product. This equates to 2.8% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 360 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,600 participants in the racing industry in Moreton Bay.

The racing industry in the **Moreton Bay region** is responsible for generating **\$42.0 million** in **value added** contribution to gross state product. This represents **2.8% of the industry total**.

RACING CLUBS IN THE REGION

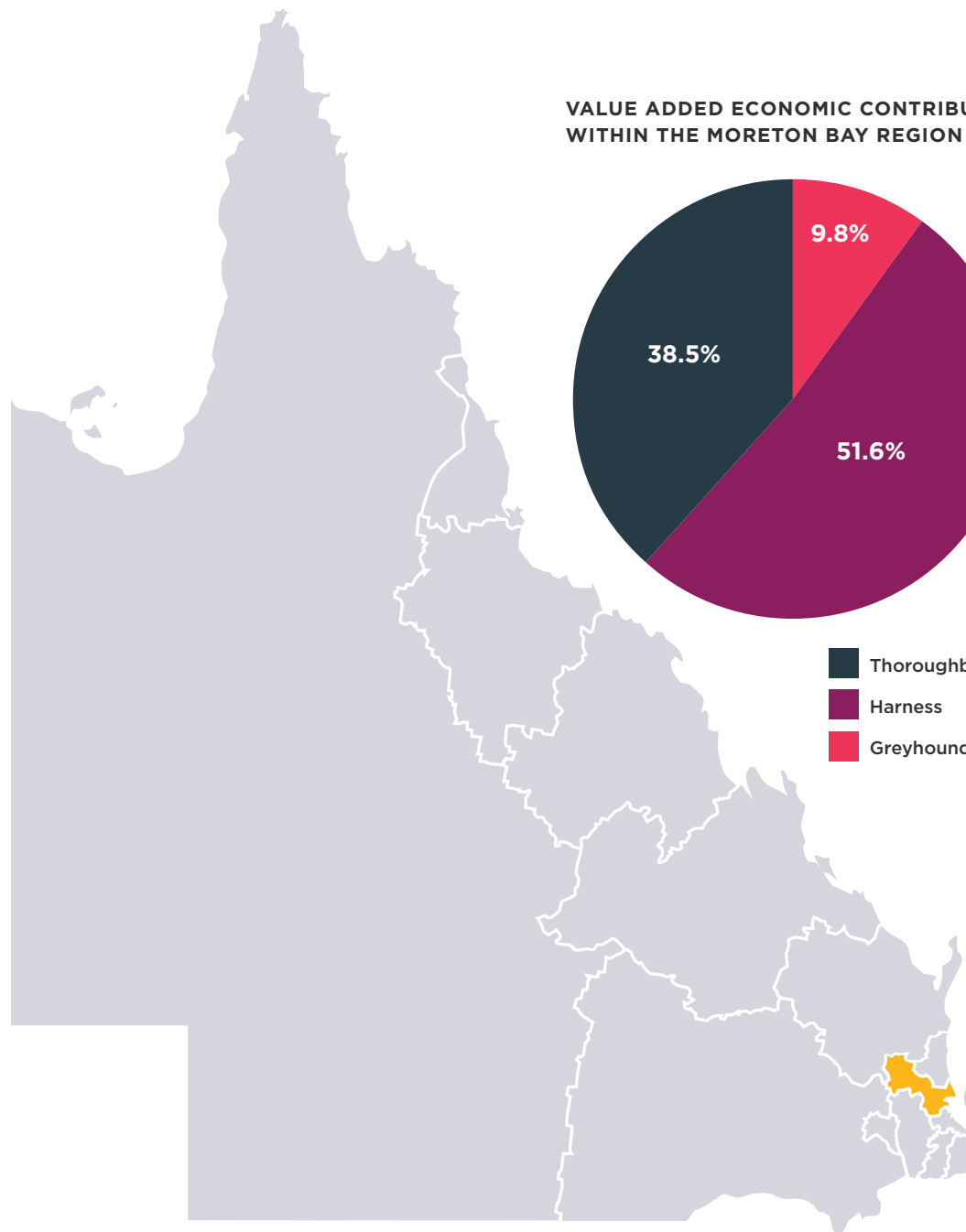
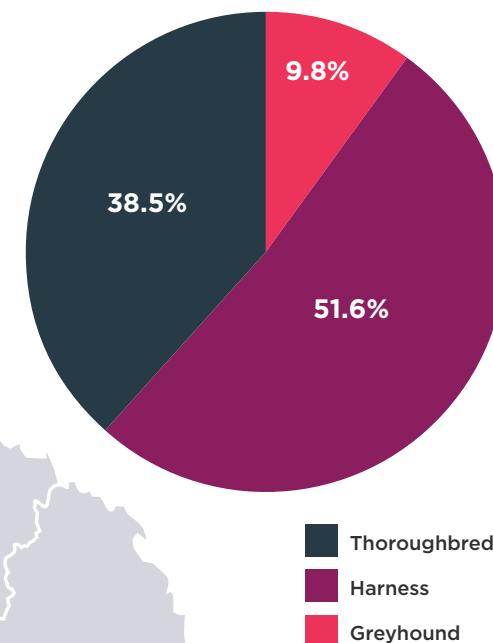
Thoroughbred

- + Kilcoy Race Club Inc.

Harness

- + Redcliffe Peninsula Harness Racing & Sporting Club Inc.

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



AT A GLANCE

2 Racing Clubs

THOROUGHBRED	1
HARNESS	1

115 Race Meetings

THOROUGHBRED	8
HARNESS	107

908 Races

THOROUGHBRED	52
HARNESS	856

178 Racing Club Members

THOROUGHBRED	78
HARNESS	100

25,022 Attendances

THOROUGHBRED	6,600
HARNESS	18,422

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$17.6m	\$23.4m	\$4.7m	\$45.6m
Total value added	\$16.2m	\$21.7m	\$4.1m	\$42.0m
Full-time equivalent employment	143	181	37	360

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	58	45	65	168
Horses and greyhounds in training	13	215	222	451

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	68	48	35	151
Owners	1,098	193	142	1,433
Trainers	10	65	80	155
Breeders staff	95	24	23	142
Stable/Kennel employees	102	34	80	216
Racing Club & industry staff (FT, PT, casual)	12	27	0	39
Jockeys, drivers & apprentices	13	39	0	52
Racing club volunteers	0	0	0	0
Volunteers assisting participants	74	212	145	431
Total participants in the Moreton Bay region	1,472	642	505	2,619

Race meetings in the Moreton Bay region attracted attendances of **25,022 or 3.0% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE MORETON BAY REGION



Queensland Outback

- + The population of the Queensland Outback region is 82,452 (2016 Projected Census).
- + There are a total of thirty-seven (37) racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Queensland - Outback region is responsible for generating more than \$22.3 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 195 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,700 participants in the racing industry in Queensland - Outback.

The racing industry in the **Queensland - Outback region is responsible for generating \$22.3 million in value added** contribution to gross state product. This represents **1.5% of the industry total.**

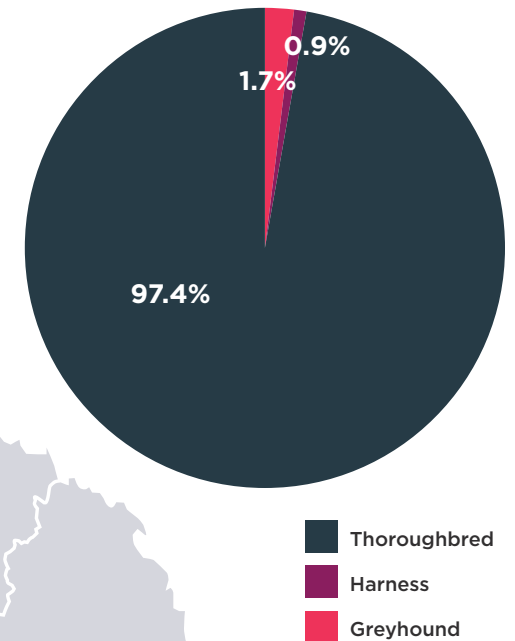
RACING CLUBS IN THE REGION

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
- + Camooweal Jockey Club
- + Central Warrego Race Club
- + Cloncurry & District Race Club Inc.
- + Cooktown Amateur Turf Club
- + Cordfield Race Club
- + Cunnamulla & District Diggers Race Club Inc.
- + Gregory Downs Jockey Club Inc.
- + Hughenden Jockey Club Inc.

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

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



AT A GLANCE

37 Racing Clubs

THOROUGHBRED 37

90 Race Meetings

THOROUGHBRED 90

492 Races

THOROUGHBRED 492

2,543 Racing Club Members

THOROUGHBRED 2,543

46,963 Attendances

THOROUGHBRED 46,963

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$31.2m	\$0.3m	\$0.6m	\$32.1m
Total value added	\$21.8m	\$0.2m	\$0.4m	\$22.3m
Full-time equivalent employment	189	2	4	195

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	6	0	0	6
Horses and greyhounds in training	446	0	3	449

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	8	0	0	8
Owners	605	0	8	613
Trainers	70	1	3	74
Breeders staff	12	0	0	12
Stable/Kennel employees	92	0	3	94
Racing Club & industry staff (FT, PT, casual)	577	0	0	577
Jockeys, drivers & apprentices	17	0	0	17
Racing club volunteers	1,178	0	0	1,178
Volunteers assisting participants	145	1	3	149
Total participants in the Queensland - Outback region	2,704	2	16	2,723

Race meetings in the Queensland - Outback region attracted attendances of **46,963** or **5.6%** of total attendances at race meetings in Queensland.

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



Sunshine Coast

- + The population of the Sunshine Coast region is 357,422 (2016 Projected Census).
- + 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 almost \$81.5 million in value added contribution to Gross State Product. This equates to 5.4% 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 678 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,900 participants in the racing industry in Sunshine Coast.

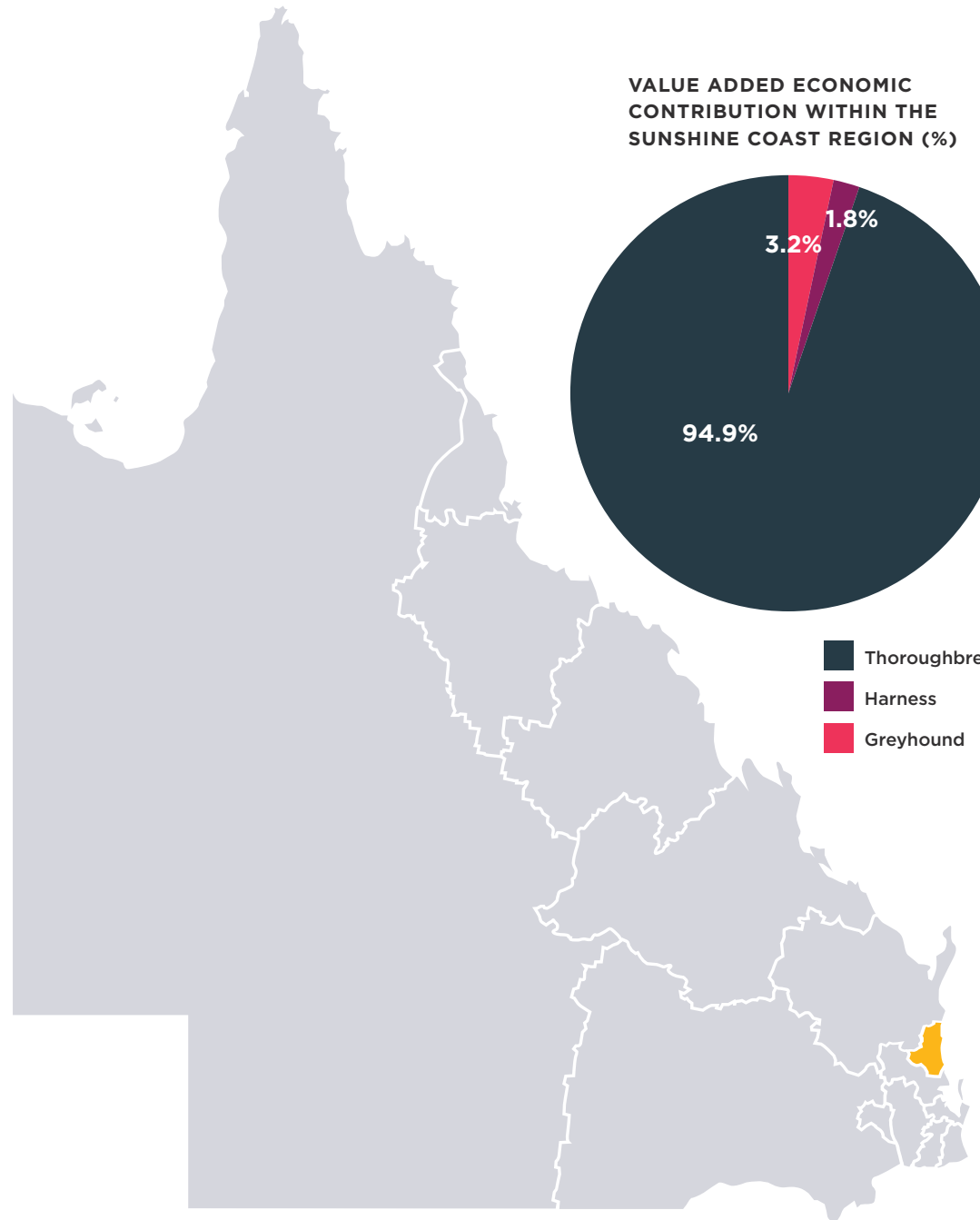
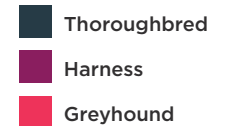
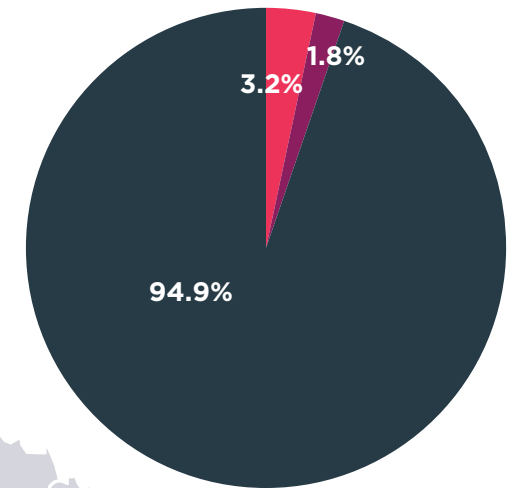
The racing industry in the **Sunshine Coast region** is responsible for generating **\$81.5 million** in **value added** contribution to gross state product. This represents **5.4%** of the industry total.

RACING CLUBS IN THE REGION

Thoroughbred

- + Sunshine Coast Turf Club Inc.

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



AT A GLANCE

1 Racing Club

THOROUGHBRED 1

72 Race Meetings

THOROUGHBRED 72

567 Races

THOROUGHBRED 567

830 Racing Club Members

THOROUGHBRED 830

72,839 Attendances

THOROUGHBRED 72,839

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$79.5m	\$1.5m	\$2.8m	\$83.9m
Total value added	\$77.4m	\$1.5m	\$2.6m	\$81.5m
Full-time equivalent employment	642	13	24	678

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	68	8	9	86
Horses and greyhounds in training	914	0	46	960

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	38	6	10	54
Owners	1,315	22	44	1,381
Trainers	66	1	12	79
Breeders staff	19	3	6	28
Stable/Kennel employees	180	4	12	196
Racing Club & industry staff (FT, PT, casual)	30	0	0	30
Jockeys, drivers & apprentices	25	0	0	25
Racing club volunteers	7	0	0	7
Volunteers assisting participants	61	17	27	104
Total participants in the Sunshine Coast region	1,741	53	112	1,905

Race meetings in the Sunshine Coast region attracted attendances of **72,839** or **8.7%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE SUNSHINE COAST REGION



Toowoomba

- + The population of the Toowoomba region is 153,201 (2016 Projected Census).
- + There are a total of two (2) racing clubs operating in the region, both of which are thoroughbred clubs.
- + The racing industry in the Toowoomba region is responsible for generating more than \$57.5 million in value added contribution to Gross State Product. This equates to 3.8% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 460 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,270 participants in the racing industry in Toowoomba.

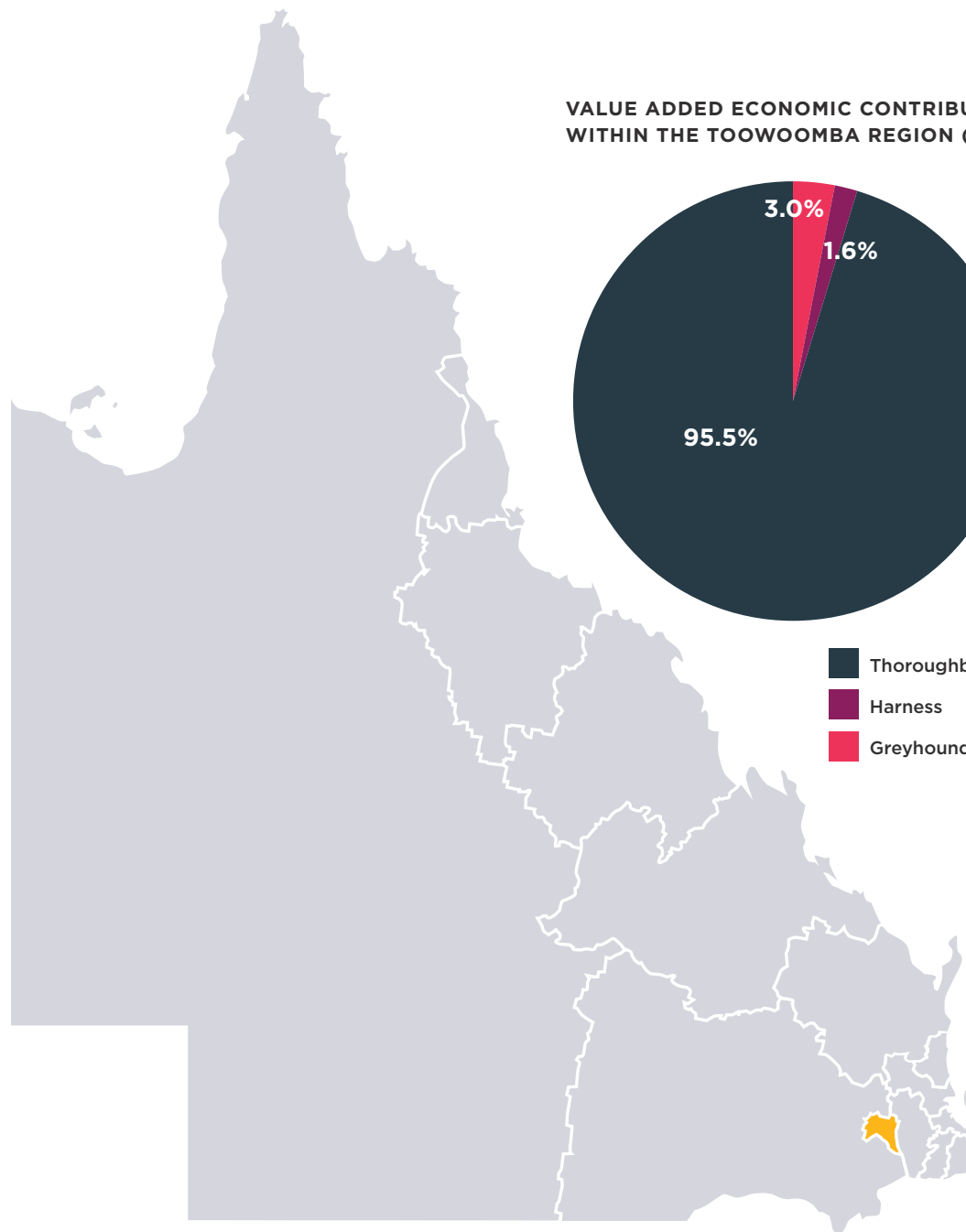
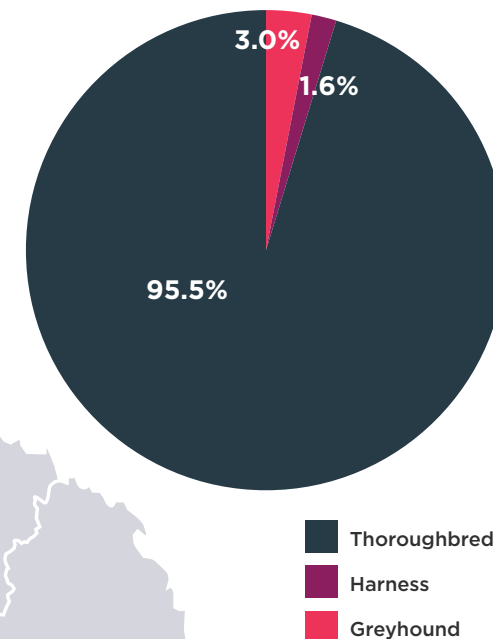
The racing industry in the **Toowoomba region is responsible for generating \$57.5 million in value added** contribution to gross state product. This represents **3.8% of the industry total.**

RACING CLUBS IN THE REGION

Thoroughbred

- + Lockyer Valley Turf Club
- + Toowoomba Turf Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOOWOOMBA REGION (%)



AT A GLANCE

2 Racing Club

THOROUGHBRED 2

53 Race Meetings

THOROUGHBRED 53

386 Races

THOROUGHBRED 386

449 Racing Club Members

THOROUGHBRED 449

21,744 Attendances

THOROUGHBRED 21,744

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$58.5m	\$1.0m	\$1.9m	\$61.4m
Total value added	\$54.9m	\$0.9m	\$1.7m	\$57.5m
Full-time equivalent employment	438	8	15	460

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	427	3	42	472
Horses and greyhounds in training	1,006	9	121	1,136

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	102	5	13	121
Owners	984	14	61	1,060
Trainers	85	9	20	114
Breeders staff	143	3	9	154
Stable/Kennel employees	206	2	20	227
Racing Club & industry staff (FT, PT, casual)	234	0	0	234
Jockeys, drivers & apprentices	22	6	0	27
Racing club volunteers	16	0	0	16
Volunteers assisting participants	250	25	44	319
Total participants in the Toowoomba region	2,042	63	167	2,272

Race meetings in the Toowoomba region attracted attendances of **21,744 or 2.6% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE TOOWOOMBA REGION



Townsville

- + The population of the Townsville region is 235,037 (2016 Projected Census).
- + 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 more than \$29.2 million in value added contribution to Gross State Product. This equates to 1.9% 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 254 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,800 participants in the racing industry in Townsville.

RACING CLUBS IN THE REGION

Thoroughbred

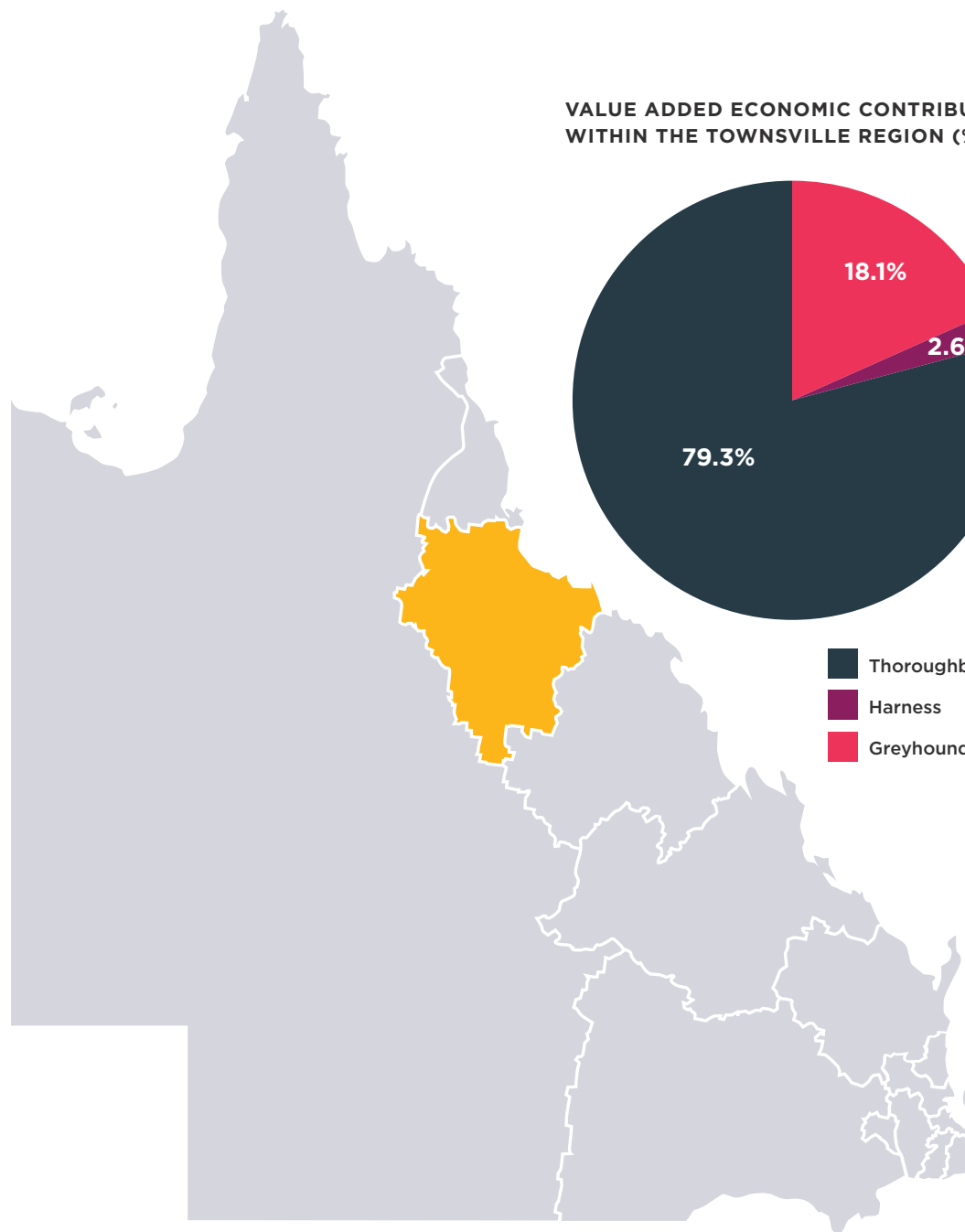
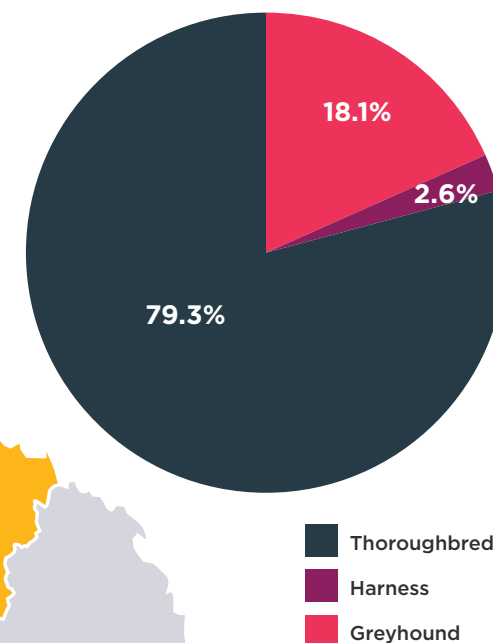
- + Burdekin Race Club Inc.
- + Charter Towers Race Club Inc.
- + Einasleigh Race Club Inc.
- + Ewan Amateur Turf Club Inc.
- + Herbert River Jockey Club Inc.
- + Pentland Race Club Inc.
- + Towers Jockey Club
- + Townsville Turf Club Inc.

Greyhound

- + Townsville Greyhound Racing Club Inc.

The racing industry in the **Townsville region is responsible for generating \$29.2 million in value added** contribution to gross state product. This represents **1.9% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOWNSVILLE REGION (%)



AT A GLANCE

9 Racing Clubs

THOROUGHBRED	8
GREYHOUND	1

98 Race Meetings

THOROUGHBRED	49
GREYHOUND	49

820 Races

THOROUGHBRED	315
GREYHOUND	505

1,097 Racing Club Members

THOROUGHBRED	1,071
GREYHOUND	26

36,383 Attendances

THOROUGHBRED	32,896
GREYHOUND	3,487

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$25.5m	\$0.9m	\$6.1m	\$32.5m
Total value added	\$23.2m	\$0.8m	\$5.3m	\$29.2m
Full-time equivalent employment	200	7	47	254

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	19	0	28	47
Horses and greyhounds in training	258	0	251	508

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	8	1	0	9
Owners	831	7	101	940
Trainers	61	0	54	114
Breeders staff	12	1	0	12
Stable/Kennel employees	109	0	54	163
Racing Club & industry staff (FT, PT, casual)	129	0	16	145
Jockeys, drivers & apprentices	13	0	0	13
Racing club volunteers	218	0	6	224
Volunteers assisting participants	126	3	59	188
Total participants in the Townsville region	1,507	12	290	1,809

Race meetings in the Townsville region attracted attendances of **36,383** or **4.4%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE TOWNSVILLE REGION



Wide Bay

- + The population of the Wide Bay region is 292,364 (2016 Projected Census).
- + There are a total of eleven (11) racing clubs operating in the region, ten (10) of which are thoroughbred clubs, and one (1) greyhound racing club.
- + The racing industry in the Wide Bay region is responsible for generating more than \$26.1 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 226 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,400 participants in the racing industry in Wide Bay.

RACING CLUBS IN THE REGION

Thoroughbred

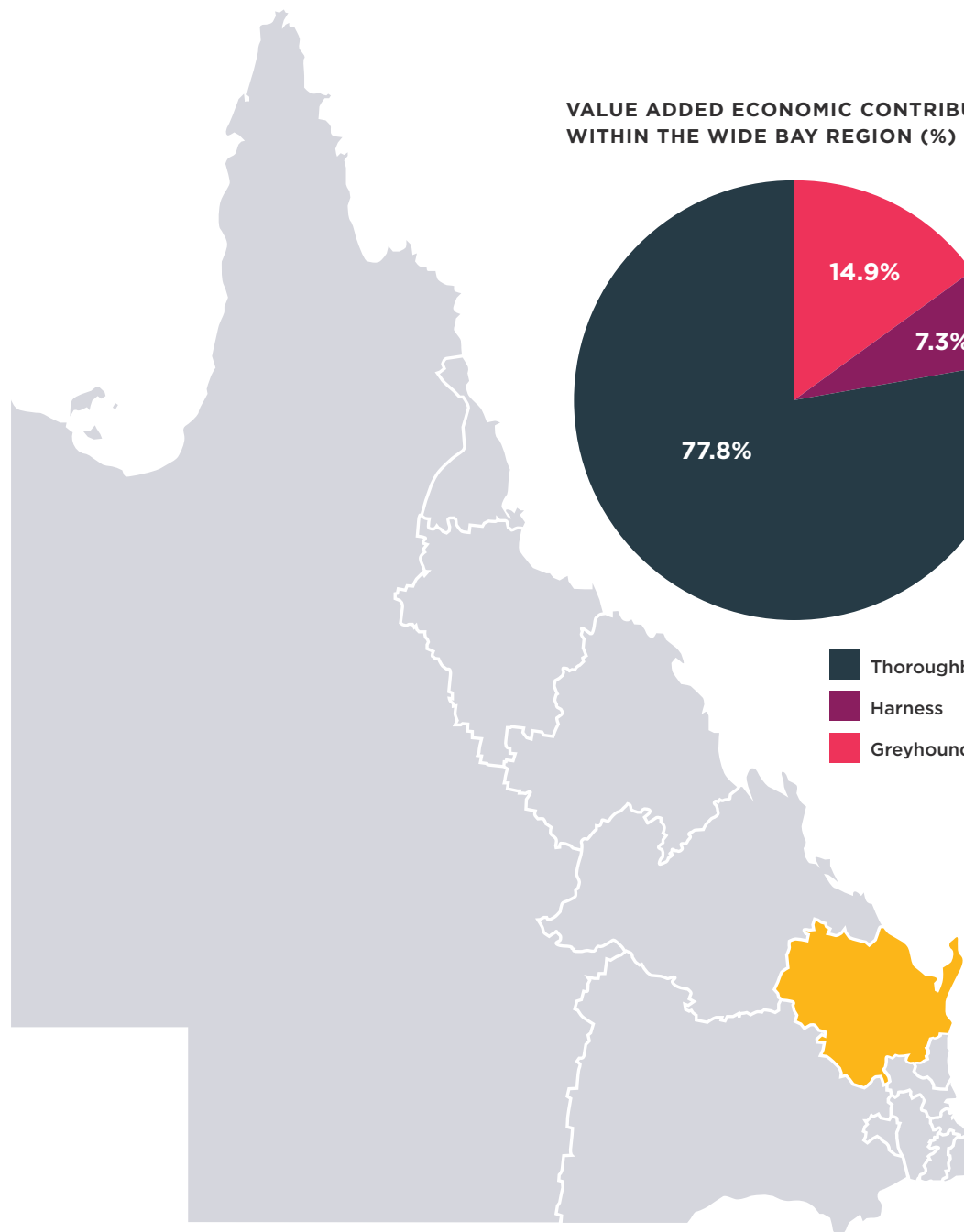
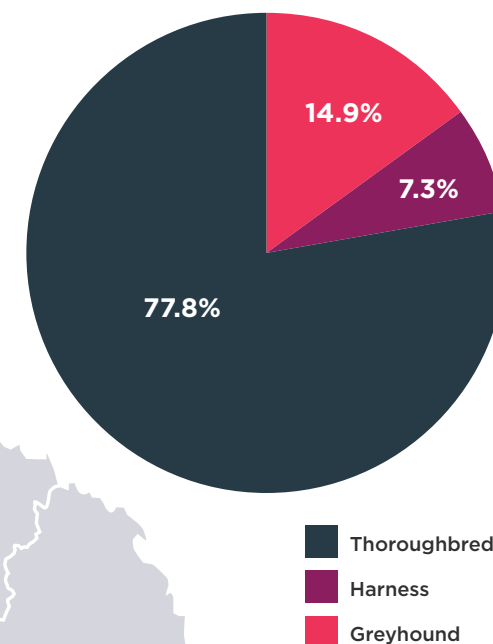
- + Bundaberg Race Club Inc.
- + Burrandowan Picnic Races Inc.
- + Eidsvold Race Club Inc.
- + Gayndah Jockey Club Inc.
- + Gympie Turf Club
- + Kumbia Race Club
- + Monto Race Club
- + Mt Perry Race Club Inc.
- + Nanango Race Club Inc.
- + South Burnett Race Club

Greyhound

- + Bundaberg Greyhound Racing Club Inc.

The racing industry in the **Wide Bay region is responsible for generating \$26.1 million in value added** contribution to gross state product. This represents **1.7% of the industry total.**

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



AT A GLANCE

11 Racing Clubs

THOROUGHBRED	10
GREYHOUND	1

69 Race Meetings

THOROUGHBRED	30
HARNESS	2
GREYHOUND	37

437 Races

THOROUGHBRED	155
HARNESS	6
GREYHOUND	276

639 Racing Club Members

THOROUGHBRED	594
GREYHOUND	45

27,861 Attendances

THOROUGHBRED	25,961
GREYHOUND	1,900

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$23.8m	\$2.3m	\$4.8m	\$30.8m
Total value added	\$20.3m	\$1.9m	\$3.9m	\$26.1m
Full-time equivalent employment	175	16	34	226

ANIMALS

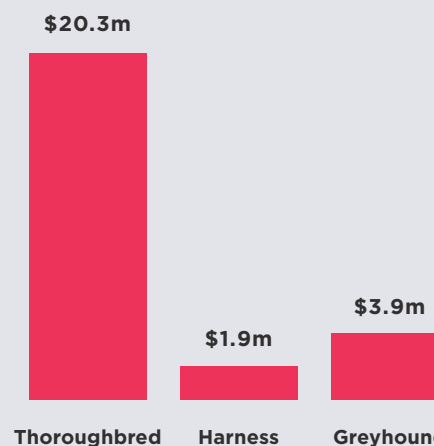
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	114	9	57	180
Horses and greyhounds in training	295	23	228	545

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	99	10	29	138
Owners	696	18	95	809
Trainers	45	8	47	101
Breeders staff	138	5	19	162
Stable/Kennel employees	97	3	47	148
Racing Club & industry staff (FT, PT, casual)	191	0	13	204
Jockeys, drivers & apprentices	8	5	0	13
Racing club volunteers	556	0	25	581
Volunteers assisting participants	168	38	100	306
Total participants in the Wide Bay region	1,999	87	375	2,462

Race meetings in the Wide Bay region attracted attendances of **27,861** or **3.3%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE WIDE BAY REGION



South East Queensland

- + The population of the South East Queensland region is 2,690,150 (2016 Projected Census).
- + There are a total of fourteen (14) racing clubs operating in the region, eight (8) of which are thoroughbred clubs, three (3) of which are harness racing clubs and three (3) greyhound racing clubs.
- + The racing industry in the South East Queensland region is responsible for generating more than \$1.2 billion in value added contribution to Gross State Product. This equates to 79.3% 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 8,896 full-time equivalent (FTE) jobs in the region.
- + There are more than 18,500 participants in the racing industry in South East Queensland.

RACING CLUBS IN THE REGION

Thoroughbred

- + Brisbane Racing Club
- + Esk Jockey Club
- + Gold Coast Turf Club Ltd
- + Ipswich Turf Club
- + Sunshine Coast Turf Club Inc.
- + Tattersall's Racing Club

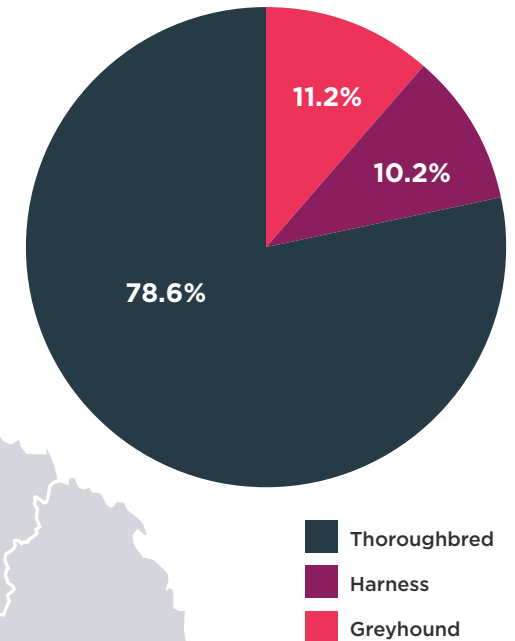
Harness

- + Albion Park Harness Racing Club
- + Gold Coast Harness Racing Club
- + Lockyer Valley Turf Club
- + Marburg Pacing Association Inc.
- + Toowoomba Turf Club

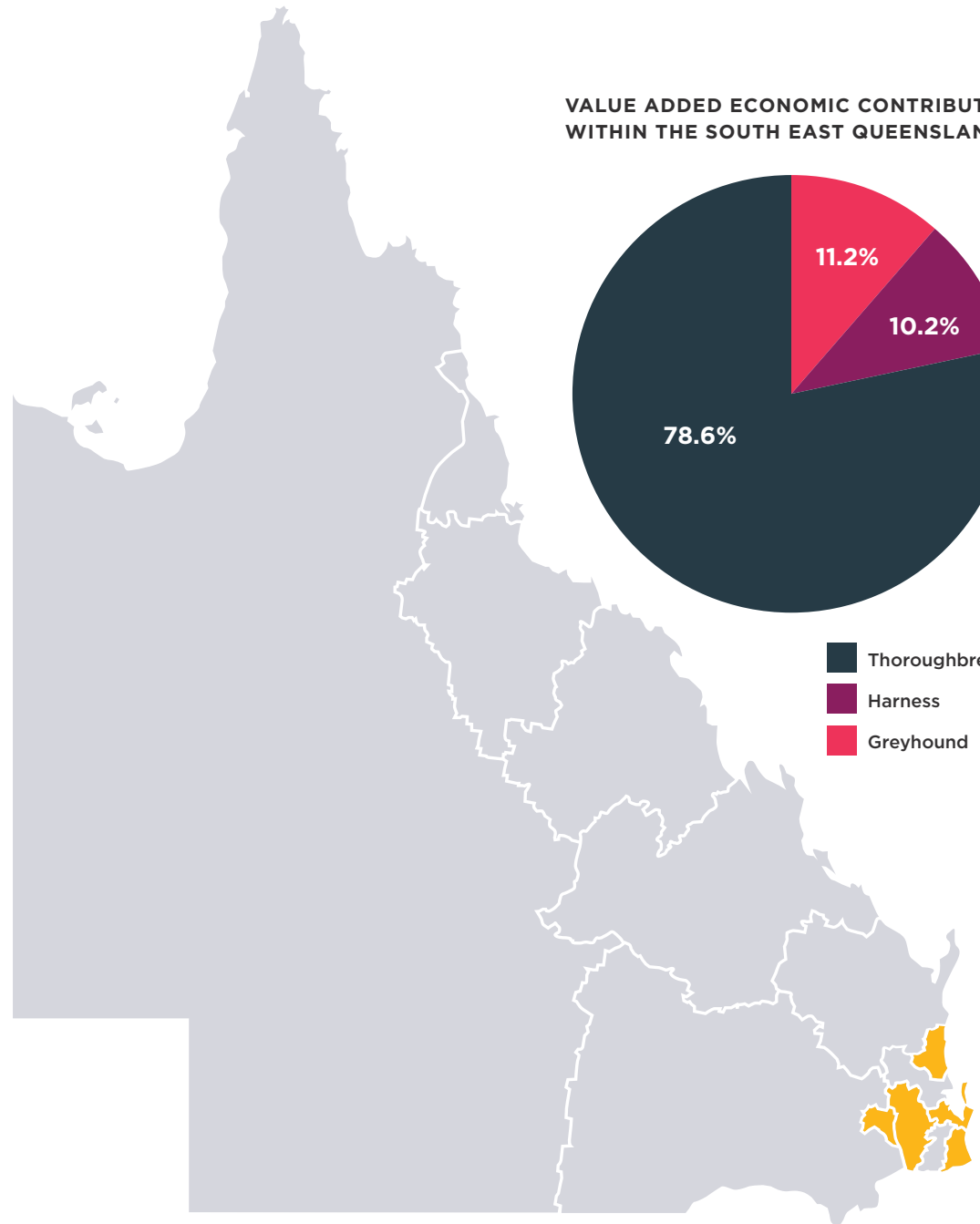
Greyhound

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

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE SOUTH EAST QUEENSLAND



The racing industry in the **South East Queensland region** is responsible for generating **\$1.2 billion** in value added contribution to gross state product. This represents **79.3%** of the industry total.



AT A GLANCE

14 Racing Clubs

THOROUGHBRED	8
HARNESS	3
GREYHOUND	3

851 Race Meetings

THOROUGHBRED	283
HARNESS	169
GREYHOUND	399

7,749 Races

THOROUGHBRED	2,244
HARNESS	1,463
GREYHOUND	4,042

11,600 Racing Club Members

THOROUGHBRED	10,735
HARNESS	627
GREYHOUND	238

513,702 Attendances

THOROUGHBRED	418,478
HARNESS	54,330
GREYHOUND	40,894

*Some totals do not add due to rounding

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$667.3m	\$85.9m	\$103.1m	\$856.3m
Total value added	\$949.1m	\$123.0m	\$135.8m	\$1,207.9m
Full-time equivalent employment	6,958	891	1,046	8,896

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	931	168	599	1,698
Horses and greyhounds in training	4,731	648	1,656	7,035

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	695	146	147	988
Owners	10,079	455	706	11,240
Trainers	354	138	272	765
Breeders staff	440	73	95	608
Stable/Kennel employees	984	69	272	1,325
Racing Club & industry staff (FT, PT, casual)	1,040	70	249	1,359
Jockeys, drivers & apprentices	116	103	0	218
Racing club volunteers	60	33	21	114
Volunteers assisting participants	848	583	530	1,962
Total participants in the South East Queensland region	14,616	1,670	2,293	18,579

Race meetings in the South East Queensland region attracted attendances of **513,702** or **61.7%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE SOUTH EAST QUEENSLAND



About IER

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

This study constitutes an economic and social impact evaluation of the Queensland racing industry (including the thoroughbred, harness and greyhound racing codes). 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:

- + South Australian Racing Industry (3 Codes)
- + Queensland racing industry (3 Codes)
- + Thoroughbred Racing Industry in Country Victoria
- + Northern Territory Thoroughbred Racing Industry
- + Standardbred and Thoroughbred Racing in British Columbia
- + Australian Harness Racing Industry
- + New Zealand Racing Industry (3 Codes)
- + Western Australian Racing Industry (3 Codes)
- + Victorian Racing Industry (3 Codes)
- + Tasmanian Racing Industry (3 Codes)

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

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

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

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

- + Pre-event evaluation of impacts of the Sydney Olympic Games on NSW – with KPMG
- + Size and Scope study of the Victorian Racing Industry (2012)
- + Size and Scope study of the Tasmanian Racing Industry (2012)
- + Economic Impact assessment of the InterDominion (Sydney) 2013 - 2016
- + Annual assessment of the Adelaide Fringe, WomAdelaide and Clipsal 500 (over the last 5-10 years)
- + Size and Scope Study of Thoroughbred Racing Industry in NT
- + Size and Scope of the Western Australian Racing Industry (2014)

Barry provides the economic modelling and advisory services to IER.

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

Definitions

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

+ Direct Expenditure - is defined as expenditure associated with producing racing animals (breeding and rearing), preparing racing animals (training), racing customer expenditure and expenditure by RQ and racing clubs on operating the industry. Direct expenditure is counted at the point at which it leaves the racing industry and hits the broader economy.

+ Direct Economic Impact (value added) - represents the amount of income included in the direct in-scope expenditure, and therefore is the amount of wages and salaries plus gross operating surplus directly created in supply these services and product, which is also equal to the direct in scope expenditure less the purchases the provider of the goods and services makes in providing the goods and services

+ Indirect Economic Impact (flow-on) - represents the value added activity generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this

+ Total Value Added - is the sum of the direct value added plus the flow on impact. It therefore represents the contribution to Gross State Product resulting from the events and activities of the Queensland racing industry

+ Full-time Equivalent Employment - is a unit that indicates the workload of an employed person in a way that makes workloads or class loads comparable across various contexts. An FTE of 1.0 is equivalent to a full-time worker (i.e. 38 hours), while an FTE of 0.5 signals half of a full work load (i.e. 19 hours).

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

+ Participants in Racing - is defined as being the number of employees (full-time, part-time and casual), participants and volunteers directly involved in the racing industry. Does not include down-the-line suppliers of goods and services

+ Input Output Modelling - is the economic modelling used to determine the economic outputs within this study. It is an economy wide model, which shows the inter-linkages between industry sectors in the economy. Therefore, the change in economic circumstances (specifically a change in final demand), for one sector of the economy can be traced though to its effect on other sectors.

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



FOCUSED THINKING



RACING
QUEENSLAND