

Size and Scope of the

QUEENSLAND RACING INDUSTRY

PREPARED BY IER | JULY 2020







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KEY FINDINGS

In 2018/19 the Queensland racing industry was responsible for **generating more than \$1.6 billion in value added contribution** to the Queensland economy – **46% of which directly benefits regional economies**

DIRECT SPENDING IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Direct Expenditure ¹	\$1,040.1m	\$134.1m	\$163.3m	\$1,337.5m

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total Value Added ²	\$1,254.9m	\$159.8m	\$191.6m	\$1,606.3m
% of Industry Value Added	78.1%	9.9%	11.9%	
Total Household Income ³	\$664.9m	\$83.9m	\$102.2m	\$850.9m
Total FTE Employment	9,895	1,238	1,510	12,643

In 2018/19, the Queensland racing industry generated total direct spending of \$1,337.5 million. This expenditure was responsible for creating a direct value added impact (in terms of wages, salaries and profits) of \$554.8 million. However, the flow-on effects linked to this expenditure increase the size of the industry's value added contribution to over \$1.6 billion.

Close to 46% of the total value added impact occurred in regional areas of Queensland, with the Gold Coast (8.3%), Sunshine Coast (5.5%) and Ipswich (4.9%) regions representing the largest regional areas of racing related economic activity.

The economic output generated by the Queensland racing industry was directly responsible for sustaining 5,802 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 12,643 jobs. This total represents the employment sustained within the industry, as well as the employment that is sustained in supply industries who meet the demand created by racing industry activity.

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

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

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





Of the **12,643 FTE jobs sustained** by the Queensland racing industry around **46% are the direct result of the racing industry activity** whilst the remainder support down-the-line industries that **produce and supply goods and services** for racing in Queensland

AT A GLANCE

RACING ACTIVITY

129 Racing Clubs

THOROUGHBRED	118
HARNESS	5
GREYHOUND	6

1,245 TAB Race Meetings

THOROUGHBRED	456
HARNESS	280
GREYHOUND	509

373 Non-TAB Race Meetings

THOROUGHBRED	270
HARNESS	7
GREYHOUND	96

12,793 Total Races

THOROUGHBRED	4,568
HARNESS	2,346
GREYHOUND	5,879

There are close to **30 race meetings held in Queensland** every week providing live entertainment to **more than 835,000 attendees**

835,455 Attendances

THOROUGHBRED	706,532
HARNESS	75,590
GREYHOUND	53,333

3,496 Live Foals/ Pups Bred

THOROUGHBRED	1,997
HARNESS	293
GREYHOUND	1,206

11,831 Horses and Greyhounds in Training

THOROUGHBRED	7,891
HARNESS	1,023
GREYHOUND	2,917

In 2018/19, more than 835,000 attendances were recorded at thoroughbred, harness and greyhound race meetings in Queensland. More than 70% of these attendances were made at regional racecourses, with the Gold Coast (14.0%), Sunshine Coast (7.8%), Ipswich (7.3%) and Central Queensland (6.7%) 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 40,000 individuals who participate in the Queensland racing industry. Many of these people enjoy gainful employment of their specific skillset where they may find limited opportunities otherwise - particularly in the breeding, training and racing related disciplines. Furthermore, many participants hold more than one role within the industry.

The industry is also supported by nearly 7,600 people who volunteer their time and resources. For many of these people, local racing clubs and participants are an important part of their community and provide valuable opportunities to stay active and engage with their community.





AT A GLANCE

THE PEOPLE

1,466 Breeders

THOROUGHBRED	1,066
HARNESS	277
GREYHOUND	123

20,097 Owners

THOROUGHBRED	18,263
HARNESS	667
GREYHOUND	1,167

1,874 Trainers

THOROUGHBRED	989
HARNESS	258
GREYHOUND	627

3,381 Racing Club & Industry Staff

THOROUGHBRED	2,994
HARNESS	104
GREYHOUND	283

4,266 Staff employed by participants

THOROUGHBRED	3,426
HARNESS	320
GREYHOUND	520

419 Jockeys & Drivers

THOROUGHBRED	261
HARNESS	158

7,579 Volunteers

THOROUGHBRED	5,510
HARNESS	1,117
GREYHOUND	953

There are **close to 40,000 individuals** who are involved in the Queensland racing industry as an **employee, participant or volunteer**. Almost **81% of these participants** in racing are in **regional communities**

INTRODUCTION

In March 2019, Racing Queensland commissioned a study into the size and scope of the three codes of racing in Queensland. The last size and scope study was undertaken in 2017/18.

PURPOSE OF THE STUDY

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

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

STUDY METHODOLOGY

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



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

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

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

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

ECONOMIC METHODOLOGY

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

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

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

well as expenditure by wagering operators to fund their operations in Queensland

- + racing customer off-track expenditure - expenditure made by racegoers, off-track, as part of their attendance at the races

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

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

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

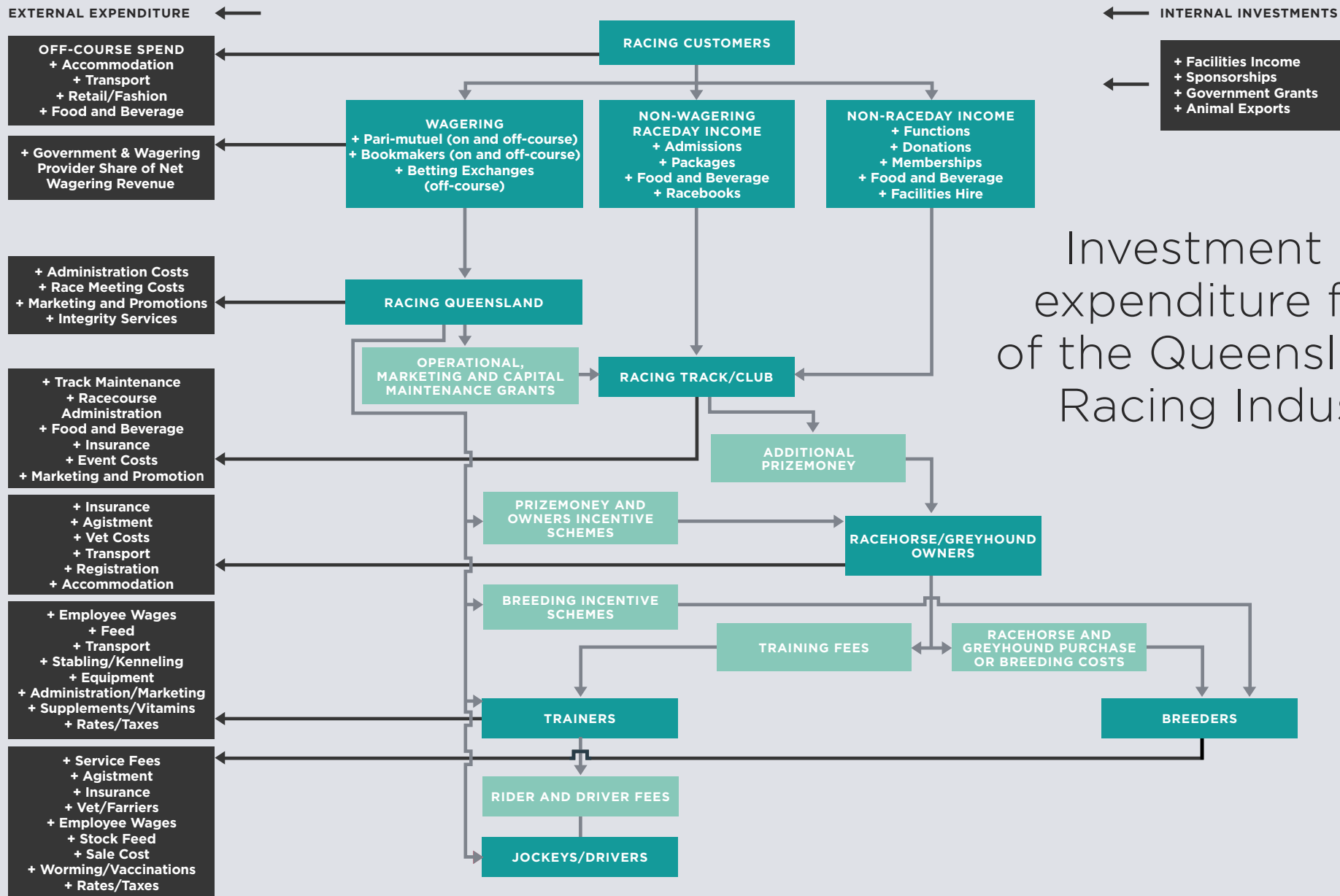
- a. R9114 - Sport and Physical Recreation Administration,
- b. R9121 - Horse and Dog Racing Activities,
- c. R9129 - Training and Racing Activities,
- d. R9209 - Other Gambling (Racing).

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

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

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

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



Investment and expenditure flow of the Queensland Racing Industry



ECONOMIC IMPACTS

The Queensland racing industry is responsible for **generating more than \$1.3 billion in expenditure** in Queensland. Almost 62% 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 2018/19, the Queensland racing industry generated more than \$1.3 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).



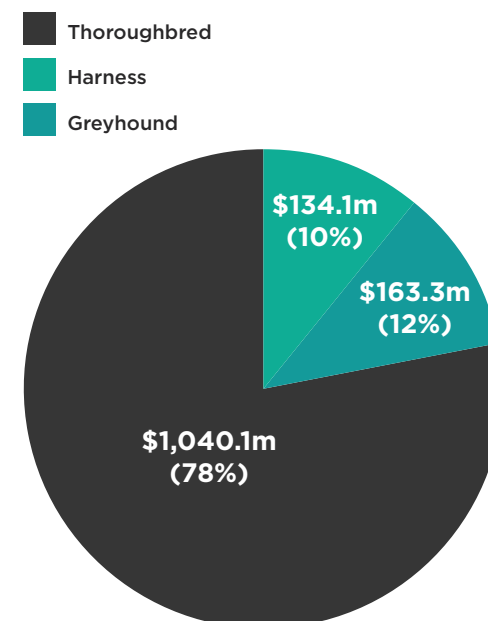


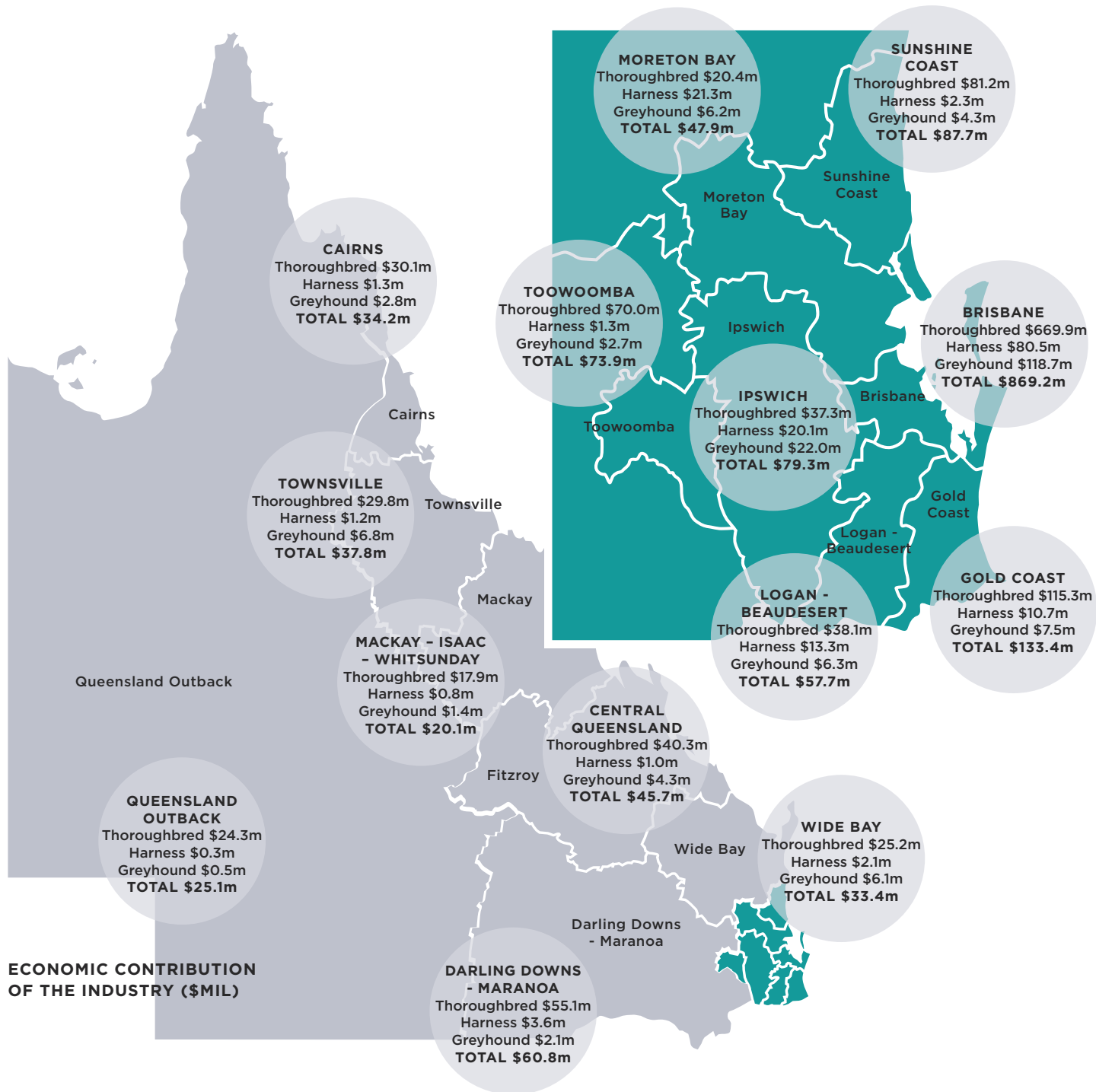
The breakdown of final expenditures is outlined below:

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	\$105.4m	7.9%
Preparation of racing horses and greyhounds (Training)	+ Private investment + Prizemoney + Industry bonuses & incentives	\$301.3m	22.5%
Racing Club & Industry Expenditure	+ Wagering product fees + Raceday revenues + Sponsorship & membership + Non-raceday revenues + Nominations	\$374.2m	28.0%
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	\$491.5m	36.8%
Racing customer expenditure off-course	+ Private investment	\$65.0m	4.9%
Total		\$1,337.5m	

Thoroughbred racing is responsible for generating almost 78% of the final expenditures. Almost 63% of this expenditure was in regional parts of the state. Greyhound racing is responsible for generating 12% of the final expenditures. More than 53% of this expenditure is in regional parts of the state. Harness racing is responsible for generating more than 10% of the final expenditures. More than 65% of this expenditure is in regional parts of the state.

DIRECT SPENDING BY CODE (\$MIL)





ECONOMIC CONTRIBUTION OF THE INDUSTRY (\$MIL)

Economic Contribution of the Industry

The Queensland racing industry is responsible for generating a real gross value added contribution of \$1,606 million for the Queensland economy. Real gross value added is the generally accepted measure of the value of production from economic activity. It is the sum of value added by all industries in a region (in this case, all regions of Queensland). In any period of time, the value added contribution in an industry equates to the value of sales less the value of inputs used in production. This means value added is equal to the income (wages, salaries and profits) generated in the course of production.

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



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

When considering the value added contribution of \$1,606 million generated by the Queensland racing industry, it is important to note that it is made up of:

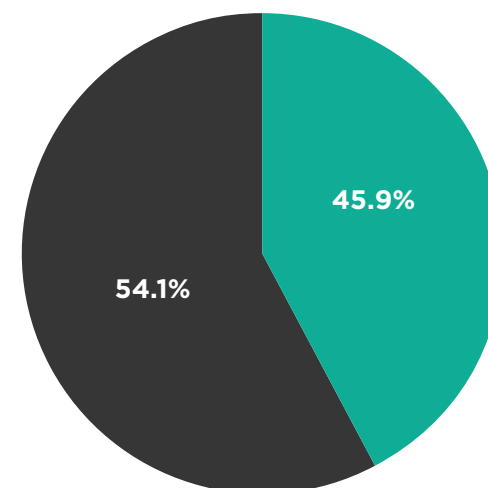
- + Direct value added (\$554.8 million) - this represents the amount of income included in the direct in scope expenditure. It is the amount of gross wages and salaries in the racing industry and the direct provision of services to racing activity, plus the gross operating surplus (profits, interest payment and direct taxes) directly created in supply these services and product. This is also equal to the direct in scope expenditure less the purchases that the provider of the goods and services makes in providing the goods and services (both supplied from within the region, as well as externally (i.e. imported).
- + Indirect (Induced) value added (\$1,051.5 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

- Brisbane
- Regional QLD



Participants in the Queensland racing industry

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

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

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

More than 23,400 breeders, owners and trainers provide the capital and the skills to produce and prepare racing horses and greyhounds for racing. These participants drive a chain of activity which leads to the production of a racing product that is consumed by audiences on almost every day of the year.

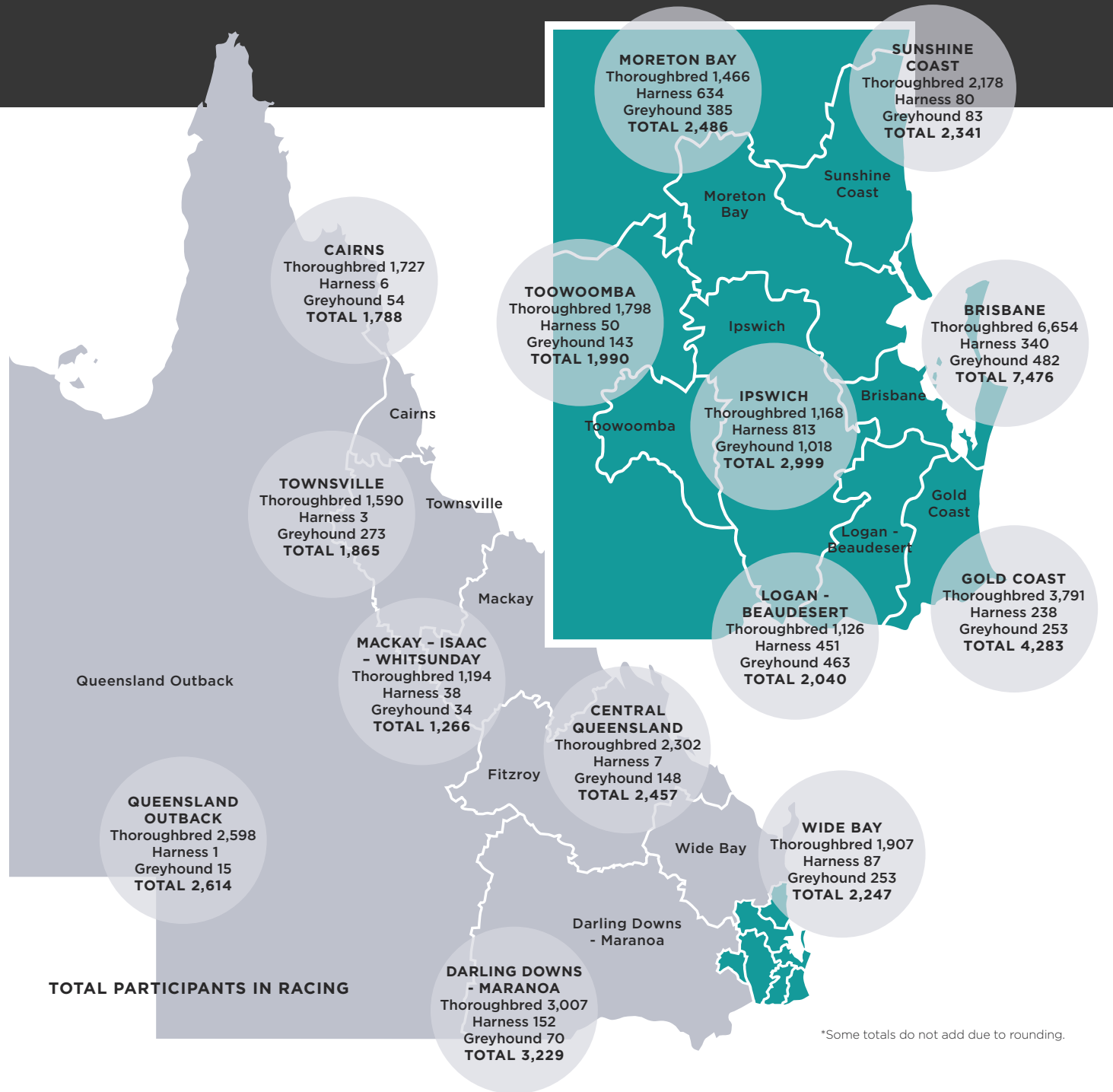
There are approximately 7,570 individuals who volunteer their time and skills in a variety of roles within the industry. In the participant space, this often includes family members - for many of whom, this family connection goes back many generations.

In total, there are 39,775 individuals who participate in the Queensland racing industry as a participant, employee or volunteer. Just over 81% of these participants are in regional parts of the State.

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	1,066	277	123	1,466
Owners	18,263	667	1,167	20,097
Trainers	989	258	627	1,874
Racing Club & Industry Staff (FT, PT, Casual)	2,994	104	283	3,381
Breeders Staff	919	139	183	1,241
Stable/Kennel Employees	2,507	181	337	3,025
Jockeys & Drivers	261	158	0	419
Racing club volunteers	3,341	38	52	3,431
Volunteers assisting participants	2,169	1,079	901	4,148
Total	32,509	2,900	3,673	39,081

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



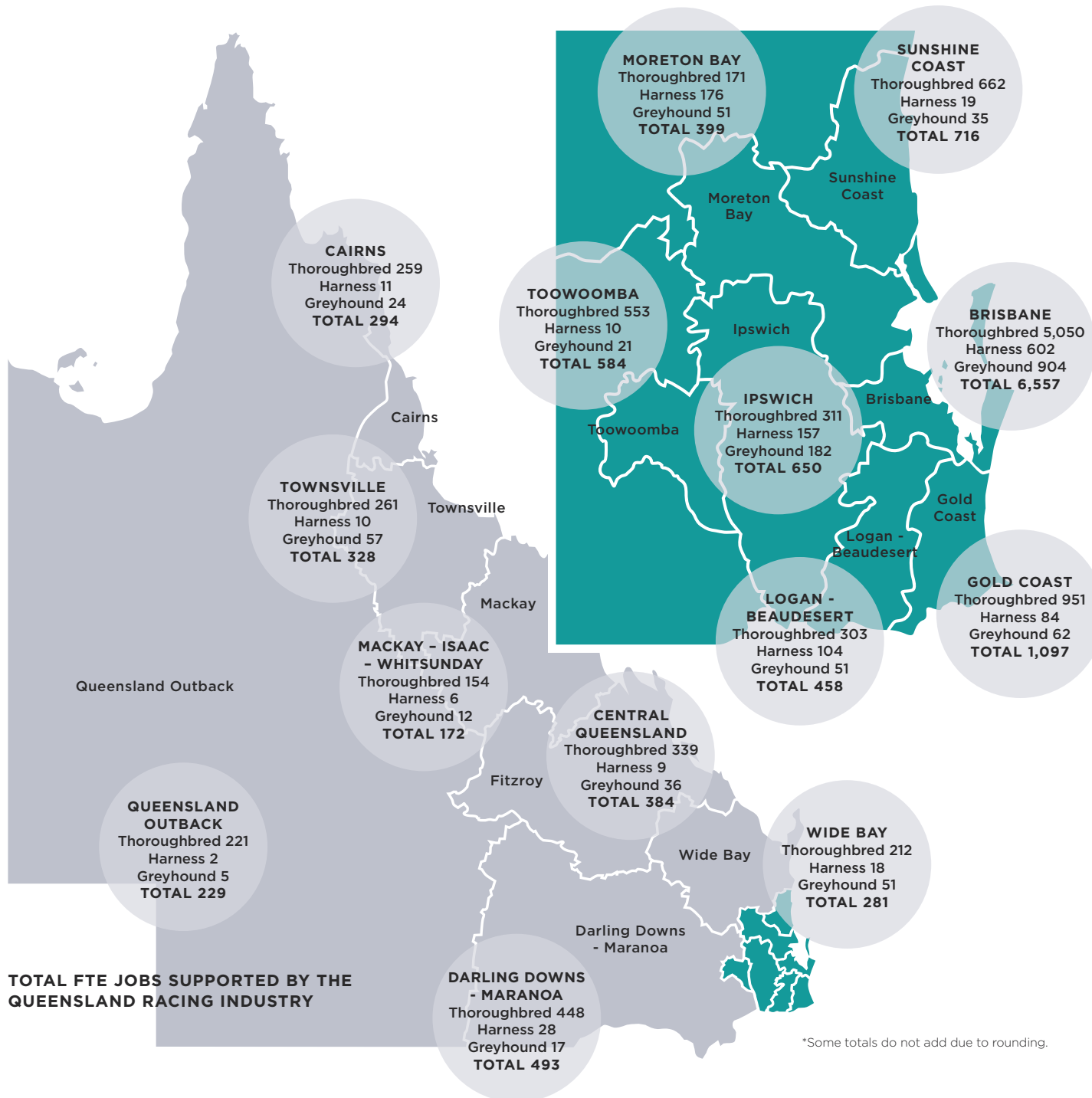


Employment Generated by Racing in Queensland

There are 8,065 people directly employed in the Queensland racing industry. As outlined earlier, this represents the headcount of full-time, part-time and casual employees of the industry, racing clubs and participants. The Queensland racing industry, like racing industries all over Australia, relies on a large number of part-time and casual roles. As such, the FTE employment is significantly lower than the headcount.

In 2018/19, the economic activity generated by the Queensland racing industry directly sustained 5,802 full-time equivalent positions in Queensland. In addition to the direct employment impact, the activities of the racing industry also help to sustain a further 6,841 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Queensland racing industry was 12,643 FTE jobs.

The FTE positions that are sustained by the Queensland racing industry resulted in more than \$850.9 million in wages and salaries for the people employed directly within the industry as well as those employed in down the-line industries that receive increased demand as a result of racing activity. Some examples of the other industries that are stimulated by racing include; veterinary, feed, retail, tourism, accommodation, transport, manufacturing and construction.



*Some totals do not add due to rounding.

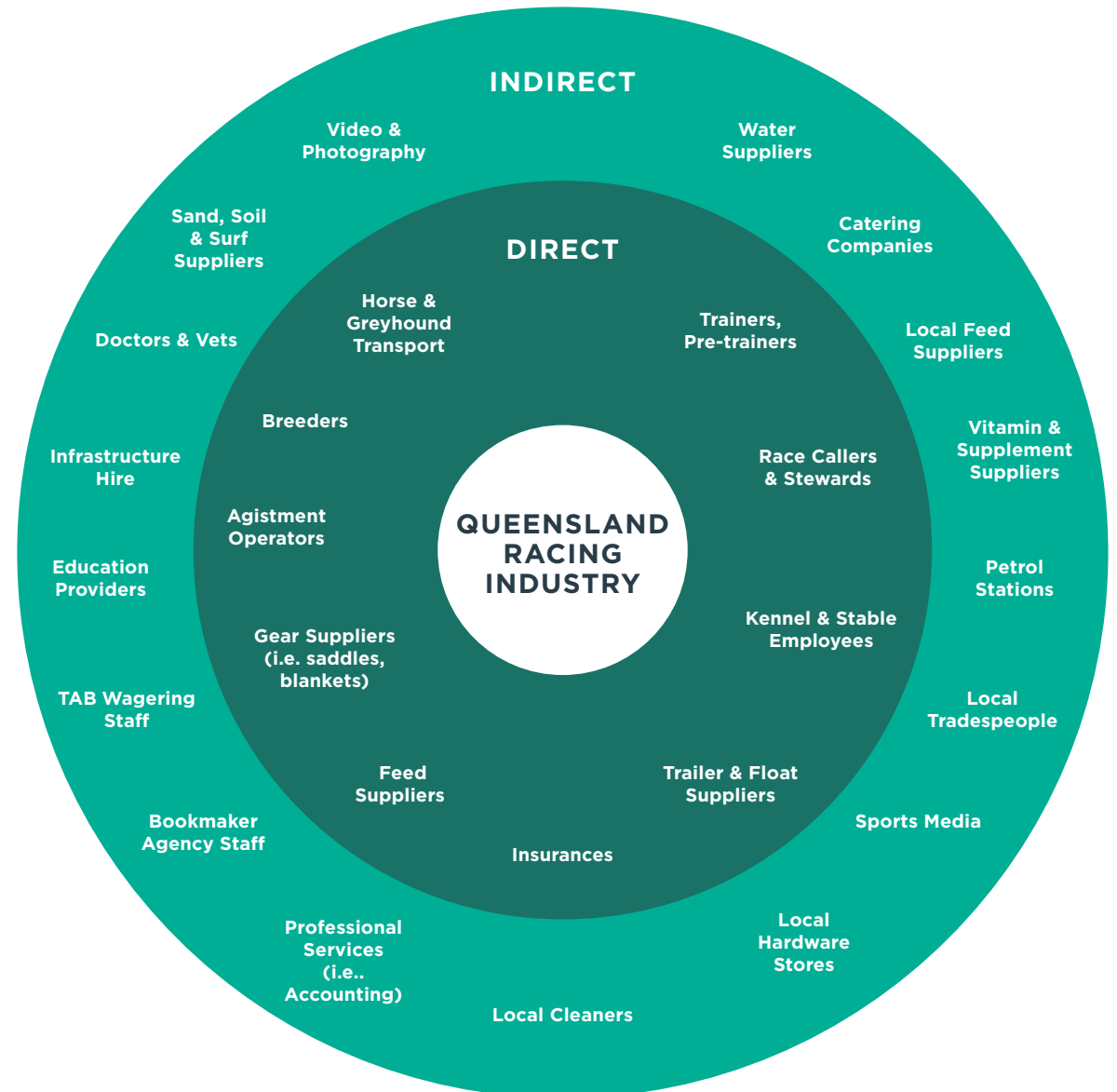
The Supplier Network

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

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

ANZSIC Sector	Key Impacts	Driven by
Professional, Scientific & Technology Services	+ Total value added - \$191.9m + Total FTE jobs - 1,535	+ Veterinary Services + Scientific Research Services + Management & Related Consulting Services
Agriculture, Forestry & Fishing	+ Total value added - \$122.1m + Total FTE jobs - 842	+ Animal Farming/ Breeding
Administrative Services	+ Total value added - \$113.7m + Total FTE jobs - 666	+ Wagering Operators/ Racing Clubs





RACING'S PARTICIPANTS AND ANIMALS

The Breeding Industry

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

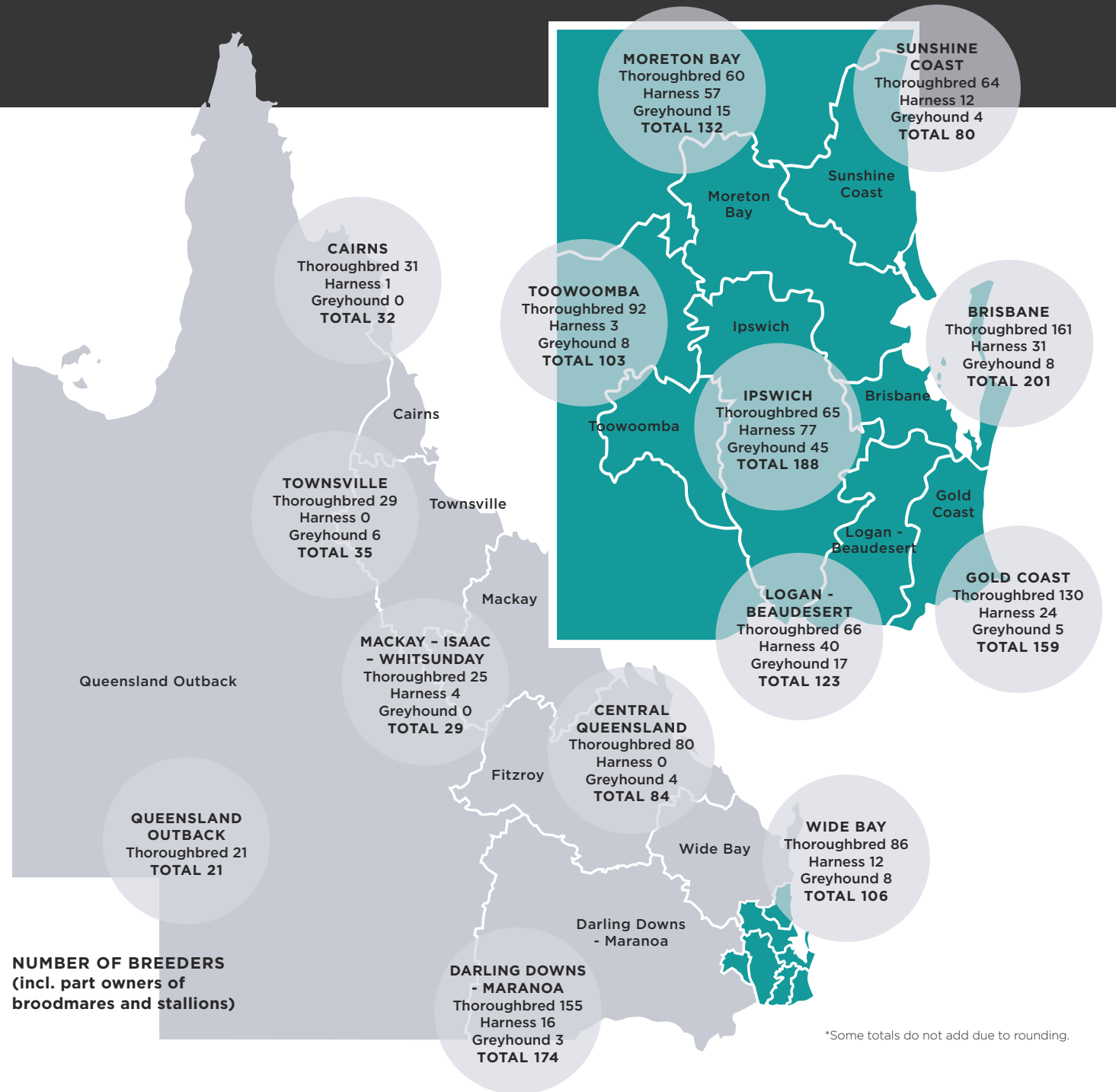
	Thoroughbred	Harness	Greyhound	Total
Cairns	31	1	0	32
Central Queensland	80	0	4	84
Darling Downs - Maranoa	155	16	3	174
Gold Coast	130	24	5	159
Ipswich	65	77	45	188
Logan - Beaudesert	66	40	17	123
Mackay - Isaac - Whitsunday	25	4	0	29
Moreton Bay	60	57	15	132
Queensland - Outback	21	0	0	21
Sunshine Coast	64	12	4	80
Toowoomba	92	3	8	103
Townsville	29	0	6	35
Wide Bay	86	12	8	106
Total Regional Queensland	905	246	115	1,265
Brisbane	161	31	8	201
Total	1,066	277	123	1,466

NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	27	1	0	27
Central Queensland	69	0	6	75
Darling Downs - Maranoa	133	8	5	146
Gold Coast	112	12	7	131
Ipswich	56	39	67	162
Logan - Beaudesert	56	20	26	102
Mackay - Isaac - Whitsunday	22	2	0	24
Moreton Bay	52	29	22	103
Queensland - Outback	18	0	0	18
Sunshine Coast	55	6	6	67
Toowoomba	79	1	11	92
Townsville	25	0	9	34
Wide Bay	74	6	11	92
Total Regional Queensland	780	123	170	1,072
Brisbane	139	16	13	167
Total	919	139	183	1,240

*Some totals do not add due to rounding.

There are **more than 1,460 individuals** who either breed, or have an ownership interest in a broodmare, broodmatron, stallion or sire. They are supported by **1,240 employees and 1,816 volunteers** – meaning that the industry is supported by **over 4,500 people directly involved in breeding activities** across the three codes



The breeding sector provides and replenishes the racing horses and greyhounds for the Queensland racing industry. There are 1,466 registered breeders in Queensland across the three codes of racing. At the top end of the breeding sector, large stud farms employ many staff and produce large numbers of foals each year. At the other end of the scale, there are a large number of hobby breeders also producing foals and pups.

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

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

NUMBER OF VOLUNTEERS ASSISTING BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	25	3	0	28
Central Queensland	64	0	7	71
Darling Downs - Maranoa	124	45	5	174
Gold Coast	104	67	8	179
Ipswich	52	216	74	343
Logan - Beaudesert	52	113	28	193
Mackay - Isaac - Whitsunday	20	11	0	31
Moreton Bay	48	160	24	233
Queensland - Outback	17	0	0	17
Sunshine Coast	51	34	7	91
Toowoomba	74	8	13	94
Townsville	23	0	10	33
Wide Bay	69	32	13	114
Total Regional Queensland	724	688	188	1,600
Brisbane	129	78	8	216
Total	853	766	197	1,816

*Some totals do not add due to rounding.





Producing Racing Animals

NUMBER OF STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Cairns	2	0	0	2
Central Queensland	6	4	0	10
Darling Downs - Maranoa	28	2	0	30
Gold Coast	9	0	1	10
Ipswich	11	7	11	29
Logan - Beaudesert	11	1	2	14
Mackay - Isaac - Whitsunday	5	0	1	6
Moreton Bay	2	8	1	11
Queensland - Outback	0	0	0	0
Sunshine Coast	5	0	0	5
Toowoomba	9	0	3	11
Townsville	1	0	1	2
Wide Bay	15	0	1	16
Total Regional Queensland	103	22	21	146
Brisbane	1	0	2	3
Total	104	22	23	149



NUMBER OF BROODMARES/MATRONS COVERED

	Thoroughbred	Harness	Greyhound	Total
Cairns	34	1	0	35
Central Queensland	115	0	4	119
Darling Downs - Maranoa	882	41	4	927
Gold Coast	253	43	5	301
Ipswich	363	153	76	591
Logan - Beaudesert	422	46	21	489
Mackay - Isaac - Whitsunday	35	5	0	40
Moreton Bay	83	50	16	149
Queensland - Outback	9	0	0	9
Sunshine Coast	98	14	8	120
Toowoomba	613	1	17	631
Townsville	28	0	7	35
Wide Bay	164	10	21	194
Total Regional Queensland	3,099	363	179	3,641
Brisbane	10	80	12	102
Total	3,109	443	191	3,743

NUMBER OF FOALS/PUPS PRODUCED

	Thoroughbred	Harness	Greyhound	Total
Cairns	22	1	2	25
Central Queensland	74	0	26	100
Darling Downs - Maranoa	566	27	20	613
Gold Coast	162	28	37	227
Ipswich	233	101	494	828
Logan - Beaudesert	271	30	133	434
Mackay - Isaac - Whitsunday	23	3	0	26
Moreton Bay	53	33	83	169
Queensland - Outback	6	0	0	6
Sunshine Coast	63	9	55	127
Toowoomba	394	1	115	510
Townsville	18	0	33	51
Wide Bay	105	7	119	231
Total Regional Queensland	1,977	240	1,118	3,348
Brisbane	7	53	88	148
Total	1,997	293	1,206	3,496

*Some totals do not add due to rounding.

COST OF PRODUCING RACEHORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	\$0.9	\$0.0	\$0.0	\$0.9
Central Queensland	\$3.0	\$0.0	\$0.1	\$3.1
Darling Downs - Maranoa	\$25.0	\$1.6	\$0.1	\$26.8
Gold Coast	\$9.5	\$0.8	\$0.2	\$10.5
Ipswich	\$9.9	\$3.2	\$2.6	\$15.7
Logan - Beaudesert	\$12.4	\$0.9	\$0.7	\$14.0
Mackay - Isaac - Whitsunday	\$0.9	\$0.1	\$0.0	\$1.0
Moreton Bay	\$2.1	\$1.8	\$0.5	\$4.3
Queensland - Outback	\$0.2	\$0.0	\$0.0	\$0.2
Sunshine Coast	\$2.5	\$0.3	\$0.3	\$3.1
Toowoomba	\$17.0	\$0.0	\$0.6	\$17.6
Townsville	\$0.7	\$0.0	\$0.2	\$0.9
Wide Bay	\$4.3	\$0.2	\$0.6	\$5.1
Total Regional Queensland	\$88.3	\$8.9	\$6.0	\$103.1
Brisbane	\$0.3	\$1.5	\$0.5	\$2.2
Total	\$88.6	\$10.4	\$6.4	\$105.4

*Some totals do not add due to rounding.



Economic Contribution of the Breeding Industry

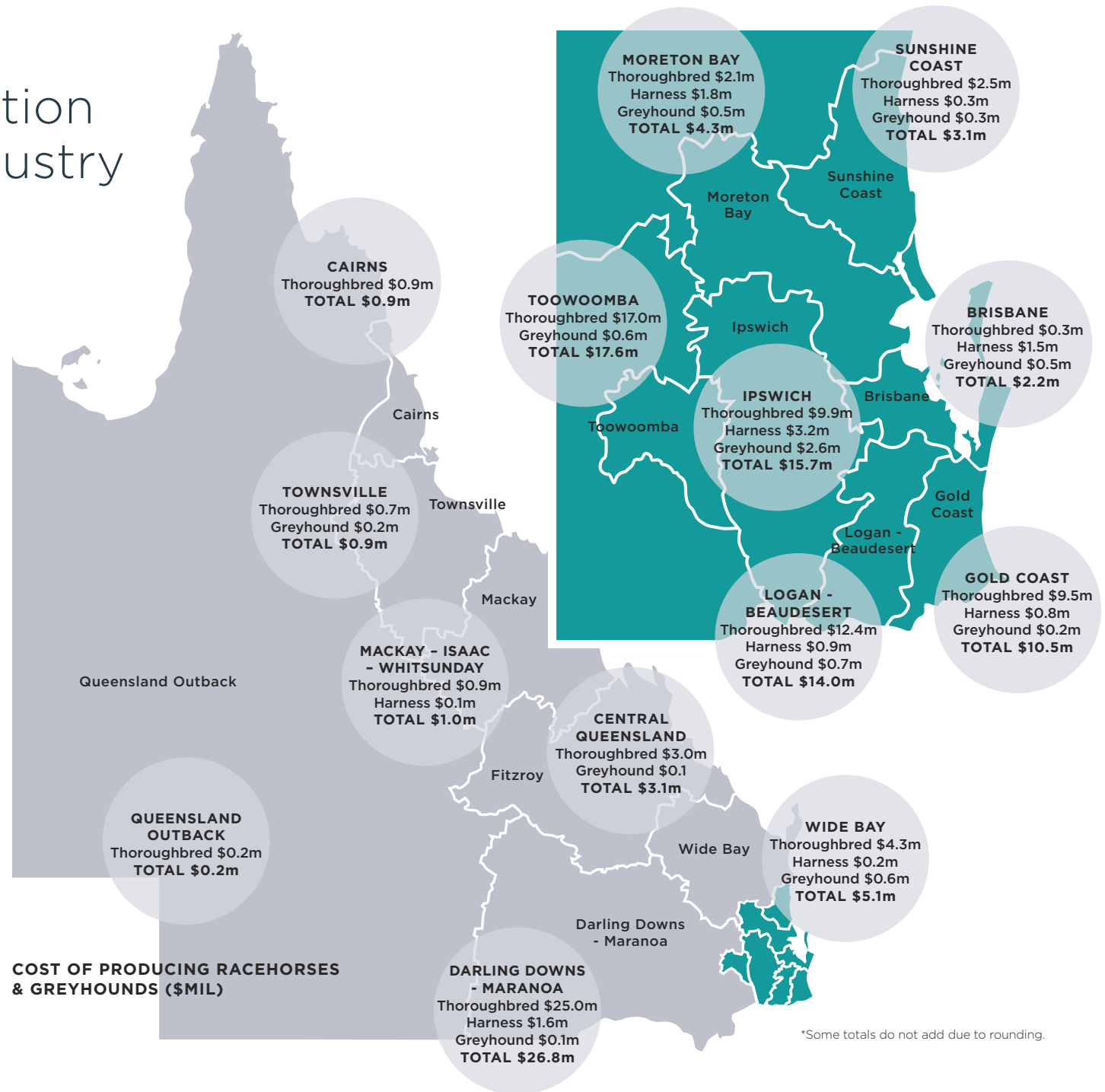
In 2018/19, breeders in the Queensland racing industry spent more than \$105 million on the production of racing stock. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of broodmares, broodmatrons, stallions and sires as well as in the process of breeding and care for foals and pups. In addition to this, breeders also incur costs for:

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

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

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

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



Over 70% of all breeding related expenditure occurs in four Queensland regions. The Darling Downs - Maranoa (25.4%), Toowoomba (16.7%), Ipswich (14.9%) and the Logan - Beaudesert (13.3%) regions are the most active breeding areas in the State.

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

THOROUGHBRED RACING

In 2018/19, there were 3,109 broodmares covered in Queensland, producing 1,997 foals. This thoroughbred breeding activity is responsible for generating almost \$88.6 million in the production and care of racing stock.

Darling Downs - Maranoa	\$25.0m (28.3%)
Toowoomba	\$16.9m (19.1%)
Logan - Beaudesert	\$12.4m (14.0%)

HARNESS RACING

In 2018/19 there were 443 broodmares covered in Queensland, producing 293 foals. This standardbred breeding activity is responsible for generating just over \$10 million in the production and care of racing stock.

Ipswich	\$3.2m (30.7%)
Moreton Bay	\$1.8m (16.8%)
Darling Downs - Maranoa	\$1.6m (15.5%)

GREYHOUND RACING

In 2018/19, there were 191 broodmatrons covered in Queensland, producing 1,206 pups. This greyhound breeding activity is responsible for generating more than \$6.4 million in the production and care of greyhound racing stock.

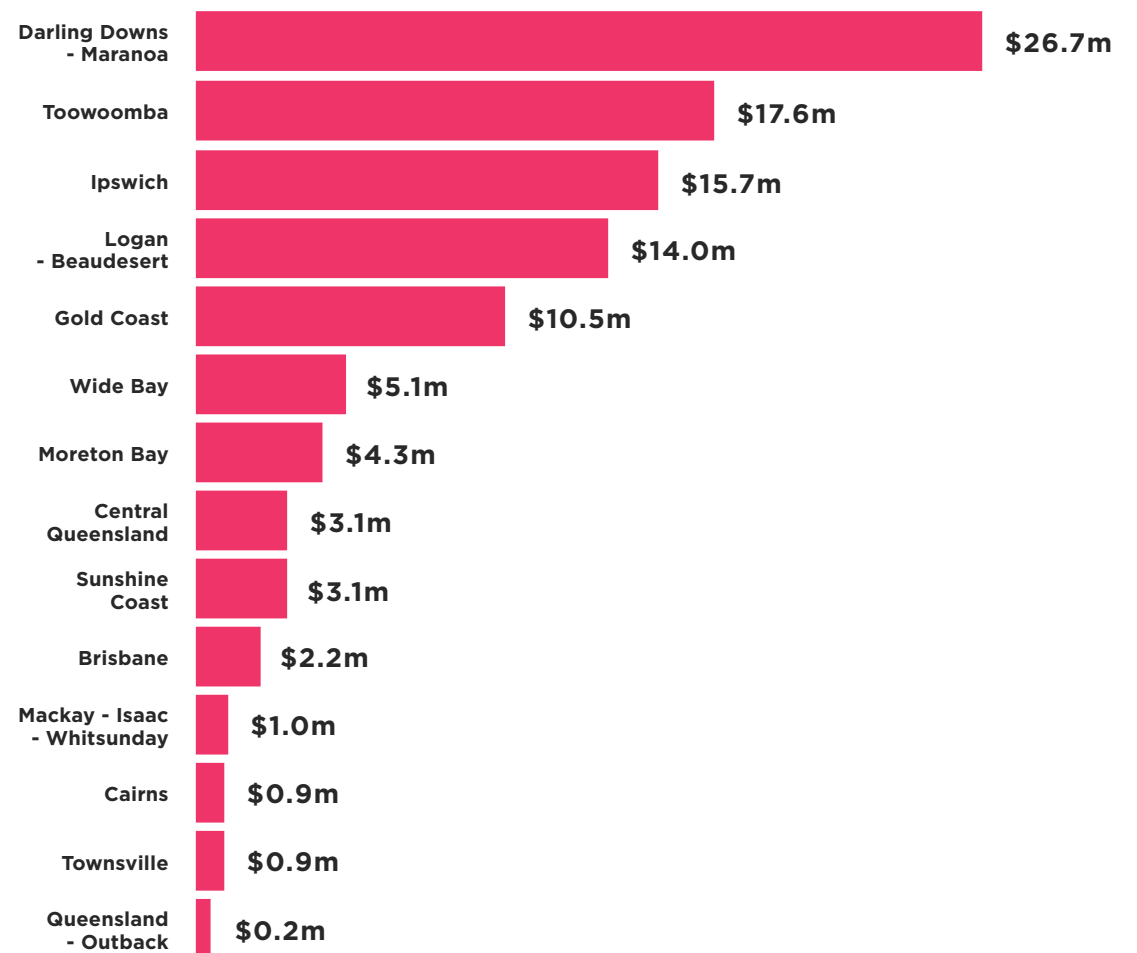
Ipswich	\$2.6m (40.9%)
Logan - Beaudesert	\$0.7m (11.0%)
Wide Bay	\$0.6m (10.0%)





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

EXPENDITURE BY THE BREEDING SECTOR



THE TRAINING INDUSTRY

The Training Industry

NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	52	0	13	66
Central Queensland	107	0	27	134
Darling Downs - Maranoa	113	8	9	130
Gold Coast	93	18	33	145
Ipswich	43	89	163	295
Logan - Beaudesert	51	52	106	208
Mackay - Isaac - Whitsunday	30	0	7	37
Moreton Bay	24	65	81	170
Queensland - Outback	77	0	3	80
Sunshine Coast	80	1	11	92
Toowoomba	90	8	21	120
Townsville	75	0	58	133
Wide Bay	56	6	46	108
Total Regional Queensland	891	247	579	1,717
Brisbane	98	11	48	157
Total	989	258	627	1,874

NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Cairns	133	0	8	141
Central Queensland	198	0	19	217
Darling Downs - Maranoa	199	6	5	210
Gold Coast	300	20	19	339
Ipswich	87	43	77	207
Logan - Beaudesert	104	39	43	185
Mackay - Isaac - Whitsunday	97	0	4	101
Moreton Bay	123	47	38	208
Queensland - Outback	118	0	2	120
Sunshine Coast	239	5	7	251
Toowoomba	276	2	18	296
Townsville	142	0	33	175
Wide Bay	113	5	30	147
Total Regional Queensland	2,129	167	303	2,598
Brisbane	378	14	34	427
Total	2,507	181	337	3,025



NUMBER OF VOLUNTEERS ASSISTING TRAINERS

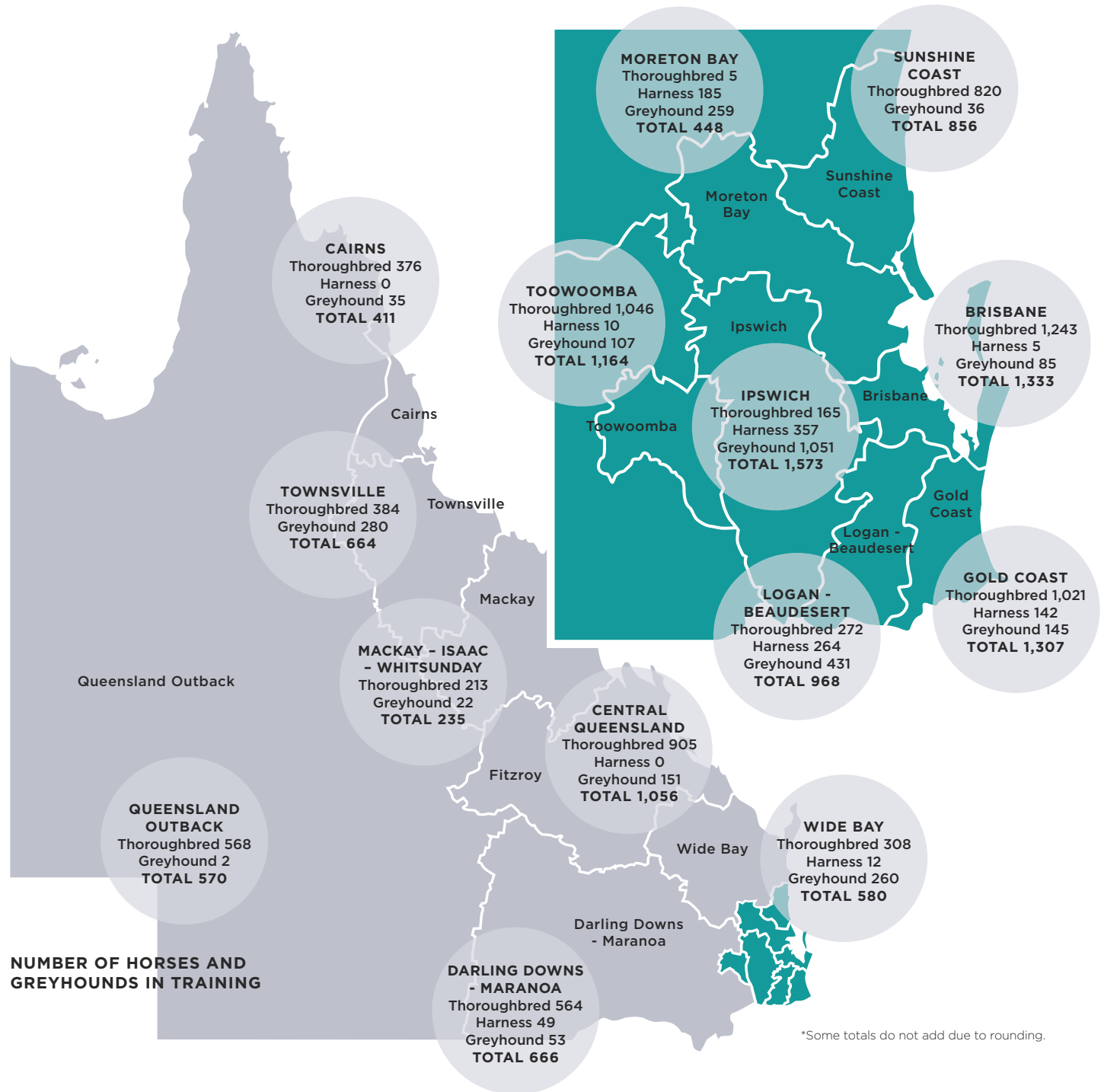
	Thoroughbred	Harness	Greyhound	Total
Cairns	73	0	15	88
Central Queensland	150	0	30	180
Darling Downs - Maranoa	158	10	10	178
Gold Coast	130	22	36	189
Ipswich	61	106	180	346
Logan - Beaudesert	71	62	117	249
Mackay - Isaac - Whitsunday	42	0	8	50
Moreton Bay	34	78	89	200
Queensland - Outback	108	0	3	111
Sunshine Coast	112	1	12	125
Toowoomba	126	10	24	159
Townsville	105	0	63	168
Wide Bay	78	7	51	136
Total Regional Queensland	1,247	295	637	2,117
Brisbane	69	17	67	153
Total	1,316	312	704	2,332

*Some totals do not add due to rounding.

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

During the 2018/19 racing season, there were close to 1,900 horse and greyhound trainers providing services to owners in Queensland. These trainers were also supported by more 2,300 volunteers. The majority of these trainers operate in regional parts of the State.

Overall, there were more than 11,800 racing horses and greyhounds in training in Queensland in 2018/19. Brisbane (15.8%), Toowoomba (13.3%) and the Gold Coast (12.9%) represent the largest areas of thoroughbred training activity. In the Harness and Greyhound racing industries, four regions (Ipswich, Logan - Beaudesert and Moreton Bay) make up 79% and 60% of the training activity respectively.



*Some totals do not add due to rounding.





Owners

OWNERS OF RACING HORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Cairns	837	2	17	856
Central Queensland	1,261	7	44	1,312
Darling Downs - Maranoa	1,005	34	32	1,071
Gold Coast	2,865	55	146	3,066
Ipswich	703	160	239	1,103
Logan - Beaudesert	656	90	126	873
Mackay - Isaac - Whitsunday	666	21	15	702
Moreton Bay	1,093	149	116	1,358
Queensland - Outback	472	1	6	479
Sunshine Coast	1,495	21	36	1,552
Toowoomba	900	14	48	963
Townsville	831	3	73	907
Wide Bay	691	15	58	764
Total Regional Queensland	13,476	573	957	15,007
Brisbane	4,787	94	210	5,090
Total	18,263	667	1,167	20,097

*Some totals do not add due to rounding.

NUMBER OF TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,092	0	134	1,226
Central Queensland	2,632	0	3,096	5,728
Darling Downs - Maranoa	909	0	0	909
Gold Coast	3,994	0	0	3,994
Ipswich	2,968	1,029	11,811	15,808
Logan - Beaudesert	831	0	0	831
Mackay - Isaac - Whitsunday	1,744	0	0	1,744
Moreton Bay	533	8,305	0	8,838
Queensland - Outback	131	0	0	131
Sunshine Coast	4,762	0	0	4,762
Toowoomba	3,669	0	0	3,669
Townsville	2,010	0	3,808	5,818
Wide Bay	0	0	518	518
Total Regional Queensland	25,275	9,334	19,367	53,976
Brisbane	5,052	12,220	19,659	36,931
Total	30,327	21,554	39,026	90,907

NUMBER OF NON-TAB RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,031	0	213	1,244
Central Queensland	1,390	0	0	1,390
Darling Downs - Maranoa	1,561	0	0	1,561
Gold Coast	0	0	0	0
Ipswich	132	119	0	251
Logan - Beaudesert	38	0	0	38
Mackay - Isaac - Whitsunday	444	0	0	444
Moreton Bay	0	44	0	44
Queensland - Outback	3,668	0	0	3,668
Sunshine Coast	0	0	0	0
Toowoomba	29	0	0	29
Townsville	642	0	0	642
Wide Bay	1,295	10	1,704	3,009
Total Regional Queensland	10,230	173	1,917	12,320
Brisbane	42	0	1,129	1,171
Total	10,272	173	3,046	13,491

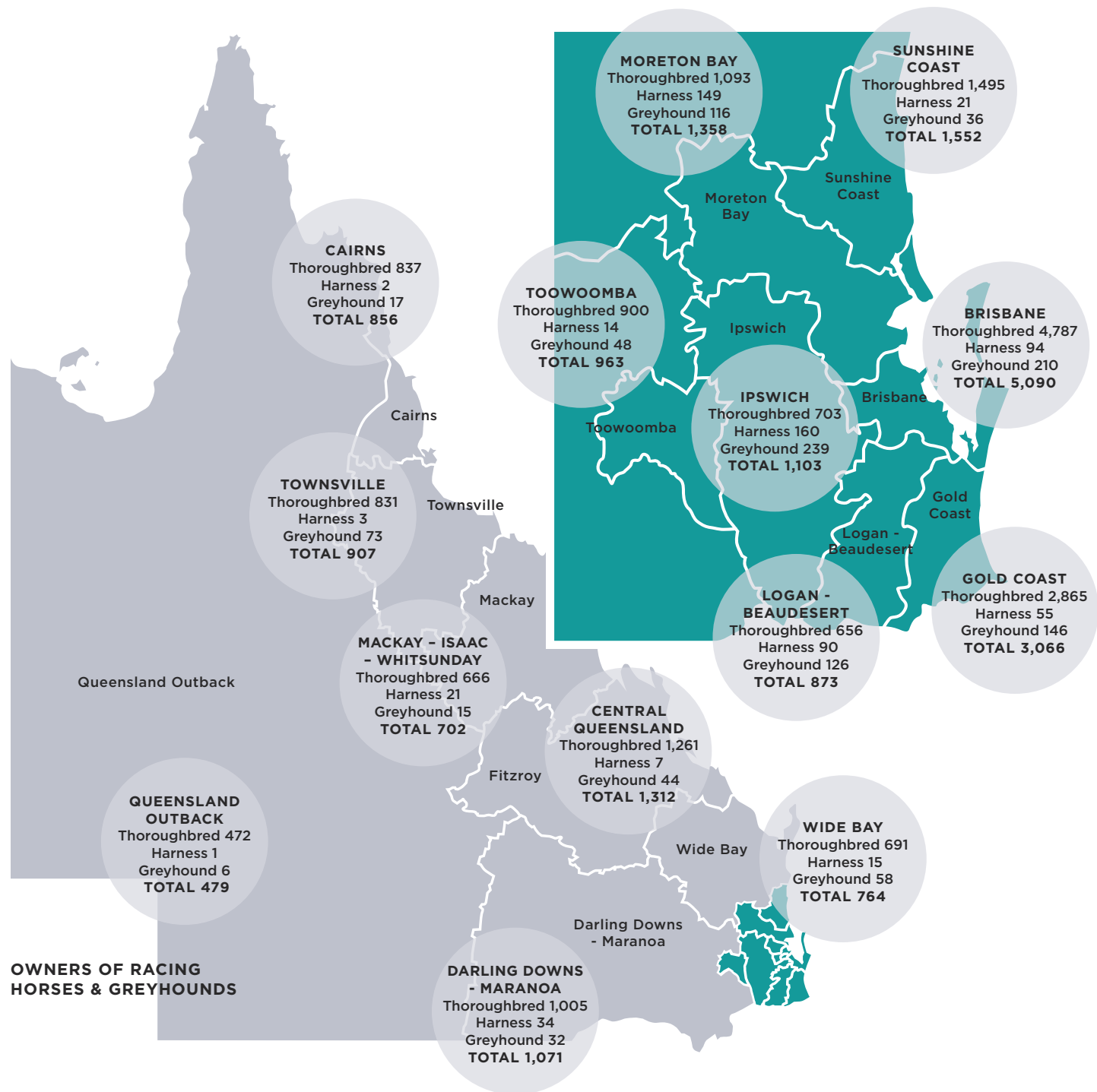
TOTAL RACE STARTS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2,123	0	347	2,470
Central Queensland	4,022	0	3,096	7,118
Darling Downs - Maranoa	2,470	0	0	2,470
Gold Coast	3,994	0	0	3,994
Ipswich	3,100	1,148	11,811	16,059
Logan - Beaudesert	869	0	0	869
Mackay - Isaac - Whitsunday	2,188	0	0	2,188
Moreton Bay	533	8,349	0	8,882
Queensland - Outback	3,799	0	0	3,799
Sunshine Coast	4,762	0	0	4,762
Toowoomba	3,698	0	0	3,698
Townsville	2,652	0	3,808	6,460
Wide Bay	1,295	10	2,222	3,527
Total Regional Queensland	35,505	9,507	21,284	66,296
Brisbane	5,094	12,220	20,788	38,102
Total	40,599	21,727	42,072	104,398

Owners race for more than \$140 million in prizemoney and bonuses that is on offer across the three codes

Owners play a significant role in the funding model of the racing industry. They provide much of the capital outlay and day-to-day funding for the purchase and preparation of racing horses and greyhounds. In 2018/19 there were over 20,000 individuals with an ownership interest in thoroughbred, harness and/or greyhound racing in Queensland. Almost 75% of owners reside in regional areas of Queensland, with Brisbane (25.3%) and the Gold Coast (15.3%) home to the most significant portion of owners across the three codes.

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



OWNERS OF RACING HORSES & GREYHOUNDS

Queensland owners and trainers spent **in excess of \$301 million** in 2018/19 preparing **racing horses and greyhounds for racing**. The Brisbane and Gold Coast regions account for **more than one-third of this economic activity**.

Economic Contribution of the Training Industry

In 2018/19, owners of racehorses and greyhounds trained in Queensland spent more than \$301 million on the preparation of their animals for racing. The calculation of expenditure on the preparation of racehorses and greyhounds takes into account the various training and non-training related expenditures incurred by owners and trainers.

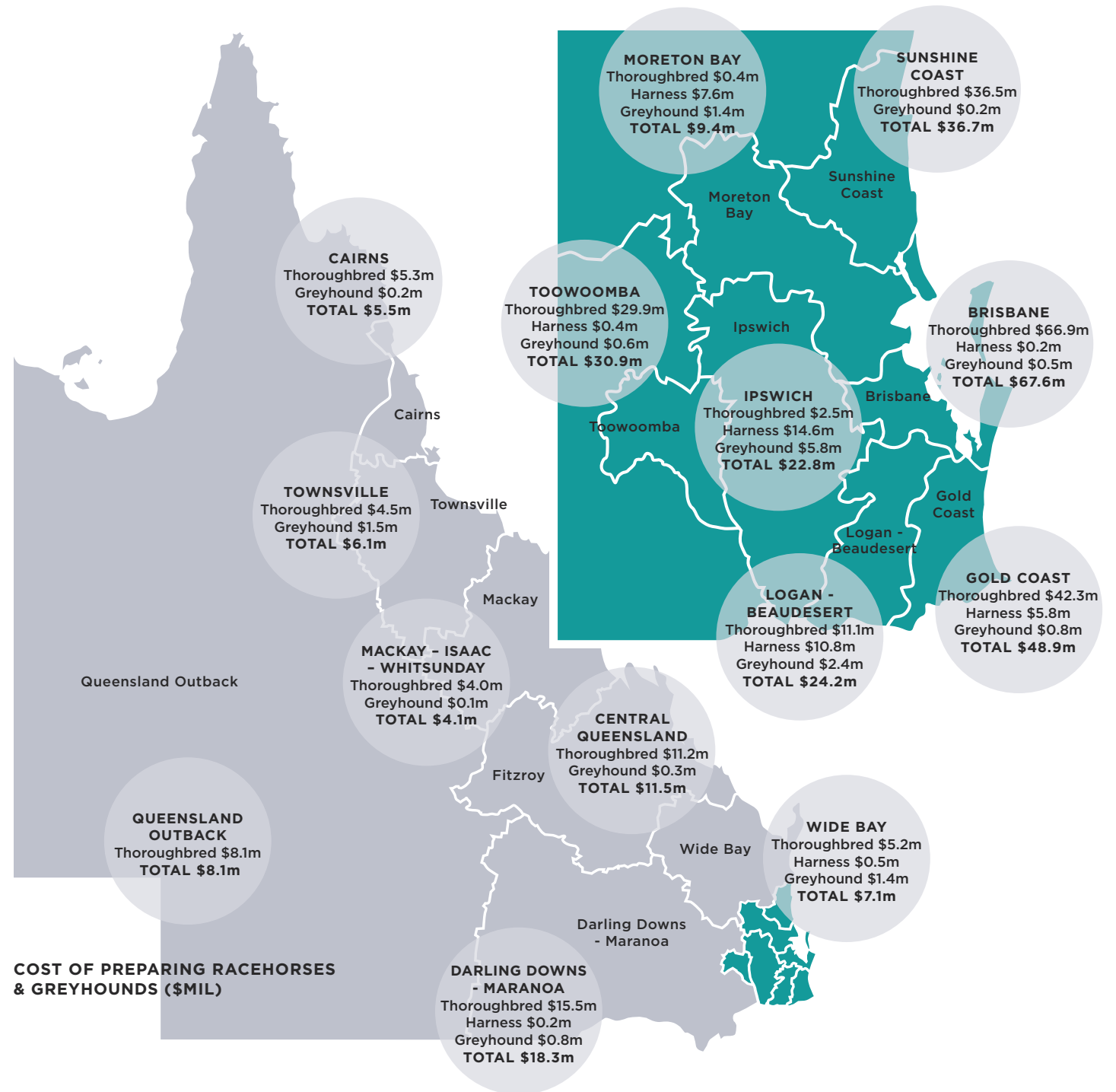
The development of expenditure profiles within each region is based upon the number of racehorses and greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the animal. For instance, expenditure during the education stage of a racehorse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

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

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

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





Overall, almost 78% of the expenditure on training activities occurs in regional areas of the state. Regionally, Gold Coast (16.2%), Sunshine Coast (12.2%) and Toowoomba (10.3%) make up the largest training areas outside of greater Brisbane (22.4%).

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

THOROUGHBRED RACING

Thoroughbred training activity is responsible for generating more than \$243.4 million in expenditure impacts in Queensland.

Brisbane	\$66.9m (27.5%)
Gold Coast	\$42.3m (17.4%)
Sunshine Coast	\$36.5m (15.0%)

HARNESS RACING

Standardbred training activity is responsible for generating almost \$41.9 million in expenditure impacts in Queensland.

Ipswich	\$14.6m (34.9%)
Logan-Beaudesert	\$10.8m (25.8%)
Moreton Bay	\$7.6m (18.1%)

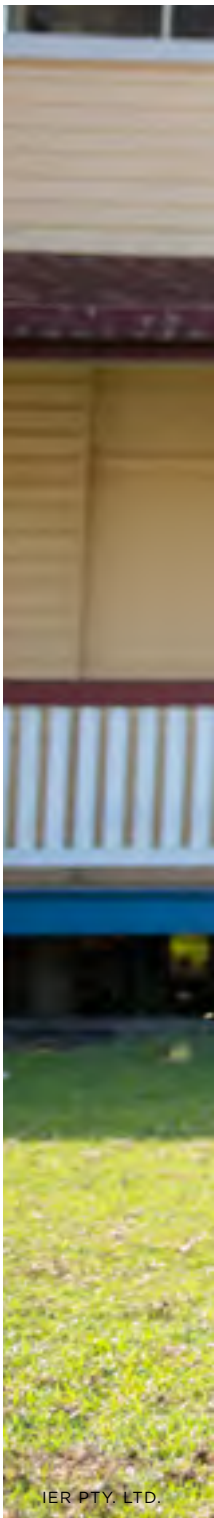
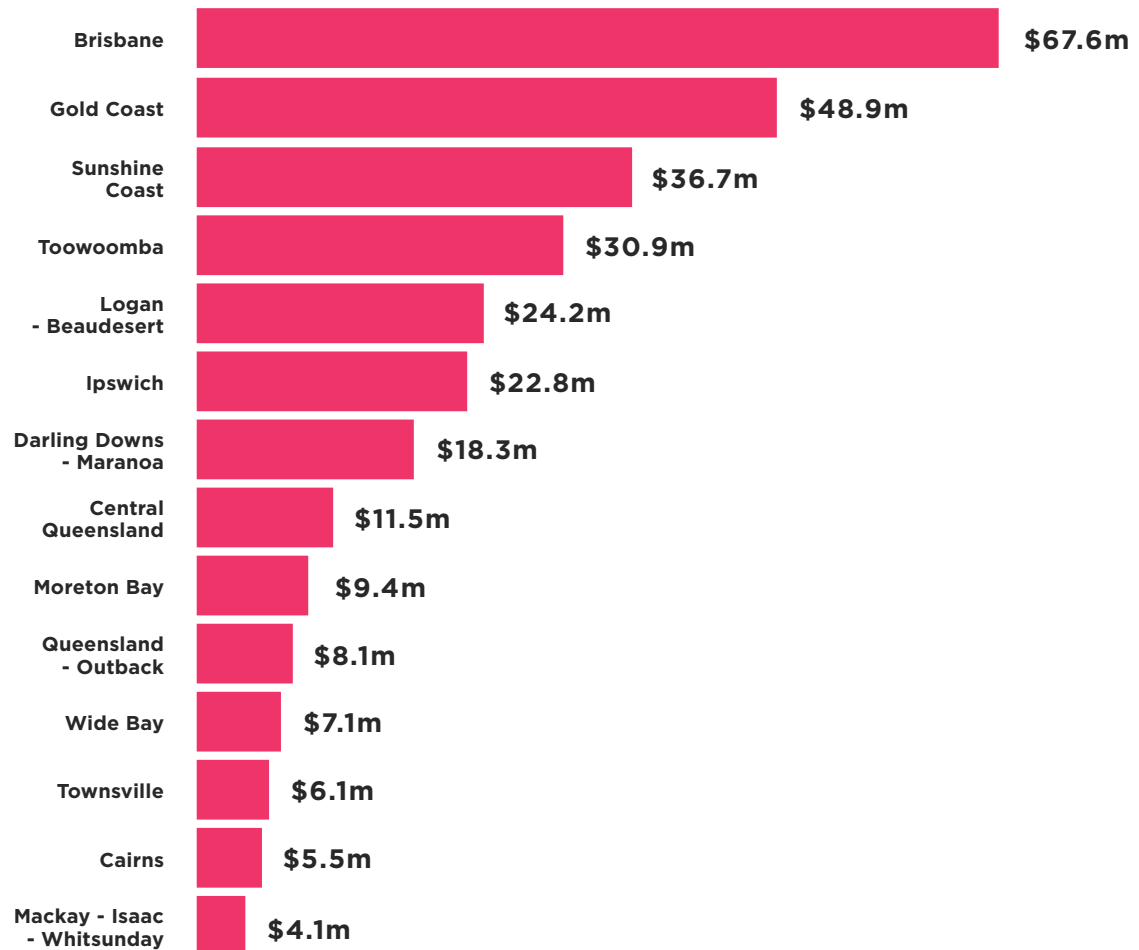
GREYHOUND RACING

Greyhound training activity is responsible for generating more than \$16.0 million in expenditure impacts in Queensland.

Ipswich	\$5.8m (36.0%)
Logan-Beaudesert	\$2.4m (14.8%)
Moreton Bay	\$1.5m (9.6%)

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

EXPENDITURE BY THE TRAINING SECTOR





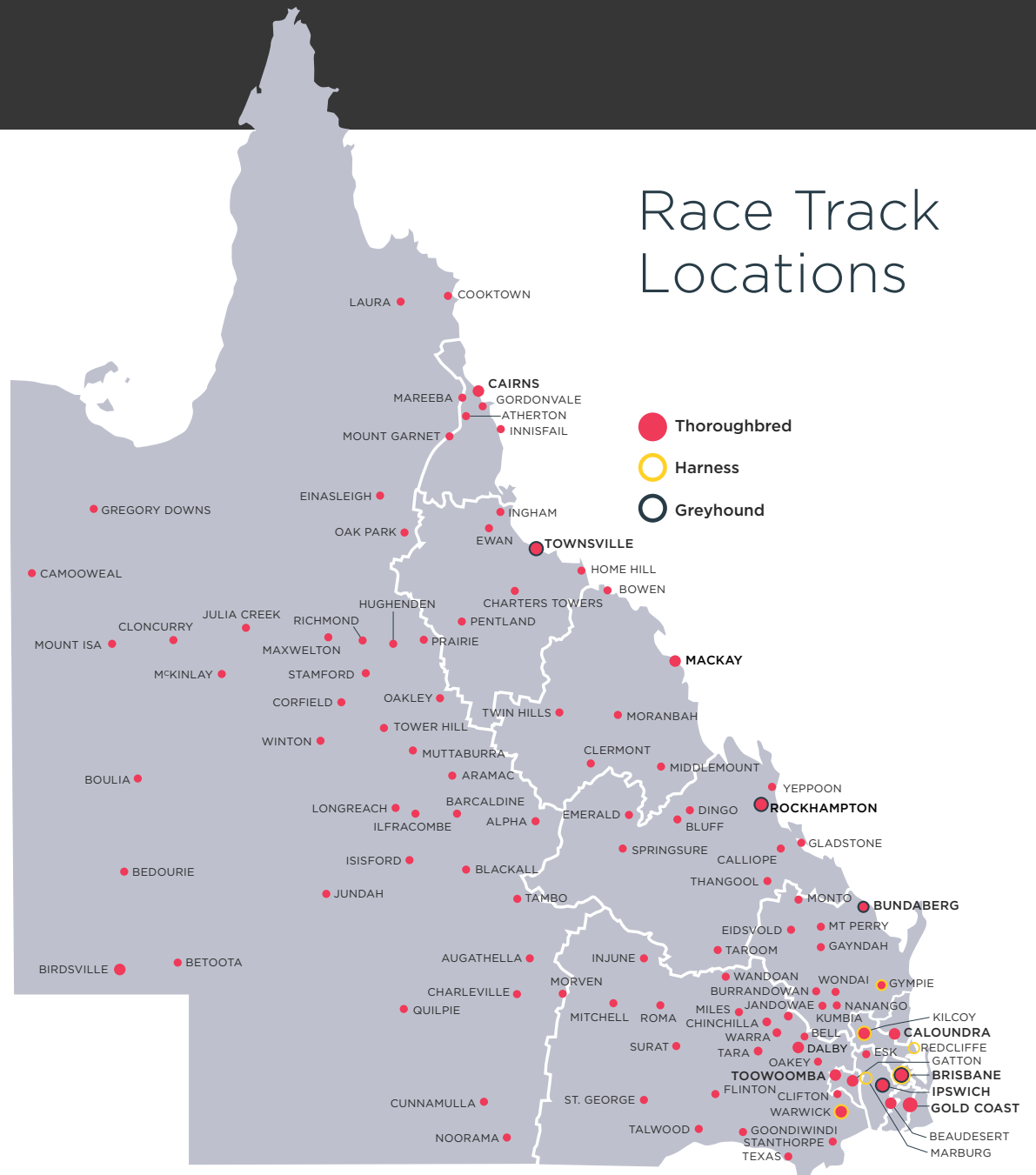
RACING CLUBS, ASSOCIATIONS AND AUTHORITIES

NUMBER OF TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	2	0	0	2
Central Queensland	3	0	1	4
Darling Downs - Maranoa	3	0	0	3
Gold Coast	1	0	0	1
Ipswich	1	1	1	3
Logan - Beaudesert	2	0	0	2
Mackay - Isaac - Whitsunday	2	0	0	2
Moreton Bay	1	1	0	2
Queensland - Outback	0	0	0	0
Sunshine Coast	1	0	0	1
Toowoomba	2	0	0	2
Townsville	1	0	1	2
Wide Bay	0	0	0	0
Total Regional Queensland	19	2	3	24
Brisbane	1	1	1	3
Total	20	3	4	27

NUMBER OF NON-TAB RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Cairns	6	0	0	6
Central Queensland	10	0	0	10
Darling Downs - Maranoa	21	1	0	22
Gold Coast	0	1	0	1
Ipswich	1	0	0	1
Logan - Beaudesert	0	0	0	0
Mackay - Isaac - Whitsunday	5	0	0	5
Moreton Bay	0	0	0	0
Queensland - Outback	37	0	0	37
Sunshine Coast	0	0	0	0
Toowoomba	0	0	0	0
Townsville	7	0	0	7
Wide Bay	10	0	1	11
Total Regional Queensland	97	2	1	100
Brisbane	1	0	1	2
Total	98	2	2	102



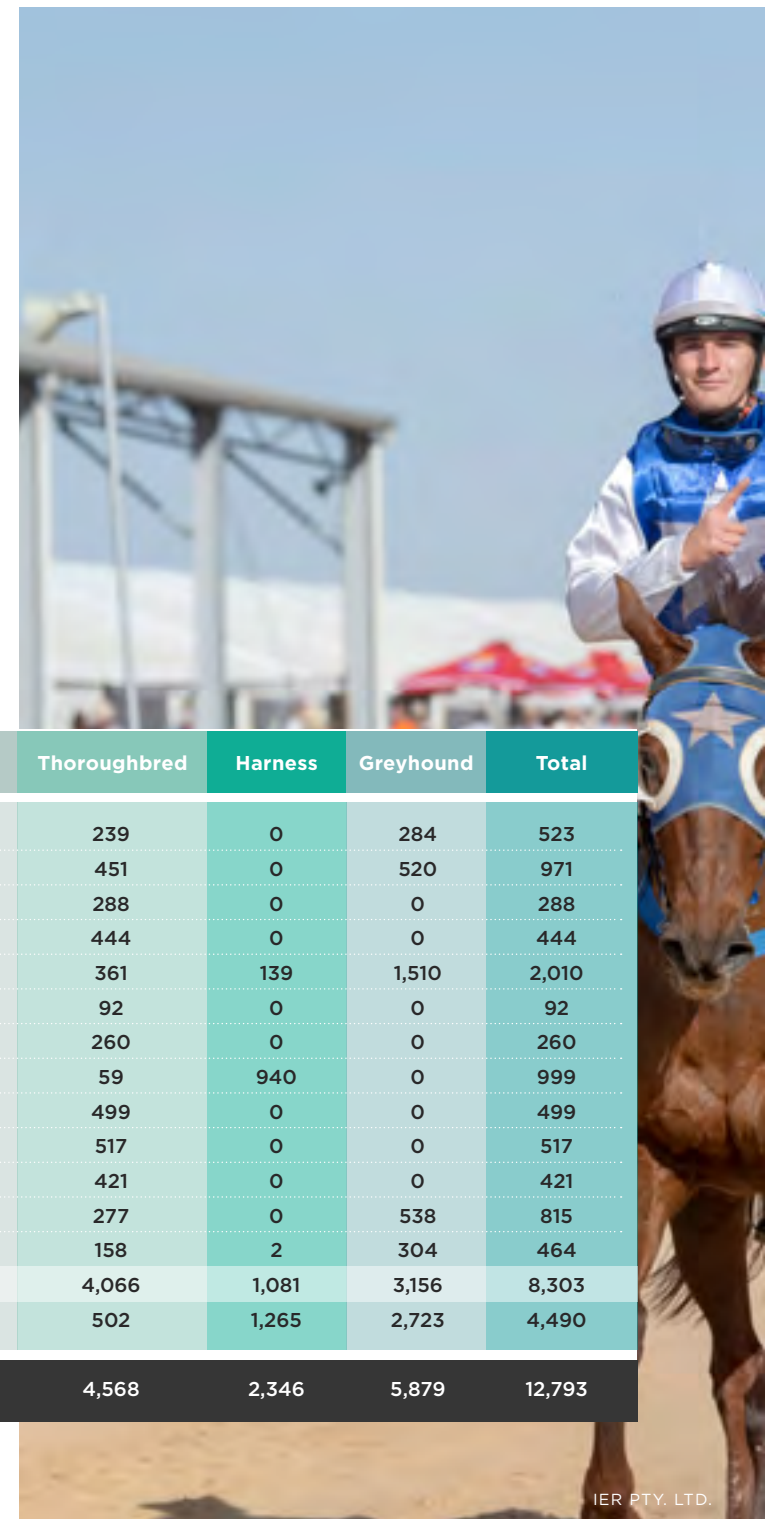
Sourced from Racing Queensland 2019

TOTAL RACE MEETINGS

	Thoroughbred	Harness	Greyhound	Total
Cairns	44	0	38	82
Central Queensland	78	0	52	130
Darling Downs - Maranoa	54	0	0	54
Gold Coast	58	0	0	58
Ipswich	55	18	155	228
Logan - Beaudesert	16	0	0	16
Mackay - Isaac - Whitsunday	42	0	0	42
Moreton Bay	9	121	0	130
Queensland - Outback	98	0	0	98
Sunshine Coast	69	0	0	69
Toowoomba	61	0	0	61
Townsville	48	0	49	97
Wide Bay	32	2	45	79
Total Regional Queensland	664	141	339	1,144
Brisbane	62	146	266	474
Total	726	287	605	1,618

TOTAL RACES

	Thoroughbred	Harness	Greyhound	Total
Cairns	239	0	284	523
Central Queensland	451	0	520	971
Darling Downs - Maranoa	288	0	0	288
Gold Coast	444	0	0	444
Ipswich	361	139	1,510	2,010
Logan - Beaudesert	92	0	0	92
Mackay - Isaac - Whitsunday	260	0	0	260
Moreton Bay	59	940	0	999
Queensland - Outback	499	0	0	499
Sunshine Coast	517	0	0	517
Toowoomba	421	0	0	421
Townsville	277	0	538	815
Wide Bay	158	2	304	464
Total Regional Queensland	4,066	1,081	3,156	8,303
Brisbane	502	1,265	2,723	4,490
Total	4,568	2,346	5,879	12,793





TOTAL ATTENDANCES

	Thoroughbred	Harness	Greyhound	Total
Cairns	46,510	0	910	47,420
Central Queensland	53,559	0	2,008	55,567
Darling Downs - Maranoa	44,756	1,500	0	46,256
Gold Coast	117,133	0	0	117,133
Ipswich	40,253	6,455	14,252	60,960
Logan - Beaudesert	5,269	0	0	5,269
Mackay - Isaac - Whitsunday	22,598	0	0	22,598
Moreton Bay	7,450	19,118	0	26,568
Queensland - Outback	45,999	0	0	45,999
Sunshine Coast	65,041	0	0	65,041
Toowoomba	27,315	0	0	27,315
Townsville	34,166	0	4,250	38,416
Wide Bay	27,698	0	1,900	29,598
Total Regional Queensland	537,747	27,073	23,320	588,140
Brisbane	168,785	48,517	30,013	247,315
Total	706,532	75,590	53,333	835,455

*Some totals do not add due to rounding.

NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Cairns	1,153	0	0	1,153
Central Queensland	1,487	0	50	1,537
Darling Downs - Maranoa	1,571	40	0	1,611
Gold Coast	66	19	0	85
Ipswich	460	80	106	646
Logan - Beaudesert	80	0	0	80
Mackay - Isaac - Whitsunday	448	0	0	448
Moreton Bay	78	81	0	159
Queensland - Outback	2,738	0	0	2,738
Sunshine Coast	1,526	0	0	1,526
Toowoomba	498	0	0	498
Townsville	1,148	0	26	1,174
Wide Bay	555	0	45	600
Total Regional Queensland	11,807	220	227	12,254
Brisbane	8,915	528	110	9,553
Total	20,722	748	337	21,807

Racing Clubs

There are 129 racing clubs in Queensland across the three codes of racing. Queensland is unique in the Australian racing landscape with the majority of these racing clubs (102) running primarily non-TAB race meetings. This means that racing at these clubs is not covered by the TAB and instead is driven more so by community involvement and on-course bookmaker betting.

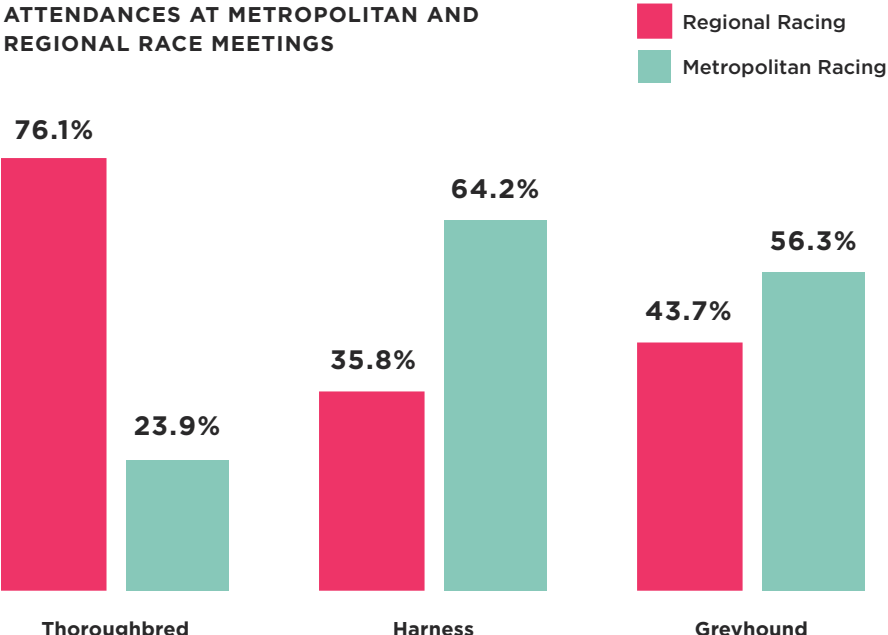
Racing clubs not only provide the opportunity for participants and spectators to participate in the sport of racing, they also provide an important social destination and in many regions, are an important part of the social fabric of the community.

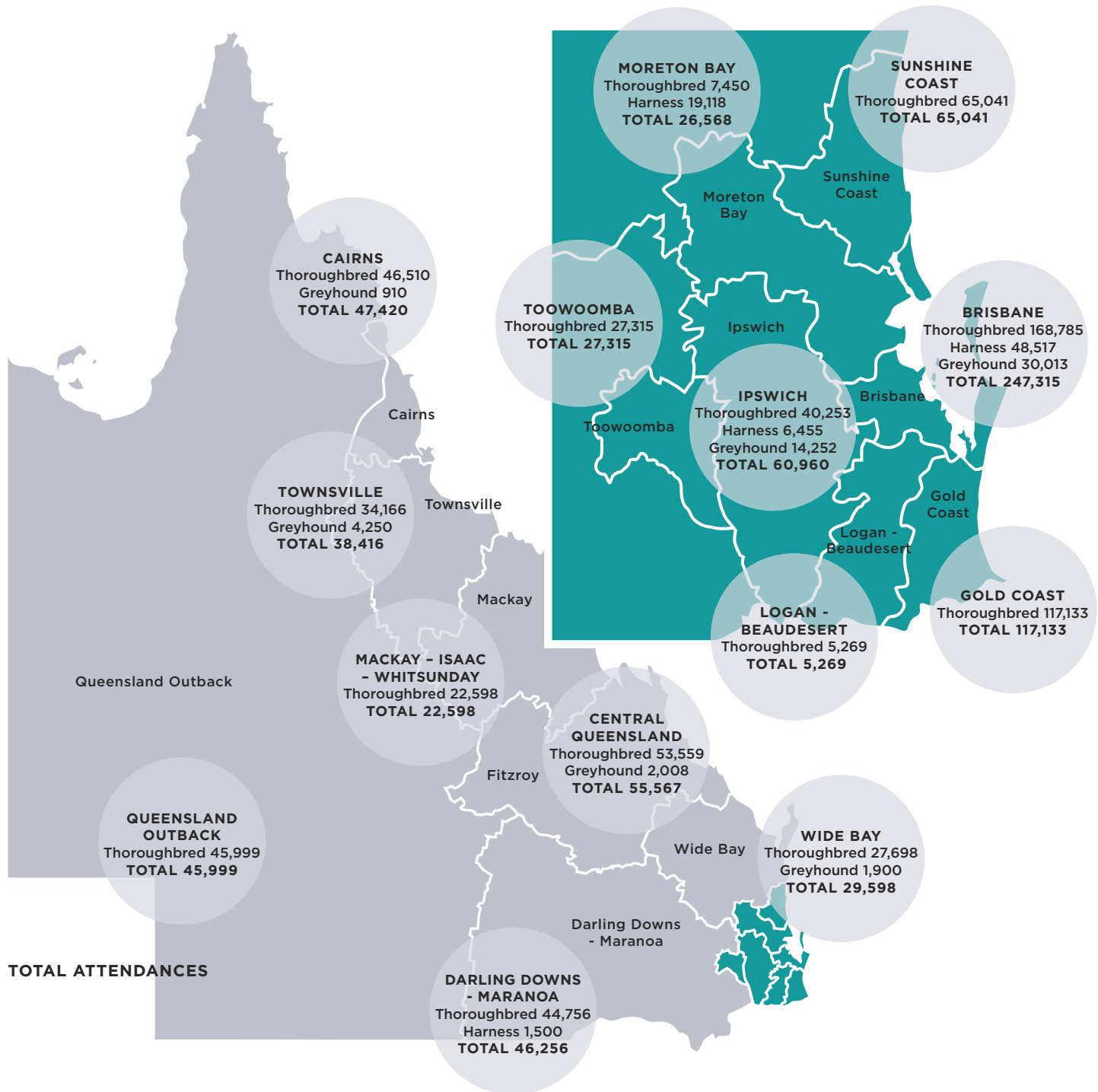
In 2018/19, there were 1,245 TAB race meetings and a further 373 non-TAB race meetings. These race meetings attracted attendances in excess of 835,000 - 70% of which were in regional areas. Thoroughbred race meetings, in Queensland, attracted a total of 706,532 attendances. Race meetings in Brisbane (168,785) and the Gold Coast (117,133) were responsible for the largest attendance. Harness race meetings attracted 75,590 attendances with race meetings in Brisbane (48,517) and Moreton Bay (19,118) making up the majority of this amount.

Greyhound racing attracted attendance of 53,333 with race meetings in Brisbane (30,013) and Ipswich (14,252) making up more than three-quarters of all attendances.

Non-TAB race meetings make up 23.0% of all race meetings in Queensland and contribute 19.9% of all attendances. The thoroughbred code makes up the largest number of non-TAB race meetings in Queensland.

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







Customer Expenditure Generated by Racing Clubs and Events

In 2018/19 it is estimated that the total expenditure generated by racing customers was \$182.3 million, (excluding wagering on the races). Racing’s customers include attendees, sponsors, members, broadcast providers, community groups and participants. Racing customer expenditure can be broadly segmented into the following categories:

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

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

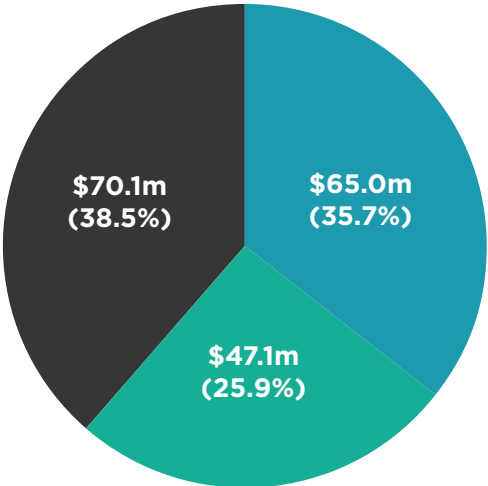
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. Major racing events have long proven their ability to extend the generation of economic stimulus into a broader cross-section of the local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

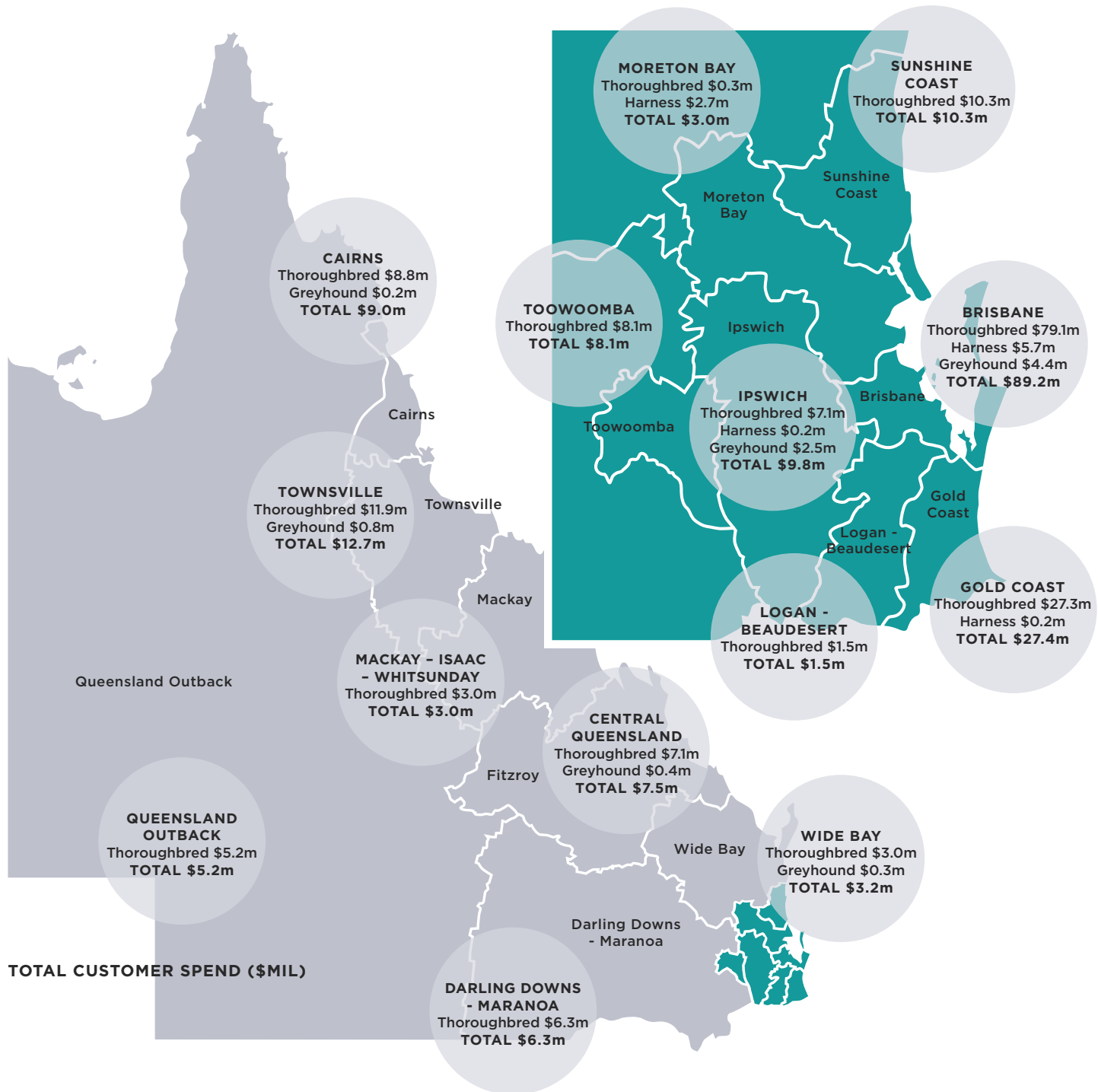
Whilst on-course wagering is the largest component of customer spend, it is analysed in the section relating to wagering.

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

BREAKDOWN OF RACING CUSTOMER SPENDING

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







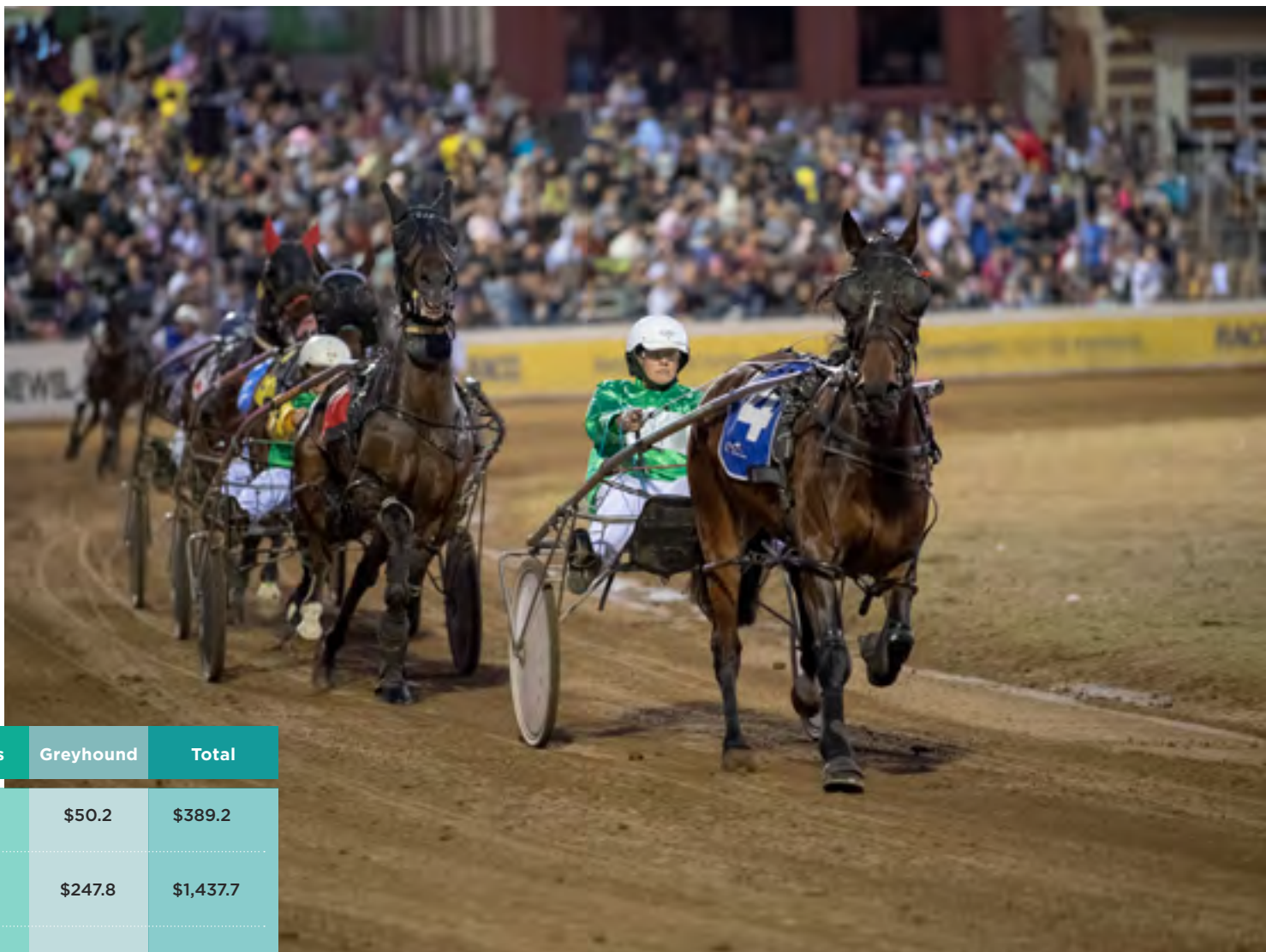
Wagering customers represent one of the key funding sources for the Queensland racing industry. In 2018/19, racing industry funding was generated through the following sources:

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

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

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

(\$MIL)	Thoroughbred	Harness	Greyhound	Total
Wagering on QLD racing product with QTAB	\$302.6	\$36.4	\$50.2	\$389.2
Wagering on Interstate/Overseas racing product with QTAB	\$1,070.6	\$119.3	\$247.8	\$1,437.7
Wagering on QLD racing product with other WSP's	\$2,676.3	\$438.9	\$817.8	\$3,932.9
Total	\$4,049.5	\$594.6	\$1,115.8	\$5,759.8



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

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

Racing in the Ipswich, Gold Coast and Sunshine Coast regions represent 36.4% of all wagering turnover on Queensland Racing product.

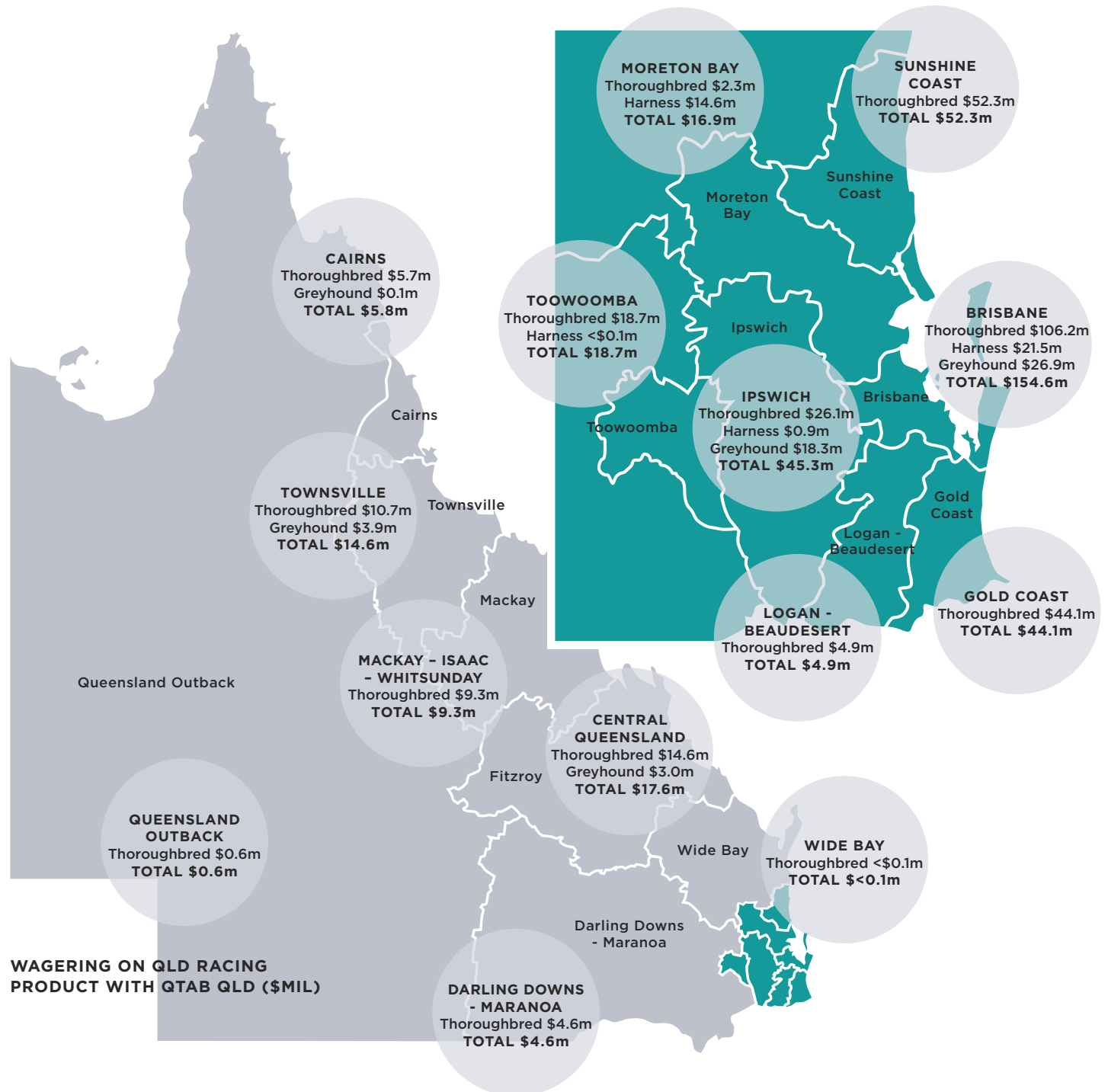
Races held in Queensland generate more than \$389.2 million in wagering turnover with QTAB QLD.

Brisbane (35.4%), Sunshine Coast (17.4%) and Gold Coast (14.7%) racing account for two-thirds of all thoroughbred wagering on Queensland Racing product with QTAB QLD. These three regions makes up 26.0% of all thoroughbred race meetings held in Queensland.

In the harness racing sector, Brisbane (58.2%) and the Moreton Bay region (39.3%) represent nearly all of the wagering on Queensland harness racing product with QTAB QLD.

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

* Note - Turnover is not based on customer location



Expenditure by the Principal Racing Authority and Clubs

In 2018/19, Racing Queensland and the 129 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of almost \$374.2 million in Queensland. This represents the expenditure incurred by these organisations in maintaining tracks, running race meetings, administration, marketing, cost of goods and prizemoney.

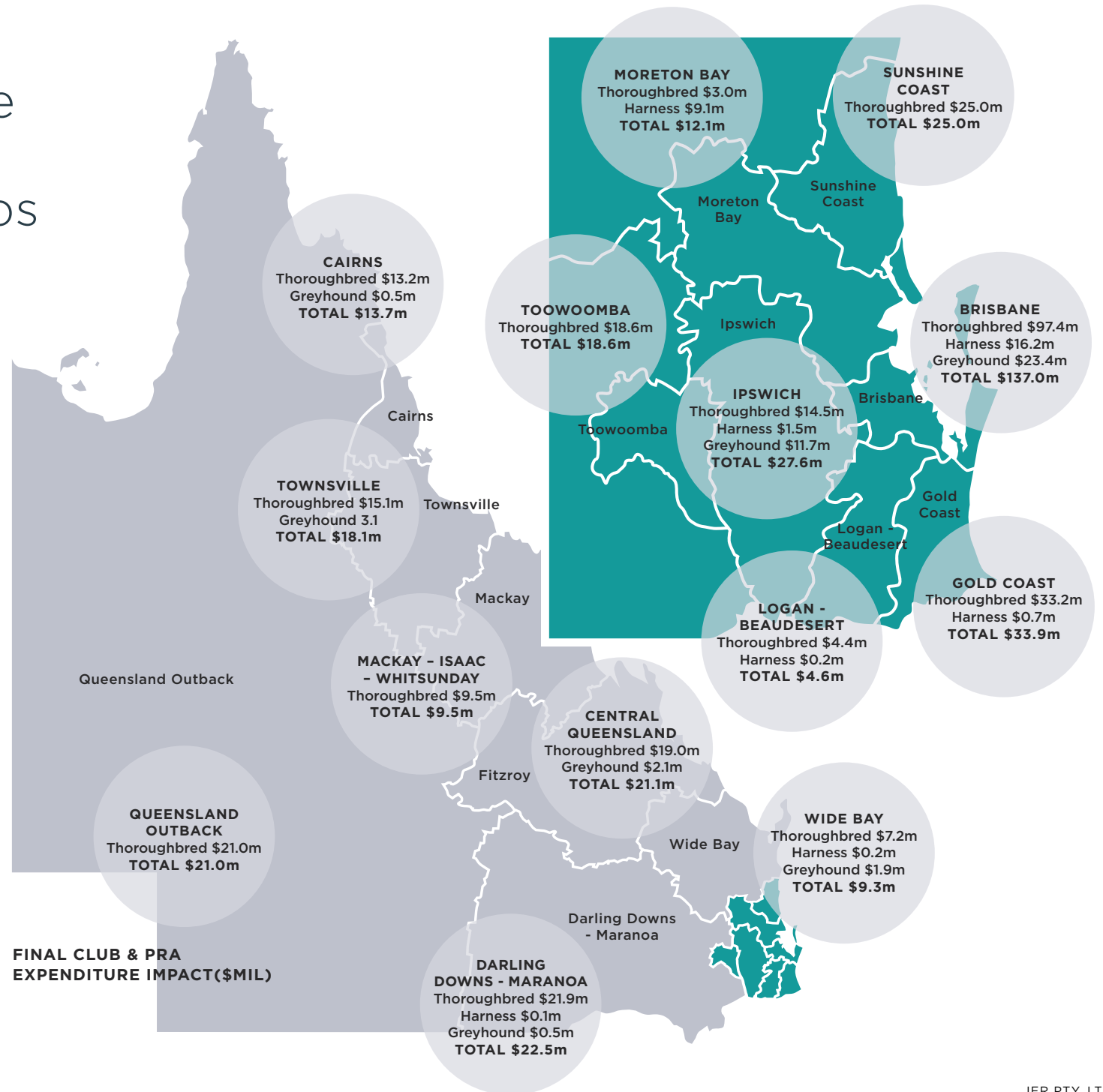
The majority of expenditure generated by the PRA and racing clubs is funded by racing customers. This includes:

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

The major areas of expenditure, in terms of racing industry operations, include:

- + Track repairs & facilities maintenance
- + Staff & personnel
- + Cost of goods
- + Marketing & promotions
- + Utilities

Over 36% (\$137.0 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. Gold Coast (9.1%) generates the next most significant impact with the remainder spread around the State.





MAJOR EVENT IMPACTS

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

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

Brisbane Racing Carnival

OVERVIEW

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

KEY TOURISM IMPACTS

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

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



The following table illustrates the key impacts to the State:

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



Magic Millions Raceday & Sales

OVERVIEW

The Magic Millions Raceday is one of Australia's richest racedays with more than \$10 million in prizemoney on offer. In 2020, the raceday attracted attendances in excess of 24,380 people.

KEY TOURISM IMPACTS

In 2020, an economic impact assessment of the Magic Millions Raceday was undertaken. The study found that the event generated \$17 million of direct in-scope expenditure for the Queensland economy. The event was directly responsible for over 12,896 visitors to Queensland – new people

to the Gold Coast and Queensland economies. In addition to the impacts associated with the raceday, the bloodstock sales component of the event has great potential to generate economic impacts within the QLD economy. This is particularly the case when a non-QLD buyer purchases a QLD bred racehorse.

The following tables illustrate the key impacts to the State:

Tourism Impact	2019	2020
In-scope visitors (spectators, sponsors and participants)	5,299	5,977
In-scope expenditure for the QLD economy	\$15.0m	\$17.3m
Visitor Nights generated in QLD	26,930	31,528

Economic Impact (\$AUD)	2019	2020
Magic Millions Polo	\$2.3m	\$2.9m
Magic Millions Raceday	\$17.4m	\$20.0m
Gold Coast Yearling Sale	\$14.1	\$15.8m
Gold Coast National Sale	\$16.0m	-
Total Economic Impact	\$49.8m	\$38.7m

*Please note the Gold Coast National Sale figures were unavailable at the time of reporting.

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.

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





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

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



COMMUNITY BUILDING

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

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

- + Over 600 community organisations or charities are assisted and supported by racing clubs
- + Over 412 community organisations share racing club facilities and resources
- + Racing in Queensland currently engage close to 7,600 volunteers who assist in various club, kindred body and industry related roles
- + 21,807 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 7,579 people who provide volunteer time and services to racing clubs. Socially, volunteering is recognised as a means of enhancing the quality of life, particularly among the aged, whilst making an important contribution to the community.

Volunteers in racing assume roles in areas such as:

- + Promotions and fundraising (e.g. Fashions on the Field, decorating, event management etc.)
- + Photo finish, timing, clerk of the course, barrier attendants, starters and judging, betting supervisors

- + Preparing and maintaining the track and grounds
- + Administration and finance duties
- + Gate ticket sellers and parking attendants
- + Operating food and beverage outlets
- + Racing operations (parking, gate attendants etc.)
- + Fundraising
- + Cleaning duties
- + Repairs, maintenance of facilities and gardening
- + Photographer
- + Operating racing museums

IER found that racing clubs financially assist and support 638 organisations and charities.

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

Just some of the charitable organisations supported by racing include:

- + Cancer Charities (e.g. Queensland Cancer Council, Prostate Cancer Awareness, Breast and Ovarian Cancer Awareness, Mark Hughes Foundation, Blonde Bandits Rally for Cancer)
- + Children's Charities (Police Boys Youth Club, Bush Kids, Isolated Children's Parents' Association, Dolly's Dream, Starlight Children's Foundation, Early Learning Childhood Centre)

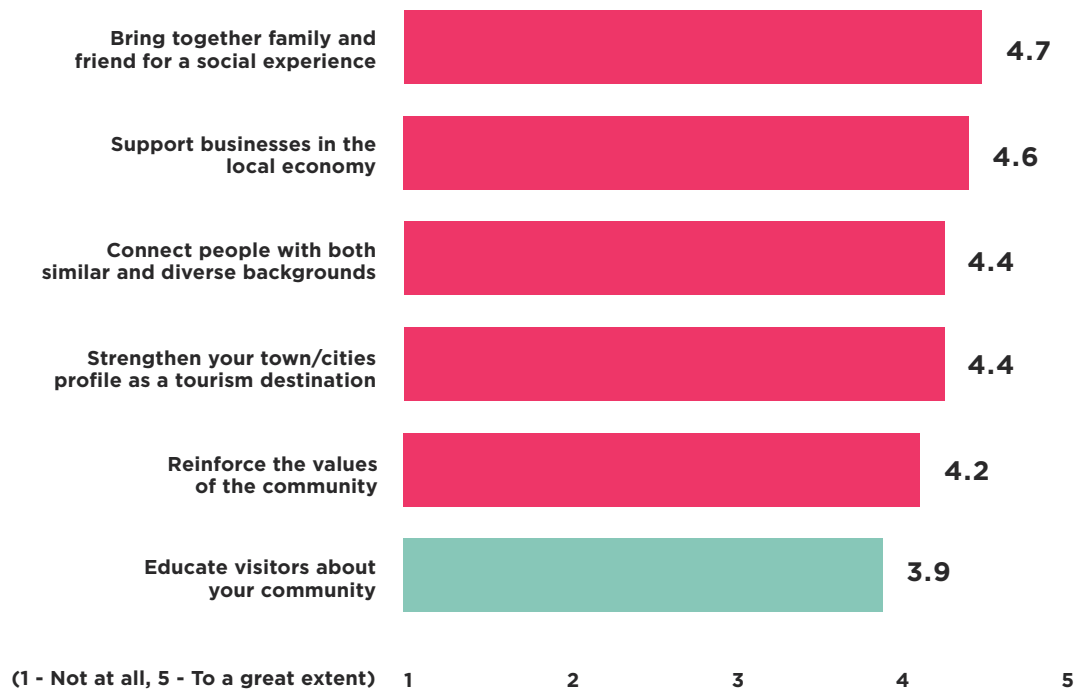


- + Sporting Clubs (e.g. Rugby League and Union, Golf, Gymnastics, Equestrian Groups, BMX Clubs, Boxing and fitness, Surf Lifesaving, Fishing Clubs, Tennis, AFL and Soccer)
- + Schools (Kindergartens, Pre-School, State schools and colleges)
- + Rotary, Lions, Apex and Variety Clubs
- + Hospitals and Health Organisations (e.g. Men's Shed)
- + General Charities (Legacy, Queensland Country Women's Association)
- + National Jockeys Trust
- + Emergency Services (e.g., Flying Doctor Service, Life Flight, Rural Fire Service, Queensland Ambulance Service)
- + Scouts and Girl Guides, Rural Show Societies

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

The social impact survey asked clubs how much they believed racing in their town or city has the ability to engage with the community from a social cohesion, education and business perspective. As the chart illustrates, all indicators were positive, particularly significant in the areas of racing's ability to 'bring together family and friends for a social experience' (4.7), to 'support businesses in the local economy' (4.6) and to 'connect people with both similar and diverse backgrounds' (4.4). These indicators illustrate the position that racing clubs see themselves as integral to the fabric of the local community.

COMMUNITY ENGAGEMENT WITH RACING QUEENSLAND





SUPPORTING FAMILY RELATIONSHIPS

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

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

Racing clubs themselves have increasingly developed activities and on-course facilities that enable families to enjoy a social day at the races. Many clubs actively promote services and amenities for families including the provision of parent rooms, baby change tables, kids' clubs,

playgrounds and dedicated children's zones. The survey revealed a number of positive initiatives which have been developed by clubs. All clubs offer attractions or services that support attendance by children. The survey revealed that:

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

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

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

SHARING FACILITIES WITHIN THE COMMUNITY

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

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

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





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), and trackwork riders/jockeys. These opportunities provide practical access and theoretical knowledge to many aspects of professional racing in Queensland.

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

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

- + On average, each club has close to one member of their staff currently participating in further education, career development and training programs each year
- + All racing clubs encourage responsible gambling
- + 25% of clubs have partnerships with primary, secondary, trade and tertiary institutions

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.



PROMOTING HEALTHY RACING CLUB ENVIRONMENTS

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

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

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

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

Racing clubs are actively implementing policies and practices in key areas that impact on the environment. Over 58% of all clubs have policies in place to save water and re-use or recycle water.

Examples include:

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

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

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

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

Examples include:

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





CLUB HISTORY AND HERITAGE

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

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

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

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

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

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

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

- + Industry awards and Halls of Fame to acknowledge horses/greyhounds, participants and associates
- + Club acknowledgement of participants - signage and plaques around club grounds
- + Publishing and contributions to history books written about the Clubs and/or regional area
- + Promoting club and feature race anniversaries e.g. 150th and 100th Cup or Club anniversaries (e.g. Gordonvale in 2016)
- + Promotion of history through on-course museums



- + Restoration of memorabilia (e.g. trophies donated back to the club)
- + Use of social media to promote club history
- + Dedicated calendar with racing stories of the past
- + Promotion of history through art galleries (Ipswich Cup), historical societies, local papers, radio, racebook and websites
- + Recognising heroes of the sport on dedicated racedays (e.g. Heritage Raceday)
- + Promotions in race book, honour boards and historical photographs and newspaper clippings
- + Heritage listing buildings on-course

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

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

Case study

FROM THE TRACK TO THE CLASSROOM

Early morning trackwork, teaching high school physical education classes and returning for an afternoon track session is all part of the routine for Melissa Gillies - despite it being difficult to juggle at times.

Melissa is one of many in the harness racing industry that pursue different careers but maintain a foothold in the harness racing world. She currently has four horses in training located at her parents property at Wanora, a rural locality in the Somerset region 45 minutes west of Brisbane.

Having taught for the past 14 years Melissa has created a well worn path in the 40 minute circuit from her home in Fernvale to Wanora and onto the Lowood State High where she teaches PE four days a week.

The hold on harness racing comes from being third generation of harness racing family that started with her grandmother 85 year old Beryl Dawson who has been involved in harness racing since 1963 and now involves over a dozen family members. And the hold continues with Melissa's two daughters, Ella, 9 and Zoe, 6 involved in racing ponies in the Mini-Trots events.

"Second nature" to Melissa Gillies. "It's crazy at times but it's what you do," she says.





 **GREYHOUND**
Adoption Program QLD

 **GREYHOUND**
Adoption Program QLD



Case study

GREYHOUND RACING

Animal welfare is at the heart of the announcement of a new state of the art \$38 million home for greyhound racing in Queensland. The Greater Brisbane Greyhound Centre announced by the Palaszczuk Government in October 2019 will be located in Purga, on the outskirts of Ipswich and 48km west of Brisbane.

The world class venue will feature a range of best practice amenities to reduce injuries and demonstrate the vibrancy of greyhound racing.

Among the amenities to be established are:

- + Three tracks including a much needed large one-turn racetrack, two-turn track and a straight track;
 - + Track radius and surface banking designed in to reduce excessive limb forces acting on greyhounds while racing;
 - + The implementation of modern cambers and a world-class racing surface;
 - + Starting box positioning to reduce interference during race starts, including drop-on boxes where best suited;
 - + Starting boxes with optimum spacing between contestants, grille heights and starting location alignment; and
- + Air-conditioned, sound-attenuated kennels Preliminary design has been undertaken with Professor David Eager, from the University of Technology Sydney who has been at the forefront of greyhound racing safety research.

The Centre's location in the Ipswich region is ideal as it is the epicentre for greyhound breeding and rearing, with almost one in every two greyhounds in Queensland born in the region. Once completed, the Brisbane and Ipswich greyhound racing clubs will co-locate to the new venue.



Case study

EDUCATION AND TRAINING IN QUEENSLAND RIDING HIGH

With the Queensland racing industry directly sustaining 8,759 FTE jobs, education and training plays a vital role in ensuring high level skills. As a registered training organisation, Racing Queensland provides courses for stablehands, trackwork riders and jockeys, with many new apprentice jockeys in the 2018-19 season having many reasons to celebrate.

Whilst the exhilaration of your first win as a newly licensed apprentice jockey would be extremely memorable, this occurred in just their first or second race for a handful of apprentice jockeys. Over a six week period Racing Queensland training staff watched with excitement as five of

their apprentices achieved this, including 25 year old Emma MacPherson who rode El Demonio to win at Nanango Race Club in the South Burnett region of Queensland in her first ever ride as a licensed apprentice jockey.

With a national shortage of jockeys, Racing Queensland were proud to have 10 apprentices successfully transition into senior jockeys in 2018-19 – a result that has not occurred for many years. After undertaking a 4-year apprenticeship, it is a testament to these apprentice jockeys dedication and passion to pursue a career in the racing industry.

The team in Racing Queensland Training consist of retired successful jockey Jeff McKay, former Tony Gollan Head travelling foreperson Kiaarn Holland as educators, the Senior Apprentice Coach is highly respected group 1 winning jockey Shane Scriven and the latest inclusion into the team is expatriate trackwork rider Jorge Villamizar, appointed to increase student numbers into courses for the Racing Industry.

Brisbane

The racing industry in the **Brisbane region is responsible for generating \$869.2 million in value added** contribution to gross state product. This represents **54.1% of the industry total.**

- + The population of the Brisbane region is 1,303,998 (ABS 2018).
- + There are a total of five (5) racing clubs operating in the region, two (2) of which are thoroughbred clubs, two (2) of which are greyhound racing clubs, and one (1) harness racing club.
- + The racing industry in the Brisbane region is responsible for generating almost \$869.2 million in value added contribution to Gross State Product. This equates to 54.1% 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 6,557 full-time equivalent (FTE) jobs in the region.
- + There are over 10,000 participants in the racing industry in Brisbane.

RACING CLUBS IN THE REGION

Thoroughbred

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

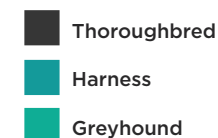
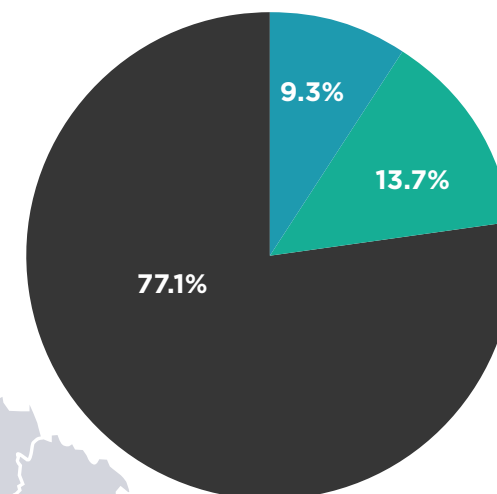
Harness

- + Albion Park Harness Racing Club

Greyhound

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

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE BRISBANE REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$386.1m	\$46.3m	\$76.6m	\$509.0m
Total value added	\$669.9m	\$80.5m	\$118.7m	\$869.2m
Full-time equivalent employment	5,050	602	904	6,557

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	7	53	88	148
Horses and greyhounds in training	1,243	5	85	1,333

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	161	31	8	201
Owners	4,787	94	210	5,090
Trainers	98	11	48	157
Breeders staff	780	123	170	1,073
Stable/Kennel employees	2,129	167	303	2,598
Racing Club & industry staff (FT, PT, casual)	810	62	87	959
Jockeys, drivers & apprentices	55	9	0	64
Racing club volunteers	28	7	6	41
Volunteers assisting participants	198	95	76	369
Total participants in the Brisbane region	6,654	340	482	7,476

Race meetings in the Brisbane region attracted attendances of **247,315** or **29.6%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE BRISBANE REGION



AT A GLANCE

5 Racing Clubs

THOROUGHBRED	2
HARNES	1
GREYHOUND	2

474 Race Meetings

THOROUGHBRED	62
HARNES	146
GREYHOUND	266

4,490 Races

THOROUGHBRED	502
HARNES	1,265
GREYHOUND	2,723

9,553 Racing Club Members

THOROUGHBRED	8,915
HARNES	528
GREYHOUND	110

247,315 Attendances

THOROUGHBRED	168,785
HARNES	48,517
GREYHOUND	30,013

*Some totals do not add due to rounding

Cairns

The racing industry in the **Cairns region is responsible for generating \$34.2 million in value added** contribution to gross state product. This represents **2.1% of the industry total.**

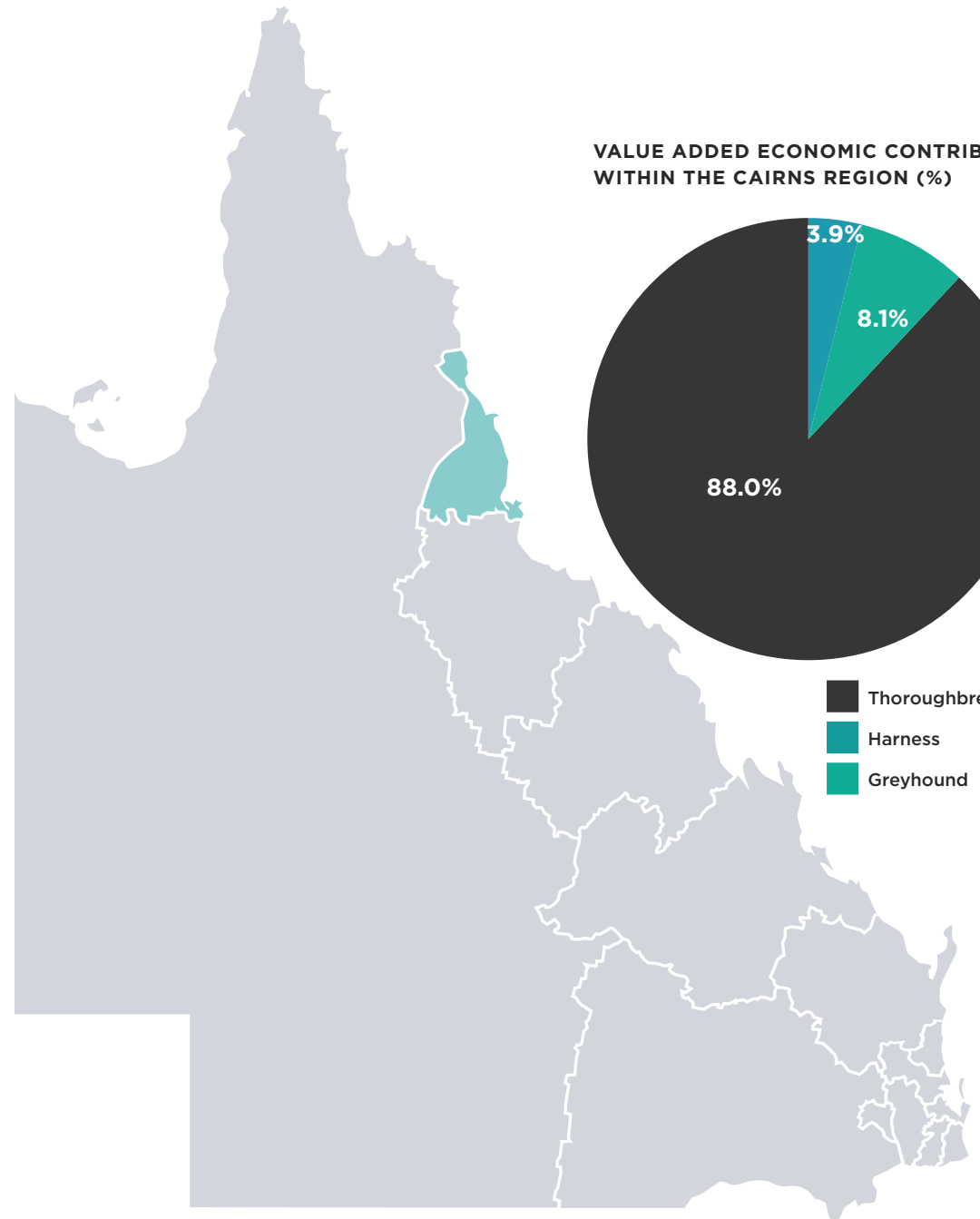
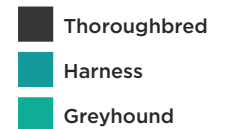
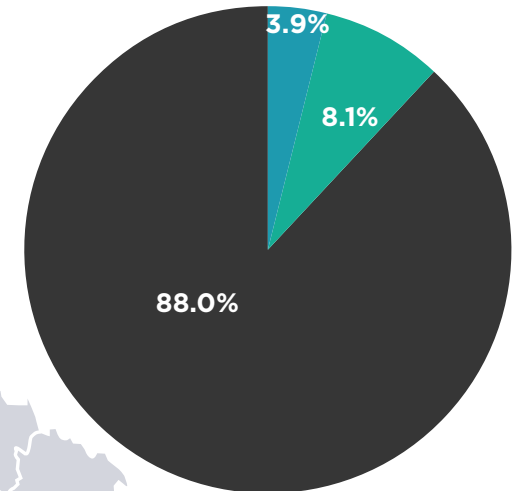
- + The population of the Cairns region is 252,037 (ABS 2018).
- + There are a total of eight (8) racing clubs operating in the region of which all are thoroughbred clubs
- + The racing industry in the Cairns region is responsible for generating more than \$34.2 million in value added contribution to Gross State Product. This equates to 2.1% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 294 full-time equivalent (FTE) jobs in the region.
- + There are over 1,500 participants in the racing industry in Cairns.

RACING CLUBS IN THE REGION

Thoroughbred

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

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE CAIRNS REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$32.1m	\$1.6m	\$3.2m	\$36.8m
Total value added	\$30.1m	\$1.3m	\$2.8m	\$34.2m
Full-time equivalent employment	259	11	24	294

ANIMALS

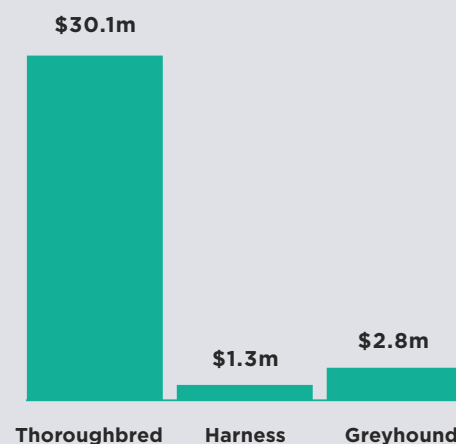
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	22	1	2	25
Horses and greyhounds in training	376	0	35	411

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	31	1	0	32
Owners	837	2	17	856
Trainers	52	0	13	66
Breeders staff	27	1	0	27
Stable/Kennel employees	133	0	8	141
Racing Club & industry staff (FT, PT, casual)	280	0	0	280
Jockeys, drivers & apprentices	16	0	0	16
Racing club volunteers	254	0	0	254
Volunteers assisting participants	98	3	15	116
Total participants in the Cairns region	1,727	6	54	1,788

Race meetings in the Cairns region attracted attendances of 47,420 or 5.7% of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE CAIRNS REGION



AT A GLANCE

8 Racing Clubs

THOROUGHBRED 8

82 Race Meetings

THOROUGHBRED 44
GREYHOUND 38

523 Races

THOROUGHBRED 239
GREYHOUND 284

1,153 Racing Club Members

THOROUGHBRED 1,153

47,420 Attendances

THOROUGHBRED 46,510
GREYHOUND 910

*Some totals do not add due to rounding

Central Queensland

The racing industry in the **Central Queensland region is responsible for generating \$45.7 million in value added** contribution to gross state product. This represents **2.8% of the industry total.**

- + The population of the Central Queensland region is 225,561 (ABS 2018).
- + There are a total of fourteen (14) racing clubs operating in the region, thirteen (13) of which are thoroughbred clubs, and one (1) a greyhound racing club.
- + The racing industry in the Central Queensland region is responsible for generating close to \$45.7 million in value added contribution to Gross State Product. This equates to 2.8% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 384 full-time equivalent (FTE) jobs in the region.
- + There are over 2,100 participants in the racing industry in Central Queensland.

RACING CLUBS IN THE REGION

Thoroughbred

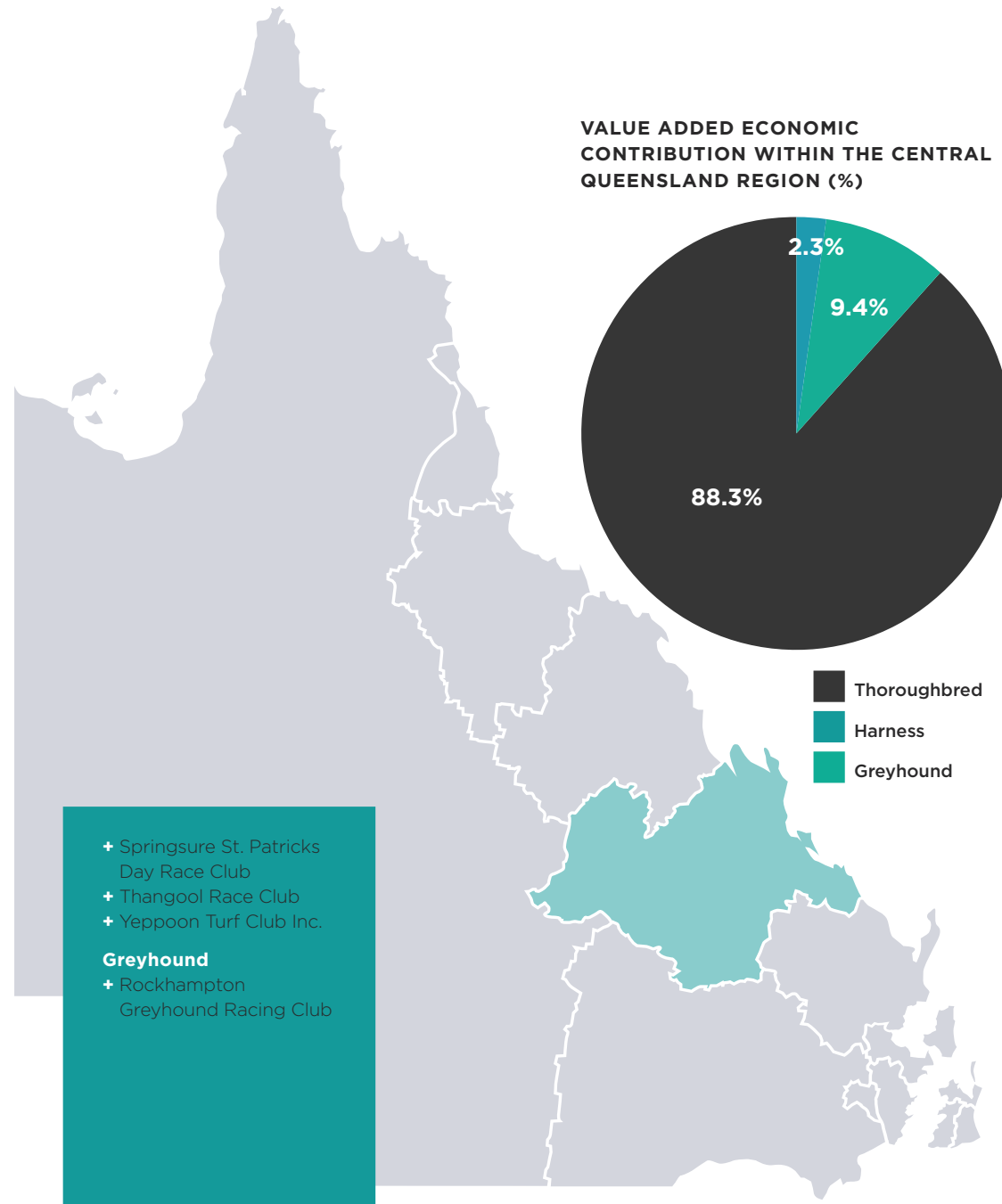
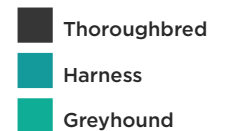
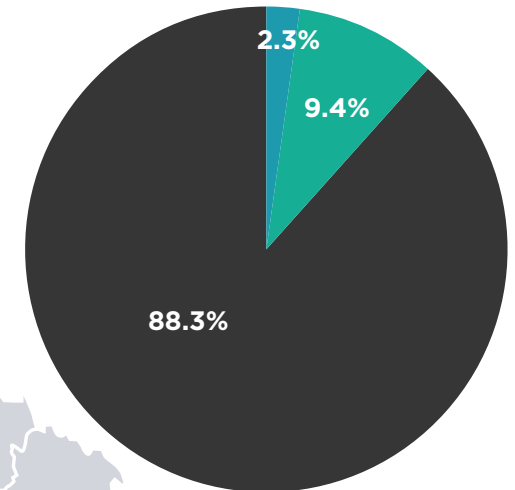
- + Bluff Blackwater Amateur Race Club Inc.
- + Calliope Jockey Club
- + Central Queensland Amateur Racing Club Inc.
- + Dawson Jockey Club
- + Dingo Race Club Inc.
- + Emerald Jockey Club
- + Gladstone Turf Club Inc.
- + Rockhampton Jockey Club Inc.
- + Rockhampton St. Patricks Day Race Club Inc.
-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

- + Springsure St. Patricks Day Race Club
- + Thangool Race Club
- + Yeppoon Turf Club Inc.

Greyhound

- + Rockhampton Greyhound Racing Club

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$44.7m	\$1.4m	\$5.2m	\$51.3m
Total value added	\$40.3m	\$1.0m	\$4.3m	\$45.7m
Full-time equivalent employment	339	9	36	384

ANIMALS

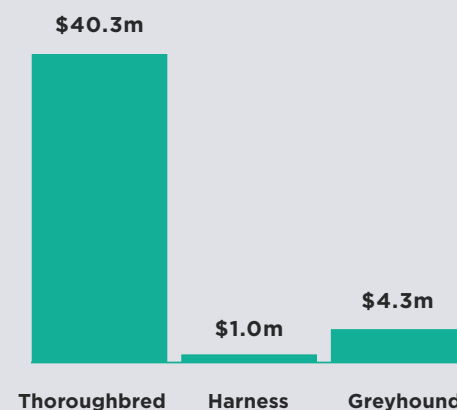
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	74	0	26	100
Horses and greyhounds in training	905	0	151	1,056

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	80	0	4	84
Owners	1,261	7	44	1,312
Trainers	107	0	27	134
Breeders staff	69	0	6	75
Stable/Kennel employees	198	0	19	217
Racing Club & industry staff (FT, PT, casual)	188	0	12	200
Jockeys, drivers & apprentices	12	0	0	12
Racing club volunteers	173	0	0	173
Volunteers assisting participants	214	0	36	250
Total participants in the Central Queensland region	2,302	7	148	2,457

Race meetings in the Central Queensland region attracted attendances of **55,567** or **6.7%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE CENTRAL QUEENSLAND REGION



AT A GLANCE

14 Racing Clubs

THOROUGHBRED	13
GREYHOUND	1

130 Race Meetings

THOROUGHBRED	78
GREYHOUND	52

971 Races

THOROUGHBRED	451
GREYHOUND	520

1,537 Racing Club Members

THOROUGHBRED	1,487
GREYHOUND	50

55,567 Attendances

THOROUGHBRED	53,559
GREYHOUND	2,008

*Some totals do not add due to rounding

Darling Downs - Maranoa

The racing industry in the **Darling Downs-Maranoa region is responsible for generating \$60.8 million in value added** contribution to gross state product. This represents **3.8% of the industry total.**

- + The population of the Darling Downs - Maranoa region is 128,781 (ABS 2018).
- + There are a total of twenty-five (25) racing clubs operating in the region, twenty-four (24) of which are thoroughbred racing clubs with one (1) harness racing club.
- + The racing industry in the Darling Downs-Maranoa region is responsible for generating almost \$60.8 million in value added contribution to Gross State Product. This equates to 3.8% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 493 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,700 participants in the racing industry in Darling Downs-Maranoa.

RACING CLUBS IN THE REGION

Thoroughbred

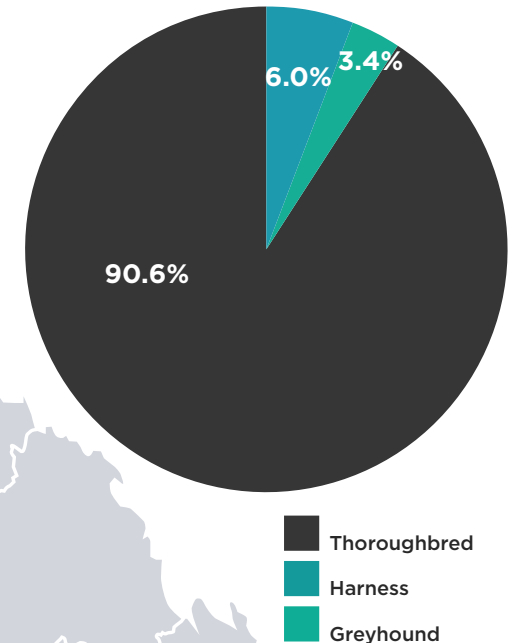
- + Bell Race Club Inc.
- + Chinchilla Race Club Inc.
- + Clifton Jockey Club Inc.
- + Dalby & Northern Downs Jockey Club Inc.
- + Dalby Amateur Picnic Race Club
- + Flinton Race Club
- + Goondiwindi & McIntyre Picnic Race Club Inc.
- + Goondiwindi Race Club Inc.
- + Injune Race Club
- + Jandowae Race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

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

Harness

- + Darling Downs Harness Club

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$67.9m	\$4.4m	\$2.9m	\$75.2m
Total value added	\$55.1m	\$3.8m	\$2.1m	\$60.8m
Full-time equivalent employment	448	28	17	493

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	566	27	20	613
Horses and greyhounds in training	564	49	53	666

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	155	16	3	174
Owners	1,005	34	32	1,071
Trainers	113	8	9	130
Breeders staff	133	8	5	146
Stable/Kennel employees	199	6	5	210
Racing Club & industry staff (FT, PT, casual)	416	12	0	428
Jockeys, drivers & apprentices	17	7	0	24
Racing club volunteers	689	5	0	694
Volunteers assisting participants	282	55	16	352
Total participants in the Darling Downs-Maranoa region	3,007	152	70	3,229

Race meetings in the Darling Downs-Maranoa region attracted attendances of **46,256** or **5.5%** of total attendances at race meetings in Queensland.

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



AT A GLANCE

25 Racing Clubs

THOROUGHBRED	24
HARNES	1

54 Race Meetings

THOROUGHBRED	54
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288 Races

THOROUGHBRED	288
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1,611 Racing Club Members

THOROUGHBRED	1,571
HARNES	40

46,256 Attendances

THOROUGHBRED	44,756
HARNES	1,500

*Some totals do not add due to rounding

Gold Coast

The racing industry in the **Gold Coast region is responsible for generating \$133.4 million in value added** contribution to gross state product. This represents **8.3% of the industry total**.

- + The population of the Gold Coast region is 622,048 (ABS 2018).
- + There are two (2) racing clubs operating in the region; one (1) harness racing club and one (1) thoroughbred racing club.
- + The racing industry in the Gold Coast region is responsible for generating more than \$133.4 million in value added contribution to Gross State Product. This equates to 8.3% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 1,097 full-time equivalent (FTE) jobs in the region.
- + There are over 4,000 participants in the racing industry in Gold Coast.

RACING CLUBS IN THE REGION

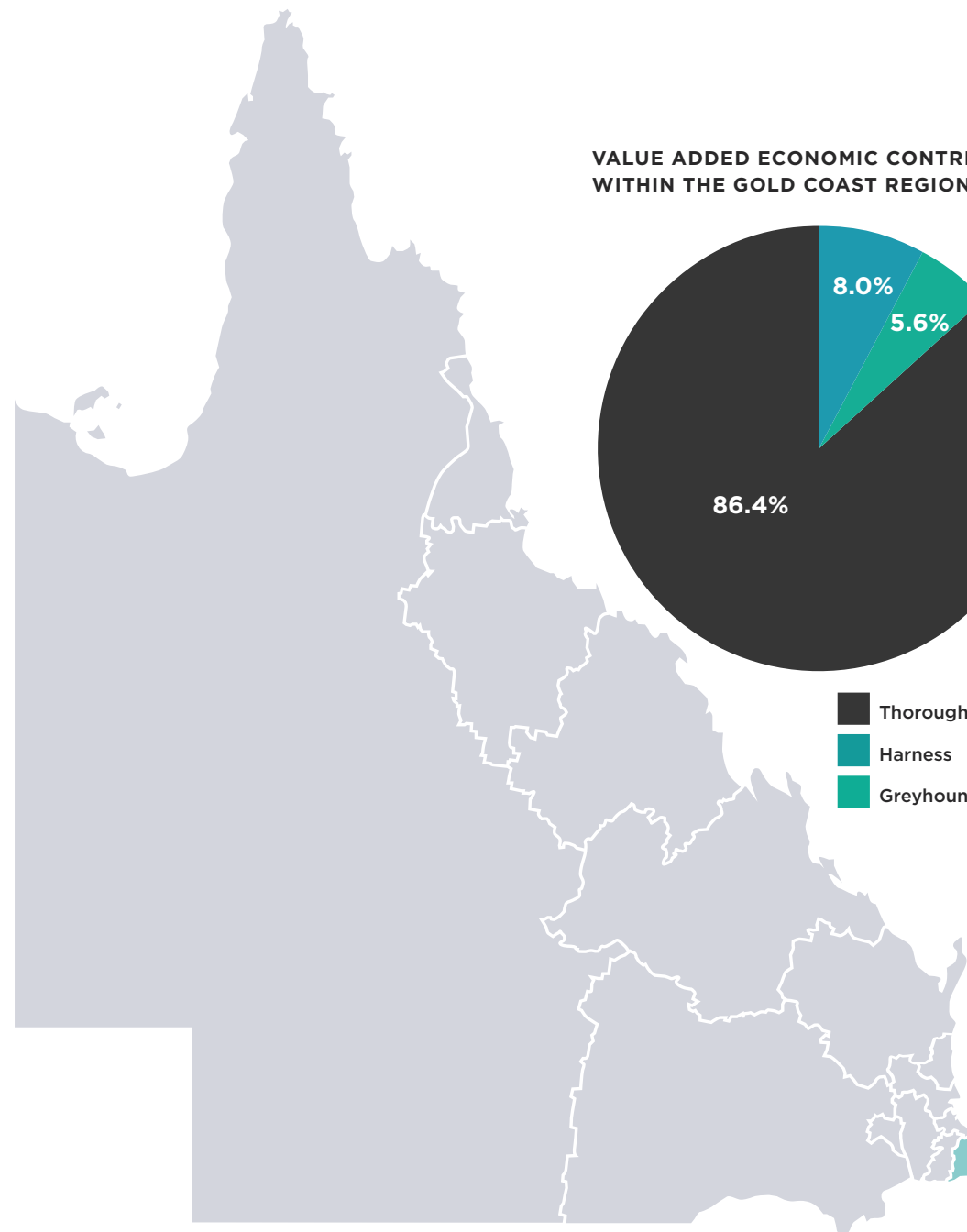
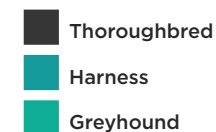
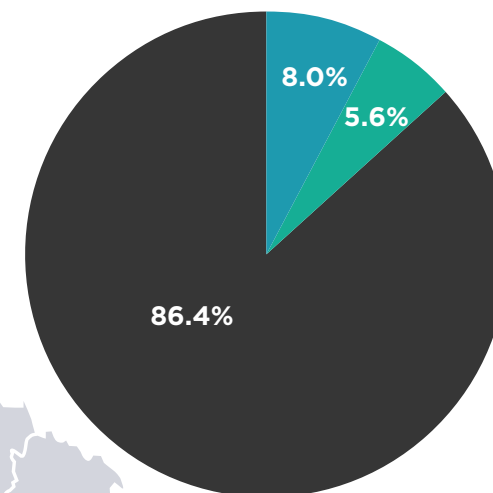
Thoroughbred

- + Gold Coast Turf Club Ltd

Harness

- + Gold Coast Harness Racing Club

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$113.9m	\$10.8m	\$8.2m	\$132.9m
Total value added	\$115.3m	\$10.7m	\$7.5m	\$133.4m
Full-time equivalent employment	951	84	62	1,097

ANIMALS

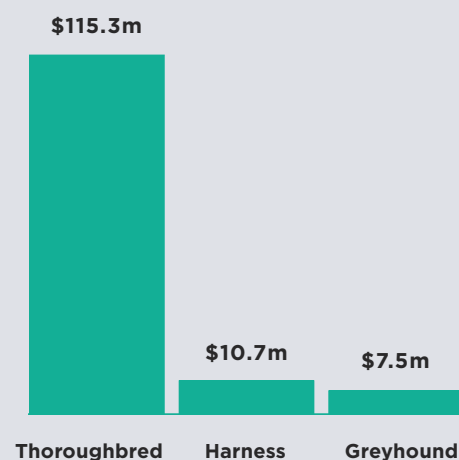
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	162	28	37	227
Horses and greyhounds in training	1,021	142	145	1,307

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	130	24	5	159
Owners	2,865	55	146	3,066
Trainers	93	18	33	145
Breeders staff	112	12	7	131
Stable/Kennel employees	300	20	19	339
Racing Club & industry staff (FT, PT, casual)	6	0	0	6
Jockeys, drivers & apprentices	46	13	0	59
Racing club volunteers	5	7	0	12
Volunteers assisting participants	235	89	44	367
Total participants in the Gold Coast region	3,791	238	253	4,283

Race meetings in the Gold Coast region attracted attendances of **117,133** or **14.0%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE GOLD COAST REGION



AT A GLANCE

2 Racing Clubs

THOROUGHBRED	1
HARNES	1

58 Race Meetings

THOROUGHBRED	58
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444 Races

THOROUGHBRED	444
--------------	-----

85 Racing Club Members

THOROUGHBRED	66
HARNES	19

117,133 Attendances

THOROUGHBRED	117,133
--------------	---------

*Some totals do not add due to rounding

Ipswich

The racing industry in the **Ipswich region is responsible for generating \$79.3 million in value added** contribution to gross state product. This represents **4.9% of the industry total.**

- + The population of the Brisbane region is 351,793 (ABS 2018).
- + There are a total of four (4) racing clubs operating in the region, two (2) of which are thoroughbred clubs, one (1) a harness racing club and one (1) a greyhound racing club.
- + The racing industry in the Ipswich region is responsible for generating almost \$79.3 million in value added contribution to Gross State Product. This equates to 4.9% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 650 full-time equivalent (FTE) jobs in the region.
- + There are nearly 2,500 participants in the racing industry in Ipswich.

RACING CLUBS IN THE REGION

Thoroughbred

- + Esk Jockey Club
- + Ipswich Turf Club

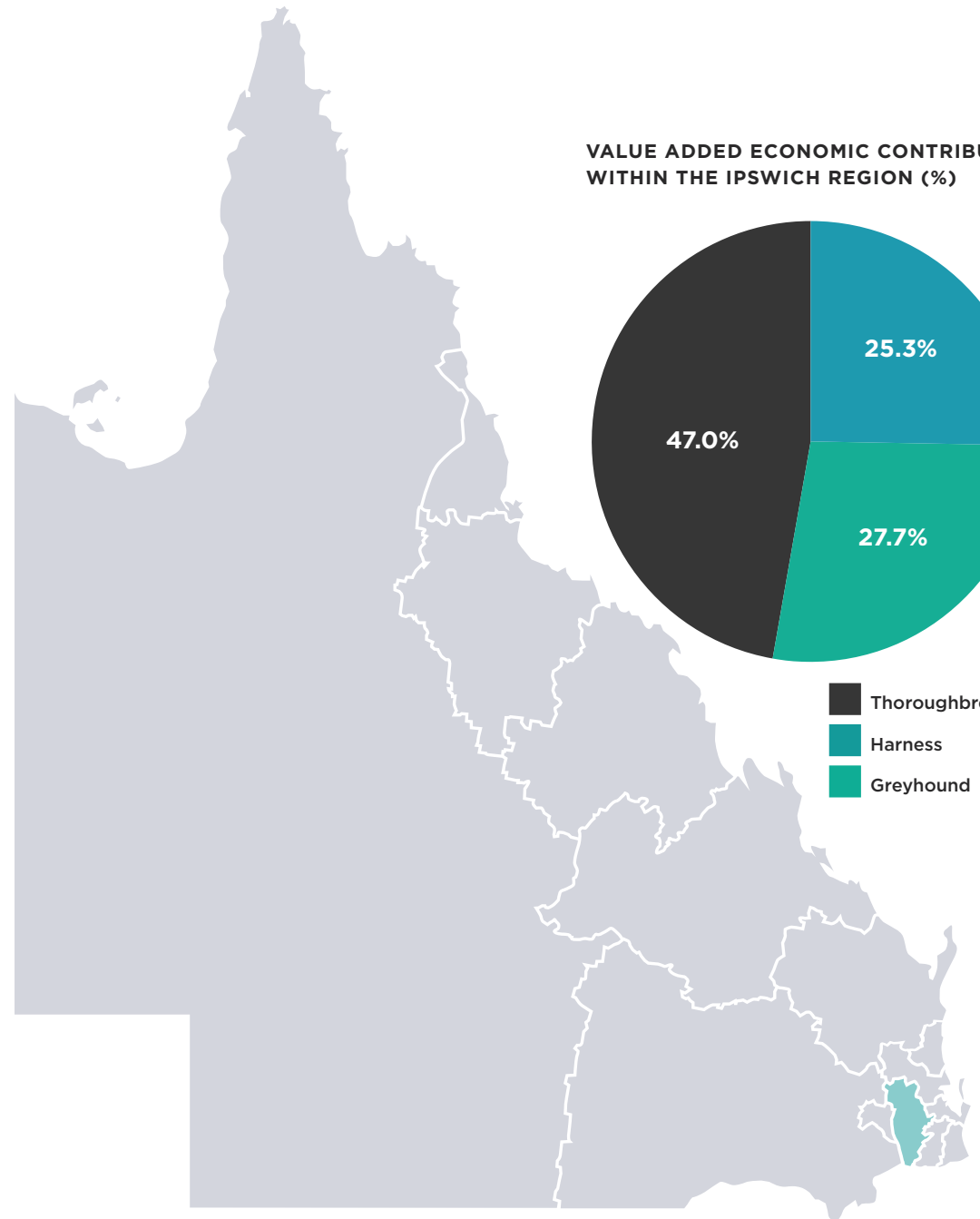
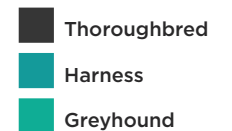
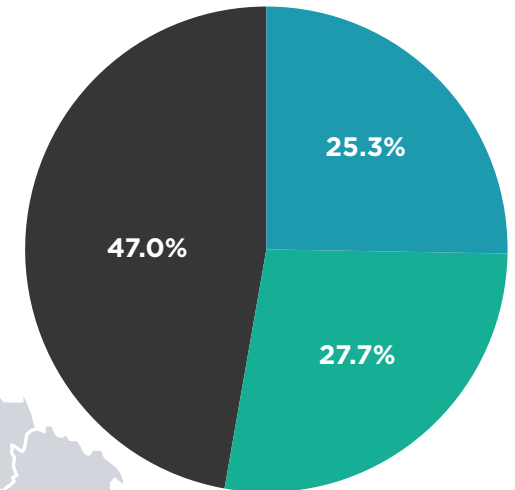
Harness

- + Marburg Pacing Association Inc.

Greyhound

- + Ipswich Greyhound Racing Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE IPSWICH REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$42.4m	\$21.1m	\$24.8m	\$88.3m
Total value added	\$37.3m	\$20.1m	\$22.0m	\$79.3m
Full-time equivalent employment	311	157	182	650

ANIMALS

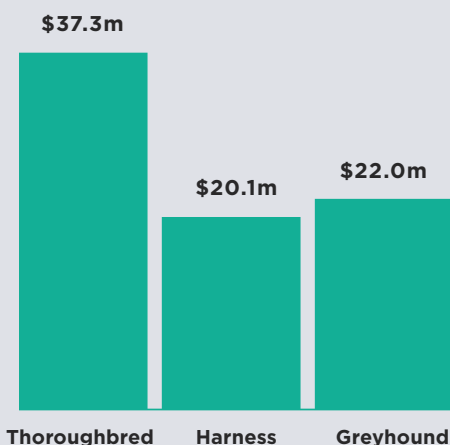
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	233	101	494	828
Horses and greyhounds in training	165	357	1,051	1,573

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	65	77	45	188
Owners	703	160	239	1,103
Trainers	43	89	163	295
Breeders staff	56	39	67	162
Stable/Kennel employees	87	43	77	207
Racing Club & industry staff (FT, PT, casual)	89	8	157	254
Jockeys, drivers & apprentices	6	56	0	62
Racing club volunteers	5	19	15	39
Volunteers assisting participants	113	322	254	689
Total participants in the Ipswich region	1,168	813	1,018	2,999

Race meetings in the Ipswich region attracted attendances of **60,960** or **7.3%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE IPSWICH REGION



AT A GLANCE

4 Racing Clubs

THOROUGHBRED	2
HARNES	1
GREYHOUND	1

228 Race Meetings

THOROUGHBRED	55
HARNES	18
GREYHOUND	155

2,010 Races

THOROUGHBRED	361
HARNES	139
GREYHOUND	1,510

646 Racing Club Members

THOROUGHBRED	460
HARNES	80
GREYHOUND	106

60,960 Attendances

THOROUGHBRED	40,253
HARNES	6,455
GREYHOUND	14,252

*Some totals do not add due to rounding

Logan - Beaudesert

The racing industry in the **Logan-Beaudesert region is responsible for generating \$57.7 million in value added contribution to gross state product. This represents 3.6% of the industry total.**

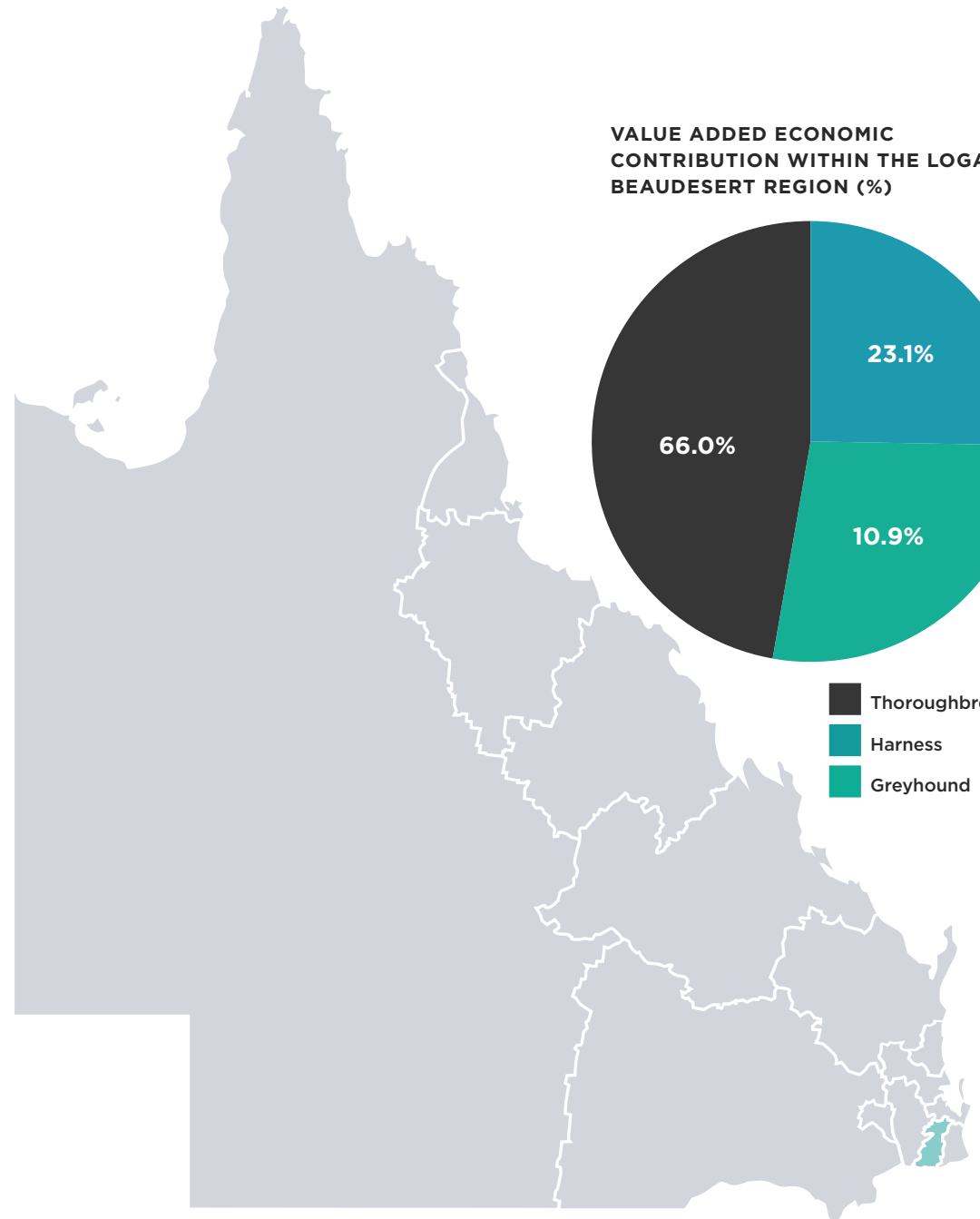
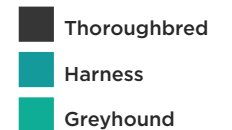
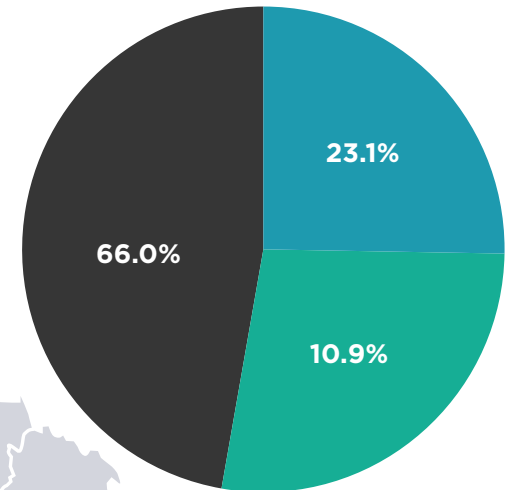
- + The population of the Logan - Beaudesert region is 341,405 (ABS 2018).
- + There are a total of two (2) racing clubs operating in the region, both of which are thoroughbred clubs.
- + The racing industry in the Logan-Beaudesert region is responsible for generating almost \$57.7 million in value added contribution to Gross State Product. This equates to 3.6% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 458 full-time equivalent (FTE) jobs in the region.
- + There are nearly 1,800 participants in the racing industry in Logan-Beaudesert.

RACING CLUBS IN THE REGION

Thoroughbred

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

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$40.3m	\$13.5m	\$7.0m	\$60.8m
Total value added	\$38.1m	\$13.3m	\$6.3m	\$57.7m
Full-time equivalent employment	303	104	51	458

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	271	30	133	434
Horses and greyhounds in training	272	264	431	968

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	66	40	17	123
Owners	656	90	126	873
Trainers	51	52	106	208
Breeders staff	56	20	26	102
Stable/Kennel employees	104	39	43	185
Racing Club & industry staff (FT, PT, casual)	21	0	0	21
Jockeys, drivers & apprentices	5	36	0	41
Racing club volunteers	45	0	0	45
Volunteers assisting participants	123	174	145	442
Total participants in the Logan-Beaudesert region	1,126	451	463	2,040

Race meetings in the Logan - Beaudesert region attracted attendances of **5,269** or **0.6%** of total attendances at race meetings in Queensland.

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



AT A GLANCE

2 Racing Clubs

THOROUGHBRED 2

16 Race Meetings

THOROUGHBRED 16

92 Races

THOROUGHBRED 92

80 Racing Club Members

THOROUGHBRED 80

5,269 Attendances

THOROUGHBRED 5,269

*Some totals do not add due to rounding

Mackay-Isaac-Whitsunday

The racing industry in the **Mackay-Isaac-Whitsunday region is responsible for generating \$20.1 million in value added** contribution to gross state product. This represents **1.2% of the industry total**.

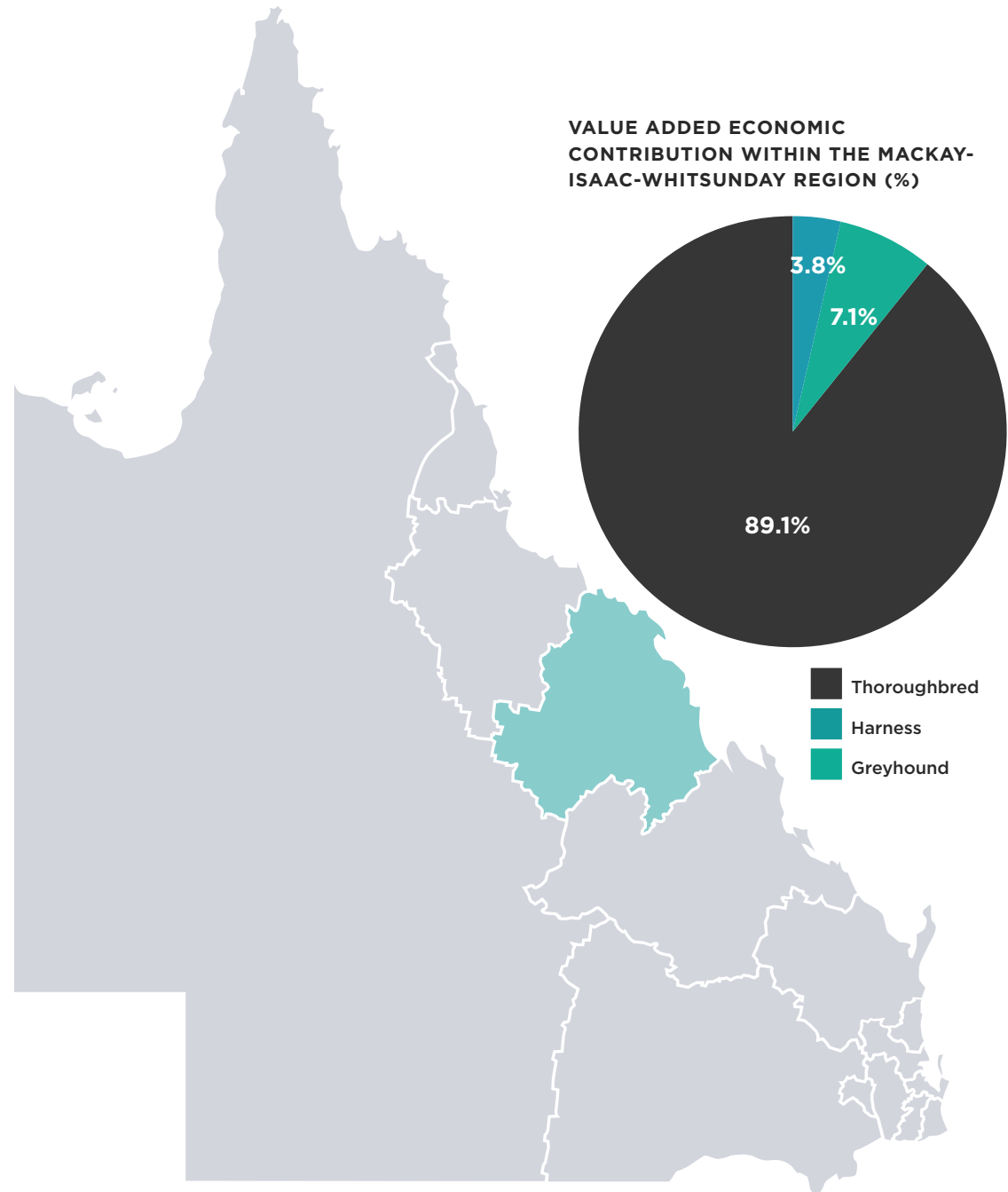
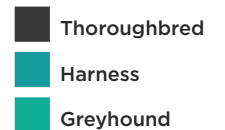
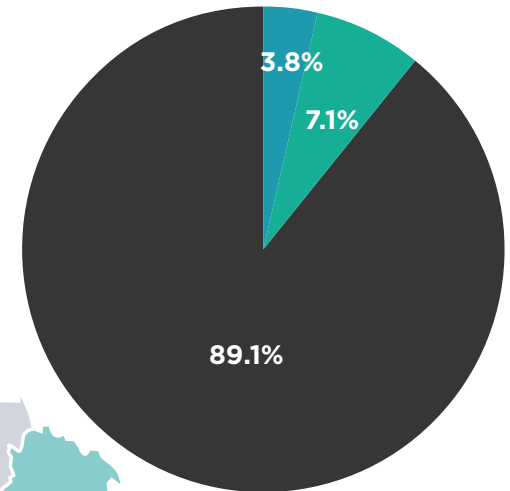
- + The population of the Mackay-Isaac-Whitsunday region is 172,523 (ABS 2018).
- + There are a total of seven (7) racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Mackay-Isaac-Whitsunday region is responsible for generating almost \$20.1 million in value added contribution to Gross State Product. This equates to 1.2% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 172 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,100 participants in the racing industry in Mackay-Isaac-Whitsunday.

RACING CLUBS IN THE REGION

Thoroughbred

- + Bowen Turf Club Inc.
- + Clermont Race Club Inc.
- + Mackay-Isaac-Whitsunday Amateur Race Club
- + Mackay-Isaac-Whitsunday Turf Club Inc.
- + 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	\$21.9m	\$1.1m	\$2.1m	\$25.1m
Total value added	\$17.9m	\$0.8m	\$1.4m	\$20.1m
Full-time Equivalent employment	154	6	12	172

ANIMALS

	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	23	3	0	26
Horses and greyhounds in training	213	0	22	235

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	25	4	0	29
Owners	666	21	15	702
Trainers	30	0	7	37
Breeders staff	22	2	0	24
Stable/Kennel employees	97	0	4	101
Racing Club & industry staff (FT, PT, casual)	114	0	0	114
Jockeys, drivers & apprentices	9	0	0	9
Racing club volunteers	169	0	0	169
Volunteers assisting participants	62	11	8	81
Total participants in the Mackay-Isaac-Whitsunday region	1,194	38	34	1,266

Race meetings in the Mackay-Isaac-Whitsunday region attracted attendances of **22,598** or **2.7%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE MACKAY REGION



AT A GLANCE

7 Racing Clubs

THOROUGHBRED 7

42 Race Meetings

THOROUGHBRED 42

260 Races

THOROUGHBRED 260

448 Racing Club Members

THOROUGHBRED 448

22,598 Attendances

THOROUGHBRED 22,598

*Some totals do not add due to rounding

Moreton Bay

The racing industry in the **Moreton Bay region is responsible for generating \$47.9 million in value added** contribution to gross state product. This represents **3.0% of the industry total.**

- + The population of the Moreton Bay region is 465,441 (ABS 2018).
- + 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 \$47.9 million in value added contribution to Gross State Product. This equates to 3.0% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 399 full-time equivalent (FTE) jobs in the region.
- + There are nearly 2,300 participants in the racing industry in Moreton Bay.

RACING CLUBS IN THE REGION

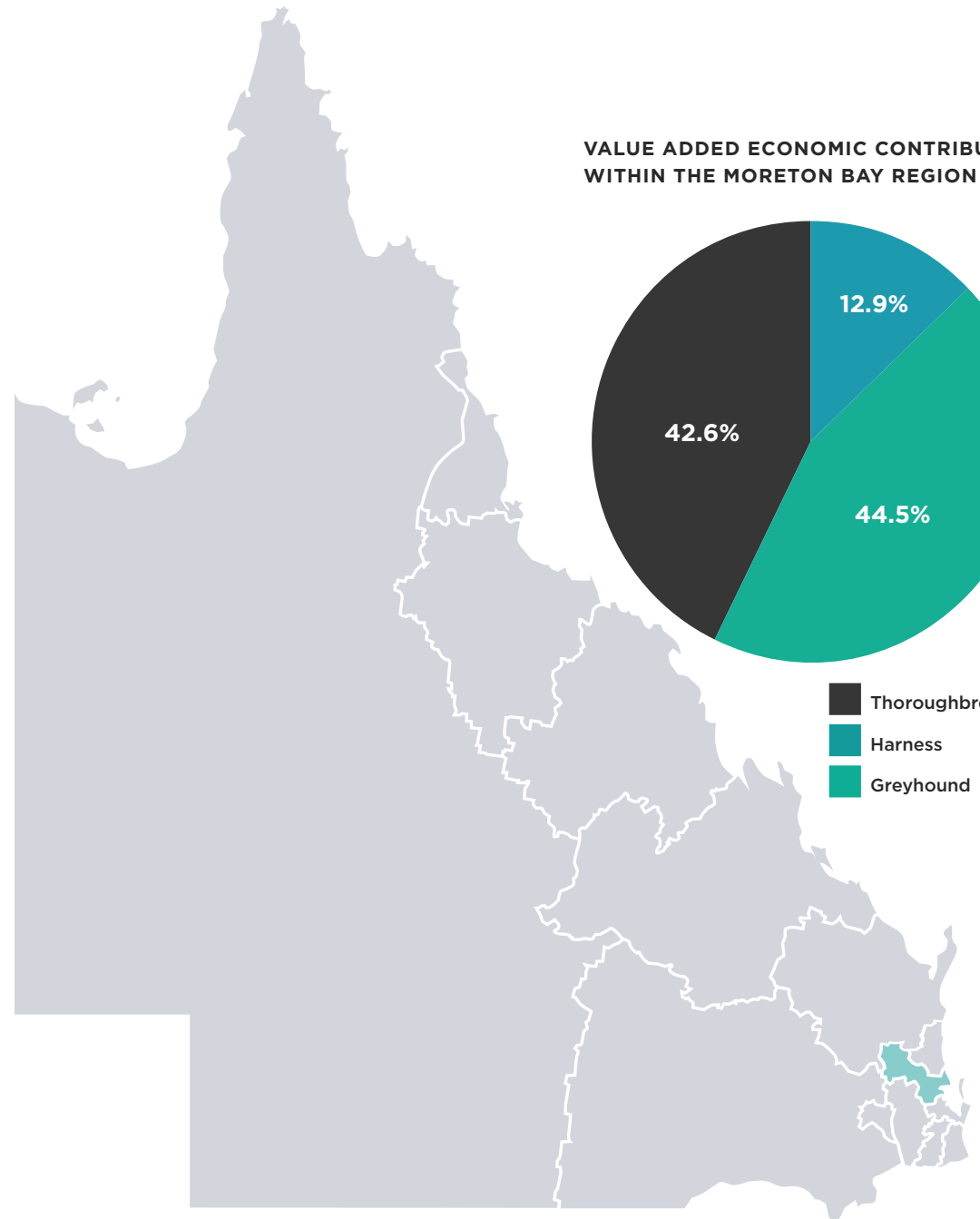
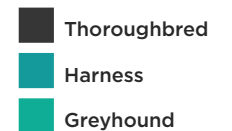
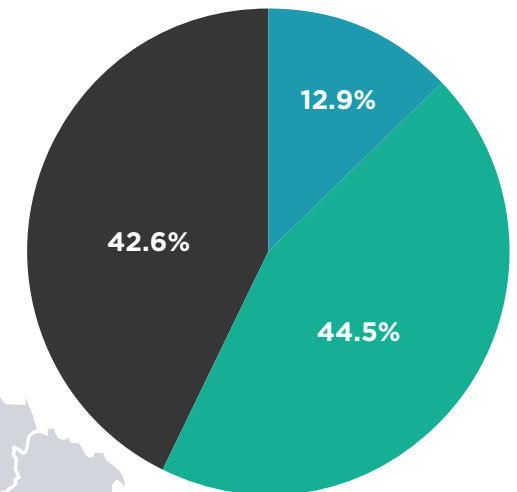
Thoroughbred

- + Kilcoy Race Club Inc.

Harness

- + Redcliffe Peninsula Harness Racing & Sporting Club Inc.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$23.7m	\$22.3m	\$7.2m	\$53.3m
Total value added	\$20.4m	\$21.3m	\$6.2m	\$47.9m
Full-time equivalent employment	171	176	51	399

ANIMALS

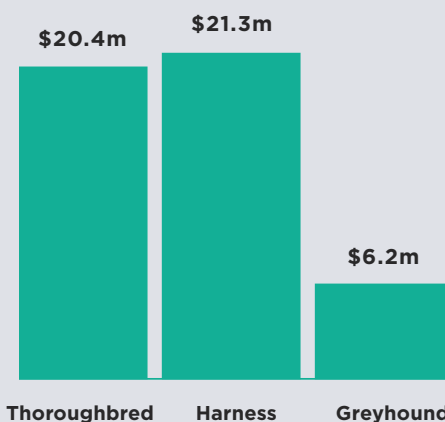
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	53	33	83	169
Horses and greyhounds in training	5	185	259	448

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	60	57	15	132
Owners	1,093	149	116	1,358
Trainers	24	65	81	170
Breeders staff	52	29	22	103
Stable/Kennel employees	123	47	38	208
Racing Club & industry staff (FT, PT, casual)	12	22	0	34
Jockeys, drivers & apprentices	19	28	0	47
Racing club volunteers	0	0	0	0
Volunteers assisting participants	82	238	113	433
Total participants in the Moreton Bay region	1,466	634	385	2,486

Race meetings in the Moreton Bay region attracted attendances of **26,568** or **3.2%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE MORETON BAY REGION



AT A GLANCE

2 Racing Clubs

THOROUGHBRED	1
HARNES	1

130 Race Meetings

THOROUGHBRED	9
HARNES	121

999 Races

THOROUGHBRED	59
HARNES	940

159 Racing Club Members

THOROUGHBRED	78
HARNES	81

26,568 Attendances

THOROUGHBRED	7,450
HARNES	19,118

*Some totals do not add due to rounding

Queensland Outback

The racing industry in the **Queensland - Outback region is responsible for generating \$25.1 million in value added** contribution to gross state product. This represents **1.6% of the industry total.**

- + The population of the Queensland Outback region is 82,311 (ABS 2018).
- + There are a total of thirty-seven (37) racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Queensland - Outback region is responsible for generating more than \$25.1 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 229 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,000 participants in the racing industry in Queensland - Outback.

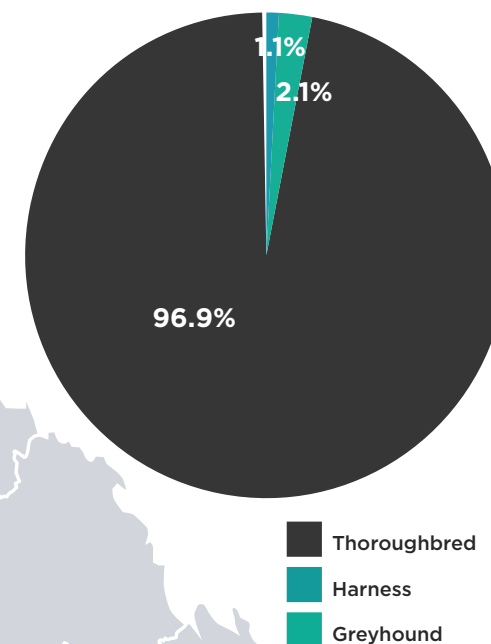
RACING CLUBS IN THE REGION

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
- + Camooweal Jockey Club
- + Central Warrego Race Club
- + Cloncurry & District Race Club Inc.

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

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$35.1m	\$0.5m	\$1.0m	\$36.5m
Total value added	\$24.3m	\$0.3m	\$0.5m	\$25.1m
Full-time equivalent employment	221	2	5	229

ANIMALS

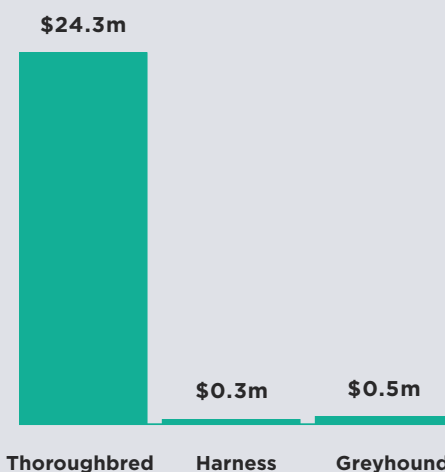
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	6	0	0	6
Horses and greyhounds in training	568	0	2	570

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	21	0	0	21
Owners	472	1	6	479
Trainers	77	0	3	80
Breeders staff	18	0	0	18
Stable/Kennel employees	118	0	2	120
Racing Club & industry staff (FT, PT, casual)	575	0	0	575
Jockeys, drivers & apprentices	15	0	0	15
Racing club volunteers	1,178	0	0	1,178
Volunteers assisting participants	125	0	3	128
Total participants in the Queensland - Outback region	2,598	1	15	2,614

Race meetings in the Queensland - Outback region attracted attendances of **45,999** or **5.5%** of total attendances at race meetings in Queensland.

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



AT A GLANCE

37 Racing Clubs

THOROUGHBRED 37

98 Race Meetings

THOROUGHBRED 98

499 Races

THOROUGHBRED 499

2,738 Racing Club Members

THOROUGHBRED 2,738

45,999 Attendances

THOROUGHBRED 45,999

*Some totals do not add due to rounding

Sunshine Coast

The racing industry in the **Sunshine Coast region is responsible for generating \$87.7 million in value added** contribution to gross state product. This represents **5.5% of the industry total.**

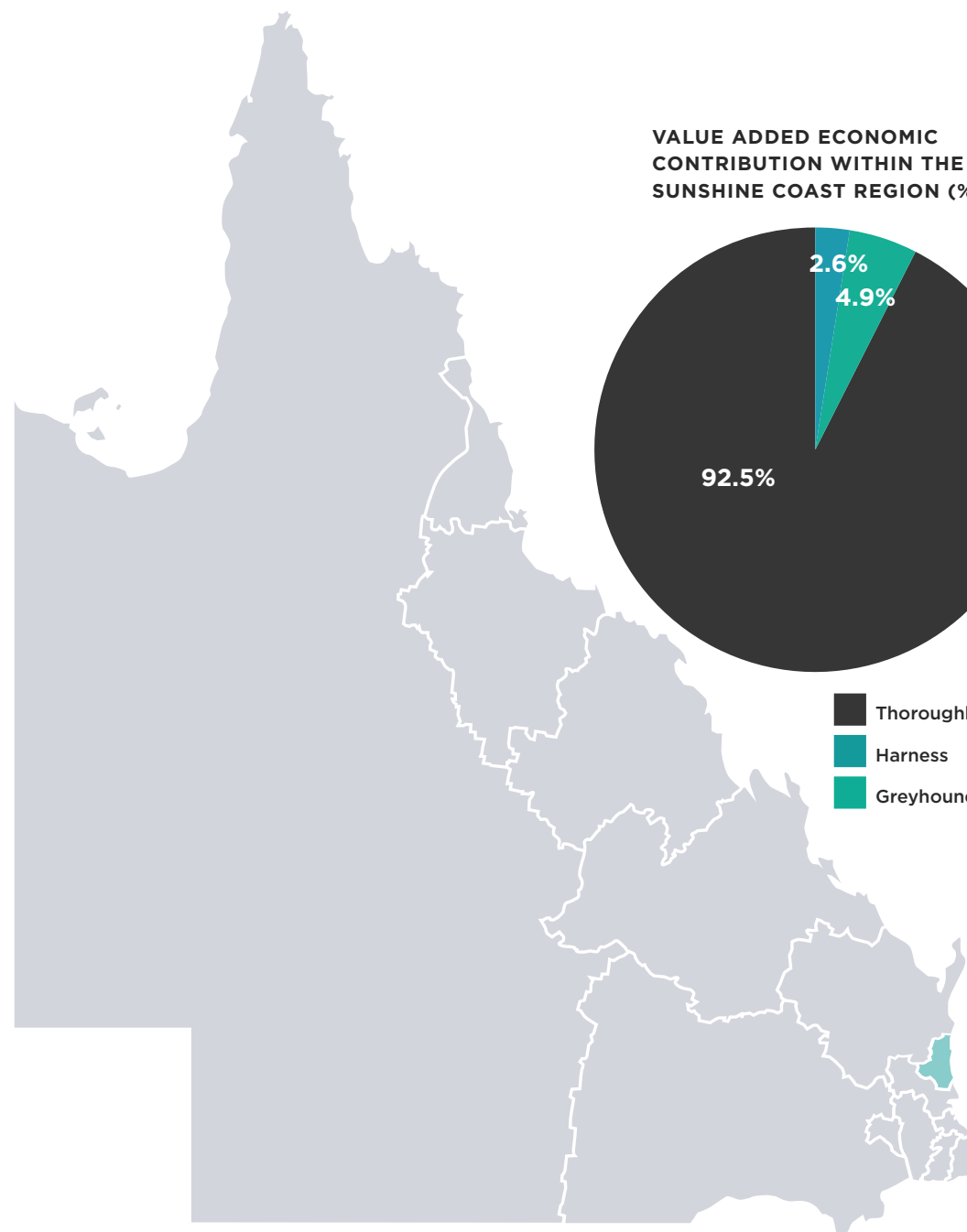
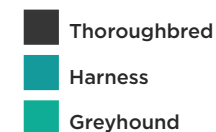
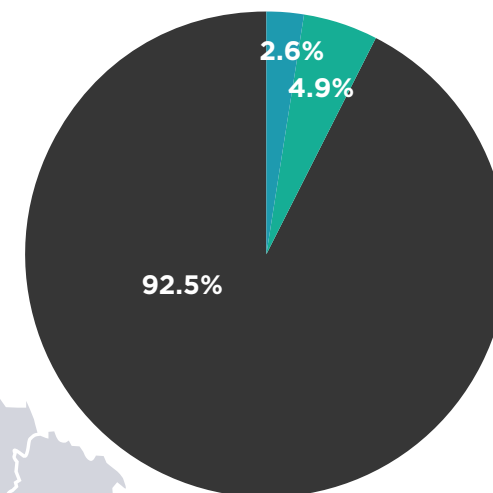
- + The population of the Sunshine Coast region is 375,271 (ABS 2018).
- + There is one (1) race club operating in the region and it is a thoroughbred club.
- + The racing industry in the Sunshine Coast region is responsible for generating almost \$87.7 million in value added contribution to Gross State Product. This equates to 5.5% 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 716 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,200 participants in the racing industry in Sunshine Coast.

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	\$80.8m	\$2.5m	\$4.9m	\$88.2m
Total value added	\$81.2m	\$2.3m	\$4.3m	\$87.7m
Full-time equivalent employment	662	19	35	716

ANIMALS

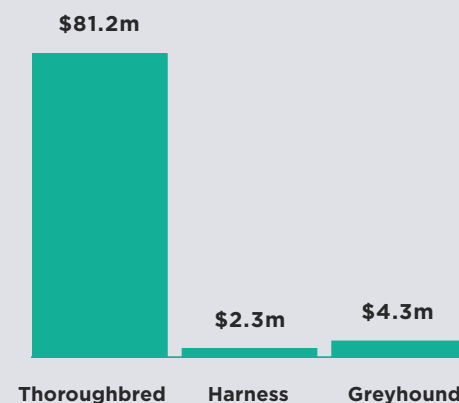
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	63	9	55	127
Horses and greyhounds in training	820	0	36	856

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	64	12	4	80
Owners	1,495	21	36	1,552
Trainers	80	1	11	92
Breeders staff	55	6	6	67
Stable/Kennel employees	239	5	7	251
Racing Club & industry staff (FT, PT, casual)	56	0	0	56
Jockeys, drivers & apprentices	20	0	0	20
Racing club volunteers	7	0	0	7
Volunteers assisting participants	163	35	19	216
Total participants in the Sunshine Coast region	2,178	80	83	2,341

Race meetings in the Sunshine Coast region attracted attendances of **65,041** or **7.8%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE SUNSHINE COAST REGION



AT A GLANCE

1 Racing Club

THOROUGHBRED 1

69 Race Meetings

THOROUGHBRED 69

517 Races

THOROUGHBRED 517

1,526 Racing Club Members

THOROUGHBRED 1,526

65,041 Attendances

THOROUGHBRED 65,041

*Some totals do not add due to rounding

Toowoomba

The racing industry in the **Toowoomba region is responsible for generating \$73.9 million in value added** contribution to gross state product. This represents **4.6% of the industry total.**

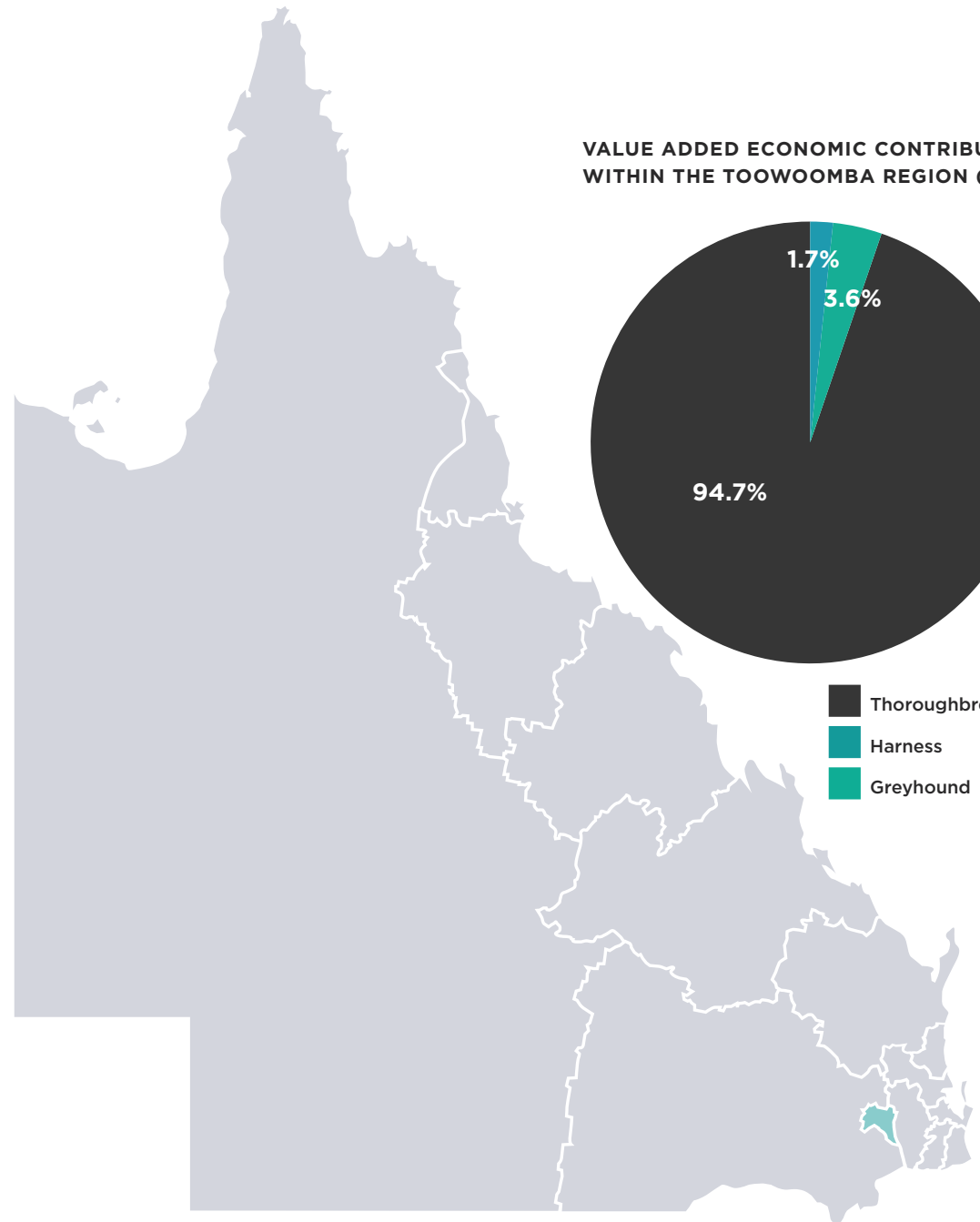
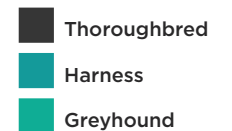
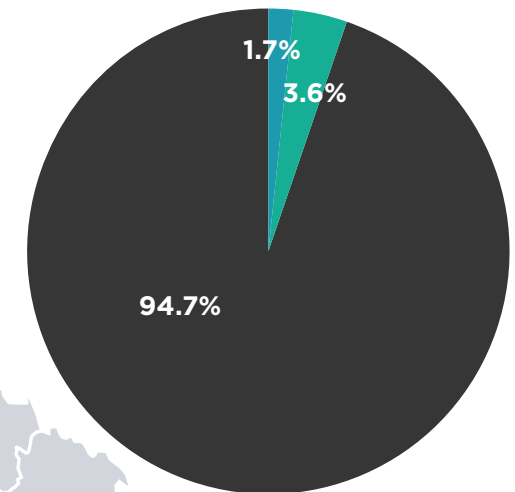
- + The population of the Toowoomba region is 156,757 (ABS 2018).
- + There are a total of two (2) racing clubs operating in the region, both of which are thoroughbred clubs.
- + The racing industry in the Toowoomba region is responsible for generating more than \$73.9 million in value added contribution to Gross State Product. This equates to 4.6% 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 584 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,800 participants in the racing industry in Toowoomba.

RACING CLUBS IN THE REGION

Thoroughbred

- + Lockyer Valley Turf Club
- + Toowoomba Turf Club

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOOWOOMBA REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$71.1m	\$1.4m	\$3.0m	\$75.5m
Total value added	\$70.0m	\$1.3m	\$2.7m	\$73.9m
Full-time equivalent employment	553	10	21	584

ANIMALS

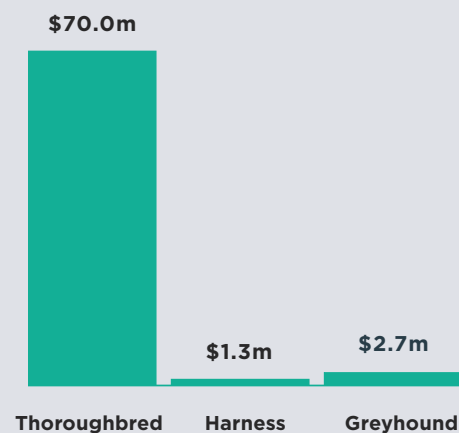
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	394	1	115	510
Horses and greyhounds in training	1,046	10	107	1,164

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	92	3	8	103
Owners	900	14	48	963
Trainers	90	8	21	120
Breeders staff	79	1	11	92
Stable/Kennel employees	276	2	18	296
Racing Club & industry staff (FT, PT, casual)	124	0	0	124
Jockeys, drivers & apprentices	20	4	0	24
Racing club volunteers	16	0	0	16
Volunteers assisting participants	200	17	36	253
Total participants in the Toowoomba region	1,798	50	143	1,990

Race meetings in the Toowoomba region attracted attendances of **27,315** or **3.3%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE TOOWOOMBA REGION



AT A GLANCE

2 Racing Club

THOROUGHBRED 2

61 Race Meetings

THOROUGHBRED 61

421 Races

THOROUGHBRED 421

498 Racing Club Members

THOROUGHBRED 498

27,315 Attendances

THOROUGHBRED 27,315

*Some totals do not add due to rounding

Townsville

The racing industry in the **Townsville region is responsible for generating \$37.8 million in value added** contribution to gross state product. This represents **2.4% of the industry total.**

- + The population of the Townsville region is 236,441 (ABS 2018).
- + There are a total of nine (9) racing clubs operating in the region, eight (8) of which are thoroughbred clubs, and one (1) a greyhound racing club.
- + The racing industry in the Townsville region is responsible for generating more than \$37.8 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 328 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,600 participants in the racing industry in Townsville.

RACING CLUBS IN THE REGION

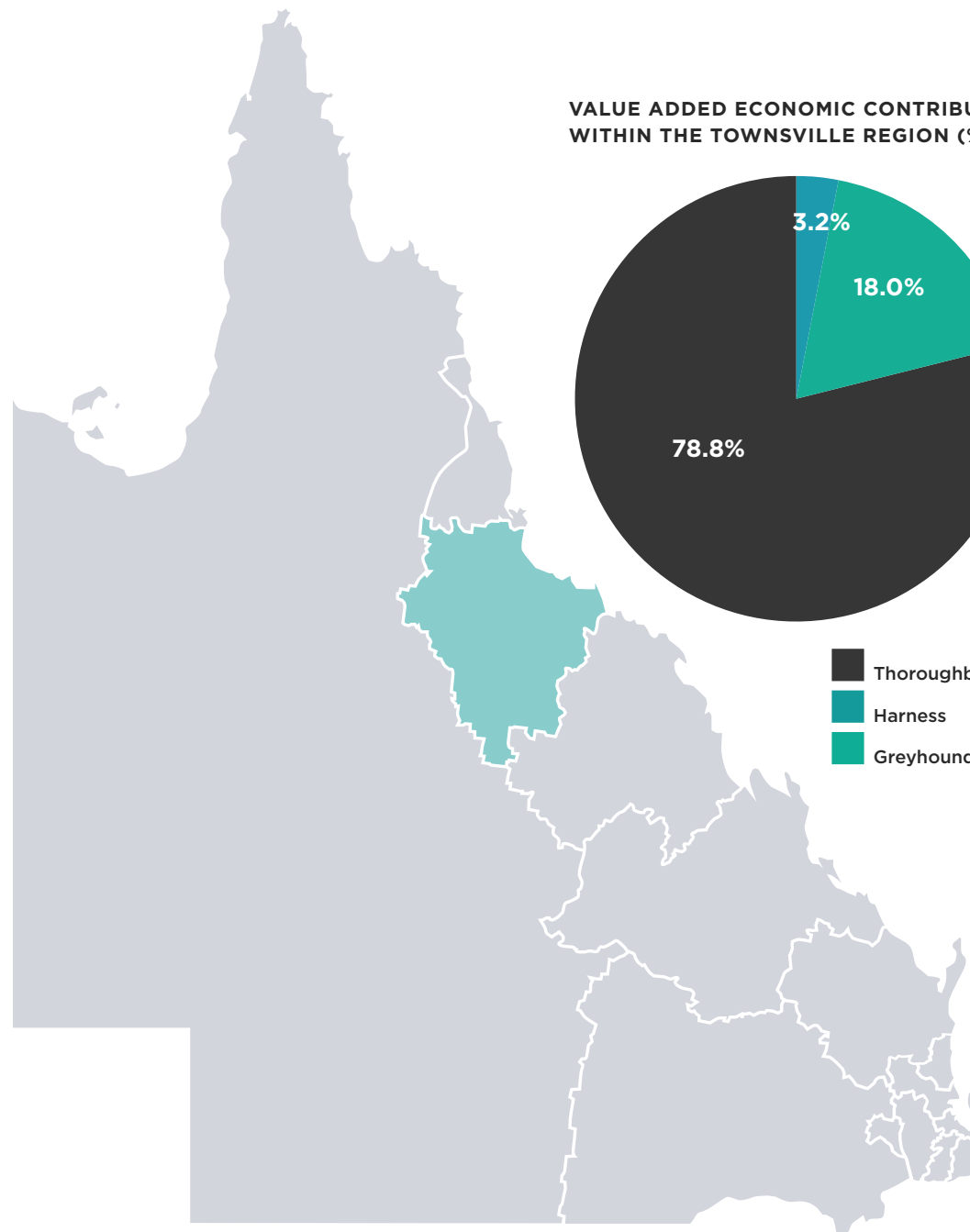
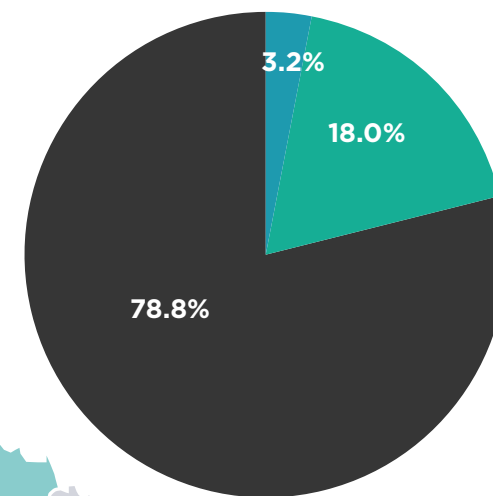
Thoroughbred

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

Greyhound

- + Townsville Greyhound Racing Club Inc.

VALUE ADDED ECONOMIC CONTRIBUTION WITHIN THE TOWNSVILLE REGION (%)



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$31.6m	\$1.5m	\$7.6m	\$40.7m
Total value added	\$29.8m	\$1.2m	\$6.8m	\$37.8m
Full-time equivalent employment	261	10	57	328

ANIMALS

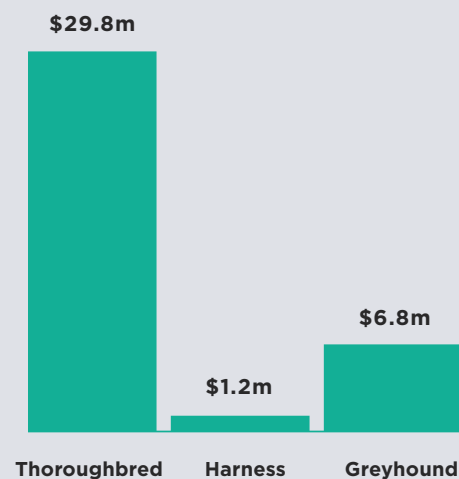
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	18	0	33	51
Horses and greyhounds in training	384	0	280	664

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	29	0	6	35
Owners	831	3	73	907
Trainers	75	0	58	133
Breeders staff	25	0	9	34
Stable/Kennel employees	142	0	33	175
Racing Club & industry staff (FT, PT, casual)	128	0	16	144
Jockeys, drivers & apprentices	14	0	0	14
Racing club volunteers	218	0	6	224
Volunteers assisting participants	128	0	73	201
Total participants in the Townsville region	1,590	3	273	1,865

Race meetings in the Townsville region attracted attendances of **38,416** or **4.6%** of total attendances at race meetings in Queensland.

VALUE ADDED GENERATED BY EACH CODE WITHIN THE TOWNSVILLE REGION



AT A GLANCE

9 Racing Clubs

THOROUGHBRED	8
GREYHOUND	1

97 Race Meetings

THOROUGHBRED	48
GREYHOUND	49

815 Races

THOROUGHBRED	277
GREYHOUND	538

1,174 Racing Club Members

THOROUGHBRED	1,148
GREYHOUND	26

38,416 Attendances

THOROUGHBRED	34,166
GREYHOUND	4,250

*Some totals do not add due to rounding

Wide Bay

The racing industry in the **Wide Bay region is responsible for generating \$33.4 million in value added** contribution to gross state product. This represents **2.1% of the industry total.**

- + The population of the Wide Bay region is 296,849 (ABS 2018).
- + 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 \$33.4 million in value added contribution to Gross State Product. This equates to 2.1% of the total impact generated by the Queensland racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 281 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,900 participants in the racing industry in Wide Bay.

RACING CLUBS IN THE REGION

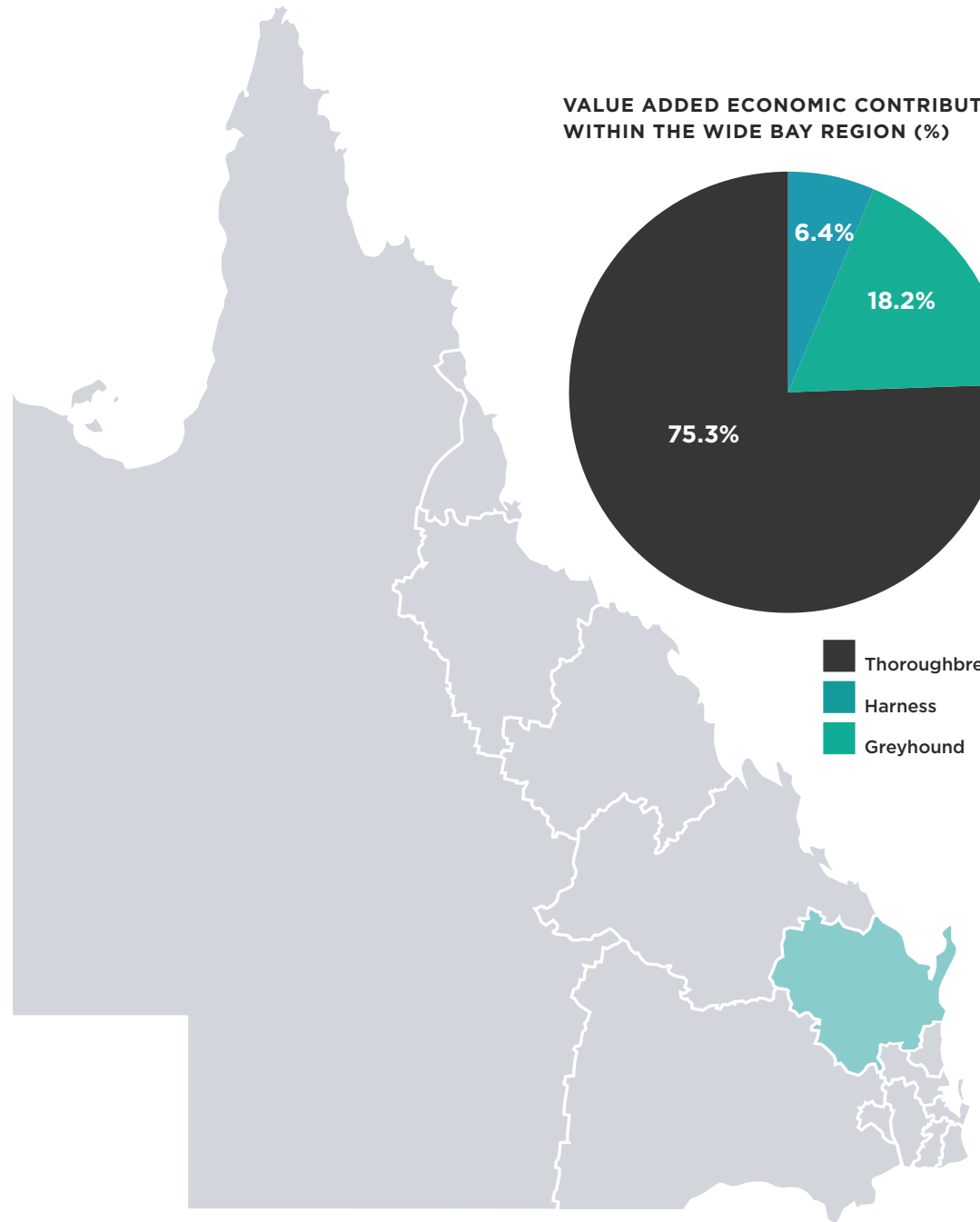
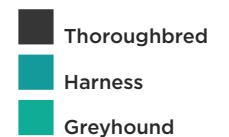
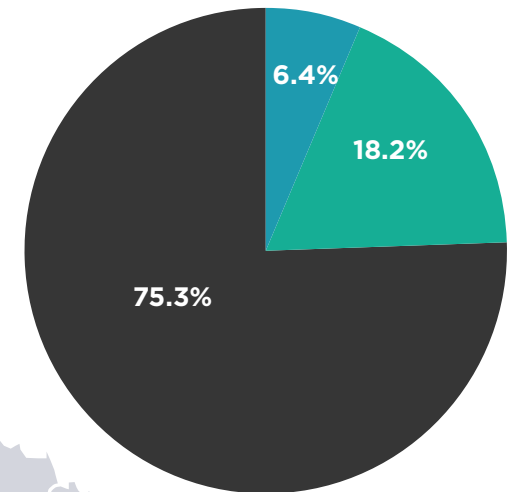
Thoroughbred

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

Greyhound

- + Bundaberg Greyhound Racing Club Inc.

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$29.6m	\$2.6m	\$7.4m	\$39.7m
Total value added	\$25.2m	\$2.1m	\$6.1m	\$33.4m
Full-time equivalent employment	212	18	51	281

ANIMALS

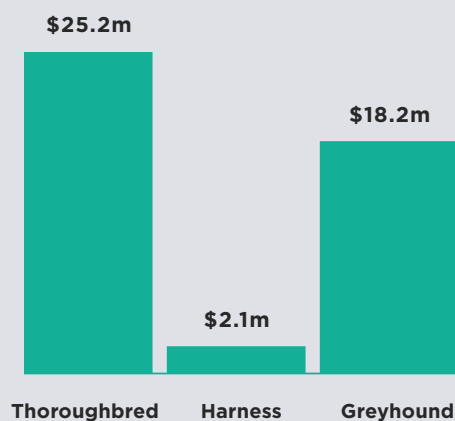
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	105	7	119	231
Horses and greyhounds in training	308	12	260	580

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	86	12	8	106
Owners	691	15	58	764
Trainers	56	6	46	108
Breeders staff	74	6	11	92
Stable/Kennel employees	113	5	30	147
Racing Club & industry staff (FT, PT, casual)	176	0	11	187
Jockeys, drivers & apprentices	7	4	0	12
Racing club volunteers	556	0	25	581
Volunteers assisting participants	147	40	63	250
Total participants in the Wide Bay region	1,907	87	253	2,247

Race meetings in the Wide Bay region attracted attendances of **29,598** or **3.5%** 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

79 Race Meetings

THOROUGHBRED	32
HARNES	2
GREYHOUND	45

464 Races

THOROUGHBRED	158
HARNES	2
GREYHOUND	304

600 Racing Club Members

THOROUGHBRED	555
GREYHOUND	45

29,598 Attendances

THOROUGHBRED	27,698
GREYHOUND	1,900

*Some totals do not add due to rounding

South East Queensland

The racing industry in the **South East Queensland region is responsible for generating \$1,243.6 million in value added** contribution to gross state product. This represents **77.4% of the industry total.**

- + The population of the South East Queensland region is 2,809,867 (ABS 2018).
- + There are a total of fourteen (14) racing clubs operating in the region, eight (8) of which are thoroughbred clubs, three (3) of which are harness racing clubs, and three (3) greyhound racing club.
- + The racing industry in the South East Queensland region is responsible for generating almost \$1,243.6 million in value added contribution to Gross State Product. This equates to 77.4% 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 9,605 full-time equivalent (FTE) jobs in the region.
- + There are more than 19,000 participants in the racing industry in South East Queensland.

RACING CLUBS IN THE REGION

Thoroughbred

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

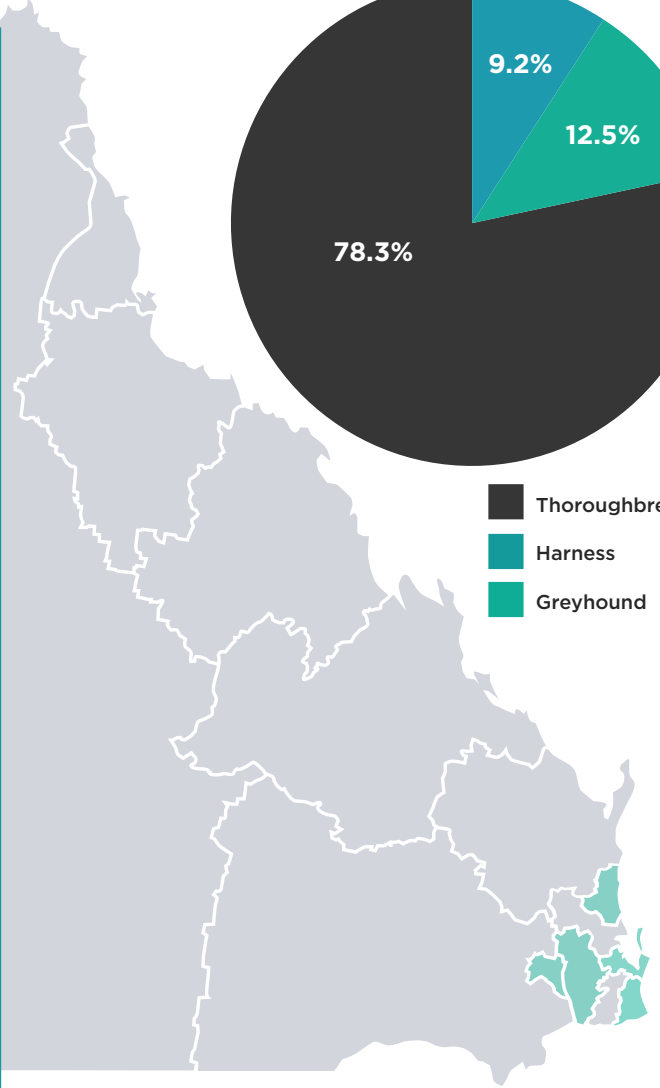
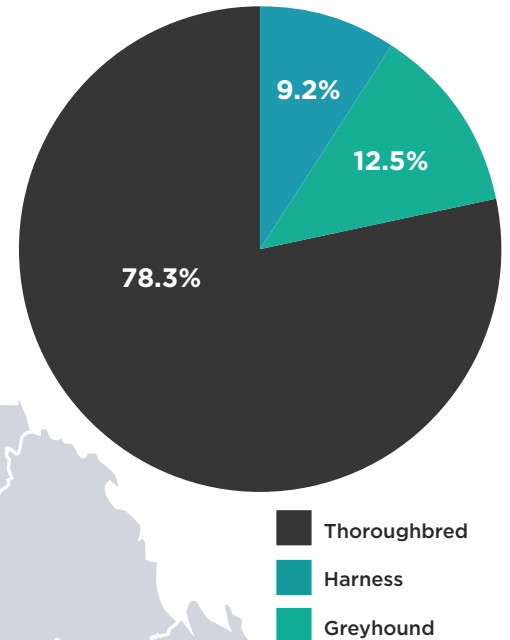
Harness

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

Greyhound

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

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



ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure	\$694.4m	\$82.1m	\$117.4m	\$893.9m
Total value added	\$973.7m	\$114.8m	\$155.1m	\$1,243.6m
Full-time equivalent employment	7,528	872	1,205	9,605

ANIMALS

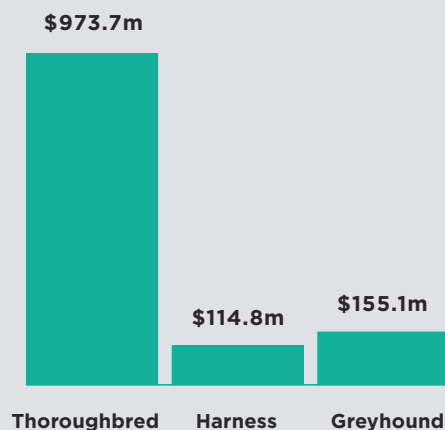
	Thoroughbred	Harness	Greyhound	Total
Pups/Foals produced	859	192	790	1,841
Horses and greyhounds in training	4,296	513	1,424	6,233

TOTAL PARTICIPANTS IN RACING

	Thoroughbred	Harness	Greyhound	Total
Breeders	513	147	70	730
Owners	10,751	345	679	11,775
Trainers	404	127	277	808
Breeders staff	442	73	104	620
Stable/Kennel employees	1,280	84	155	1,520
Racing Club & industry staff (FT, PT, casual)	1,085	70	244	1,399
Jockeys, drivers & apprentices	147	82	0	229
Racing club volunteers	60	33	21	114
Volunteers assisting participants	908	558	429	1,895
Total participants in the South East Queensland region	15,590	1,520	1,979	19,089

Race meetings in the South East Queensland region attracted attendances of **517,764** or **62.0%** of total attendances at race meetings in Queensland.

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



AT A GLANCE

14 Racing Clubs

THOROUGHBRED	8
HARNES	3
GREYHOUND	3

890 Race Meetings

THOROUGHBRED	305
HARNES	164
GREYHOUND	421

7,882 Races

THOROUGHBRED	2,245
HARNES	1,404
GREYHOUND	4,233

12,308 Racing Club Members

THOROUGHBRED	11,465
HARNES	627
GREYHOUND	216

517,764 Attendances

THOROUGHBRED	418,527
HARNES	54,972
GREYHOUND	44,265

*Some totals do not add due to rounding

About IER

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

This study constitutes an economic and social impact evaluation of the Queensland racing industry (including the thoroughbred, harness and greyhound racing codes). An understanding of the intricate and sometimes complex flow of money in the racing industry underpins this assessment. IER has recently prepared similar studies for:

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

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

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

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

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

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

Barry provides the economic modelling and advisory services to IER.

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

Definitions

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

- + Direct Expenditure** - is defined as expenditure associated with producing racing animals (breeding and rearing), preparing racing animals (training), racing customer expenditure and expenditure by RQ and racing clubs on operating the industry. Direct expenditure is counted at the point at which it leaves the racing industry and hits the broader economy.
- + Direct Economic Impact (value added)** - represents the amount of income included in the direct in-scope expenditure, and therefore is the amount of wages and salaries plus gross operating surplus directly created in supply these services and product, which is also equal to the direct in scope expenditure less the purchases the provider of the goods and services makes in providing the goods and services
- + Indirect Economic Impact (flow-on)** - represents the value added activity generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this
- + Total Value Added** - is the sum of the direct value added plus the flow on impact. It therefore represents the contribution to Gross State Product resulting from the events and activities of the Queensland racing industry

- + Full-time Equivalent Employment** - is a unit that indicates the workload of an employed person in a way that makes workloads or class loads comparable across various contexts. An FTE of 1.0 is equivalent to a full-time worker (i.e. 38 hours), while an FTE of 0.5 signals half of a full work load (i.e. 19 hours).
- + Household Income** - is defined as being wages and salaries (before tax) earned from employment generated by the racing industry
- + Participants in Racing** - is defined as being the number of employees (full-time, part-time and casual), participants and volunteers directly involved in the racing industry. Does not include down-the-line suppliers of goods and services
- + Input Output Modelling** - is the economic modelling used to determine the economic outputs within this study. It is an economy wide model, which shows the inter-linkages between industry sectors in the economy. Therefore, the change in economic circumstances (specifically a change in final demand), for one sector of the economy can be traced though to its effect on other sectors.

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



FOCUSED THINKING



RACING
QUEENSLAND