



RACING AND WAGERING WESTERN AUSTRALIA

WESTERN AUSTRALIAN RACING INDUSTRY



ECONOMIC & SOCIAL IMPACT REPORT HIGHLIGHTS



FOCUSED THINKING

OUR RACING INDUSTRY

**THOROUGHBRED
RACING IS THE
THIRD HIGHEST
ATTENDED SPORT
IN WA**

The Western Australian racing industry plays an important economic and social role, enhancing both individual and community well-being. There is an average of more than two thoroughbred, harness or greyhound race meetings held each day in this state; providing employment and entertainment for Western Australians and visitors alike.

Thoroughbred racing is the third highest attended sport in Western Australia behind AFL football and motor racing.

Nationally, consumption of harness and greyhound racing is proportionally higher in Western Australia than in any other State or Territory.

The racing industry generates more than \$821 million in economic contribution to Western Australia. Its economic activities sustain more than 7,360 full time equivalent roles. However due to the presence of many part-time, casual and contractor roles, the actual number of individuals employed in the industry is much higher.

KEY FINDINGS

VALUE

Economic Contribution to WA
(Value Added)

\$821.1 mil

Number of Participants in Racing

24,459

Full Time Employment

7,361 FTE¹

Number of Race Meetings

880

¹ FTE = Full Time Equivalent Employment

AT A GLANCE:

52 Racing Clubs

8,839 Racing Club Members

880 Race Meetings

823,249 Attendances

8,206 Races





Photo courtesy: Western Racepix

RACING & OUR ECONOMY

- The racing industry in Western Australia generates \$682.3 million direct expenditure²
 - The training and preparation of racing animals is responsible for more than \$165 million of this expenditure
 - Revenues from wagering activities comprises the largest component of the industry's impact
- Almost 55% of the industry's expenditure occurs in regional parts of Western Australia
 - Racing customers spend more than \$60 million associated with their attendance at the races. The retail (\$7.9 million) and accommodation (\$5.3 million) sectors are key beneficiaries of this economic activity

²Direct spending is defined as expenditure associate with producing racing animals (breeding & rearing), preparing racing animals (training), net revenues from wagering activities, racing body revenue and racing customer expenditures.

SOURCE OF DIRECT SPENDING

VALUE

Producing racing animals (breeding)	\$62.8 mil
Preparing racing animals (training)	\$165.8 mil
Net wagering & industry body revenues	\$393.6 mil
Racing customer expenditure	\$60.1 mil
TOTAL	\$682.3 mil



Photo courtesy: AtoZ Visual





IT'S THE **PEOPLE** WHO MAKE RACING COME ALIVE

Participation in Racing	Total
Breeders	860
Breeders Staff	652
Owners & Syndicate Members	13,055
Trainers	1,426
Stable/Kennel Employees	1,536
Participants in Producing Racing Animals	17,529
Racing Club Staff (Full Time & Part Time)	305
Casual/Contractor Staff	2,742
Farriers/Float Drivers/Vets/Attendants	683
Club Volunteers	924
Jockeys, Drivers & Apprentices	147
Bookmaker & Wagering Staff	2,084
Participants in Producing the Racing Product	6,885
Total Participants in Racing	24,459



MORE THAN 24,400 PEOPLE ARE DIRECTLY INVOLVED IN THE WESTERN AUSTRALIAN RACING INDUSTRY. THE PEEL AND SOUTH WEST REGIONS ARE THE MOST ACTIVE OUTSIDE THE METROPOLITAN AREA

- Breeders provide and replenish WA's racing stock. There are 860 people in WA involved in breeding racehorses and greyhounds, with more than 55% operating in regional WA. In 2014/15, the production of racehorses and greyhounds resulted in more than \$62.8 million in direct expenditure impact
- Owners provide much of the capital outlay and day-to-day funding for the production of racehorses and greyhounds. There are more than 13,000 owners of racehorses and greyhounds in WA - 58% of which are in Perth. In 2014/15, owners of racehorses and greyhounds spent more than \$165.8 million on training services and other owner expenses
- Trainers play the vital role of preparing racehorses and greyhounds for racing. Additionally, they also employ a large number of skilled and unskilled individuals to assist in the training activities. There are more than 1,420 trainers of racehorses and greyhounds in WA - 64% of whom operate in regional WA. Perth and the Peel region are home to more than 60% of the state's trainers
- More than 920 people provide important volunteer support to the racing industry in WA. Volunteers assume key roles at many racing clubs, including administration, raceday hospitality and committee roles



AT A GLANCE:

860 Breeders

1,426 Trainers

2,184 Foals & Pups
Produced

10,887 Horses & Greyhounds
in Training

13,055 Owners & Syndicate
Members

147 Jockeys, Drivers &
Apprentices





WAGERING TURNOVER

VALUE

TAB on-course

\$60.8 mil

TAB off-course

\$1,565.6 mil

Fixed odds

\$361.3 mil

Bookmakers on-course

\$60.8 mil

RACING & OUR COMMUNITIES

- The Western Australian racing industry plays an important role in the development and preservation of social and community benefits throughout rural, regional and metropolitan areas of the state. This contribution to community social benefit enhances both individual and community wellbeing throughout Western Australia
- The survey results highlighted the following positive initiatives highlighted by clubs:
 - + *Over 260 community organisations or charities are assisted financially by racing clubs*
 - + *Over 150 community organisations share the racing club facilities and resources*
 - + *Close to 10,000 people hold racing club memberships whilst just under 1,000 people provide volunteer time and services to racing clubs*
- The three codes of racing in Western Australia are very proactive in engaging with families and many cup days and themed events provide a strong link to the community. Over the last decade racing clubs have increasingly developed activities and facilities that enable families to enjoy a social day at the races
- Key environmental initiatives are also evident in club and industry policies and practices. Almost half of all clubs have policies in place to save water and re-use or recirculate water. Additionally, more than 40% of racing clubs have programs in place to utilise solar energy or save electricity through developments such as:
 - + *Installation of panels for solar energy generation*
 - + *Lighting and power programming to save energy and sensor lights*
 - + *Development of energy reduction plans including use of electricity in off peak periods*
- More than one in four clubs (27%) have policies and programs to develop native flora and fauna





About Racing & Wagering WA

RWWA fosters the development, promotes the welfare and ensures the integrity of metropolitan and country thoroughbred, harness and greyhound racing in the interests of the long-term sustainability of the racing industry in Western Australia. RWWA has responsibility for the off-course wagering functions trading as the TAB.



RACING AND WAGERING WESTERN AUSTRALIA

www.rwwa.com.au

About IER

IER is a leading independent consulting and economic research firm. IER provides economic evaluations for a wide variety of event and tourism bodies across Australia spanning from large metropolitan events to small regional festivals and events. IER has undertaken similar size and scope studies in all States of Australia as well as New Zealand and Canada over the last decade.



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