

Size and Scope of the

# QUEENSLAND RACING INDUSTRY

PREPARED BY IER | MAY 2025









## Contents

<b>KEY FINDINGS</b>	<b>04</b>
<b>INTRODUCTION</b>	<b>10</b>
<b>ECONOMIC IMPACTS</b>	<b>14</b>
<b>EMPLOYMENT AND SUPPLY</b>	<b>18</b>
<b>RACING'S PARTICIPANTS AND ANIMALS</b>	<b>26</b>
<b>THE TRAINING INDUSTRY</b>	<b>38</b>
<b>RACING CLUBS, ASSOCIATIONS AND AUTHORITIES</b>	<b>52</b>
<b>MAJOR EVENT IMPACTS</b>	<b>64</b>
<b>SOCIAL AND COMMUNITY ENGAGEMENT</b>	<b>66</b>
<b>REGIONAL SUMMARIES</b>	<b>76</b>
<b>APPENDIX</b>	<b>104</b>

## KEY FINDINGS

In 2023/24 the Queensland racing industry was responsible for **generating close to \$2.5 billion in value added contribution** to the Queensland economy – **51% of which directly benefits regional economies**

### DIRECT SPENDING IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Direct Expenditure <sup>1</sup>	\$1,460.8m	\$182.2m	\$252.1m	\$1,895.1m

### ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Value Added <sup>2</sup>	\$1,892.3m	\$233.4m	\$331.2m	\$2,456.9m
% of Industry Value Added	77.0%	9.5%	13.5%	
Total Household Income <sup>3</sup>	\$1,033.7m	\$127.1m	\$187.0m	\$1,347.8m
Total FTE Employment	11,143	1,360	1,969	14,472

In 2023/24, the Queensland racing industry generated total direct spending of \$1,895.1 million. This expenditure was responsible for creating a direct value added impact (in terms of wages, salaries and profits) of \$900.3 million. However, the flow-on effects linked to this expenditure increase the size of the industry's value added contribution to almost \$2.5 billion.

More than half of the total value added impact occurred in regional areas of Queensland, with the Gold Coast (13.3%), Darling Downs - Maranoa (7.4%) and Ipswich (6.5%) 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 6,911 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 14,472 jobs. This total represents the employment sustained within the industry, as well as the employment that is sustained in supply industries who meet the demand created by racing industry activity.

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

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

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







Of the **14,472 FTE jobs sustained** by the Queensland racing industry over **48%** are the **direct result of the racing industry activity** whilst the remainder support down-the-line industries that **produce and supply goods and services** for racing in Queensland



In 2023/24, over 810,600 attendances were recorded at thoroughbred, harness and greyhound race meetings in Queensland. Approximately 73% of these attendances were made at racecourses outside Brisbane, with the Gold Coast (13.9%), Darling Downs (10.0%) and Sunshine Coast (9.1%), representing the largest regions.

Participants are the lifeblood of the racing industry. They provide the investment, time, skills and passion that underpins horse and greyhound racing in the state. In total, there are close to 49,250 roles occupied in the Queensland racing industry. Many of these people enjoy gainful employment of their specific skillset where they may find limited opportunities otherwise - particularly in the breeding, training and racing related disciplines. Furthermore, many participants hold more than one role within the industry.

The industry is supported by more than 7,500 volunteer roles providing their time and resources. For many of these people, local racing clubs and participants are an important part of their community and provide valuable opportunities to stay active and engage with their community.

There are close to **32 race meetings held in Queensland** every week providing live entertainment to **over 810,600 attendees**

## AT A GLANCE

### RACING ACTIVITY

#### 120 Racing Clubs

<b>THOROUGHBRED</b>	<b>111</b>
<b>HARNESS</b>	<b>4</b>
<b>GREYHOUND</b>	<b>5</b>

#### 1,444 TAB Race Meetings

<b>THOROUGHBRED</b>	<b>465</b>
<b>HARNESS</b>	<b>304</b>
<b>GREYHOUND</b>	<b>675</b>

#### 215 Non-TAB Race Meetings

<b>THOROUGHBRED</b>	<b>213</b>
<b>HARNESS</b>	<b>1</b>
<b>GREYHOUND</b>	<b>1</b>

#### 15,239 Total Races

<b>THOROUGHBRED</b>	<b>4,762</b>
<b>HARNESS</b>	<b>2,752</b>
<b>GREYHOUND</b>	<b>7,725</b>

#### 810,626 Attendances

<b>THOROUGHBRED</b>	<b>666,399</b>
<b>HARNESS</b>	<b>69,016</b>
<b>GREYHOUND</b>	<b>75,211</b>

#### 3,065 Live Foals/ Pups Bred

<b>THOROUGHBRED</b>	<b>1,658</b>
<b>HARNESS</b>	<b>316</b>
<b>GREYHOUND</b>	<b>1,091</b>

#### 15,132 Horses and Greyhounds in Training

<b>THOROUGHBRED</b>	<b>9,709</b>
<b>HARNESS</b>	<b>1,140</b>
<b>GREYHOUND</b>	<b>4,283</b>





## AT A GLANCE

### THE PEOPLE

#### 1,277 Breeders

THOROUGHBRED	706
HARNESS	200
GREYHOUND	371

#### 28,574 Owners

THOROUGHBRED	22,458
HARNESS	747
GREYHOUND	5,369

#### 2,170 Trainers

THOROUGHBRED	1,219
HARNESS	259
GREYHOUND	692

#### 4,996 Racing Club & Industry Staff

THOROUGHBRED	4,145
HARNESS	260
GREYHOUND	591

#### 4,337 Staff employed by participants

THOROUGHBRED	3,353
HARNESS	272
GREYHOUND	712

There are **close to 49,248 roles occupied** in the Queensland racing industry as an **employee, participant or volunteer**. Almost **80% of these participants** in racing are in **regional communities**

#### 381 Jockeys & Drivers

THOROUGHBRED	234
HARNESS	147

#### 7,513 Volunteers

THOROUGHBRED	5,530
HARNESS	899
GREYHOUND	1,084

## Historical snapshot

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

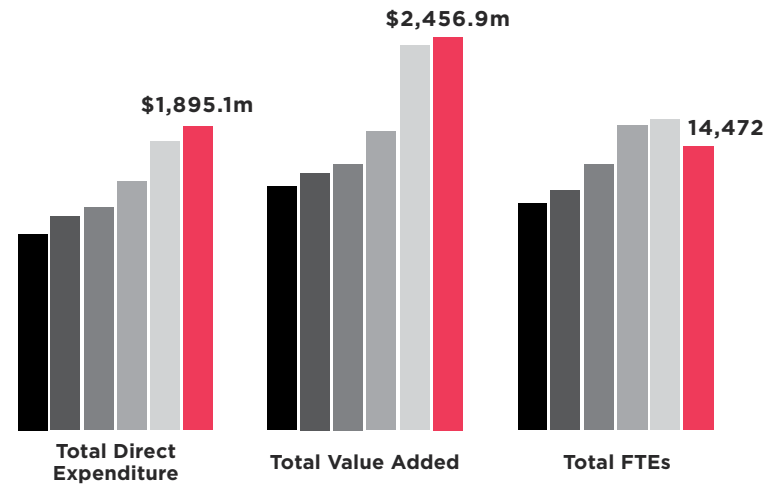
The following charts illustrate the key economic indicators across previous Queensland Racing size and scope studies since 2018/19.

When comparing the overall results for the racing industry in Queensland it is evident that although overall direct expenditure and value added contribution has grown year-on-year, in 2023/24 the number of FTE jobs experienced a decline due to macro-economic factors.

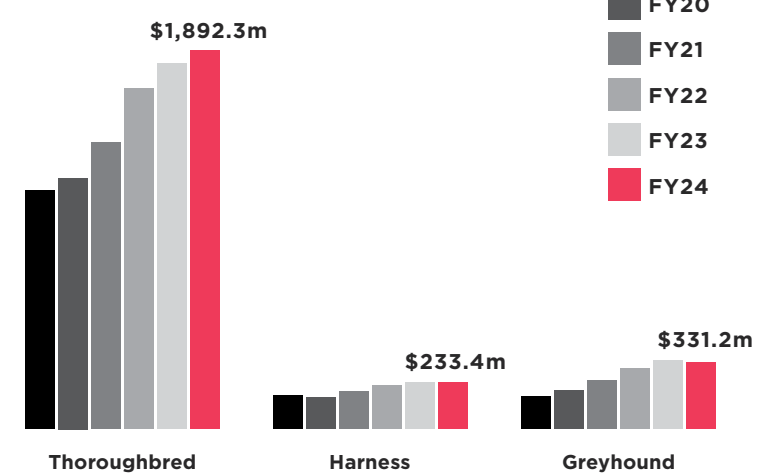
In 2023/24 this pattern was also evident across all of the three codes. Looking at the total direct expenditure it is evident that there was an increase across all three of the codes in 2023/24. Thoroughbreds experienced the largest growth in total direct expenditure in 2023/24 increasing by 7%, this was followed by Harness (3%) while Greyhound decreased 2%.

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

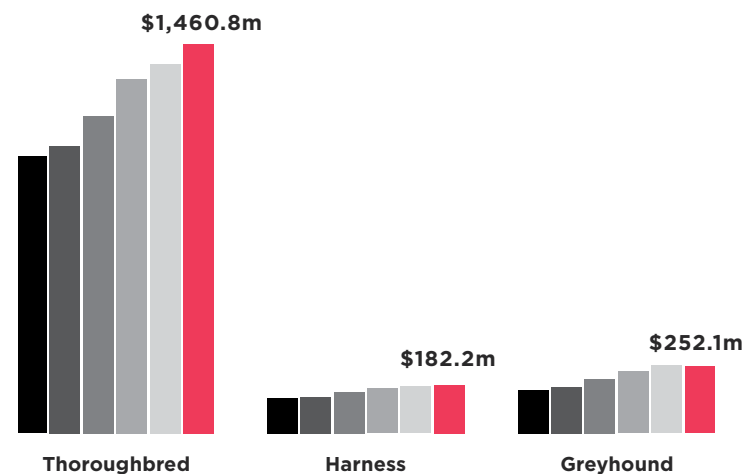
#### AGGREGATE KEY ECONOMIC INDICATORS



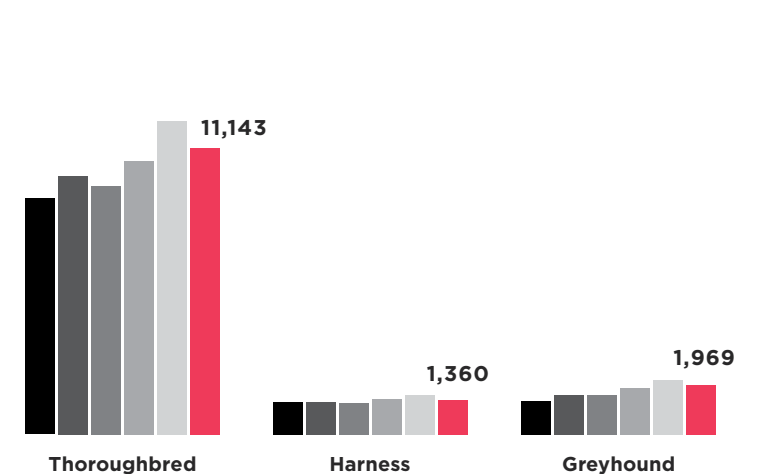
#### TOTAL VALUE ADDED BY CODE



#### TOTAL DIRECT EXPENDITURE BY CODE



#### TOTAL FTE BY CODE









# INTRODUCTION

In July 2024, Racing Queensland commissioned a study into the size and scope of the three codes of racing in Queensland. The last size and scope study was undertaken in for the 2022/23 racing year.

## PURPOSE OF THE STUDY

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

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

## STUDY METHODOLOGY

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





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

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

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

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

This study also provides an estimate of the number of people involved in racing as a licensed participant, volunteer or employee. There is some level of duplication in some of the participation categories resulting from an inability to de-

duplicate individual databases. Conversely, it is widely acknowledged that there is a significant cohort of individuals, involved in racing, who are not accounted for in any official database (i.e. members of micro syndicates, members of companies or trusts which have ownership in racing animals). As such, when the report presents a sub-total of the participants in racing, these factors above should be considered.

### ECONOMIC METHODOLOGY

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

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

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

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

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

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

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

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

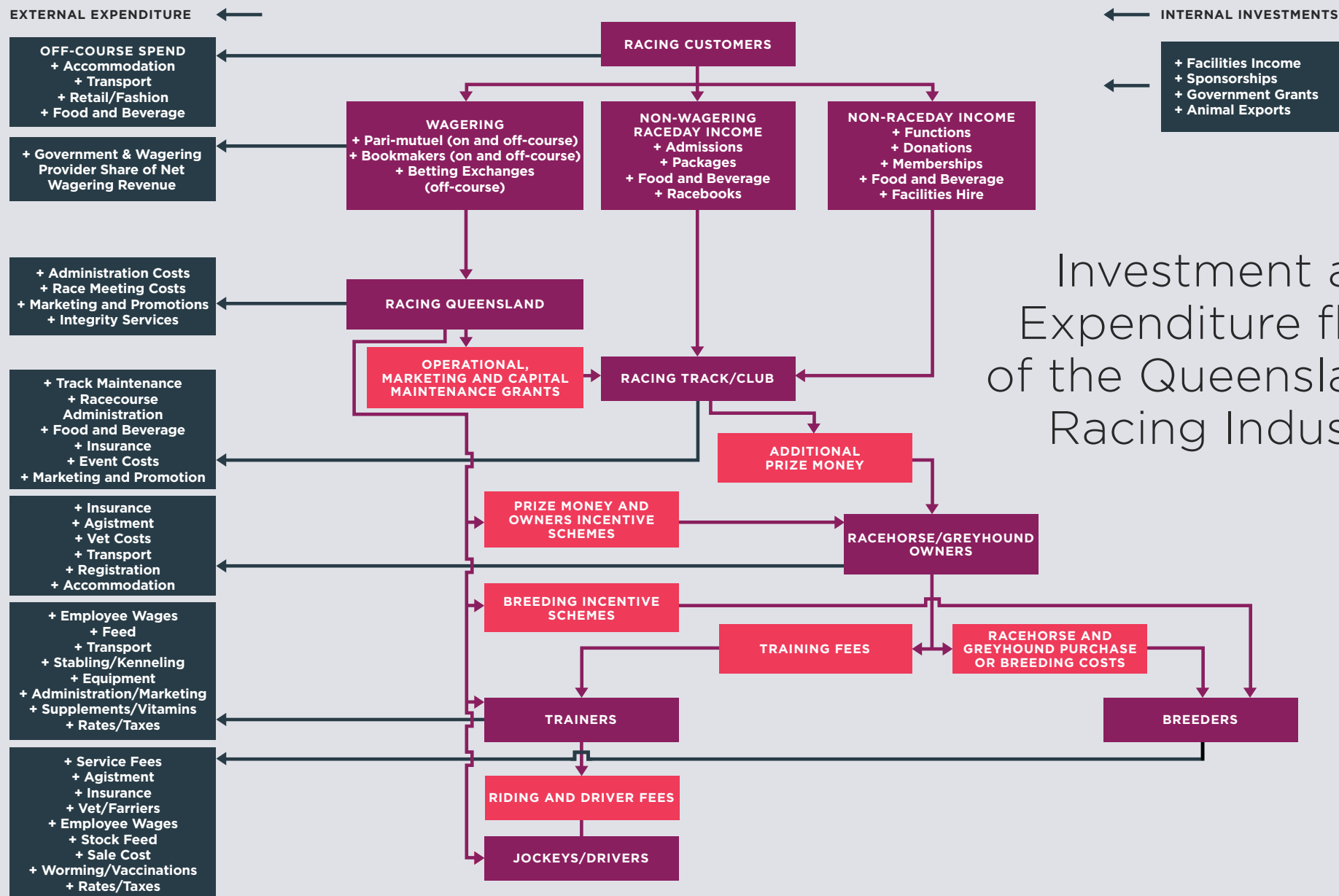
**3 Economic modelling** IER has utilised an input output methodology for the calculation of economic impacts associated with the racing industry in Queensland. The input output model provides direct and indirect impacts in relation to value added, income and employment. This study is based on the 2022/23 national input output tables.

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

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

Note that in this report (2023-24) Logan-Beaudesert has been combined with the Gold Coast to make one region called the 'Gold Coast.

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







## ECONOMIC IMPACTS

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

### Direct Spending by the Queensland racing industry

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

In 2023/24 the Queensland racing industry generated \$1.9 billion in direct expenditure. The calculation of direct expenditure is based on

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



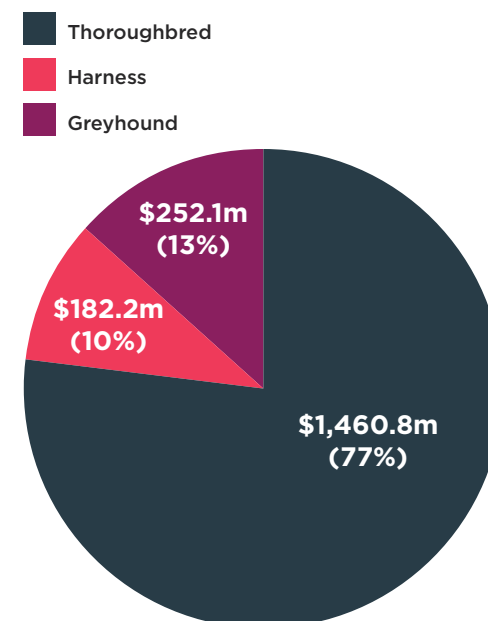


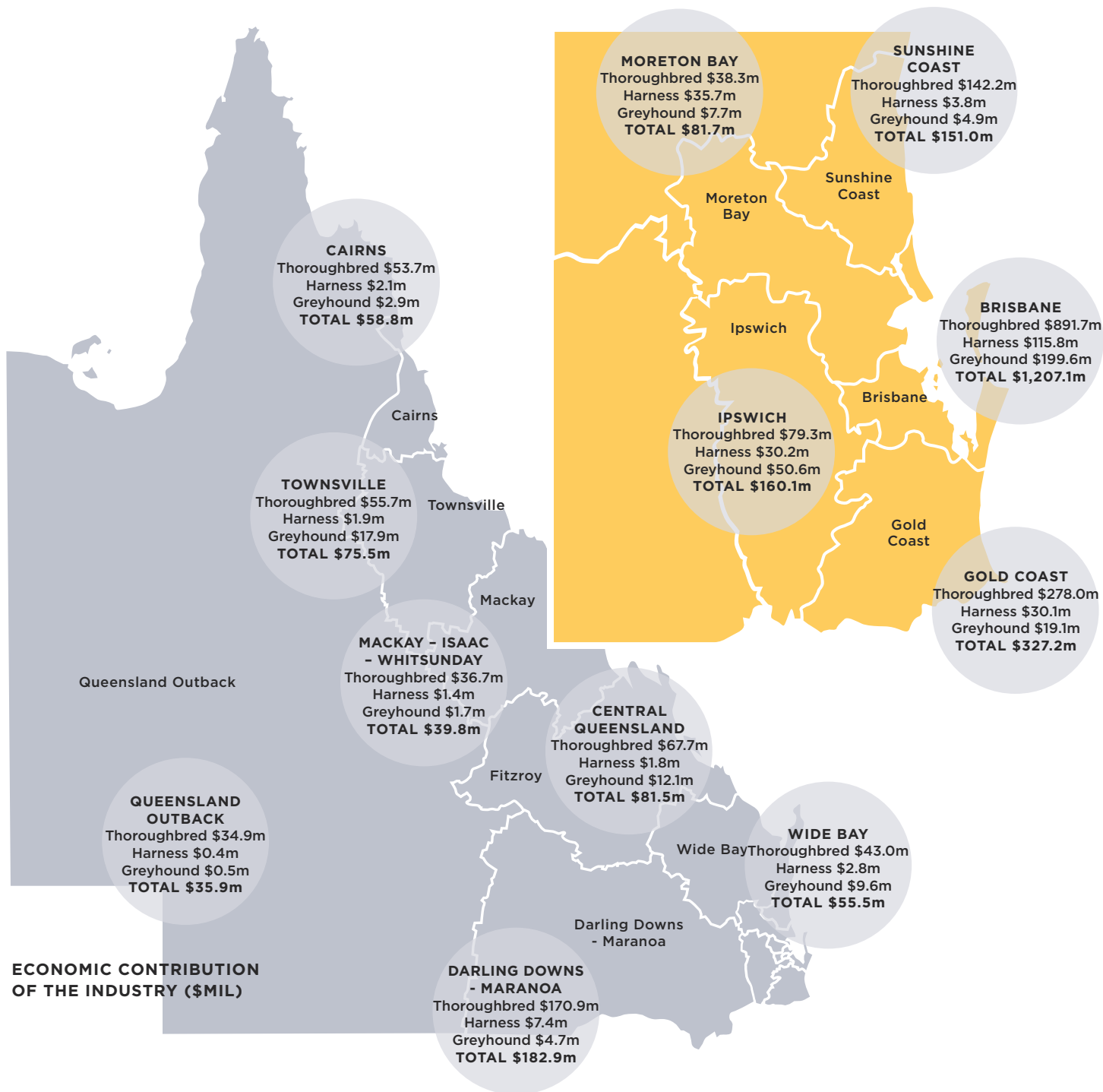
The breakdown of final expenditures is outlined below:

Sources of Final Expenditure	Funded by	Amount	% of Final Expenditure
Production of racing horses and greyhounds (breeding)	+ private investment + service fees revenue + industry bonuses & incentives	\$141.7m	7.5%
Preparation of racing horses and greyhounds (training)	+ private investment + prize money + industry bonuses & incentives	\$422.8m	22.3%
Racing club & industry expenditure	+ wagering product fees + raceday revenues + sponsorship & membership + non-raceday revenues + nominations	\$665.3m	35.1%
Other wagering operator expenditure	+ taxation on wagering revenue generated by the Racing Queensland product + wagering operator profits on turnover related to the Racing Queensland product	\$586.4m	30.9%
Racing customer expenditure off-course	+ private investment	\$78.8m	4.2%
<b>Total</b>		<b>\$1,895.1m</b>	

Thoroughbred racing is responsible for generating three quarters of the final expenditures. More than 66% of this expenditure was in regional parts of the state. Harness racing is responsible for generating close to 10% of the final expenditures. More than two thirds of this expenditure was in regional parts of the state. Greyhound racing is responsible for generating over 13% of the final expenditures. Close to 53% of this expenditure is in regional parts of the state.

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





## Economic Contribution of the Industry

The Queensland racing industry is responsible for generating a real gross value added contribution of \$2,456.9 million for the Queensland economy. Real gross value added is the generally accepted measure of the value of production from economic activity. It is the sum of value added by all industries in a region (in this case, all regions of Queensland). In any period of time, the value added contribution in an industry equates to the value of sales less the value of inputs used in production. This means value added is equal to the income (wages, salaries and profits) generated in the course of production.

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



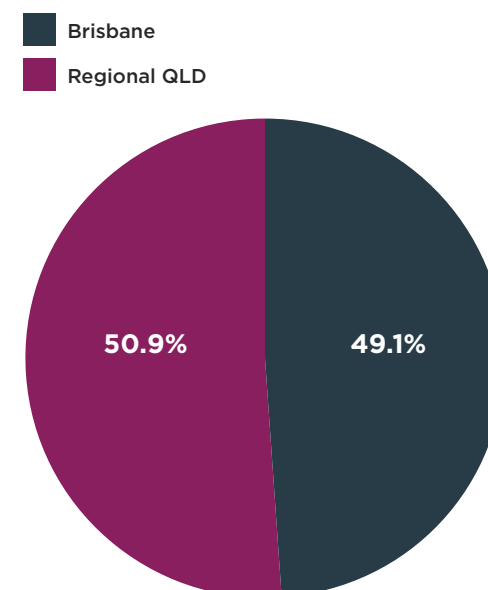
Generally, the level of economic activity will not always proportionally follow the final expenditures, as regional areas generally have higher import penetrations than metropolitan areas – i.e. a lot of the expenditure is on product imported from the metropolitan area. As such, the model takes into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

When considering the value added contribution of \$2,456.9 million generated by the Queensland racing industry, it is important to note that it is made up of:

- ✦ Direct value added (\$900.3 million) - this represents the amount of income included in the direct in scope expenditure. It is the amount of gross wages and salaries in the racing industry and the direct provision of services to racing activity, plus the gross operating surplus (profits, interest payment and direct taxes) directly created in supply these services and product. This is also equal to the direct in scope expenditure less the purchases that the provider of the goods and services makes in providing the goods and services (both supplied from within the region, as well as externally (i.e. imported).
- ✦ Indirect (Induced) value added (\$1,556.6 million) – represents the value added activity (wages, salaries and gross operating surplus) generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this.

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

#### QUEENSLAND RACING INDUSTRY ECONOMIC IMPACT BY REGION





## Participants in the Queensland racing industry

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

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

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

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

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

More than 32,000 breeders, owners and trainers provide the capital and the skills to produce and prepare racing horses and greyhounds for racing. These participants drive a chain of activity which leads to the production of a racing product that is consumed by audiences on almost every day of the year.

There are 7,513 volunteer roles occupied, in which individuals provide their time and skills

### TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
<b>Breeders</b>	706	200	371	1,277
<b>Owners</b>	22,458	747	5,369	28,574
<b>Trainers</b>	1,219	259	692	2,170
<b>Racing Club &amp; Industry Staff (FT, PT, Casual)</b>	4,145	260	591	4,996
<b>Breeders Staff</b>	608	100	281	988
<b>Stable/Kennel Employees</b>	2,746	172	431	3,349
<b>Jockeys &amp; Drivers</b>	234	147	0	381
<b>Racing club volunteers</b>	3,326	33	31	3,390
<b>Volunteers assisting participants</b>	2,204	866	1,053	4,123
<b>Total</b>	<b>37,645</b>	<b>2,785</b>	<b>8,818</b>	<b>49,248</b>

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

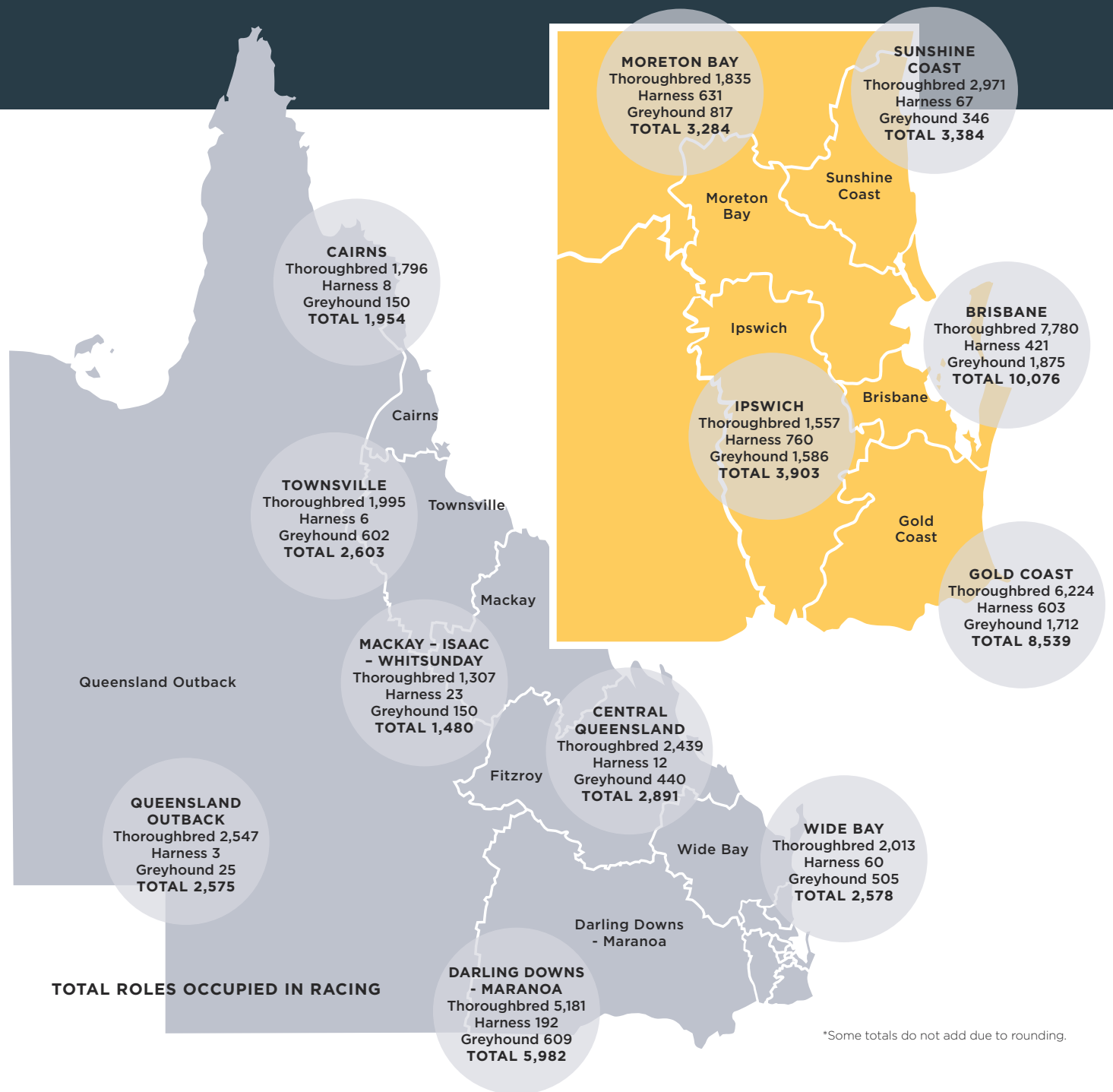
\*Racing Club & Industry staff includes:

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

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

In total, there are 49,248 roles occupied in the Queensland racing industry as a participant, employee or volunteer. Close to 80% of these Queensland roles are in regional parts of the State.

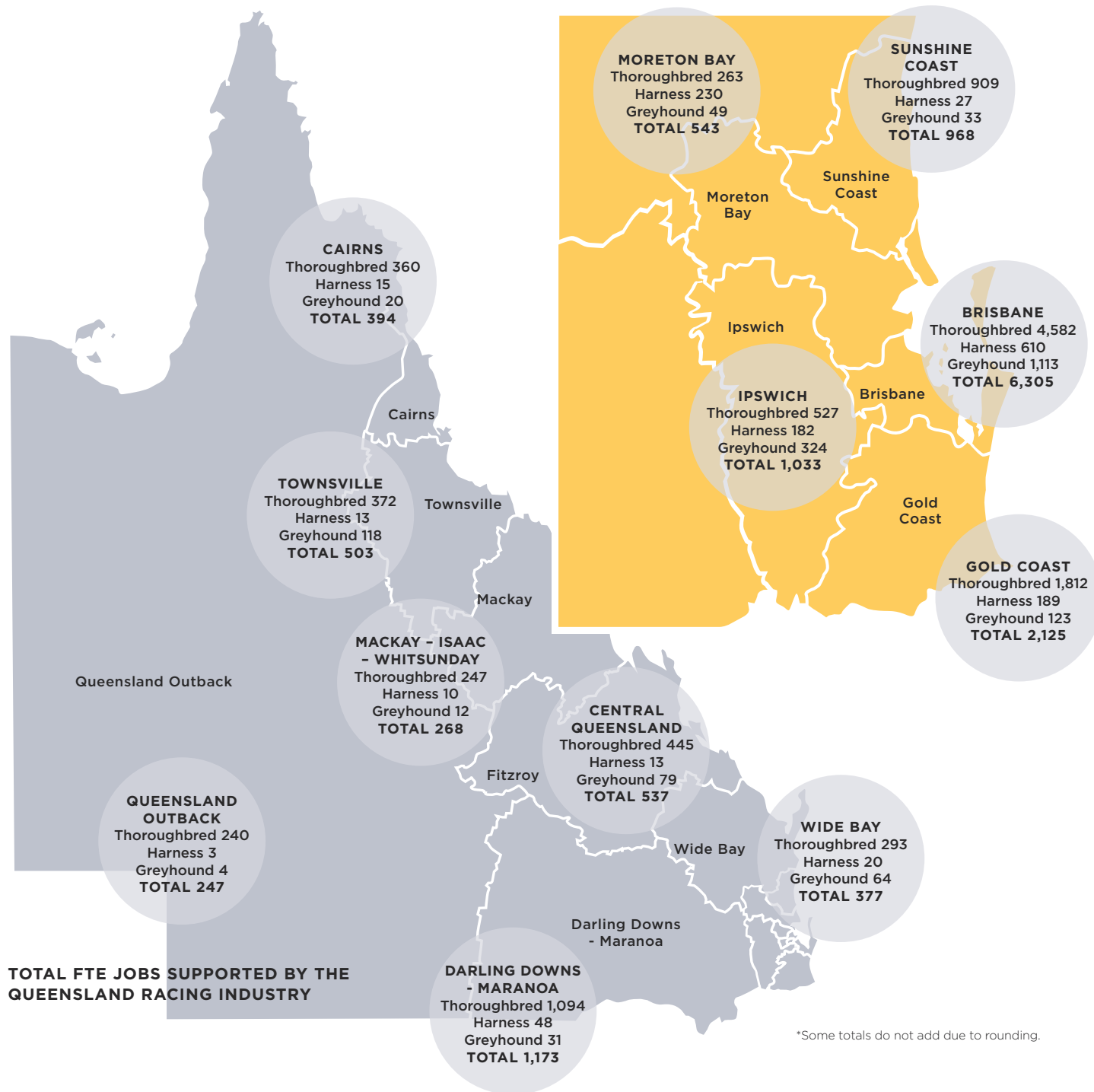












\*Some totals do not add due to rounding.

# Employment Generated by Racing in Queensland

The Queensland racing industry, like racing jurisdictions all over Australia, relies on a large number of part-time and casual roles. As such, the FTE employment is significantly lower than the headcount of employees within the industry.

In 2023/24, the economic activity generated by the Queensland racing industry directly sustained 6,911 full-time equivalent positions in Queensland. In addition to the direct employment impact, the activities of the racing industry also help to sustain a further 7,561 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Queensland racing industry was 14,472 FTE jobs.

The FTE positions that are sustained by the Queensland racing industry resulted in close to \$1,347.8 million in wages and salaries for the people employed directly within the industry as well as those employed in down the-line industries that receive increased demand as a result of racing activity. Some examples of the other industries that are stimulated by racing include; veterinary, feed, retail, tourism, accommodation, transport, manufacturing and construction.

# The Supplier Network

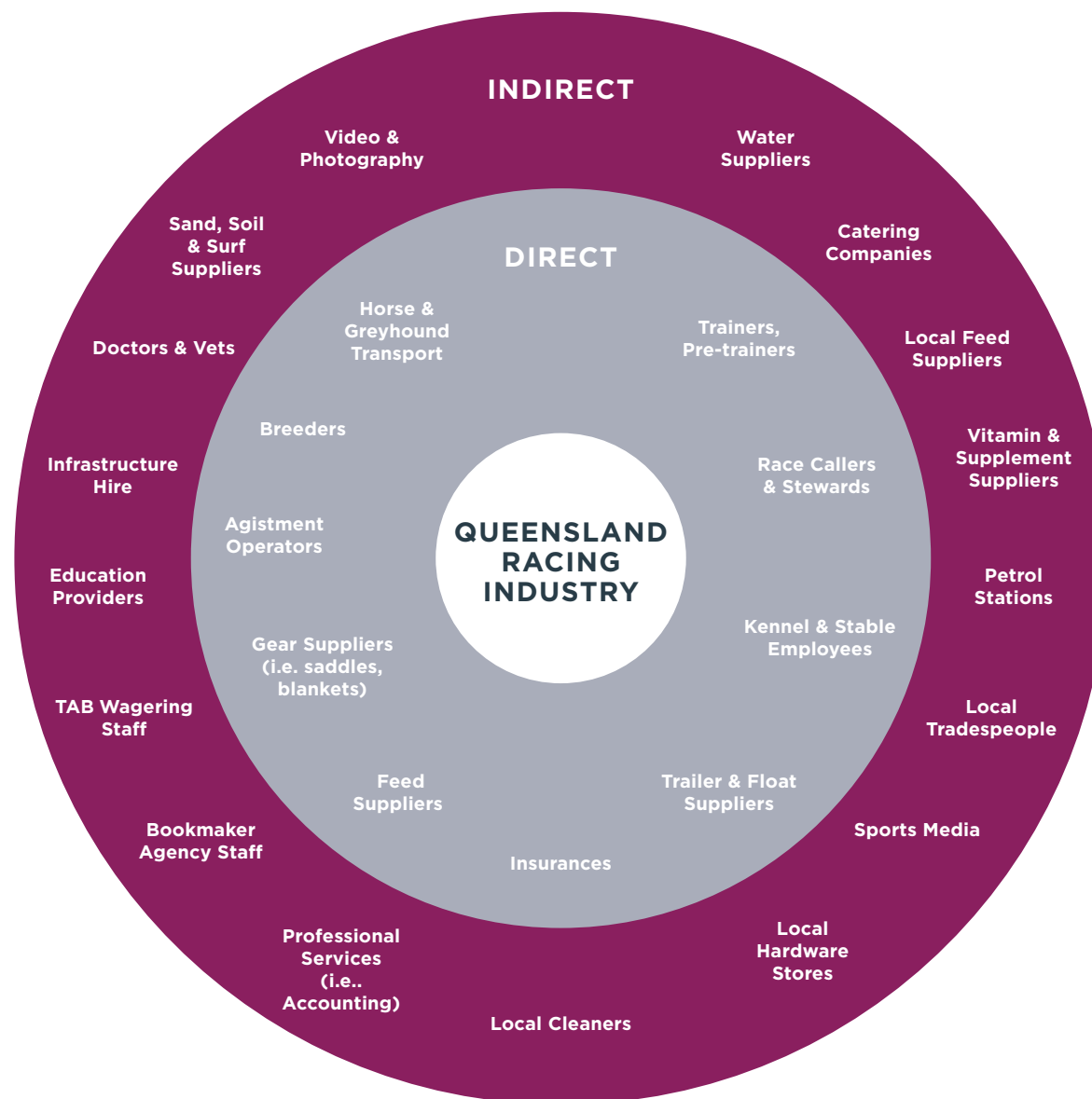
The Queensland racing industry is supported by a large supplier network in a mutually beneficial way. For many suppliers of goods and services, a strong racing industry forms an important part of the critical mass of their client base. Many offer specific skills, and customised products that are relevant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

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

ANZSIC Sector	Key Impacts	Driven by
Professional, scientific & technical services	+ Direct value added - \$160.9m + Direct FTE jobs - 948	+ veterinary services + scientific research services + management & related consulting services
Other gambling services	+ Direct value added - \$104.8m + Direct FTE jobs - 1,052	+ bookmaker operation + gambling activity
Sport and recreation	+ Direct value added - \$80.3m + Direct FTE jobs - 784	+ breeding, training and racing activity







## Case study

### VITAL CONTRIBUTIONS RECOGNISED THROUGH CHEER A VOLUNTEER

The Queensland racing industry is supported by more than 7,500 volunteers that work tirelessly each year. Despite their hard work and dedication, these volunteers can largely go unrecognised.

Racing Queensland was keen to find a way to highlight and congratulate the state's incredible volunteers for their hard work and dedication. Thus, the Cheer A Volunteer Awards Program was born.

In conjunction with Neil Mansell Transport & Mittys, the program allows clubs the chance to nominate a volunteer for the monthly Cheer a Volunteer Award to ensure they receive the recognition they truly deserve.

Since the first award was handed out in April 2024, the program has seen a wide range of our volunteers being rightfully lauded for their contributions.

Inaugural winner Graeme Lynch from the Esk Jockey Club had been involved with the club for over 25 years, taking care of the track as well as making sure everything is running smoothly on a race day.

Husband-and-wife duo Liz and David Land were recognised as being the backbone of the Cunnamulla & District Diggers' Race Club, while Helen "Mort" Morton is known as the person you always go to when you have any sort of enquiry or issue at the Longreach Jockey Club.

Volunteers play such a vital role at the Prairie Jockey Club, they could not single out just one person - the entire committee was nominated for the award in February 2025!

All monthly winners receive a beautiful trophy, while their club wins a set of cloths & bibs.

With the Cheer A Volunteer Awards Program to continue throughout 2025, there are sure to be many more volunteers celebrated for the impact they have had on racing in Queensland.







# RACING'S PARTICIPANTS AND ANIMALS

## The Breeding Industry

### NUMBER OF BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	14	0	3	17
Central Queensland	60	1	17	78
Darling Downs - Maranoa	176	15	33	223
Gold Coast	140	48	83	271
Ipswich	42	53	117	212
Mackay - Isaac - Whitsunday	13	3	2	18
Moreton Bay	33	43	35	111
Queensland - Outback	9	0	0	9
Sunshine Coast	48	7	11	66
Townsville	21	0	20	41
Wide Bay	50	4	26	80
Total Regional Queensland	605	174	346	1,126
Brisbane	101	26	25	151
<b>Total</b>	<b>706</b>	<b>200</b>	<b>371</b>	<b>1,277</b>

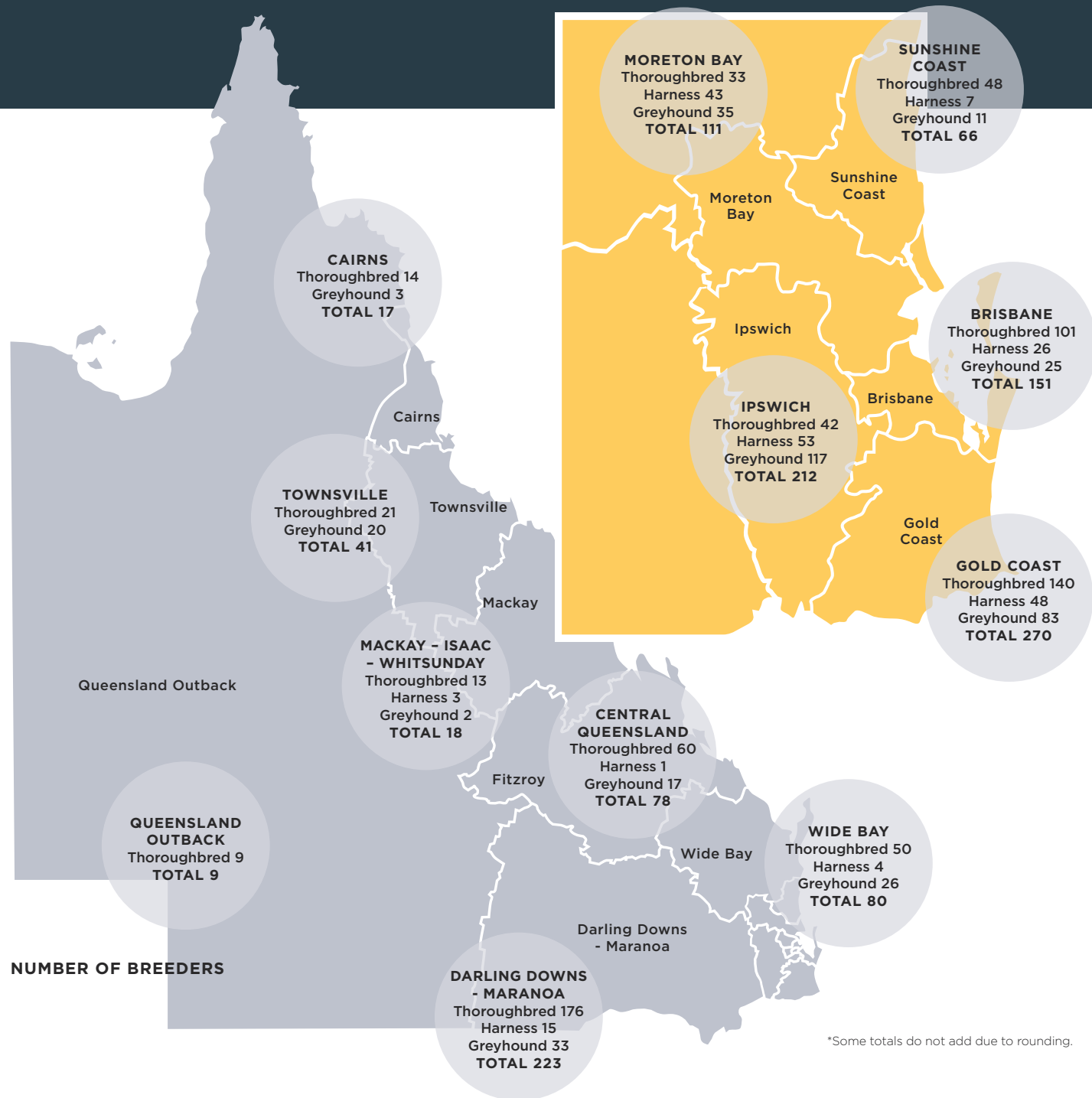
\*Includes part owners of broodmares/breeding females and stallions/sires

### NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	12	0	2	15
Central Queensland	52	1	13	65
Darling Downs - Maranoa	151	7	25	183
Gold Coast	120	24	62	207
Ipswich	36	27	89	151
Mackay - Isaac - Whitsunday	11	2	2	14
Moreton Bay	28	22	26	76
Queensland - Outback	8	0	0	8
Sunshine Coast	41	4	8	53
Townsville	18	0	15	33
Wide Bay	43	2	20	65
Total Regional Queensland	521	87	262	870
Brisbane	87	13	19	118
<b>Total</b>	<b>608</b>	<b>100</b>	<b>281</b>	<b>988</b>

\*Some totals do not add due to rounding.

There are **close to 1,300 individuals** who either breed, or have an ownership interest in a broodmare, broodmatron, stallion or sire. They are supported by **988 employees and 1,395 volunteers** – meaning that the industry is supported by **close to 3,700 roles directly involved in breeding activities** across the three codes





The breeding sector provides and replenishes the racing horses and greyhounds for the Queensland racing industry. There are 1,277 registered breeders in Queensland across the three codes of racing. At the top end of the breeding sector, large stud farms employ many staff and produce large numbers of foals each year. At the other end of the scale, there are a large number of hobby breeders also producing foals and pups.

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

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

NUMBER OF VOLUNTEERS ASSISTING BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	11	0	2	14
Central Queensland	48	3	13	64
Darling Downs - Maranoa	141	42	24	206
Gold Coast	112	134	62	308
Ipswich	33	149	88	270
Mackay - Isaac - Whitsunday	10	8	2	20
Moreton Bay	26	121	26	174
Queensland - Outback	7	0	0	7
Sunshine Coast	38	20	8	66
Townsville	17	0	15	32
Wide Bay	40	11	20	71
Total Regional Queensland	484	488	260	1,232
Brisbane	81	64	18	163
Total	565	552	278	1,395

\*Some totals do not add due to rounding.









# Producing Racing Animals

NUMBER OF STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Cairns	3	0	0	3
Central Queensland	8	0	0	8
Darling Downs - Maranoa	29	8	1	38
Gold Coast	12	0	3	15
Ipswich	6	6	2	14
Mackay - Isaac - Whitsunday	3	0	0	3
Moreton Bay	1	8	0	9
Queensland - Outback	0	0	0	0
Sunshine Coast	0	0	0	0
Townsville	2	0	1	3
Wide Bay	10	0	1	11
Total Regional Queensland	74	22	8	104
Brisbane	1	0	1	2
Total	75	22	9	106





## NUMBER OF BROODMARES/BREEDING FEMALES COVERED

	Thoroughbred	Harness	Greyhound	Total
Cairns	12	0	1	13
Central Queensland	105	1	8	114
Darling Downs - Maranoa	1,367	59	18	1,443
Gold Coast	662	95	44	801
Ipswich	368	139	47	554
Mackay - Isaac - Whitsunday	36	3	1	40
Moreton Bay	56	61	12	129
Queensland - Outback	4	0	0	4
Sunshine Coast	77	11	6	94
Townsville	24	0	6	30
Wide Bay	123	4	4	131
Total Regional Queensland	2,832	373	147	3,352
Brisbane	21	88	7	116
<b>Total</b>	<b>2,853</b>	<b>461</b>	<b>154</b>	<b>3,468</b>

## NUMBER OF FOALS/PUPS PRODUCED

	Thoroughbred	Harness	Greyhound	Total
Cairns	7	0	7	14
Central Queensland	61	0	59	120
Darling Downs - Maranoa	795	59	122	975
Gold Coast	385	51	348	784
Ipswich	214	92	327	633
Mackay - Isaac - Whitsunday	21	2	3	26
Moreton Bay	32	45	69	146
Queensland - Outback	2	0	0	2
Sunshine Coast	45	7	40	92
Townsville	14	0	37	51
Wide Bay	71	5	26	102
Total Regional Queensland	1,646	261	1,038	2,945
Brisbane	12	55	53	121
<b>Total</b>	<b>1,658</b>	<b>316</b>	<b>1,091</b>	<b>3,065</b>

\*Some totals do not add due to rounding.



COST OF PRODUCING RACEHORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	\$0.4	\$0.0	\$0.1	\$0.5
Central Queensland	\$3.8	\$0.0	\$0.4	\$4.2
Darling Downs - Maranoa	\$61.3	\$2.9	\$0.9	\$65.1
Gold Coast	\$27.9	\$2.5	\$2.5	\$30.9
Ipswich	\$13.2	\$4.5	\$2.4	\$20.0
Mackay - Isaac - Whitsunday	\$1.3	\$0.1	\$0.0	\$1.4
Moreton Bay	\$1.9	\$2.2	\$0.5	\$4.7
Queensland - Outback	\$0.1	\$0.1	\$0.0	\$0.1
Sunshine Coast	\$2.7	\$0.3	\$0.3	\$3.3
Townsville	\$0.9	\$0.0	\$0.3	\$1.1
Wide Bay	\$4.3	\$0.2	\$0.2	\$4.7
Total Regional Queensland	\$117.9	\$12.8	\$7.5	\$137.9
Brisbane	\$0.7	\$2.7	\$0.4	\$3.8
Total (m)	\$118.4	\$15.5	\$7.9	\$141.7

\*Some totals do not add due to rounding.

# Economic Contribution of the Breeding Industry

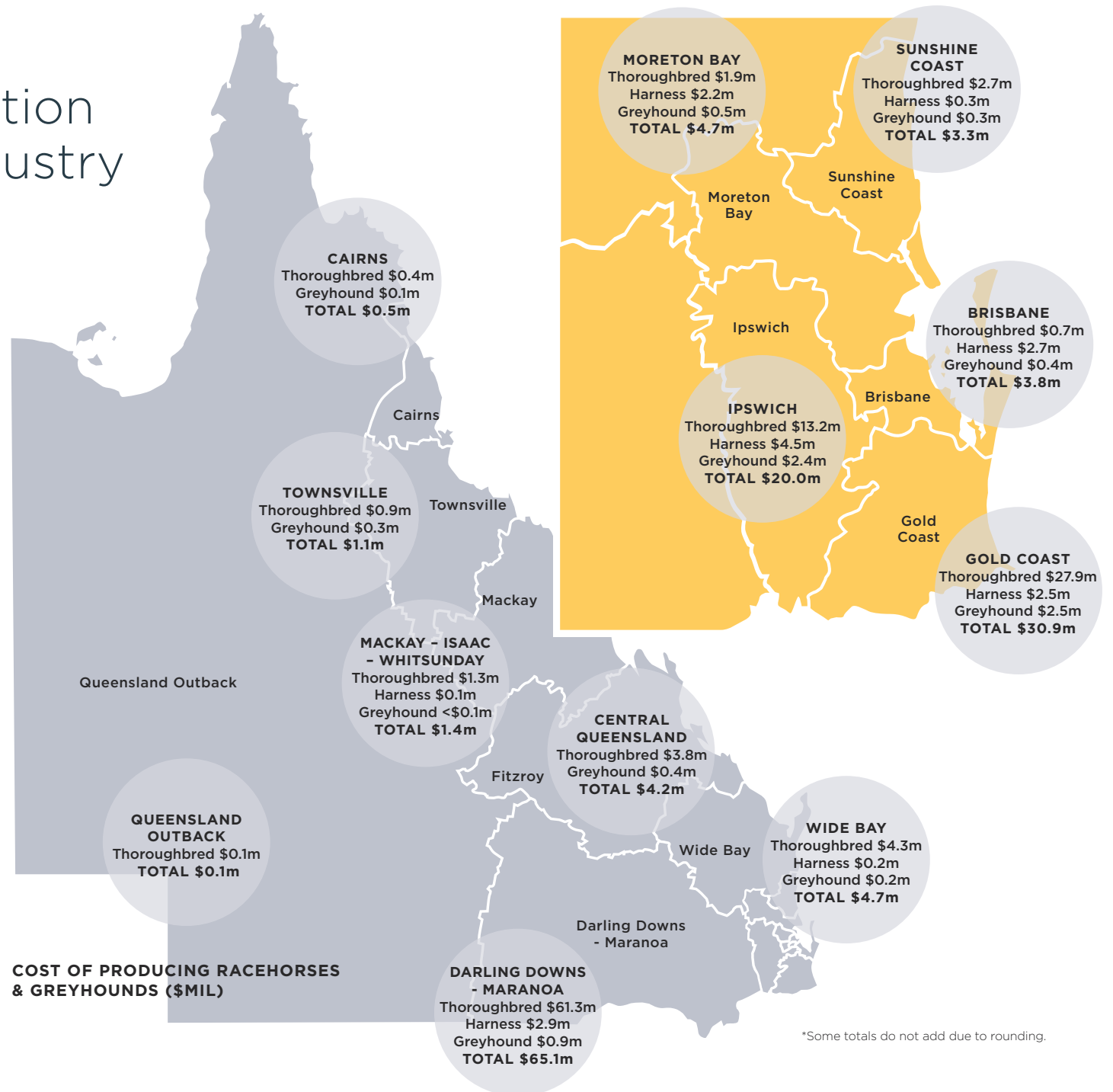
In 2023/24, breeders in the Queensland racing industry spent close to \$142 million on the production of racing stock. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of broodmares, broodmatrons, stallions and sires as well as in the process of breeding and care for foals and pups. In addition to this, breeders also incur costs for:

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

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

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

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





More than 80% of all breeding related expenditure occurs in three Queensland regions. The Darling Downs - Maranoa (45.9%), Ipswich (14.1%) and Gold Coast (23.1%) 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 2023/24, there were 2,853 broodmares covered in Queensland, producing 1,658 foals. This thoroughbred breeding activity is responsible for generating close to \$118.4 million in the production and care of racing stock.

Darling Downs – Maranoa	\$61.3m (51.8%)
Gold Coast	\$27.9m (23.5%)
Ipswich	\$13.2m (11.1%)

HARNESS RACING

In 2023/24 there were 461 broodmares covered in Queensland, producing 316 foals. This standardbred breeding activity is responsible for generating more than \$15.5 million in the production and care of racing stock.

Ipswich	\$4.5m (29.2%)
Darling Downs - Maranoa	\$2.9m (18.6%)
Brisbane	\$2.7m (17.5%)

GREYHOUND RACING

In 2023/24, there were 154 breeding females covered in Queensland, producing 1,091 pups. This greyhound breeding activity is responsible for generating more than \$7.9 million in the production and care of greyhound racing stock.

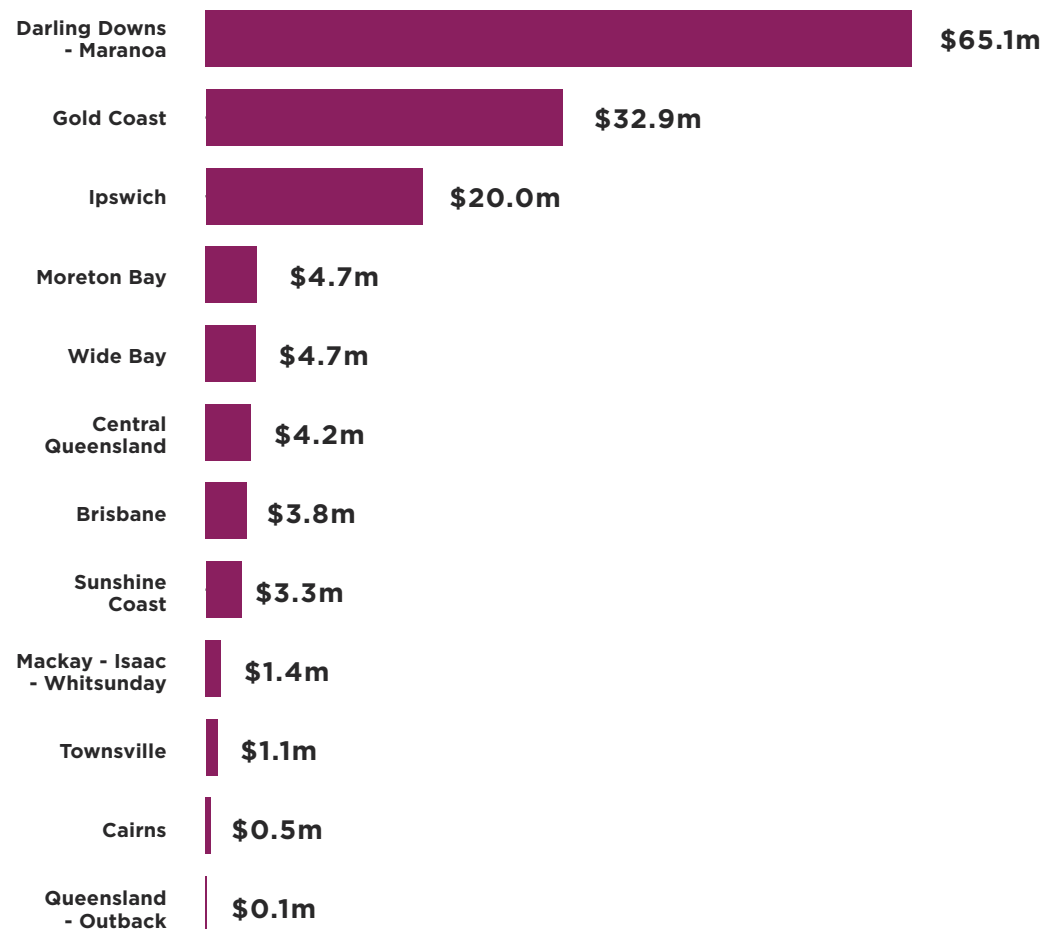
Gold Coast	\$2.5m (31.5%)
Ipswich	\$2.4m (30.0%)
Darling Downs - Maranoa	\$0.9m (11.2%)





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

#### EXPENDITURE BY THE BREEDING SECTOR





## Case study

### QUEENSLAND RACE CLUBS PAYING IT FORWARD

Racing clubs across the state have been giving excess and used equipment a new lease on life as part of the Pay It Forward Program.

Since kicking off in early 2024, the program has been a wonderful opportunity for Queensland's more-resourced clubs to help smaller clubs thrive.

Racing Queensland had noticed clubs updating their racing and hospitality equipment, and then often packing away old items into a shed or container.

Items like unused aluminium or plastic rail, saddlecloths and bibs, barrier and fence padding, glassware, and tables and chairs which were still in good condition, were often left sitting in storage.

With the Pay It Forward Program, the smaller clubs can be the recipients of such items and benefit greatly from the generosity of Queensland's bigger clubs - what may seem as just a few tables and stools for one club could be a complete windfall for another.

Items that are in good condition, able to meet current Licensed Venue Standards, or be able to be refurbished, can still be put to great use. Equipment is especially well-received by some of Queensland's clubs who only hold one or two meetings a year, with the program promoting sustainability and camaraderie between the 120 clubs across the state.

Since its inception, at least a dozen clubs have benefited from the Pay It Forward Program.

The biggest contribution to date has come from the Brisbane Racing Club who have donated a cabin from a steward/judge's tower.

The cabin will go through fabrication production for new legs and supports before heading north to take its place at the Gladstone Turf Club.

Another example again included the BRC donating sets of bibs and cloths to the Warwick Turf Club, Springsure St Patrick's Day Race Club, and Cunnamulla & District Diggers' Race Club.

Racing Queensland is continuing to encourage clubs to donate equipment or make any future requests to ensure racing continues to flourish across the Sunshine State.





## Case study INTER DOMINION

### OVERVIEW

First established in 1935, the Inter Dominion Championship is one of the world's greatest harness racing series with representatives from both Australia and New Zealand. The series returned to Queensland during 2023 for the first time since 2009, with the final held at The Creek in Albion Park. More than 5,000 were in attendance to see the return of one of the biggest events on the harness racing calendar to Brisbane.

### KEY TOURISM IMPACTS

In 2023, an economic impact assessment of the Inter Dominion was undertaken by IER. The study found that the event generated in total expenditure stimulus of near to \$2.3 million for the Brisbane economy. Furthermore, the event was responsible for attracting close to \$1.8 million in new money for the region. This money was generated by near to 1,200 visitors to Brisbane, who were responsible for generating more than 5,100 visitor nights for the Queensland economy.

### KEY SOCIAL IMPACTS

As a part of the study, attendees were asked to consider the motivation for attending the event. The research found strong engagement with the sport to be the main attraction for many attendees. The number one motivation for attending was for "a love of horses" (30.1%) followed by "it's a tradition, I always go when possible" (28.7%) and "the reputation of the raceday" (29.7%).

Sharing the passion of harness racing with others is a key part of going to the races for attendees with approximately 1 in 3 attendees stating they "like harness racing, especially when shared with friends or family" and a further 1 in 4 attendees stating "racing events are important to me, I enjoy the social aspects of being amongst like-minded people when attending the races".

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

Tourism impact	2023
In-scope visitors (spectators, sponsors and participants)	1,197
Total expenditure stimulus	\$2.3m
In-scope expenditure for the QLD economy	\$1.8m
Visitor Nights generated in QLD	5,161

# THE TRAINING INDUSTRY

## The Training Industry

### NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	57	0	12	69
Central Queensland	121	0	34	155
Darling Downs - Maranoa	258	18	44	319
Gold Coast	186	66	139	391
Ipswich	55	95	199	349
Mackay - Isaac - Whitsunday	35	0	6	41
Moreton Bay	39	62	70	171
Queensland - Outback	103	0	1	104
Sunshine Coast	90	2	14	106
Townsville	94	0	68	162
Wide Bay	85	8	60	153
Total Regional Queensland	1,122	251	646	2,019
Brisbane	97	8	46	151
<b>Total</b>	<b>1,219</b>	<b>259</b>	<b>692</b>	<b>2,170</b>

### NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Cairns	169	0	3	172
Central Queensland	168	0	24	192
Darling Downs - Maranoa	474	12	33	518
Gold Coast	465	53	86	603
Ipswich	130	46	101	278
Mackay - Isaac - Whitsunday	105	1	7	113
Moreton Bay	136	46	51	233
Queensland - Outback	128	0	1	129
Sunshine Coast	283	1	10	294
Townsville	173	0	33	206
Wide Bay	103	1	34	138
Total Regional Queensland	2,234	160	383	2,877
Brisbane	412	12	48	472
<b>Total</b>	<b>2,746</b>	<b>172</b>	<b>431</b>	<b>3,349</b>



#### NUMBER OF VOLUNTEERS ASSISTING TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	80	0	13	93
Central Queensland	170	0	37	207
Darling Downs - Maranoa	361	21	48	430
Gold Coast	260	79	153	492
Ipswich	77	114	219	410
Mackay - Isaac - Whitsunday	49	0	7	56
Moreton Bay	54	75	77	206
Queensland - Outback	144	0	1	145
Sunshine Coast	126	2	15	143
Townsville	131	0	75	206
Wide Bay	119	10	66	195
Total Regional Queensland	1,571	301	711	2,583
Brisbane	68	13	64	145
<b>Total</b>	<b>1,639</b>	<b>314</b>	<b>775</b>	<b>2,728</b>

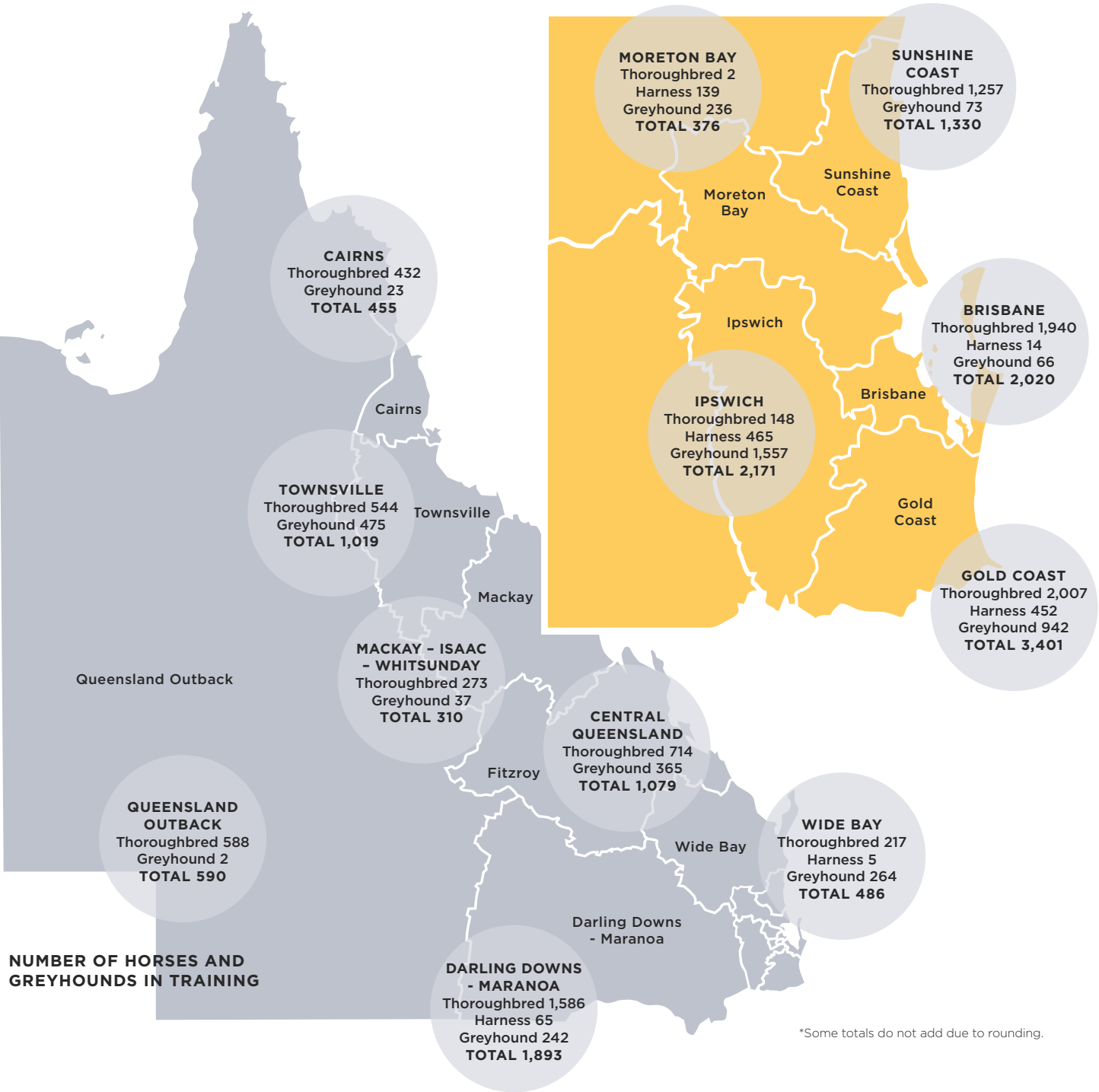
\*Some totals do not add due to rounding.



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

During the 2023/24 racing season, there were close to 2,200 horse and greyhound trainers providing services to owners in Queensland. These trainers were also supported by more than 2,700 volunteers. The majority of these trainers operate in regional parts of the state.

Overall, there were more than 15,100 racing horses and greyhounds in training in Queensland in 2023/24. The Gold Coast (20.7%), Brisbane (20.2%), and Darling Downs - Maranoa (16.3%) represent the largest areas of thoroughbred training activity. In the Harness and Greyhound racing industries, Ipswich (37.3%), Gold Coast (25.7%) and Townsville (8.8%) make up the majority of the training activity.



\*Some totals do not add due to rounding.









# Owners

## OWNERS OF RACING HORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	959	4	105	1,068
Central Queensland	1,328	5	273	1,605
Darling Downs - Maranoa	2,156	56	393	2,602
Gold Coast	4,380	148	1,092	5,620
Ipswich	958	181	748	1,887
Mackay - Isaac - Whitsunday	786	7	119	913
Moreton Bay	1,376	164	515	2,065
Queensland - Outback	595	2	20	617
Sunshine Coast	2,026	27	265	2,318
Townsville	1,151	3	300	1,454
Wide Bay	926	17	230	1,172
Total Regional Queensland	16,641	613	4,061	23,315
Brisbane	5,817	134	1,308	7,259
<b>Total</b>	<b>22,458</b>	<b>747</b>	<b>5,369</b>	<b>28,574</b>

\*Some totals do not add due to rounding.

## NUMBER OF TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,443	0	0	1,443
Central Queensland	2,463	0	4,734	7,197
Darling Downs - Maranoa	5,827	0	0	5,827
Gold Coast	3,515	0	0	3,515
Ipswich	3,403	1,293	17,150	21,846
Mackay - Isaac - Whitsunday	1,834	0	0	1,834
Moreton Bay	829	10,443	0	11,272
Queensland - Outback	601	0	0	601
Sunshine Coast	4,581	0	0	4,581
Townsville	2,626	0	8,402	11,027
Wide Bay	100	0	3,528	3,358
Total Regional Queensland	27,221	11,736	33,543	72,501
Brisbane	7,434	12,995	24,684	45,112
<b>Total</b>	<b>34,655</b>	<b>24,731</b>	<b>58,227</b>	<b>117,613</b>

NUMBER OF NON-TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	923	0	0	923
Central Queensland	1,058	0	0	1,058
Darling Downs - Maranoa	1,478	44	0	1,522
Gold Coast	0	0	0	0
Ipswich	211	0	0	211
Mackay - Isaac - Whitsunday	749	0	0	749
Moreton Bay	53	0	0	53
Queensland - Outback	2,858	0	0	2,858
Sunshine Coast	0	0	0	0
Townsville	504	0	0	504
Wide Bay	1,114	0	0	1,114
Total Regional Queensland	8,949	44	0	8,993
Brisbane	0	0	70	70
Total	8,949	44	70	9,063

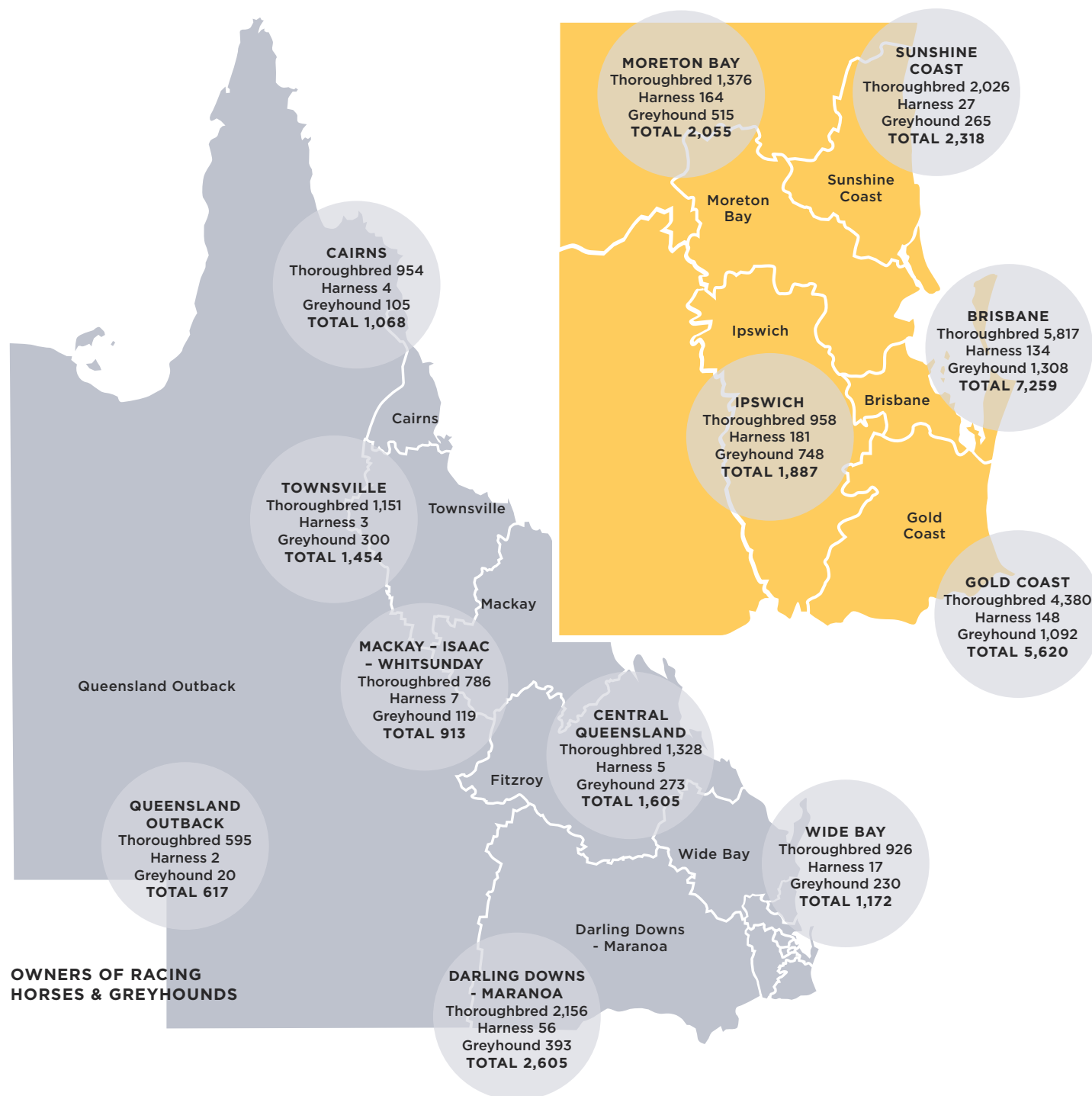
TOTAL RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2,366	0	0	2,366
Central Queensland	3,521	0	4,734	8,255
Darling Downs - Maranoa	7,304	44	0	7,348
Gold Coast	3,515	0	0	3,515
Ipswich	3,614	1,293	17,150	22,057
Mackay - Isaac - Whitsunday	2,583	0	0	2,583
Moreton Bay	882	10,443	0	11,325
Queensland - Outback	3,459	0	0	3,459
Sunshine Coast	4,581	0	0	4,581
Townsville	3,130	0	8,402	11,532
Wide Bay	1,214	0	3,528	4,472
Total Regional Queensland	36,170	11,780	33,543	81,494
Brisbane	7,435	12,995	24,754	45,182
Total	43,604	24,775	58,297	126,676

## Owners race for more than \$264 million in prize money and bonuses that is on offer across the three codes

Owners play a significant role in the funding model of the racing industry. They provide much of the capital outlay and day-to-day funding for the purchase and preparation of racing horses and greyhounds. In 2023/24 there were more than 28,500 owners interested in thoroughbred, harness and/or greyhound racing in Queensland. Close to 75% of owners reside in regional areas of Queensland, with Brisbane (25.4%) and the Gold Coast (19.2%) home to the most significant portion of owners across the three codes.

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





Queensland owners and trainers spent **close to \$423 million** in 2023/24 preparing **racing horses and greyhounds for racing**. The Brisbane and Gold Coast regions account for **nearly 45% of this economic activity**.

## Economic Contribution of the Training Industry

In 2023/24, owners of racehorses and greyhounds trained in Queensland spent almost \$423 million on the preparation of their animals for racing. The calculation of expenditure on the preparation of racehorses and greyhounds takes into account the various training and non-training related expenditures incurred by owners and trainers.

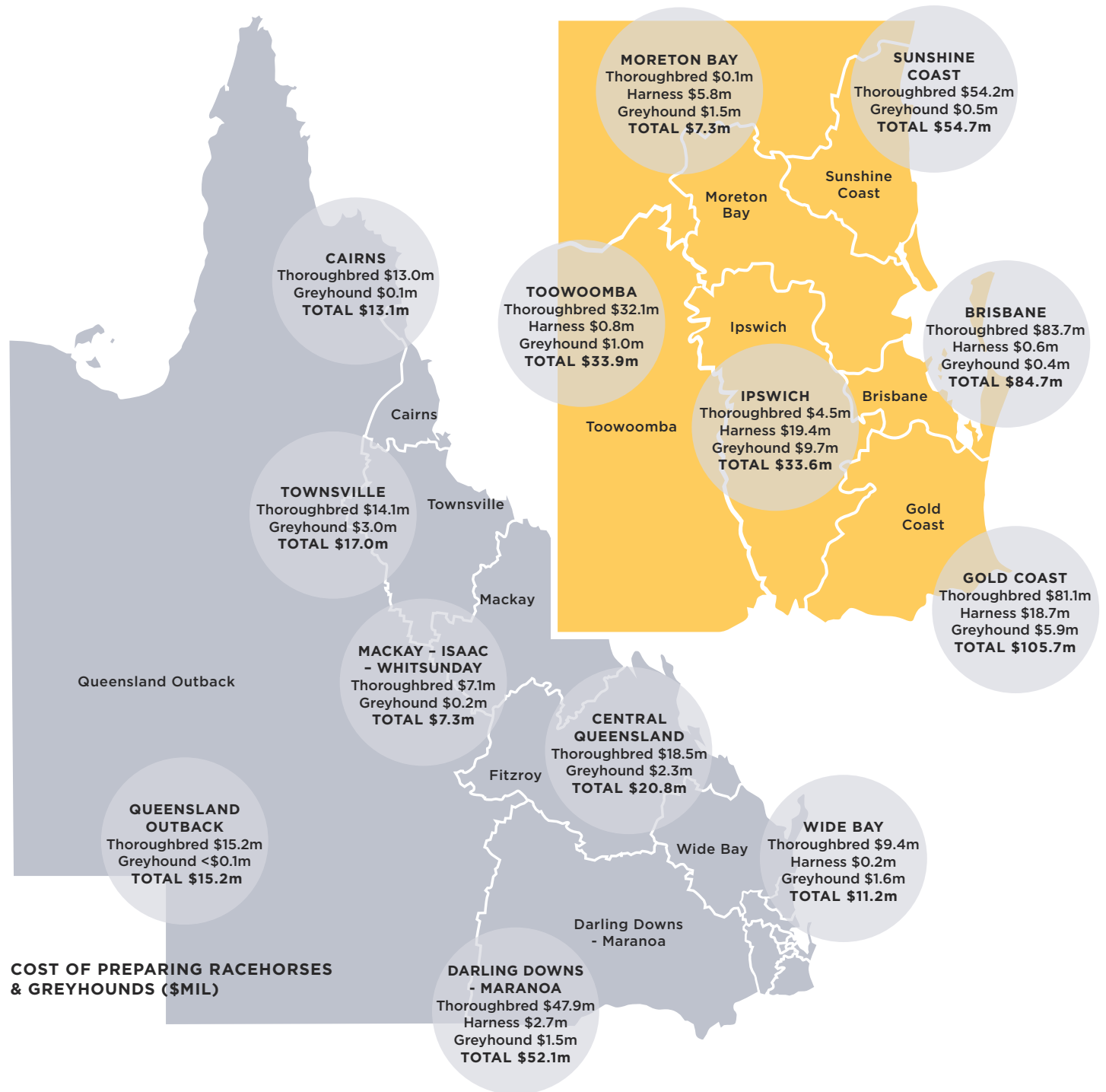
The development of expenditure profiles within each region is based upon the number of racehorses and greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the animal. For instance, expenditure during the education stage of a racehorse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

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

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

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





Overall, for every \$10 spend on training activities, \$8 of the expenditure on training activities occurs in regional areas of the state. Regionally, Gold Coast (25.5%), Sunshine Coast (12.9%) and Darling Downs - Maranoa (12.3%) make up the largest training areas outside of Brisbane (20.0%).

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 \$348.7 million in expenditure impacts in Queensland.

Brisbane	\$83.7m (24.0%)
Gold Coast	\$81.1m (23.2%)
Sunshine Coast	\$54.2m (15.6%)

HARNESS RACING

Standardbred training activity is responsible for generating more than \$47.5 million in expenditure impacts in Queensland.

Ipswich	\$19.4m (40.9%)
Gold Coast	\$18.7m (39.5%)
Moreton Bay	\$5.8m (12.2%)

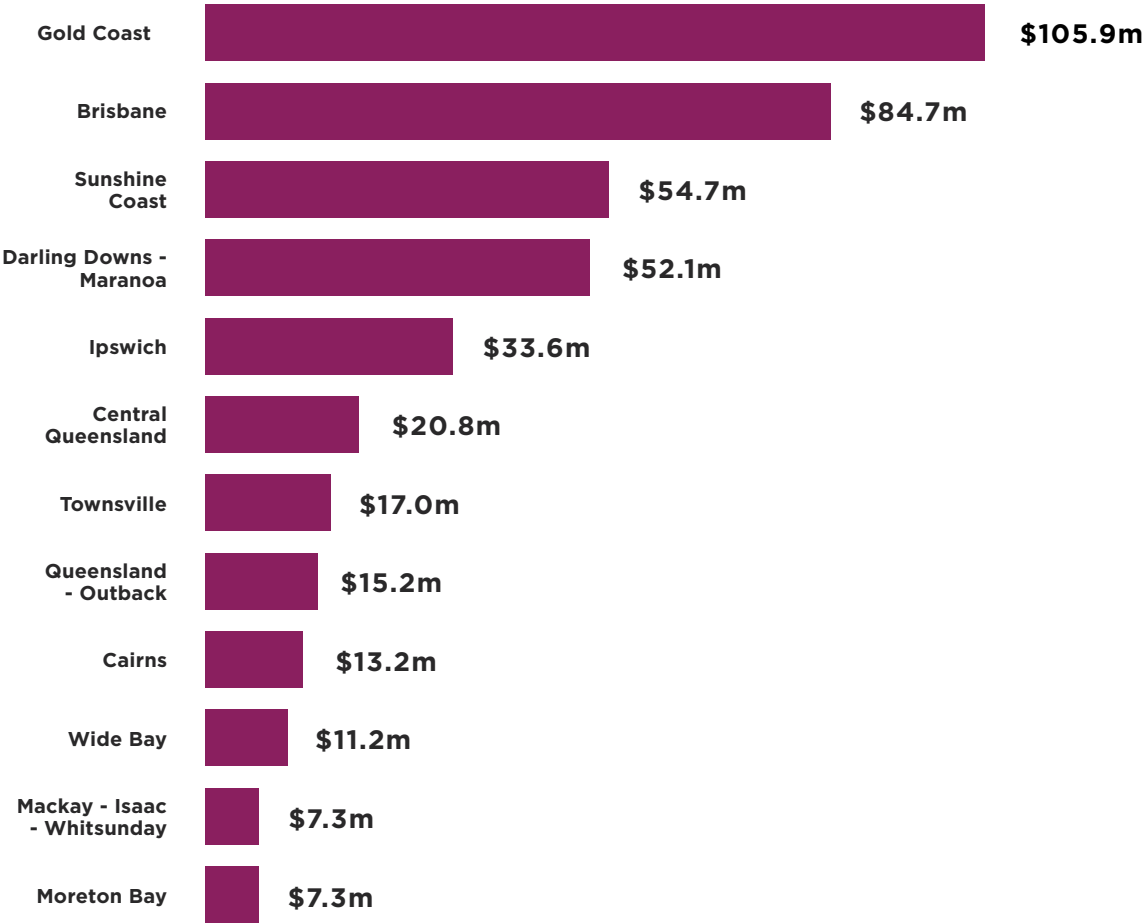
GREYHOUND RACING

Greyhound training activity is responsible for generating close to \$26.7 million in expenditure impacts in Queensland.

Ipswich	\$9.7m (36.4%)
Gold Coast	\$5.9m (22.0%)
Townsville	\$3.0m (11.1%)

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

EXPENDITURE BY THE TRAINING SECTOR









## Case study

### THE Q CREATES HISTORY

Queensland's new home of greyhound racing is now open, with the world-class facility a game changer for the industry.

The \$90 million project – \$44.15 million contributed from the Racing Infrastructure Fund – will be known as The Q, situated just south of Ipswich.

Greyhound racing already contributes more than \$250 million to the Brisbane and Ipswich economies each year, and this new centre will further boost that and open the door to hosting some of the world's most prestigious races.

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

As part of the project, a staggering 7,200 tonnes of sand was delivered to the site for the construction of the three tracks.

The new track names are known as Q1 Lakeside, Q2 Parklands and Q Straight, with animal care at the heart of The Q's design and operation.

The facility has been built using the latest best practice standards for greyhound racing safety principles, including modern cambers and drop-on boxes.

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

In recent years, the Queensland greyhound code has made significant strides.

The adoption of the Race Meeting Injury Scheme, along with the Queensland Racing Integrity Commission's enhanced protocols around the treatment of on-course injuries, supports the industry's commitment to placing animal care at the core of its day-to-day activities.

As part of the project, RQ has engaged with some of the world's most authoritative voices in track design and injury prevention to further inform its decision making, providing new and improved ways to deliver safer racing surfaces.

The Q held its first meeting on April 4 with the official opening event slated for June, 2025 to coincide with the \$225,000 Group 1 Flying Amy Classic.







# RACING CLUBS, ASSOCIATIONS AND AUTHORITIES

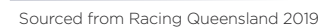
## NUMBER OF TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1	0	0	1
Central Queensland	1	0	1	2
Darling Downs - Maranoa	4	1	0	5
Gold Coast	1	0	0	1
Ipswich	1	1	0	2
Mackay - Isaac - Whitsunday	1	0	0	1
Moreton Bay	1	1	0	2
Queensland - Outback	1	0	0	1
Sunshine Coast	1	0	0	1
Townsville	1	0	1	2
Wide Bay	0	0	1	1
Total Regional Queensland	13	3	3	19
Brisbane	2	1	2	5
<b>Total</b>	<b>15</b>	<b>4</b>	<b>5</b>	<b>24</b>

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

## NUMBER OF NON-TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	6	0	0	6
Central Queensland	11	0	0	11
Darling Downs - Maranoa	22	0	0	22
Gold Coast	1	0	0	1
Ipswich	1	0	0	1
Mackay - Isaac - Whitsunday	5	0	0	5
Moreton Bay	0	0	0	0
Queensland - Outback	33	0	0	33
Sunshine Coast	0	0	0	0
Townsville	7	0	0	7
Wide Bay	10	0	0	10
Total Regional Queensland	96	0	0	96
Brisbane	0	0	0	0
<b>Total</b>	<b>96</b>	<b>0</b>	<b>0</b>	<b>96</b>





TOTAL RACE MEETINGS

	Thoroughbred	Harness	Greyhound	Total
Cairns	41	0	0	41
Central Queensland	68	0	56	124
Darling Downs - Maranoa	113	1	0	114
Gold Coast	53	0	0	53
Ipswich	49	18	195	262
Mackay - Isaac - Whitsunday	46	0	0	46
Moreton Bay	12	137	0	149
Queensland - Outback	78	0	0	78
Sunshine Coast	61	0	0	61
Townsville	46	0	91	137
Wide Bay	29	0	42	71
Total Regional Queensland	596	156	384	1,136
Brisbane	82	149	292	523
Total	678	305	676	1,659

TOTAL RACES

	Thoroughbred	Harness	Greyhound	Total
Cairns	277	0	0	277
Central Queensland	428	0	631	1,059
Darling Downs - Maranoa	783	6	0	789
Gold Coast	399	0	0	399
Ipswich	379	147	2,247	2,773
Mackay - Isaac - Whitsunday	301	0	0	301
Moreton Bay	89	1,222	0	1,311
Queensland - Outback	446	0	0	446
Sunshine Coast	465	0	0	465
Townsville	327	0	1,081	1,408
Wide Bay	152	0	448	600
Total Regional Queensland	4,046	1,375	4,407	9,828
Brisbane	716	1,377	3,318	5,411
Total	4,762	2,752	7,725	15,239





#### TOTAL ATTENDANCES

	Thoroughbred	Harness	Greyhound	Total
Cairns	37,484	0	0	37,384
Central Queensland	48,459	0	3,686	52,145
Darling Downs - Maranoa	81,081	0	0	81,081
Gold Coast	112,533	0	0	112,533
Ipswich	33,149	6,030	15,731	54,910
Mackay - Isaac - Whitsunday	27,940	0	0	27,940
Moreton Bay	5,540	28,053	0	33,593
Queensland - Outback	45,358	0	0	45,358
Sunshine Coast	73,479	0	0	73,479
Townsville	35,808	0	6,745	42,543
Wide Bay	26,898	0	3,330	40,228
Total Regional Queensland	527,729	34,083	29,482	591,294
Brisbane	138,670	34,933	45,729	219,332
<b>Total</b>	<b>666,399</b>	<b>69,016</b>	<b>75,211</b>	<b>810,626</b>

\*Some totals do not add due to rounding.



NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	969	0	0	969
Central Queensland	878	0	45	923
Darling Downs - Maranoa	1,858	36	0	1,894
Gold Coast	3,516	0	0	3,516
Ipswich	377	72	0	449
Mackay - Isaac - Whitsunday	305	0	0	305
Moreton Bay	93	122	0	215
Queensland - Outback	2,129	0	0	2,129
Sunshine Coast	2,309	0	0	2,309
Townsville	1,799	0	55	1,854
Wide Bay	882	0	50	932
Total Regional Queensland	15,109	230	150	15,489
Brisbane	9,075	297	344	9,716
<b>Total</b>	<b>24,184</b>	<b>527</b>	<b>494</b>	<b>25,205</b>





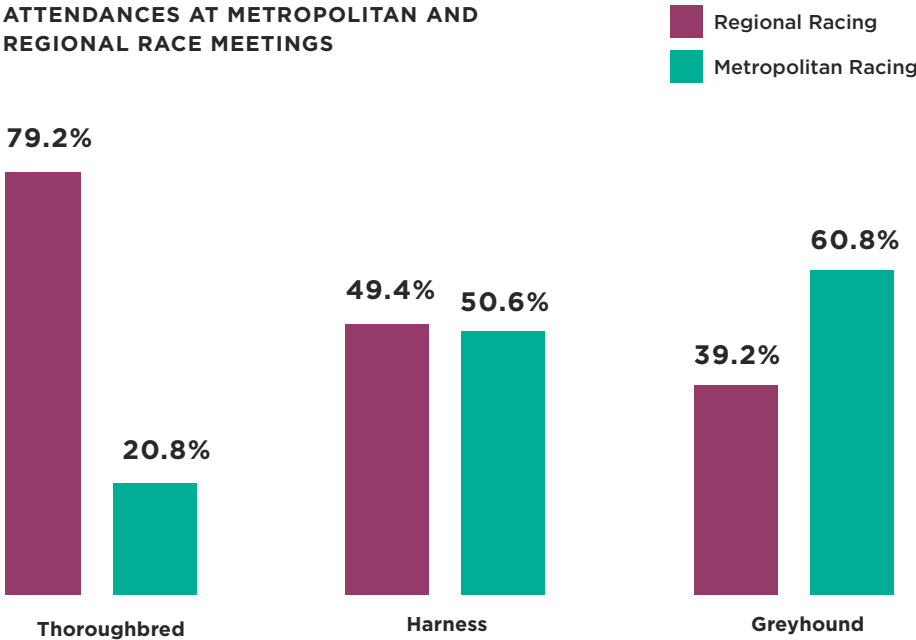
# Racing Clubs

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

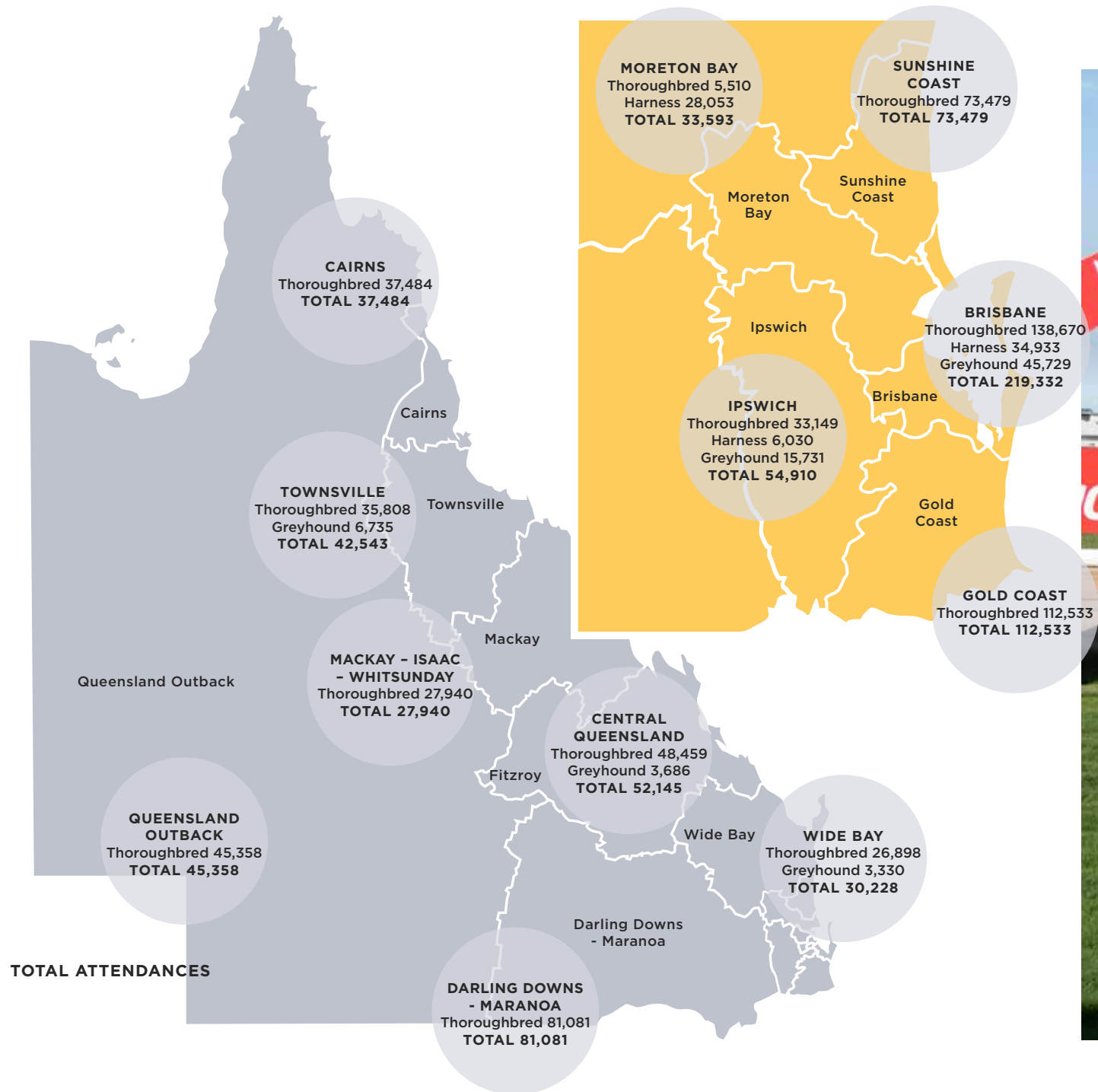
Racing clubs not only provide the opportunity for participants and spectators to participate in the sport of racing, they also provide an important social destination and in many regions, are an important part of the social fabric of the community.

In 2023/24, there were 1,444 TAB race meetings and a further 215 non-TAB race meetings. These race meetings attracted attendances over 810,626 - 73% of which were in regional areas. Thoroughbred race meetings, in Queensland, attracted a total of 666,399 attendances. Race meetings in Brisbane (138,670) and the Gold Coast (112,533) were responsible for the largest attendance. Harness race meetings attracted 69,016 attendances with race meetings in Brisbane (34,933) and Moreton Bay (28,053) making up the majority of this amount. Greyhound racing attracted attendance of 75,211 with race meetings in Brisbane (45,729) and Ipswich (15,731) making up 82% all attendances.

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









# Customer Expenditure Generated by Racing Clubs and Events

In 2023/24 it is estimated that the total expenditure generated by racing customers was more than \$217.2 million, (excluding wagering on the races). Racing’s customers include attendees, sponsors, members, broadcast providers, community groups and participants. Racing customer expenditure can be broadly segmented into the following categories:

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

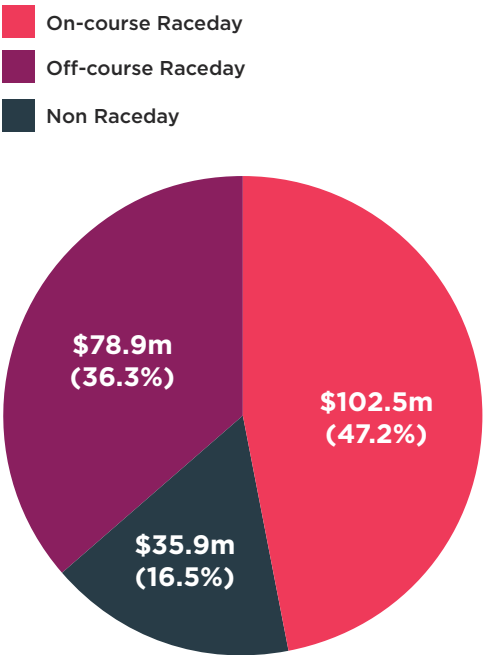
On-course customer expenditure funds the administration, operation and other costs that racing clubs incur.

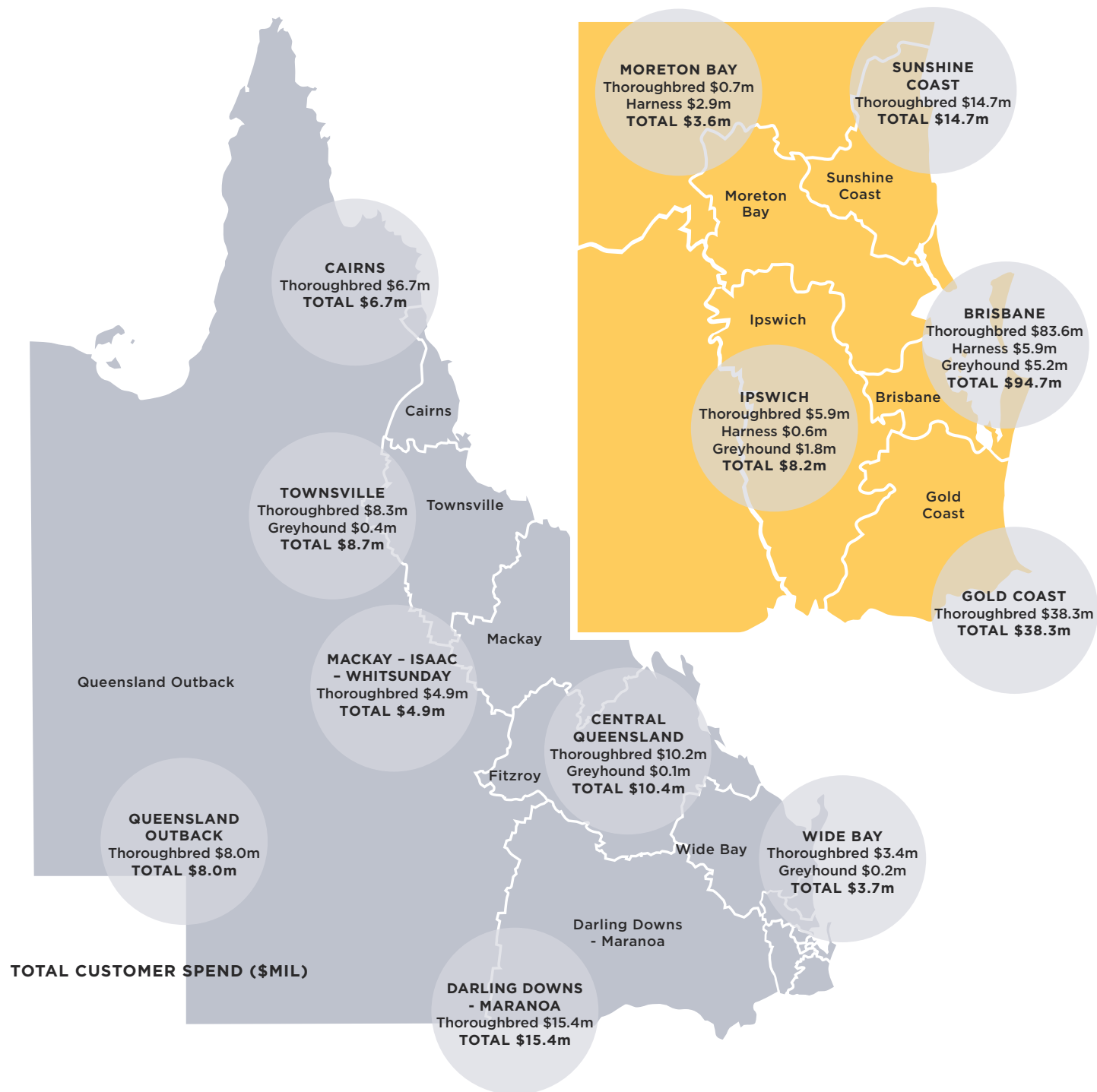
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. Major racing events have long proven their ability to extend the generation of economic stimulus into a broader cross-section of the local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

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

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

BREAKDOWN OF RACING  
CUSTOMER SPENDING











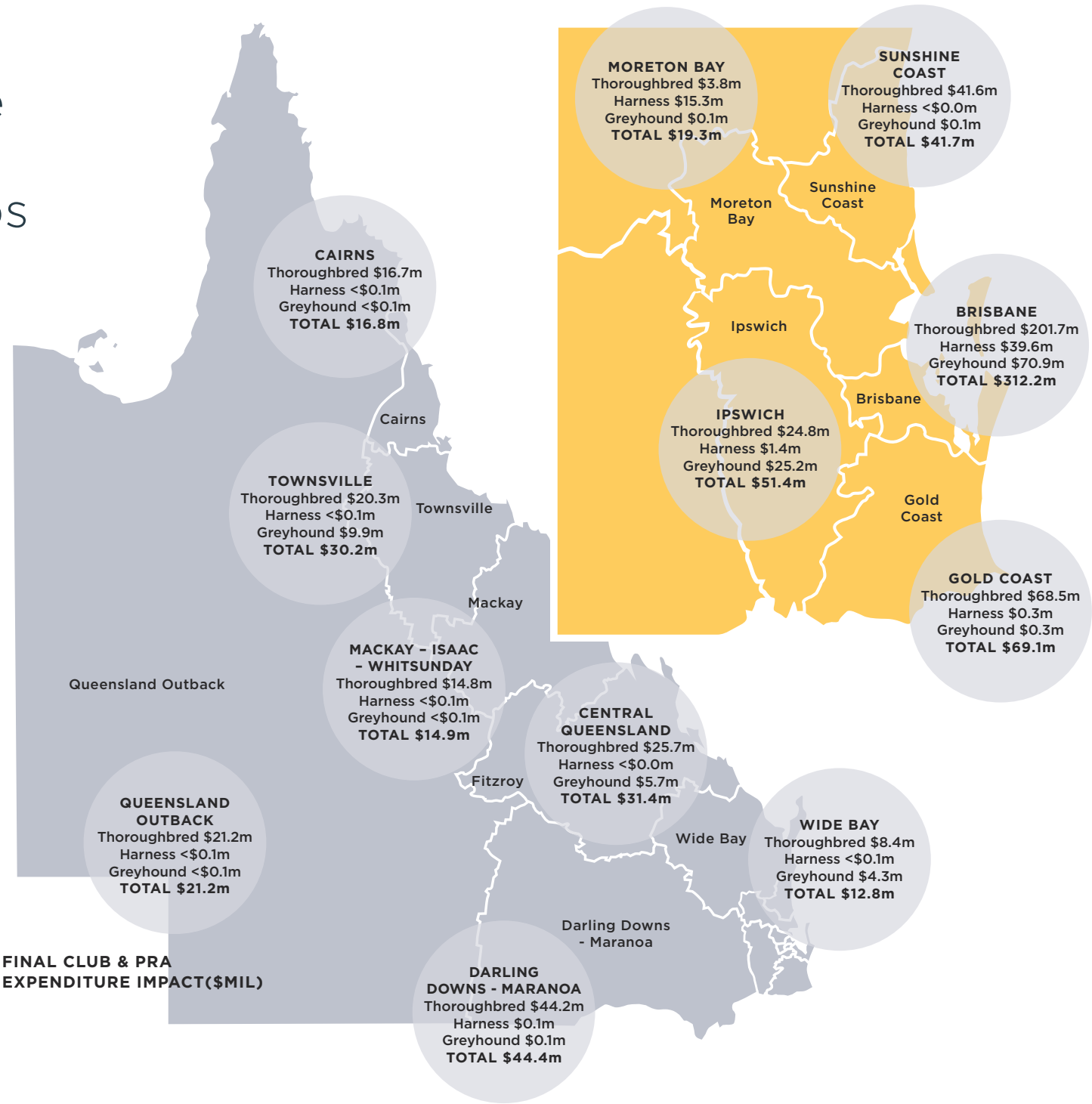
# Expenditure by the Principal Racing Authority and Clubs

In 2023/24, Racing Queensland and the 120 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of more than \$665 million in Queensland. This represents the expenditure incurred by these organisations in maintaining tracks, running race meetings, administration, marketing, cost of goods and prize money.

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

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

Forty-seven percent (\$312.2 million) of this expenditure impact occurred in Brisbane – a result largely driven by the presence of the largest racing clubs (in terms of size and financial impact) as well as the principal racing authority. The Gold Coast (10%) generates the next most significant impact with the remainder spread around the State.







## MAJOR EVENT IMPACTS

# Magic Millions Raceday & Sales

### OVERVIEW

The Magic Millions Raceday is one of Australia's richest racedays with more than \$14.2 million in prize money on offer. In 2024, the raceday attracted attendances in excess of 24,000 people.

### KEY TOURISM IMPACTS

In 2024, an economic impact assessment of the Magic Millions Raceday was undertaken. The study found that the event generated more than \$25.1 million of direct in-scope expenditure for the Queensland economy.

The event was directly responsible for over 8,604 visitors to Queensland – new people to the Gold Coast and Queensland economies. In addition to the impacts associated with the raceday, the bloodstock sales component of the event has great potential to generate economic impacts within the QLD economy. This is particularly the case when a non-QLD buyer purchases a QLD bred racehorse.

The following tables illustrate the key impacts to the State:

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

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

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







# Community and Social Benefits

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

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

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

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

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

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

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







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

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

CAPACITY BUILDING

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

CHARITABLE SUPPORT

More than 580 charitable organisations are supported by the racing industry. These charities receive direct funds, in addition to in-kind support

HISTORY

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

VOLUNTEERISM

Over 7,500 individuals provide their skills, time and support to the racing industry as a volunteer

FACILITY SHARING

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

COMMUNITY

Racing clubs provide an important community for more than 25,200 members and volunteers who are actively engaged in their club. Close to 810,650 attendances are recorded at Queensland race meetings.

## COMMUNITY BUILDING

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

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

- + Close to 460 community organisations or charities are assisted and supported by racing clubs
- + Close to 226 community organisations share racing club facilities and resources
- + Racing in Queensland currently engage more than 7,500 volunteers who assist in various club, kindred body and industry related roles
- + 25,205 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 3,390 people who provide volunteer time and services to racing clubs. Socially, volunteering is recognised as a means of enhancing the quality of life, particularly among the aged, whilst making an important contribution to the community.

Volunteers in racing assume roles in areas such as:

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

attendants, starters and judging, betting supervisors

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

IER found that racing clubs financially assist or support 586 organisations and charities.

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

Just some of the charitable organisations supported by racing include:

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



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

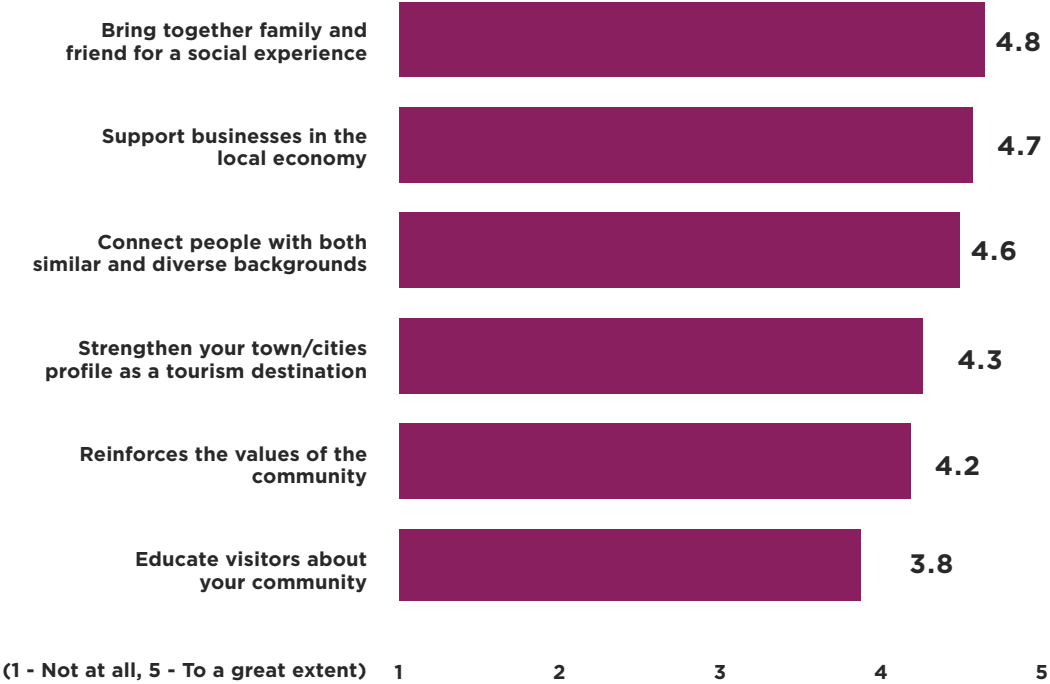
- + Sporting clubs (e.g. Rugby League, Rowing, Gymnastics, Equestrian Groups, Surf Lifesaving, Netball, Tennis, AFL, Cricket)
- + Schools (Kindergartens, Pre-School, State schools and colleges)
- + Rotary, Lions, Apex, RSL's and Variety Clubs
- + Hospitals and Health Organisations (e.g. Men's Shed)
-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



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

The social impact survey asked clubs how much they believed racing in their town or city has the ability to engage with the community from a social cohesion, education and business perspective. As the chart illustrates, all indicators were positive, particularly significant in the areas of racing's ability to 'bring together family and friends for a social experience' (4.8), to 'support businesses in the local economy' (4.7) and to 'connect people with both similar and diverse backgrounds' (4.6). These indicators illustrate the position that racing clubs see themselves as integral to the fabric of the local community.

COMMUNITY ENGAGEMENT WITH RACING QUEENSLAND





### SUPPORTING FAMILY RELATIONSHIPS

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

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

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

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

- + All clubs have complimentary entry and offer some level of free activities for children
- + Almost all clubs offer events for families and children on special racedays
- + Close to three-quarters of clubs actively involve people from culturally diverse backgrounds

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

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

### SHARING FACILITIES WITHIN THE COMMUNITY

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

Some of the 226 organisations which share facilities and resources with clubs include:

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







## EDUCATION AND TRAINING

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

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

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

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

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

- + Clubs have individuals participating in further education, career development and training programs each year
- + All racing clubs encourage responsible gambling
- + 19% of clubs have partnerships with primary, secondary, trade and tertiary institutions



## PROMOTING HEALTHY RACING CLUB ENVIRONMENTS

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

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

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

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

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

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

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

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

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

More than 16% of clubs have policies and programs to develop native flora and fauna. Examples include:

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







## CLUB HISTORY AND HERITAGE

Thoroughbred, harness and greyhound racing in Queensland 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.

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

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

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

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



## REGIONAL SUMMARIES

### Brisbane

- + The population of the Brisbane region is 1,399,754 (Australian Bureau of Statistics).
- + There are a total of five (5) racing clubs operating in the region, two (2) of which are thoroughbred clubs, two (2) of which are greyhound racing clubs, and one (1) harness racing club.
- + The racing industry in the Brisbane region is responsible for generating close to \$1,207.1 million in value added contribution to Gross State Product. This equates to 49.1% 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 6,305 full-time equivalent (FTE) jobs in the region.
- + There are close to 10,080 roles occupied in the racing industry in Brisbane.

#### RACING CLUBS IN THE REGION

##### Thoroughbred

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

##### Harness

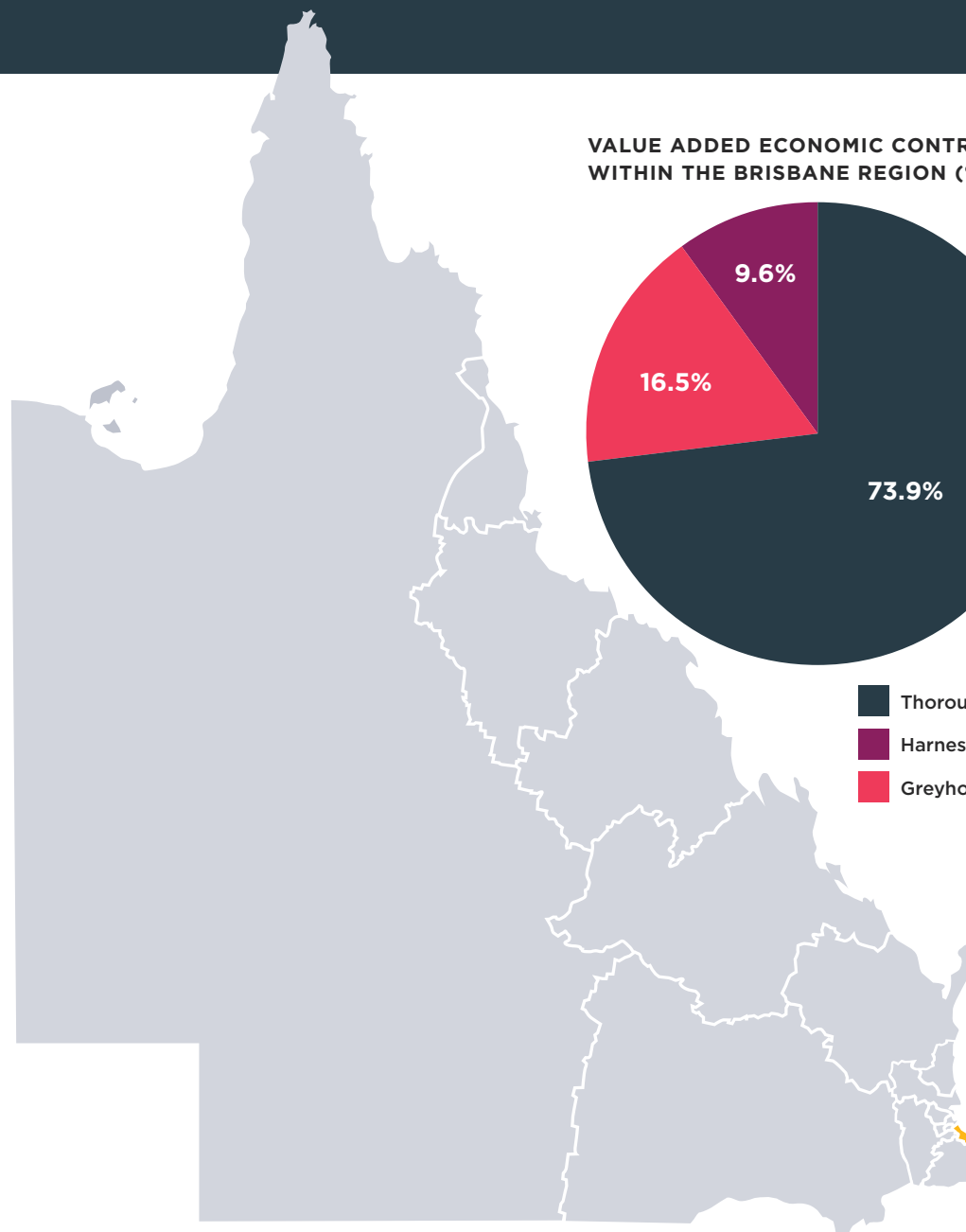
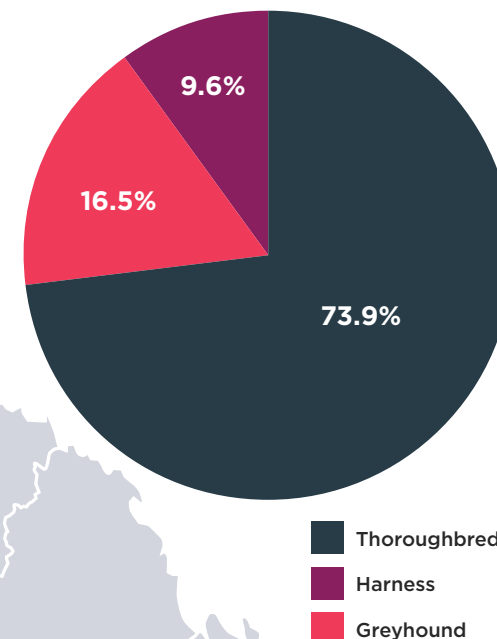
- + Albion Park Harness Racing Club

##### Greyhound

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

The racing industry in the **Brisbane region is responsible for generating \$1,207.1 million in value added** contribution to gross state product. This represents **49.1% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE BRISBANE REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$474.1m	\$68.9m	\$126.0m	\$669.0m
Total value added	\$891.7m	\$115.8m	\$199.6m	\$1,207.1m
Full-time equivalent employment	4,582	610	1,113	6,305

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	12	55	53	121
Horses and greyhounds in training	1,940	14	66	2,020

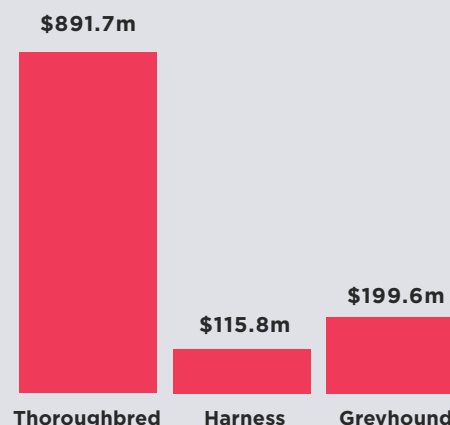
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	101	26	25	151
Owners	5,817	134	1,308	7,259
Trainers	97	8	46	151
Breeders staff	87	13	19	118
Stable/Kennel employees	412	12	48	472
Racing Club & industry staff (FT, PT, casual)	1,076	148	337	1,561
Jockeys, drivers & apprentices	42	2	0	44
Racing club volunteers	0	0	11	11
Volunteers assisting participants	149	77	82	308
<b>Total roles occupied in the Brisbane region</b>	<b>7,780</b>	<b>421</b>	<b>1,875</b>	<b>10,076</b>

\*Some totals do not add due to rounding.

Race meetings in the Brisbane region attracted attendances of **219,332** or **27.1% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

### 5 Racing Clubs

THOROUGHBRED	2
HARNESS	1
GREYHOUND	2

### 523 Race Meetings

THOROUGHBRED	82
HARNESS	149
GREYHOUND	292

### 5,411 Races

THOROUGHBRED	716
HARNESS	1,377
GREYHOUND	3,318

### 9,716 Racing Club Members

THOROUGHBRED	9,075
HARNESS	297
GREYHOUND	344

### 219,332 Attendances

THOROUGHBRED	138,670
HARNESS	34,933
GREYHOUND	45,729

\*Some totals do not add due to rounding

# Cairns

- + The population of the Cairns region is 265,366 (Australian Bureau of Statistics).
- + There are a total of seven (7) racing clubs operating in the region which are all thoroughbred clubs.
- + The racing industry in the Cairns region is responsible for generating close to \$58.8 million in value added contribution to Gross State Product. This equates to 2.4% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 394 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,950 roles occupied in the racing industry in Cairns.

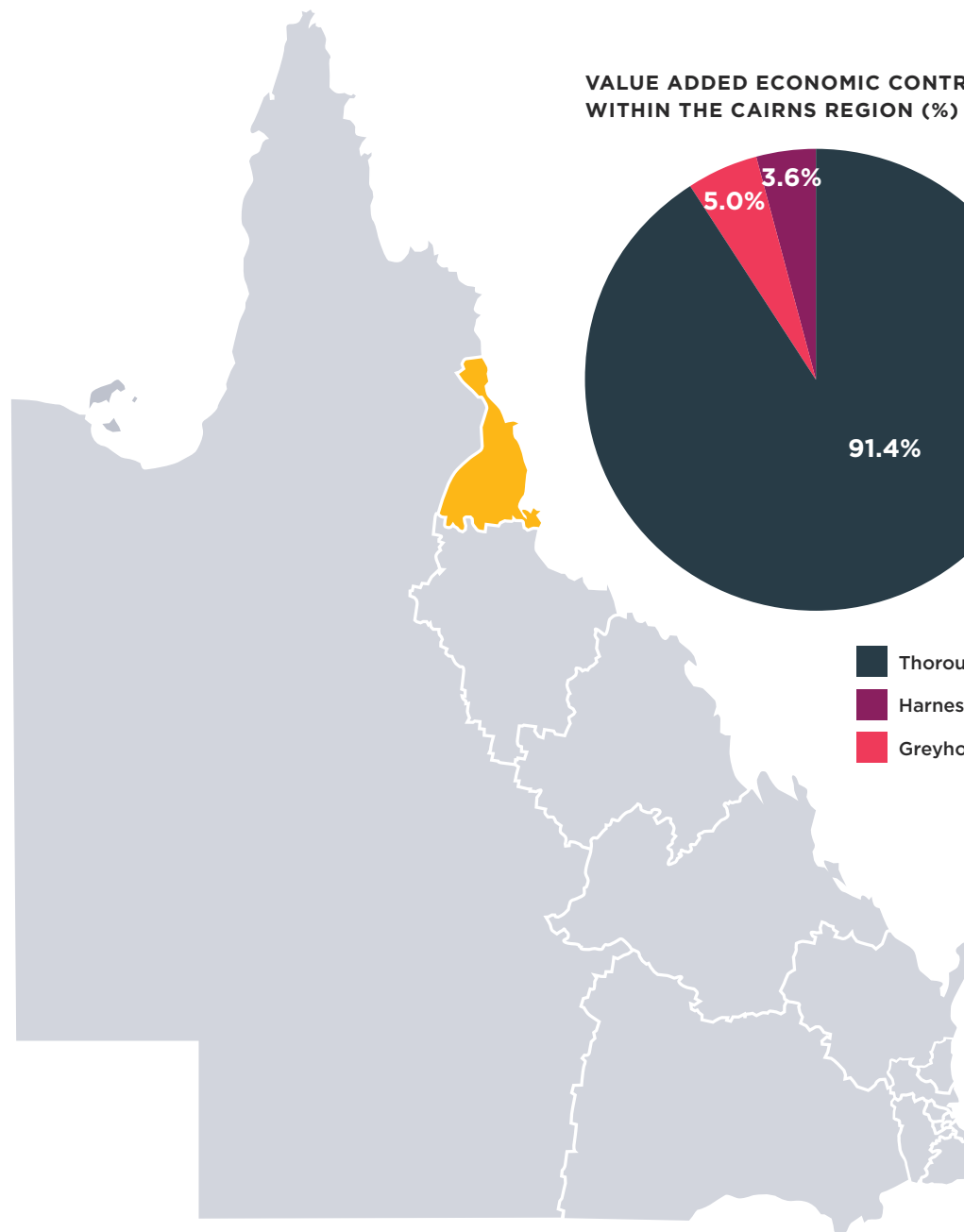
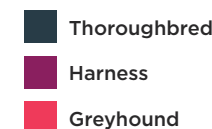
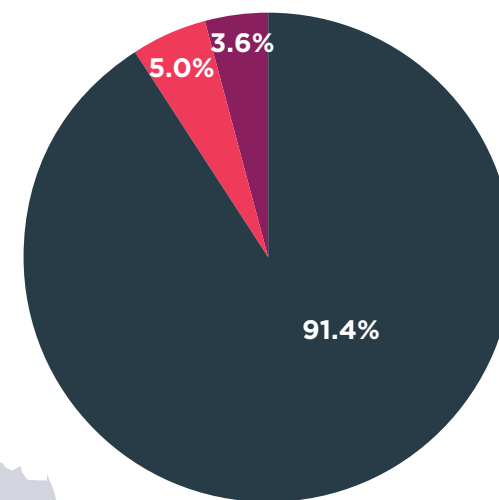
## RACING CLUBS IN THE REGION

### Thoroughbred

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

The racing industry in the **Cairns region is responsible for generating \$58.8 million in value added** contribution to gross state product. This represents **2.4% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CAIRNS REGION (%)





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$51.2m	\$2.0m	\$2.7m	\$55.9m
Total value added	\$53.7m	\$2.1m	\$2.9m	\$58.8m
Full-time equivalent employment	360	15	20	394

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	7	0	7	14
Horses and greyhounds in training	432	0	23	455

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	14	0	3	17
Owners	959	4	105	1,068
Trainers	57	0	12	69
Breeders staff	12	0	2	15
Stable/Kennel employees	169	0	3	172
Racing Club & industry staff (FT, PT, casual)	320	3	9	332
Jockeys, drivers & apprentices	12	1	0	13
Racing club volunteers	162	0	0	162
Volunteers assisting participants	91	0	16	107
<b>Total roles occupied in the Cairns region</b>	<b>1,796</b>	<b>8</b>	<b>150</b>	<b>1,954</b>

\*Some totals do not add due to rounding.

Race meetings in the Cairns region attracted attendances of **37,484** or **4.6%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 7 Racing Clubs

THOROUGHBRED 7

## 41 Race Meetings

THOROUGHBRED 41

## 277 Races

THOROUGHBRED 277

## 969 Racing Club Members

THOROUGHBRED 969

## 37,484 Attendances

THOROUGHBRED 37,484

\*Some totals do not add due to rounding

# Central Queensland

- + The population of the Central Queensland region is 238,231 (Australian Bureau of Statistics).
- + There are a total of thirteen (13) racing clubs operating in the region, twelve (12) of which are thoroughbred clubs, and one (1) a greyhound racing club.
- + The racing industry in the Central Queensland region is responsible for generating close to \$81.5 million in value added contribution to Gross State Product. This equates to 3.3% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 537 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,900 roles occupied in the racing industry in Central Queensland.

## RACING CLUBS IN THE REGION

### Thoroughbred

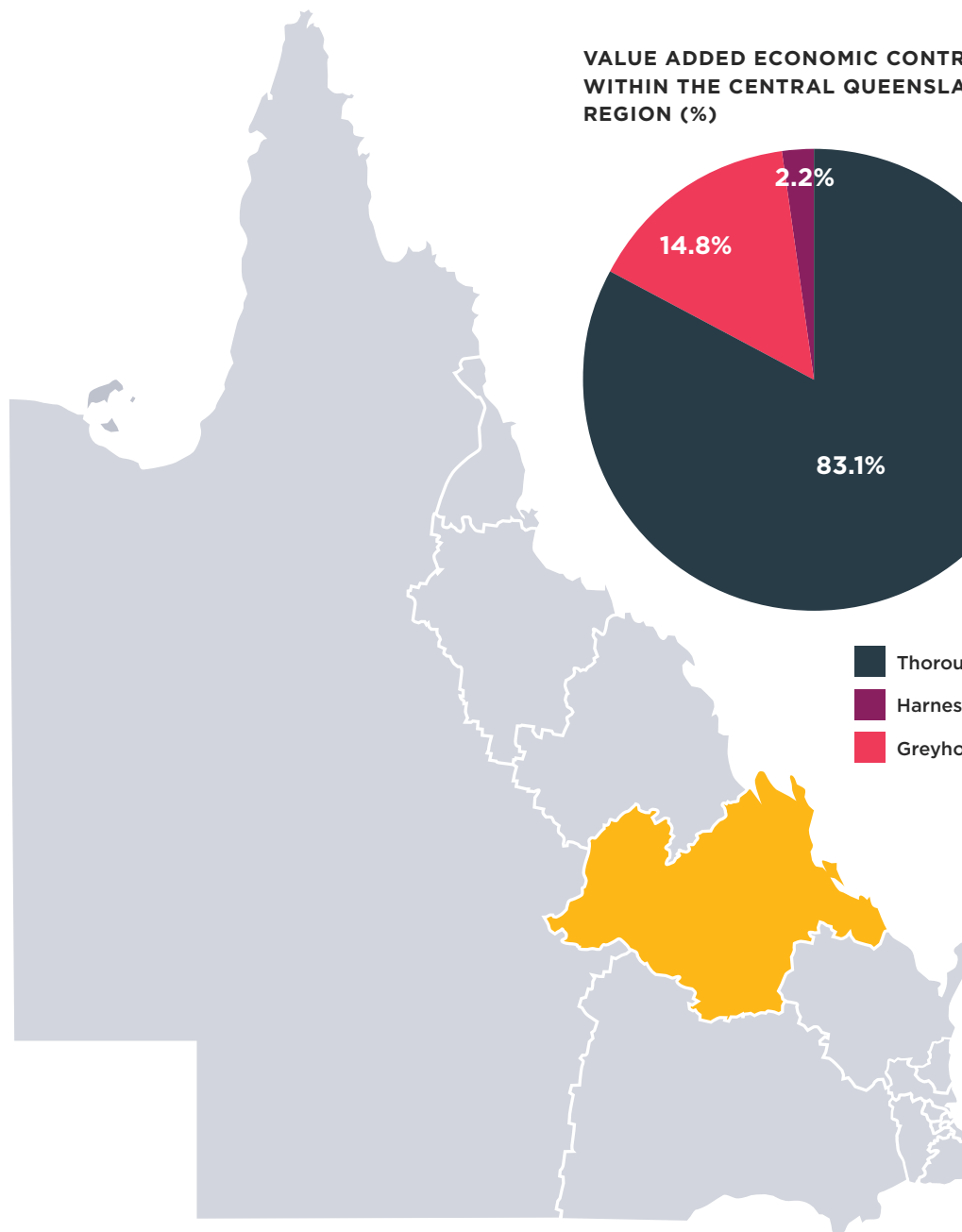
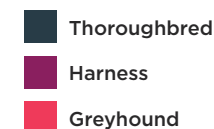
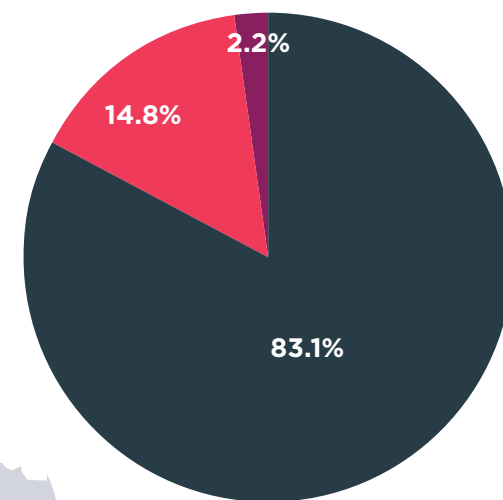
- + Bluff Blackwater Amateur Race Club Inc.
- + Calliope Jockey Club
- + Central Queensland Amateur Racing Club Inc.
- + Dawson Jockey Club
- + Dingo Race Club Inc.
- + Emerald Jockey Club
- + Gladstone Turf Club Inc.
- + Rockhampton Jockey Club Inc.
- + Springsure Jockey Club
- + Springsure St. Patricks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

### Greyhound

- + Rockhampton Greyhound Racing Club

The racing industry in the **Central Queensland region** is responsible for generating **\$81.5 million in value added** contribution to gross state product. This represents **3.3%** of the industry total.

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$68.0m	\$1.8m	\$12.2m	\$82.0m
Total value added	\$67.7m	\$1.8m	\$12.1m	\$81.5m
Full-time equivalent employment	445	13	79	537

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	61	0	59	120
Horses and greyhounds in training	714	0	365	1,079

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	60	1	17	78
Owners	1,328	5	273	1,605
Trainers	121	0	34	155
Breeders staff	52	1	13	65
Stable/Kennel employees	168	0	24	192
Racing Club & industry staff (FT, PT, casual)	169	3	23	195
Jockeys, drivers & apprentices	12	0	0	12
Racing club volunteers	311	0	6	317
Volunteers assisting participants	218	3	50	271
<b>Total roles occupied in the Central Queensland region</b>	<b>2,439</b>	<b>12</b>	<b>440</b>	<b>2,891</b>

\*Some totals do not add due to rounding.

Race meetings in the Central Queensland region attracted attendances of **52,145** or **6.4%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 13 Racing Clubs

THOROUGHBRED	12
GREYHOUND	1

## 124 Race Meetings

THOROUGHBRED	68
GREYHOUND	56

## 1,059 Races

THOROUGHBRED	428
GREYHOUND	631

## 923 Racing Club Members

THOROUGHBRED	878
GREYHOUND	45

## 52,145 Attendances

THOROUGHBRED	48,459
GREYHOUND	3,686

\*Some totals do not add due to rounding



# Darling Downs - Maranoa

- + The population of the Darling Downs - Maranoa & Toowoomba region is 303,283 (Australian Bureau of Statistics).
- + There are a total of twenty-seven (27) racing clubs operating in the region, which are all thoroughbred clubs except one harness club.
- + The racing industry in the Darling Downs-Maranoa region is responsible for generating more than \$182.9 million in value added contribution to Gross State Product. This equates to 7.4% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 1,173 full-time equivalent (FTE) jobs in the region.
- + There are more than 6,000 roles occupied in the racing industry in Darling Downs-Maranoa.

The racing industry in the **Darling Downs-Maranoa region** is responsible for generating **\$182.9 million** in **value added** contribution to gross state product. This represents **7.4%** of the industry total.

## RACING CLUBS IN THE REGION

### Thoroughbred

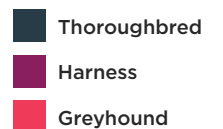
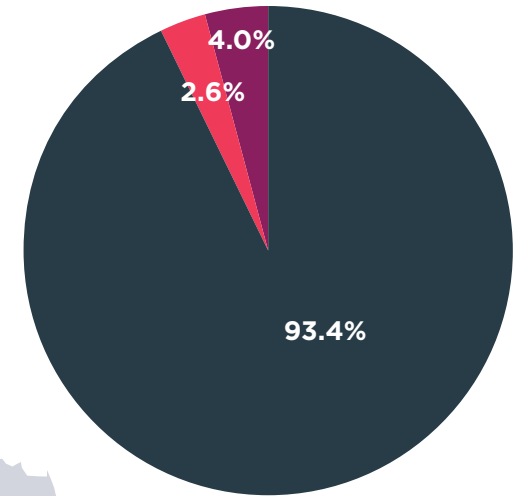
- + Bell Race Club Inc.
- + Chinchilla Race Club Inc.
- + Clifton Jockey Club Inc.
- + Dalby & Northern Downs Jockey Club Inc.
- + Dalby Amateur Picnic Race Club
- + Flinton Race Club
- + Goondiwindi & McIntyre Picnic Race Club Inc.
- + Goondiwindi Race Club Inc.
- + Injune Race Club
- + Jandowae Race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

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

### Harness

- + The Darling Downs Harness Racing Club Inc.

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$183.1m	\$8.0m	\$5.3m	\$196.5m
Total value added	\$170.9m	\$7.4m	\$4.7m	\$182.9m
Full-time equivalent employment	1,094	48	31	1,173

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	795	59	122	975
Horses and greyhounds in training	1,586	65	242	1,893

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	176	15	33	223
Owners	2,156	56	393	2,605
Trainers	258	18	44	319
Breeders staff	151	7	25	183
Stable/Kennel employees	474	12	33	518
Racing Club & industry staff (FT, PT, casual)	752	4	10	766
Jockeys, drivers & apprentices	34	16	0	50
Racing club volunteers	678	2	0	680
Volunteers assisting participants	502	63	72	637
<b>Total roles occupied in the Darling Downs - Maranoa region</b>	<b>5,181</b>	<b>192</b>	<b>609</b>	<b>5,982</b>

\*Some totals do not add due to rounding.

Race meetings in the Darling Downs - Maranoa region attracted attendances of **81,081** or **10.0%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 27 Racing Clubs

THOROUGHBRED	26
HARNESS	1

## 114 Race Meetings

THOROUGHBRED	113
HARNESS	1

## 789 Races

THOROUGHBRED	783
HARNESS	6

## 1,894 Racing Club Members

THOROUGHBRED	1,858
HARNESS	36

## 81,081 Attendances

THOROUGHBRED	81,081
HARNESS	0

\*Some totals do not add due to rounding

# Gold Coast

- + The population of the Gold Coast region is 1,075,933 (Australian Bureau of Statistics).
- + There is one (2) thoroughbred racing club operating in the region
- + The racing industry in the Gold Coast region is responsible for generating close to \$327.2 million in value added contribution to Gross State Product. This equates to 13.3% 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 2,125 full-time equivalent (FTE) jobs in the region.
- + There are more than 8,500 roles occupied in the racing industry in Gold Coast.

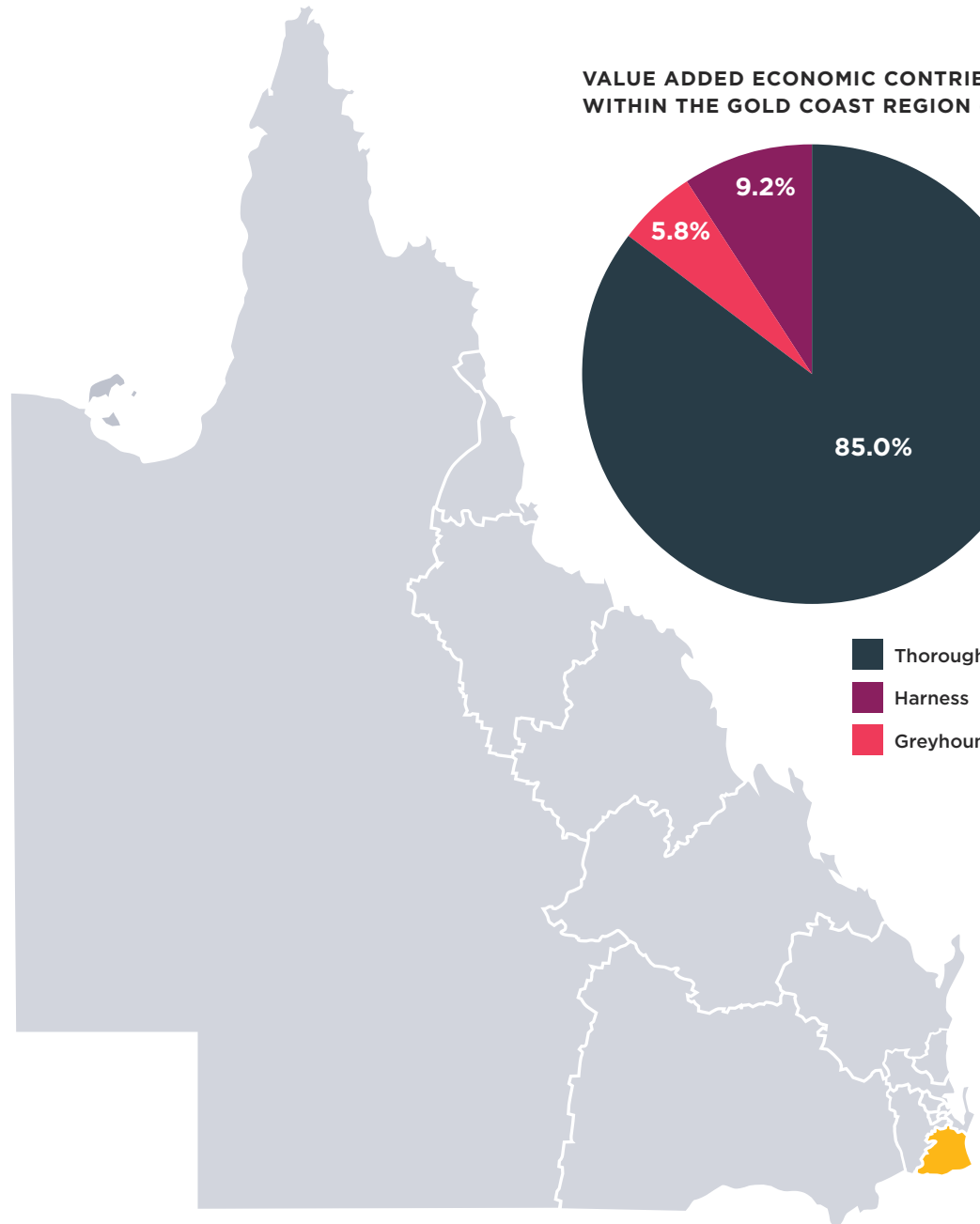
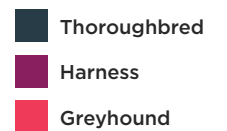
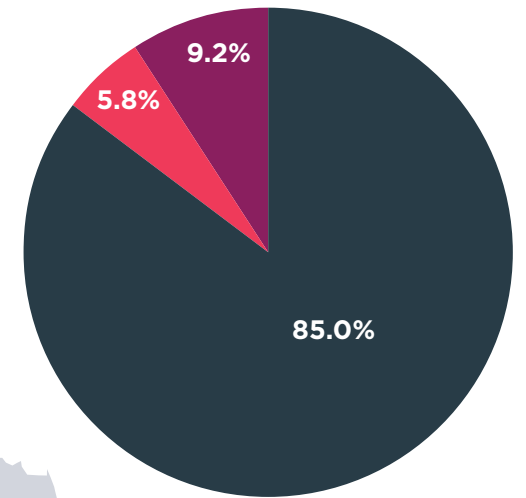
The racing industry in the **Gold Coast region** is responsible for generating **\$327.2 million** in **value added** contribution to gross state product. This represents **13.3% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

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

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





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$259.7m	\$29.6m	\$18.6m	\$307.9m
Total value added	\$278.0m	\$30.1m	\$19.1m	\$327.2m
Full-time equivalent employment	1,812	189	123	2,125

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	385	51	348	784
Horses and greyhounds in training	2,007	452	942	3,401

## TOTAL ROLES OCCUPIED IN RACING

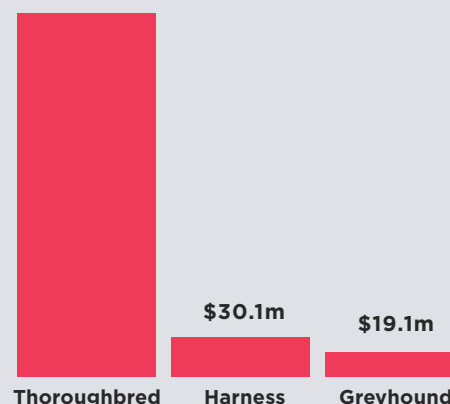
	Thoroughbred	Harness	Greyhound	Total
Breeders	140	48	83	270
Owners	4,380	148	1,092	5,620
Trainers	186	66	139	391
Breeders staff	120	24	62	207
Stable/Kennel employees	465	53	86	603
Racing Club & industry staff (FT, PT, casual)	493	11	36	540
Jockeys, drivers & apprentices	43	40	0	83
Racing club volunteers	25	0	0	25
Volunteers assisting participants	372	214	215	800
<b>Total roles occupied in the Gold Coast region</b>	<b>6,224</b>	<b>603</b>	<b>1,712</b>	<b>8,539</b>

\*Some totals do not add due to rounding.

Race meetings in the Gold Coast region attracted attendances of **112,533** or **13.9% of total attendances** at race meetings in Queensland.

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

\$278.0m



## AT A GLANCE

## 2 Racing Clubs

THOROUGHBRED 2

## 53 Race Meetings

THOROUGHBRED 53

## 399 Races

THOROUGHBRED 399

## 3,510 Racing Club Members

THOROUGHBRED 3,510

## 112,533 Attendances

THOROUGHBRED 112,533

\*Some totals do not add due to rounding

# Ipswich

- + The population of the Ipswich region is 397,323 (Australian Bureau of Statistics).
- + There are a total of three (3) racing clubs operating in the region, two (2) of which are thoroughbred clubs and one (1) a harness racing club.
- + The racing industry in the Ipswich region is responsible for generating close to \$160.1 million in value added contribution to Gross State Product. This equates to 6.5% 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 1,033 full-time equivalent (FTE) jobs in the region.
- + There are over 3,900 roles occupied in the racing industry in Ipswich.

The racing industry in the Ipswich region is responsible for generating \$160.1 million in value added contribution to gross state product. This represents 6.5% of the industry total.

## RACING CLUBS IN THE REGION

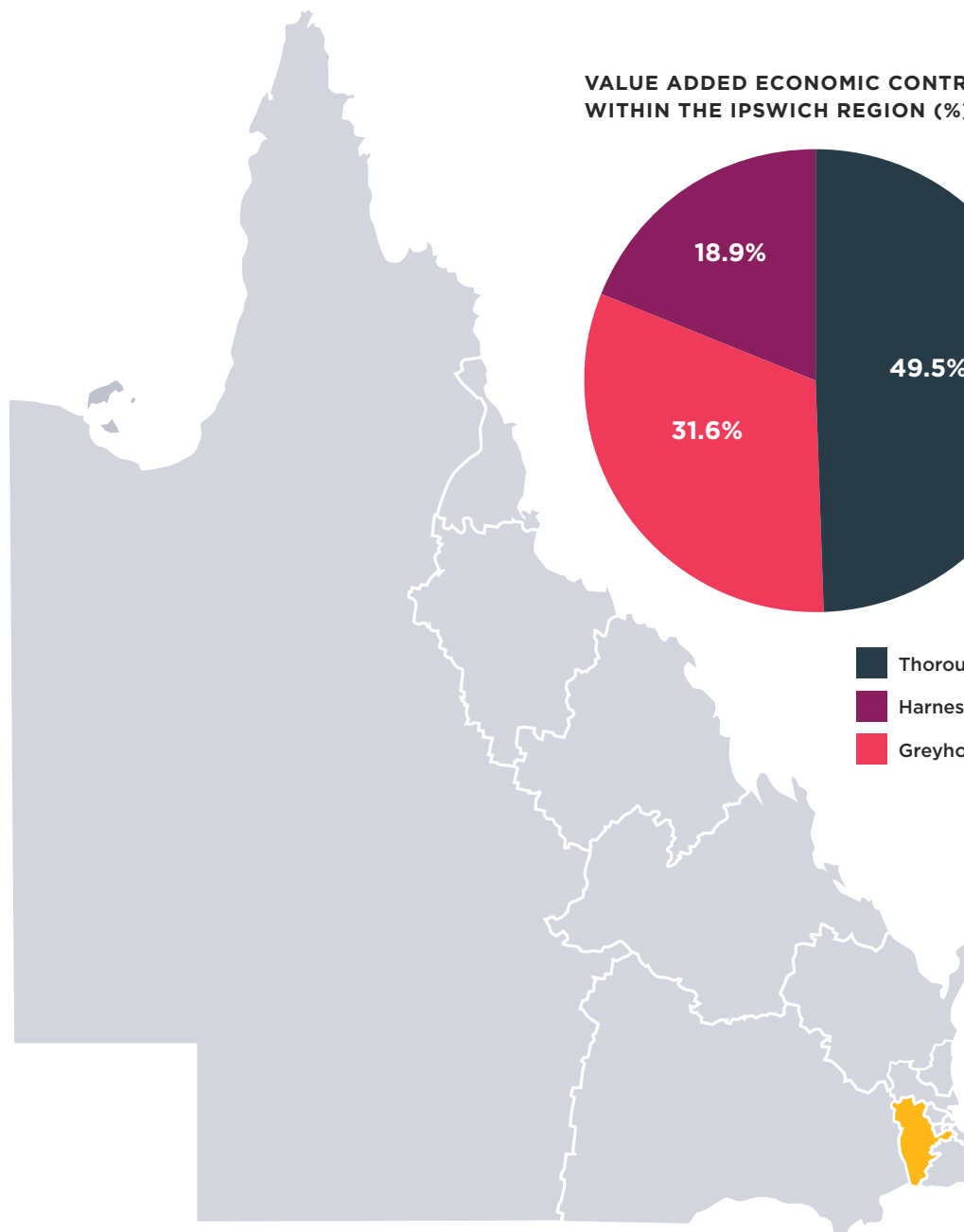
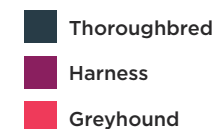
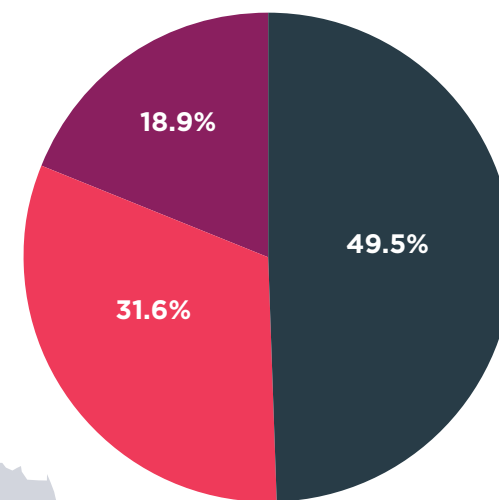
### Thoroughbred

- + Esk Jockey Club
- + Ipswich Turf Club

### Harness

- + Marburg Pacing Association Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE IPSWICH REGION (%)



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$71.8m	\$28.9m	\$45.8m	\$146.5m
Total value added	\$79.3m	\$30.2m	\$50.6m	\$160.1m
Full-time equivalent employment	527	182	324	1,033

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	214	92	327	633
Horses and greyhounds in training	148	465	1,557	2,171

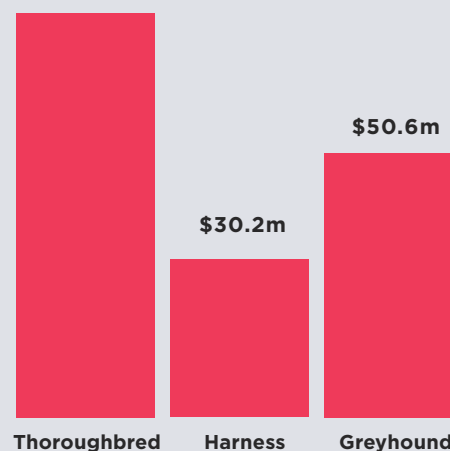
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	42	53	117	212
Owners	958	181	748	1,887
Trainers	55	95	199	349
Breeders staff	36	27	89	151
Stable/Kennel employees	130	46	101	278
Racing Club & industry staff (FT, PT, casual)	197	19	24	241
Jockeys, drivers & apprentices	5	57	0	62
Racing club volunteers	23	19	0	42
Volunteers assisting participants	110	263	307	680
<b>Total roles occupied in the Ipswich region</b>	<b>1,557</b>	<b>760</b>	<b>1,586</b>	<b>3,903</b>

\*Some totals do not add due to rounding.

Race meetings in the Ipswich region attracted attendances of **54,910** or **6.8% of total attendances** at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE IPSWICH REGION  
\$79.3m



## AT A GLANCE

## 3 Racing Clubs

THOROUGHBRED	2
HARNESS	1

## 262 Race Meetings

THOROUGHBRED	49
HARNESS	18
GREYHOUND	195

## 2,773 Races

THOROUGHBRED	379
HARNESS	147
GREYHOUND	2,247

## 449 Racing Club Members

THOROUGHBRED	377
HARNESS	72

## 54,910 Attendances

THOROUGHBRED	33,149
HARNESS	6,030
GREYHOUND	15,731

\*Some totals do not add due to rounding



# Mackay-Isaac-Whitsunday

- + The population of the Mackay-Isaac-Whitsunday region is 189,643 (Australian Bureau of Statistics).
- + There are a total of six (6) racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Mackay-Isaac-Whitsunday region is responsible for generating close to \$39.8 million in value added contribution to Gross State Product. This equates to 1.6% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 268 full-time equivalent (FTE) jobs in the region.
- + There are close to 1,500 roles occupied in the racing industry in Mackay-Isaac-Whitsunday.

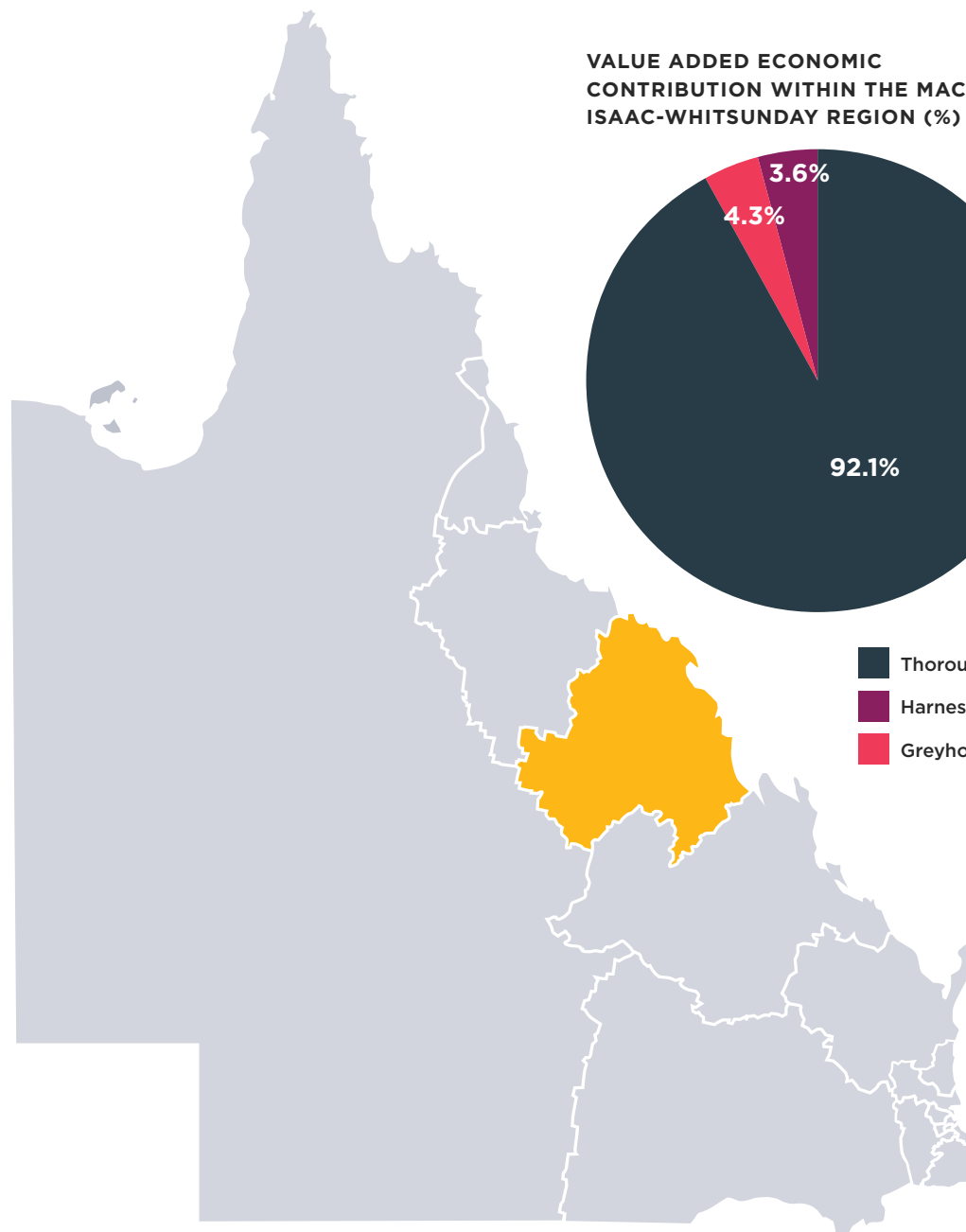
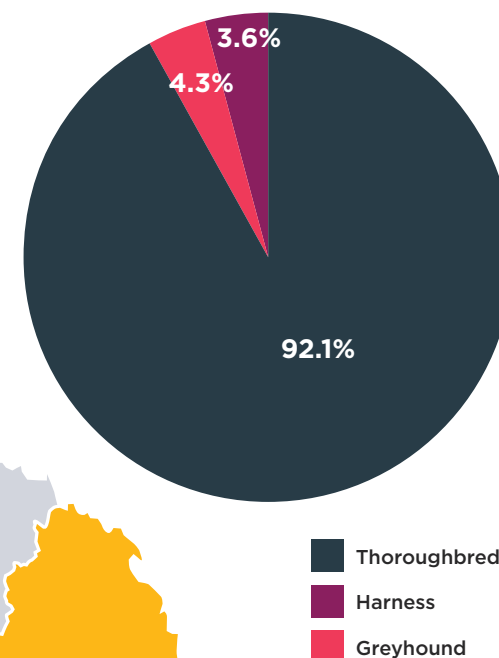
The racing industry in the **Mackay-Isaac-Whitsunday region** is responsible for generating **\$39.8 million in value added** contribution to gross state product. This represents **1.6% of the industry total**.

## RACING CLUBS IN THE REGION

### Thoroughbred

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

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$38.3m	\$1.5m	\$2.0m	\$41.9m
Total value added	\$36.7m	\$1.4m	\$1.7m	\$39.8m
Full-time equivalent employment	247	10	12	268

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	21	2	3	26
Horses and greyhounds in training	273	0	37	310

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	13	3	2	18
Owners	786	7	119	913
Trainers	35	0	6	41
Breeders staff	11	2	2	14
Stable/Kennel employees	105	1	7	113
Racing Club & industry staff (FT, PT, casual)	169	2	6	177
Jockeys, drivers & apprentices	3	0	0	3
Racing club volunteers	125	0	0	125
Volunteers assisting participants	59	8	8	76
<b>Total roles occupied in the Mackay-Isaac-Whitsunday region</b>	<b>1,307</b>	<b>23</b>	<b>150</b>	<b>1,480</b>

\*Some totals do not add due to rounding.

Race meetings in the Mackay-Isaac-Whitsunday region attracted attendances of **27,940** or **3.4%** of total attendances at race meetings in Queensland.

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



## AT A GLANCE

## 6 Racing Clubs

THOROUGHBRED 6

## 46 Race Meetings

THOROUGHBRED 46

## 301 Races

THOROUGHBRED 301

## 305 Racing Club Members

THOROUGHBRED 305

## 27,940 Attendances

THOROUGHBRED 27,940

\*Some totals do not add due to rounding

# Moreton Bay

- + The population of the Moreton Bay region is 516,444 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region, one (1) of which is a thoroughbred club, and one (1) a harness racing club.
- + The racing industry in the Moreton Bay region is responsible for generating almost \$81.7 million in value added contribution to Gross State Product. This equates to 3.3% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 543 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,300 roles occupied in the racing industry in Moreton Bay.

## RACING CLUBS IN THE REGION

### Thoroughbred

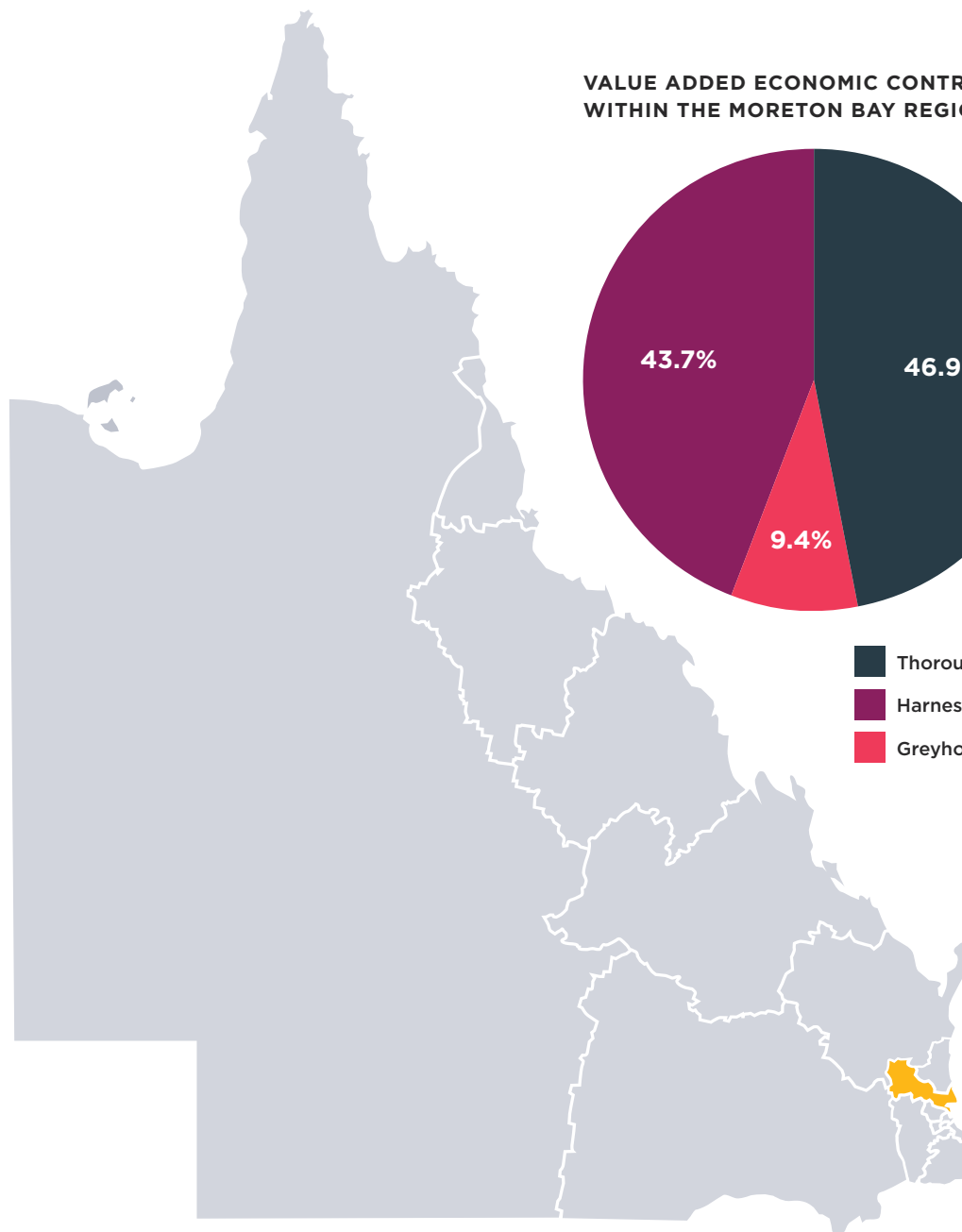
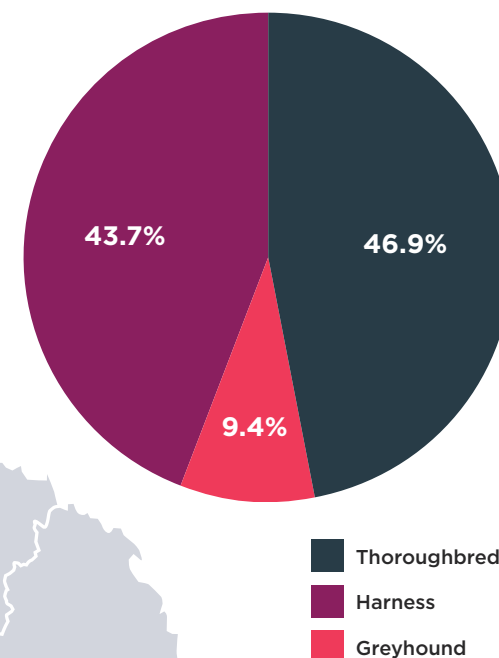
- + Kilcoy Race Club Inc.

### Harness

- + Redcliffe Peninsula Harness Racing & Sporting Club Inc.

The racing industry in the **Moreton Bay region** is responsible for generating **\$81.7 million in value added** contribution to gross state product. This represents **3.3% of the industry total**.

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





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$35.3m	\$32.5m	\$6.9m	\$74.6m
Total value added	\$38.3m	\$35.7m	\$7.7m	\$81.7m
Full-time equivalent employment	263	230	49	543

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	32	45	69	146
Horses and greyhounds in training	2	139	236	376

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	33	43	35	111
Owners	1,376	164	515	2,055
Trainers	39	62	70	171
Breeders staff	28	22	26	76
Stable/Kennel employees	136	46	51	233
Racing Club & industry staff (FT, PT, casual)	111	60	17	188
Jockeys, drivers & apprentices	15	27	0	42
Racing club volunteers	17	12	0	29
Volunteers assisting participants	81	196	103	379
<b>Total roles occupied in the Moreton Bay region</b>	<b>1,835</b>	<b>631</b>	<b>817</b>	<b>3,284</b>

\*Some totals do not add due to rounding.

Race meetings in the Moreton Bay region attracted attendances of **33,593** or **4.1% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

## 2 Racing Clubs

THOROUGHBRED	1
HARNESS	1

## 149 Race Meetings

THOROUGHBRED	12
HARNESS	137

## 1,311 Races

THOROUGHBRED	89
HARNESS	1,222

## 215 Racing Club Members

THOROUGHBRED	93
HARNESS	122

## 33,593 Attendances

THOROUGHBRED	5,540
HARNESS	28,053

\*Some totals do not add due to rounding

# Queensland Outback

- + The population of the Queensland Outback region is 82,158 (Australian Bureau of Statistics).
- + There are a total of thirty-four (34) racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Queensland - Outback region is responsible for generating more than \$35.9 million in value added contribution to Gross State Product. This equates to 1.5% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 247 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,600 roles occupied in the racing industry in Queensland - Outback.

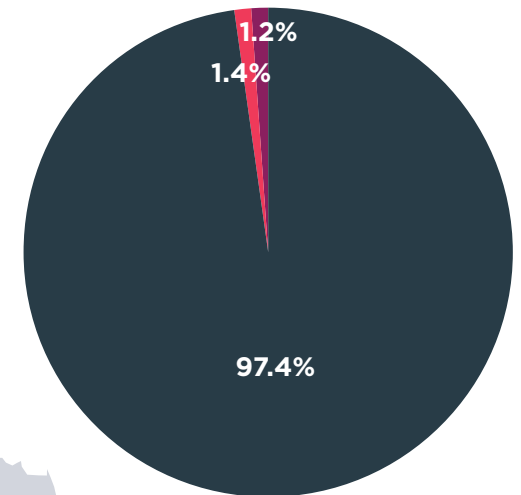
## RACING CLUBS IN THE REGION

### Thoroughbred

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

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

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



- Thoroughbred
- Harness
- Greyhound

The racing industry in the **Queensland - Outback region** is responsible for generating **\$35.9 million** in value added contribution to gross state product. This represents **1.5% of the industry total**.

## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$48.3m	\$0.6m	\$0.8m	\$49.7m
Total value added	\$34.9m	\$0.4m	\$0.5m	\$35.9m
Full-time equivalent employment	240	3	4	247

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	2	0	0	2
Horses and greyhounds in training	588	0	2	590

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	9	0	0	9
Owners	595	2	20	617
Trainers	103	0	1	104
Breeders staff	8	0	0	8
Stable/Kennel employees	128	0	1	129
Racing Club & industry staff (FT, PT, casual)	328	1	3	331
Jockeys, drivers & apprentices	15	0	0	15
Racing club volunteers	1,211	0	0	1,211
Volunteers assisting participants	151	0	1	152
<b>Total roles occupied in the Queensland Outback region</b>	<b>2,547</b>	<b>3</b>	<b>25</b>	<b>2,575</b>

\*Some totals do not add due to rounding.

Race meetings in the Queensland Outback region attracted attendances of **45,358** or **5.6%** of total attendances at race meetings in Queensland.

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

\$34.9m



## AT A GLANCE

34 Racing Clubs

THOROUGHBRED 34

78 Race Meetings

THOROUGHBRED 78

446 Races

THOROUGHBRED 446

2,129 Racing Club Members

THOROUGHBRED 2,129

45,358 Attendances

THOROUGHBRED 45,358

\*Some totals do not add due to rounding



# Sunshine Coast

- + The population of the Sunshine Coast region is 424,309 (Australian Bureau of Statistics).
- + There is one (1) race club operating in the region and it is a thoroughbred club.
- + The racing industry in the Sunshine Coast region is responsible for generating more than \$151.0 million in value added contribution to Gross State Product. This equates to 6.1% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 968 full-time equivalent (FTE) jobs in the region.
- + There are close to 3,400 roles occupied in the racing industry in Sunshine Coast.

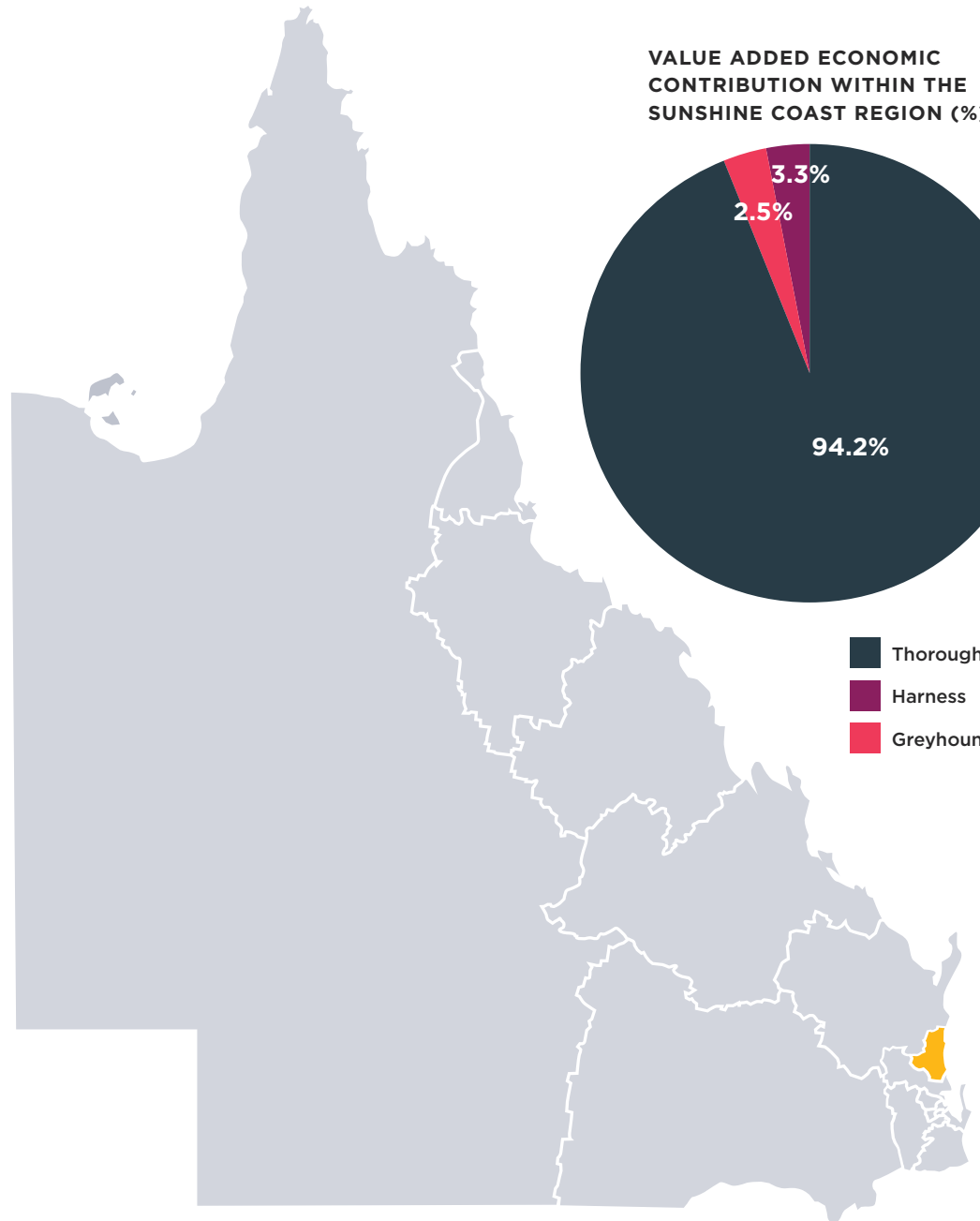
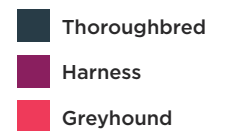
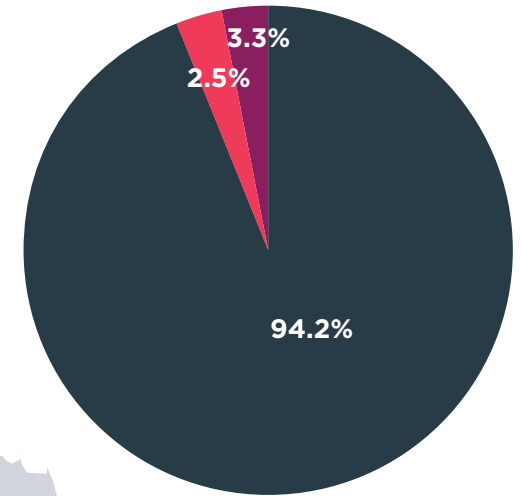
The racing industry in the **Sunshine Coast region** is responsible for generating **\$151.0 million** in **value added** contribution to gross state product. This represents **6.1% of the industry total**.

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Sunshine Coast Turf Club Inc.

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$132.6m	\$3.6m	\$4.7m	\$140.9m
Total value added	\$142.2m	\$3.8m	\$4.9m	\$151.0m
Full-time equivalent employment	909	27	33	968

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	45	7	40	92
Horses and greyhounds in training	1,257	0	73	1,330

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	48	7	11	66
Owners	2,026	27	265	2,318
Trainers	90	2	14	106
Breeders staff	41	4	8	53
Stable/Kennel employees	283	1	10	294
Racing Club & industry staff (FT, PT, casual)	285	4	14	304
Jockeys, drivers & apprentices	27	0	0	27
Racing club volunteers	7	0	0	7
Volunteers assisting participants	164	22	24	210
<b>Total roles occupied in the Sunshine Coast region</b>	<b>2,971</b>	<b>67</b>	<b>346</b>	<b>3,384</b>

\*Some totals do not add due to rounding.

## Race meetings in the Sunshine Coast region

attracted attendances of **73,479** or **9.1% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

### 1 Racing Clubs

THOROUGHBRED 1

### 61 Race Meetings

THOROUGHBRED 61

### 465 Races

THOROUGHBRED 465

### 2,309 Racing Club Members

THOROUGHBRED 2,309

### 73,479 Attendances

THOROUGHBRED 73,479

\*Some totals do not add due to rounding

# Townsville

- + The population of the Townsville region is 243,798 (Australian Bureau of Statistics).
- + There are a total of nine (9) racing clubs operating in the region, eight (8) of which are thoroughbred clubs, and one (1) a greyhound racing club.
- + The racing industry in the Townsville region is responsible for generating near to \$75.5 million in value added contribution to Gross State Product. This equates to 3.1% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 503 full-time equivalent (FTE) jobs in the region.
- + There are over 2,600 roles occupied in the racing industry in Townsville.

## RACING CLUBS IN THE REGION

### Thoroughbred

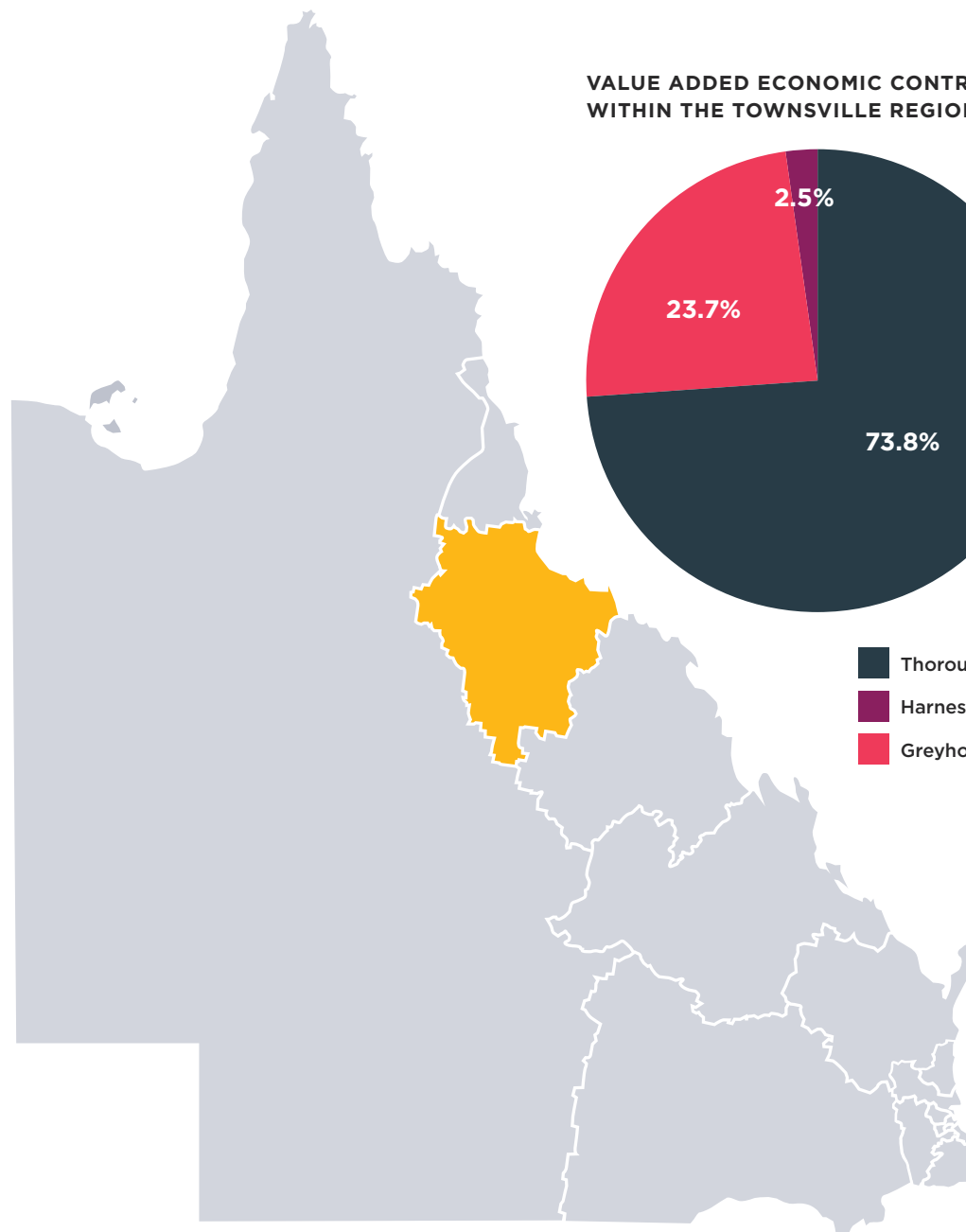
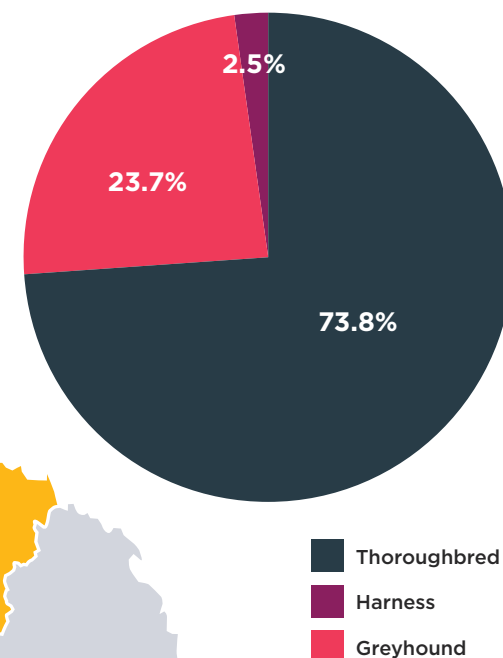
- + Burdekin Race Club Inc.
- + Charter Towers Race Club Inc.
- + Einasleigh Race Club Inc.
- + Ewan Amateur Turf Club Inc.
- + Herbert River Jockey Club Inc.
- + Pentland Race Club Inc.
- + Towers Jockey Club
- + Townsville Turf Club Inc.

### Greyhound

- + Townsville Greyhound Racing Club Inc.

The racing industry in the **Townsville region is responsible for generating \$75.5 million in value added** contribution to gross state product. This represents **3.1% of the industry total.**

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOWNSVILLE REGION (%)





## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$54.5m	\$1.9m	\$17.4m	\$73.8m
Total value added	\$55.7m	\$1.9m	\$17.9m	\$75.5m
Full-time equivalent employment	372	13	118	503

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	14	0	37	51
Horses and greyhounds in training	544	0	475	1,019

## TOTAL ROLES OCCUPIED IN RACING

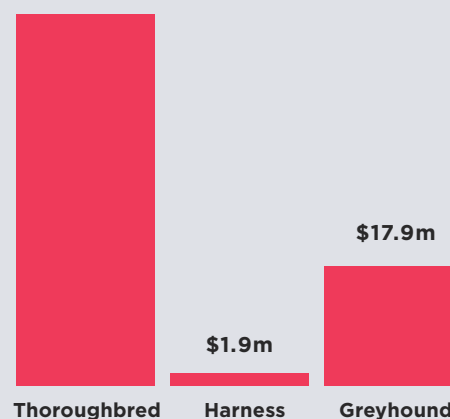
	Thoroughbred	Harness	Greyhound	Total
Breeders	21	0	20	41
Owners	1,151	3	300	1,454
Trainers	94	0	68	162
Breeders staff	18	0	15	33
Stable/Kennel employees	173	0	33	206
Racing Club & industry staff (FT, PT, casual)	144	3	63	210
Jockeys, drivers & apprentices	18	0	0	18
Racing club volunteers	229	0	12	241
Volunteers assisting participants	148	0	90	238
<b>Total roles occupied in the Townsville region</b>	<b>1,995</b>	<b>6</b>	<b>602</b>	<b>2,603</b>

\*Some totals do not add due to rounding.

Race meetings in the Townsville region attracted attendances of **42,543** or **5.2% of total attendances** at race meetings in Queensland.

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

\$55.7m



## AT A GLANCE

## 9 Racing Clubs

THOROUGHBRED	8
GREYHOUND	1

## 137 Race Meetings

THOROUGHBRED	46
GREYHOUND	91

## 1,408 Races

THOROUGHBRED	327
GREYHOUND	1,081

## 1,854 Racing Club Members

THOROUGHBRED	1,799
GREYHOUND	55

## 42,543 Attendances

THOROUGHBRED	35,808
GREYHOUND	6,735

\*Some totals do not add due to rounding

# Wide Bay

- + The population of the Wide Bay region is 324,178 (Australian Bureau of Statistics).
- + There are a total of eleven (11) racing clubs operating in the region, ten (10) of which are thoroughbred clubs, and one (1) greyhound racing club.
- + The racing industry in the Wide Bay region is responsible for generating more than \$55.5 million in value added contribution to Gross State Product. This equates to 2.3% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 377 full-time equivalent (FTE) jobs in the region.
- + There are close to 2,600 roles occupied in the racing industry in Wide Bay.

The racing industry in the **Wide Bay region is responsible for generating \$55.5 million in value added** contribution to gross state product. This represents **2.3% of the industry total.**

## RACING CLUBS IN THE REGION

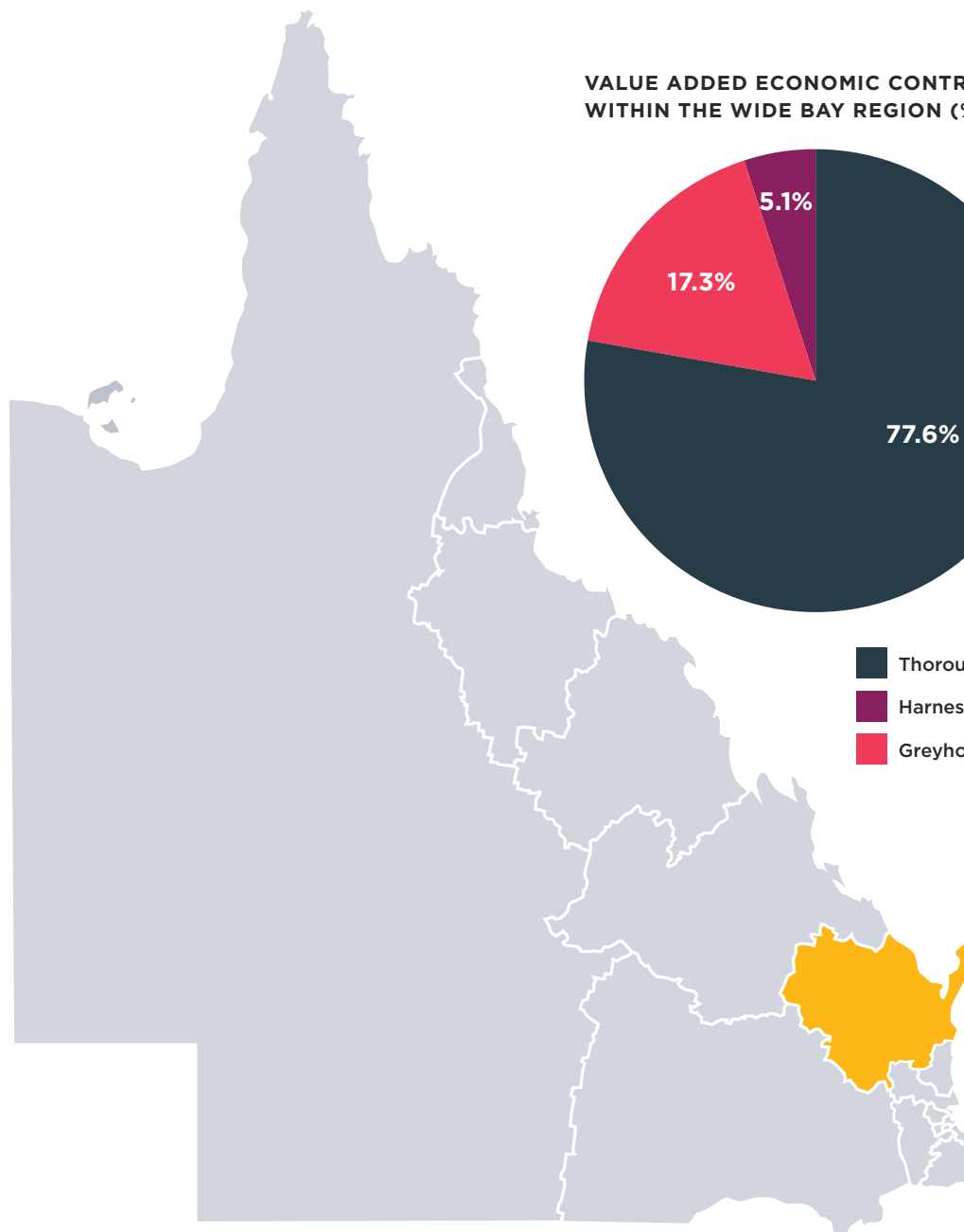
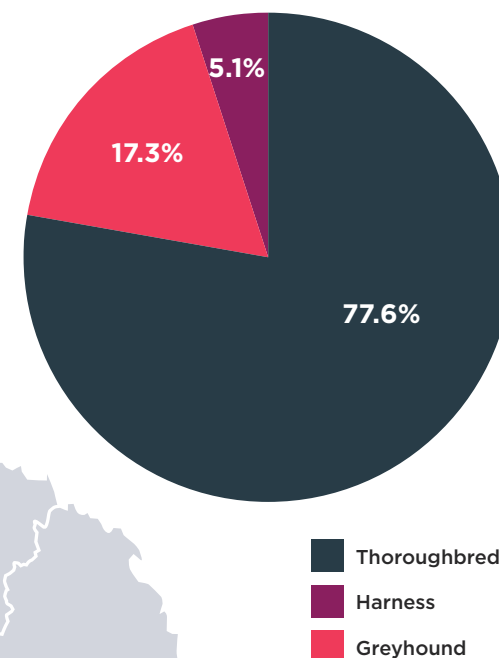
### Thoroughbred

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

### Greyhound

- + Bundaberg Greyhound Racing Club Inc.

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$43.9m	\$2.9m	\$9.7m	\$56.4m
Total value added	\$43.0m	\$2.8m	\$9.6m	\$55.5m
Full-time equivalent employment	293	20	64	377

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	71	5	26	102
Horses and greyhounds in training	217	5	264	486

## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	50	4	26	80
Owners	926	17	230	1,172
Trainers	85	8	60	153
Breeders staff	43	2	20	65
Stable/Kennel employees	103	1	34	138
Racing Club & industry staff (FT, PT, casual)	100	3	48	151
Jockeys, drivers & apprentices	8	4	0	12
Racing club volunteers	538	0	2	540
Volunteers assisting participants	159	21	86	266
<b>Total roles occupied in the Wide Bay region</b>	<b>2,013</b>	<b>60</b>	<b>505</b>	<b>2,578</b>

\*Some totals do not add due to rounding.

Race meetings in the Wide Bay region attracted attendances of **30,228** or **3.7% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

## 11 Racing Clubs

THOROUGHBRED	10
GREYHOUND	1

## 71 Race Meetings

THOROUGHBRED	29
GREYHOUND	42

## 600 Races

THOROUGHBRED	152
GREYHOUND	448

## 932 Racing Club Members

THOROUGHBRED	882
GREYHOUND	50

## 30,228 Attendances

THOROUGHBRED	26,898
GREYHOUND	3,330

\*Some totals do not add due to rounding



# South East Queensland

- + The population of the South East Queensland region is 3,813,763 (Australian Bureau of Statistics).
- + There are a total of thirteen (13) racing clubs operating in the region, eight (8) of which are thoroughbred clubs, three (3) harness and two (2) greyhound racing clubs.
- + The racing industry in the South East Queensland region is responsible for generating more than \$1,927.0 million in value added contribution to Gross State Product. This equates to 78.4% 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 10,973 full-time equivalent (FTE) jobs in the region.
- + There are close to 29,200 participants in the racing industry in South East Queensland.

The racing industry in the **South East Queensland region is responsible for generating \$1,927.0 million in value added** contribution to gross state product. This represents **78.4% of the industry total.**

## RACING CLUBS IN THE REGION

### Thoroughbred

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

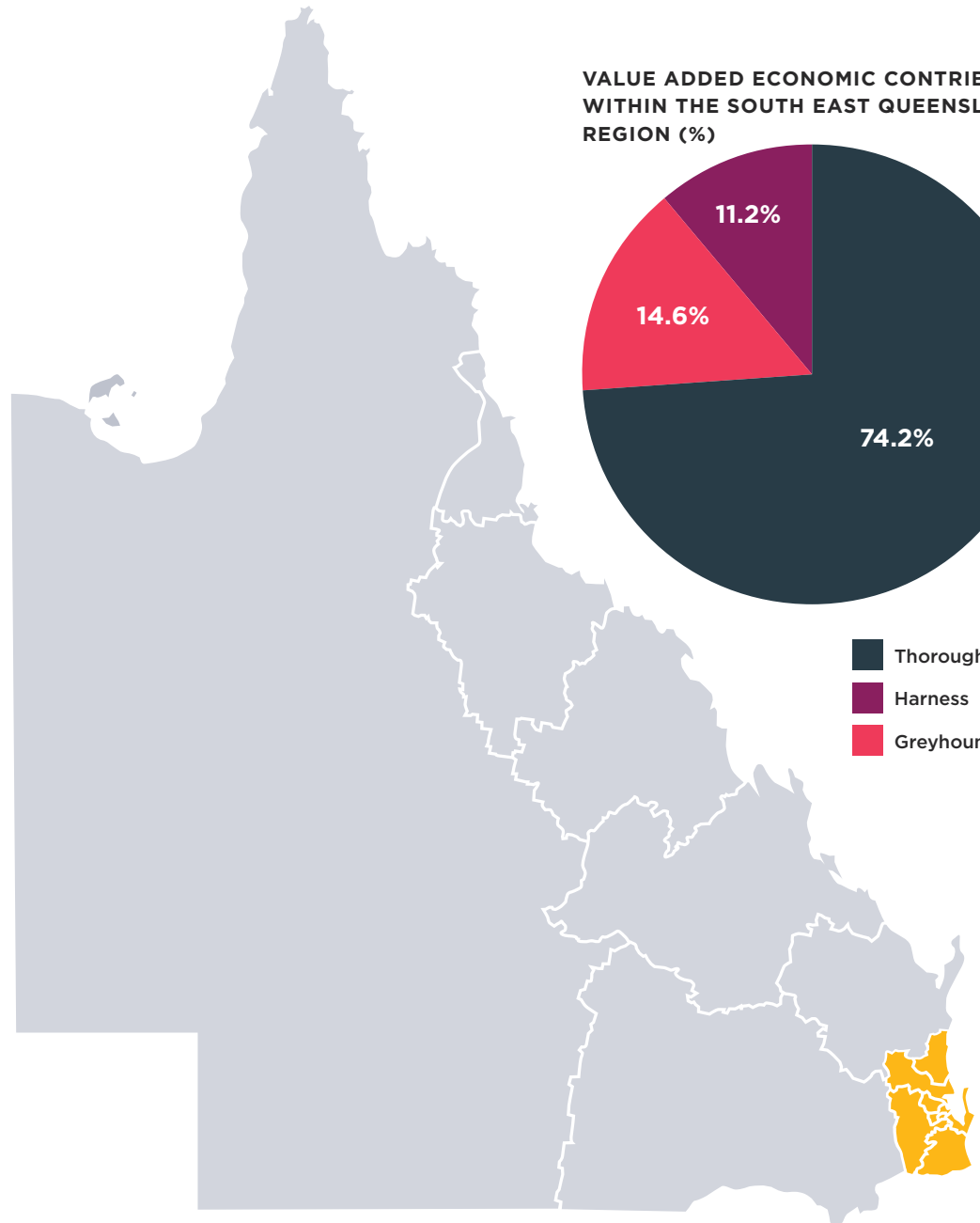
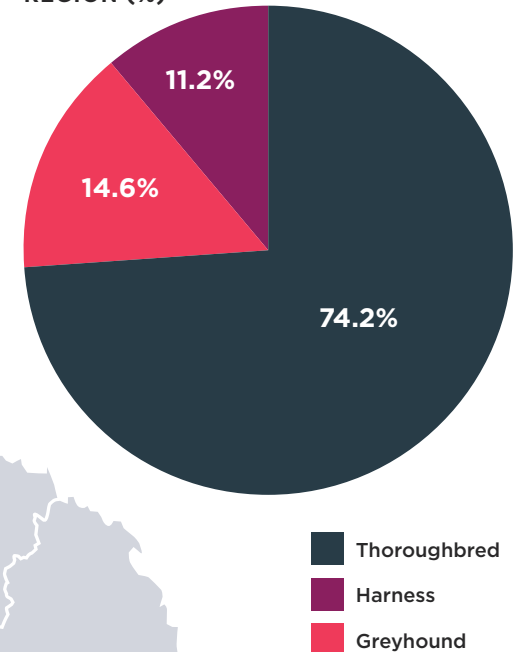
### Harness

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

### Greyhound

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

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



## ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$973.4m	\$163.4m	\$202.1m	\$1,338.9m
Total value added	\$1,429.6	\$215.6m	\$281.8m	\$1,927.0m
Full-time equivalent employment	8,093	1,238	1,643	10,973

## ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	687	251	837	1,775
Horses and greyhounds in training	5,355	1,070	2,875	9,299

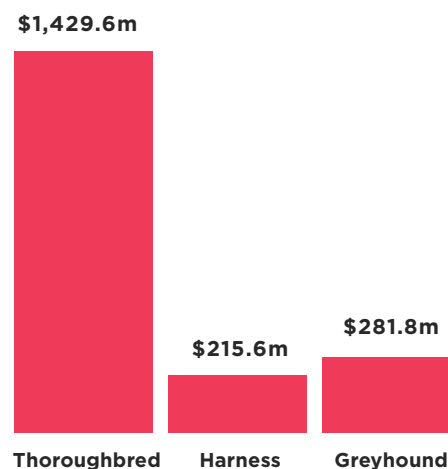
## TOTAL ROLES OCCUPIED IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	363	177	270	810
Owners	14,557	653	3,929	19,139
Trainers	467	233	467	1,167
Breeders staff	312	89	204	605
Stable/Kennel employees	1,425	158	296	1,880
Racing Club & industry staff (FT, PT, casual)	2,163	242	428	2,833
Jockeys, drivers & apprentices	132	126	0	258
Racing club volunteers	72	31	11	114
Volunteers assisting participants	875	771	731	2,377
<b>Total roles occupied in the South East Queensland region</b>	<b>20,367</b>	<b>2,481</b>	<b>6,337</b>	<b>29,185</b>

\*Some totals do not add due to rounding.

Race meetings in the South East Queensland region attracted attendances of **493,847** or **60.9% of total attendances** at race meetings in Queensland.

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



## AT A GLANCE

## 13 Racing Clubs

THOROUGHBRED	8
HARNESS	3
GREYHOUND	2

## 1,048 Race Meetings

THOROUGHBRED	257
HARNESS	304
GREYHOUND	487

## 16,199 Races

THOROUGHBRED	2,048
HARNESS	2,746
GREYHOUND	5,565

## 16,199 Racing Club Members

THOROUGHBRED	15,364
HARNESS	491
GREYHOUND	344

## 493,847 Attendances

THOROUGHBRED	363,371
HARNESS	69,016
GREYHOUND	61,460

\*Some totals do not add due to rounding

# About IER

IER is a leading strategic consulting business specialising in the tourism, events and entertainment industries. For over thirty years, IER has provided economic impact evaluations for both private and Government clients.

In particular, IER has specialised in consulting on a variety of projects related to the racing industries in Australia and New Zealand over this time.

This study constitutes an economic and social impact evaluation of the thoroughbred, harness and greyhound racing industry in Queensland.

It has been developed utilising the following source data:

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

An understanding of the intricate and sometimes complex flow of money in the racing industry underpins this assessment. IER has recently prepared similar studies for:

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

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

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

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

- + Size and scope of the New Zealand racing industry
- + Size and scope of the South Australian racing industry
- + Size and scope of the Tasmanian racing industry
- + Size and scope of the New South Wales harness racing industry
- + Size and scope of the Australian Football League
- + Size and scope of Thoroughbred racing industry in the Northern Territory
- + Size and scope of the Victorian racing industry
- + Size and scope of the Western Australian racing industry
- + Size and scope of the Asian Racing Federation
- + Size and scope of the South Australian racing industry
- + Economic and social impact study of harness racing in Australia

Barry provides the economic modelling and advisory services to IER.



# Economic Methodology

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

## **BASIS OF EVALUATION**

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

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

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

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

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

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

The result of an unconstrained whole of economy or general equilibrium model underpinned by input output tables, is a prominent process for translating direct created expenditure (a final demand stimulus) of industries or projects into jobs and incomes, and for establishing the extent of the flow on impact. There is some level of academic argument about appropriate models for converting increases in external expenditure (final demand) into regional economic impacts. The critics of using unconstrained models such as input output tables often argue that they overstate the value of an industry - and reference that "multiplier" impacts are taken as method of ratcheting up the stated value (noting that this study uses an impact assessment rather than multipliers per se). This criticism would be valid when analysts applied turnover multipliers but is not the case

with the more appropriate use of value added multipliers - which translate the expenditure estimates to national accounting framework measure with a whole of economy context.

Indeed, value added multipliers (the value added impact (direct and induced) relative to a dollar of created expenditure) are often less than 1. It is further noted that the constraints that are applied in more complex economic models do not tend to be substantial at the state and regional level in a longer term context (labour flows from state to state and region to region and capital can also flow freely).

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

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

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

It should be emphasised that this methodology includes the identification and inclusion of local (Queensland) expenditure associated with racing. The economic impacts determined by this approach do not represent the value that would be lost to the State if the industry did not exist. Generally, when considering expenditure by locals it is often held that substitution is a significant factor in whether that spending would be lost to the economy. Taking the racing industry as an

example, it is likely (under a scenario where it no longer existed) that much of the local resident spend would substitute to other activities. Depending on where this spending occurs the overall economic impact of that spending could be higher or lower than what it was when spent on racing.

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



# Definitions

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

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

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

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

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

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

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

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

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



