

Size and Scope of the  
**WESTERN  
AUSTRALIAN  
RACING INDUSTRY**

PREPARED BY IER | OCTOBER 2021



FOCUSED THINKING





# Btouch



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## KEY FINDINGS

# Overview of Results

### DIRECT SPENDING IMPACTS

(\$mil)	Thoroughbred	Harness	Greyhound	Total
<b>Total Direct Expenditure<sup>1</sup></b>	<b>\$580.2</b>	<b>\$156.4</b>	<b>\$133.8</b>	<b>\$870.3</b>

<sup>1</sup> Direct expenditure is defined as expenditure associated with producing foals & pups (breeding & rearing), preparing racehorses and greyhound (training), wagering related revenues, racing customer expenditure and non-raceday revenues

In 2018/19, the WA racing industry generated total direct spending of \$870.3 million. This expenditure is responsible for creating a direct value-added impact (or wages, salaries and profits) of \$373.0 million.

However, the flow-on effects linked to this expenditure increases the size of the industry's value-added contribution to almost \$970 million.

The economic output generated by the racing industry in WA is responsible for sustaining 8,452 full time equivalent jobs in the State.

Clost to 51% of the total value-added impact occurs in the Perth region, with the Peel (18.2%), South West (9.7%) and Wheatbelt (8.1%) regions representing the largest areas of racing related economic activity. Thoroughbred racing is responsible for generating close to 67% of this impact, with harness racing (18.0%) and greyhound racing (15.1%) generating the remainder.

### ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
<b>Total Value-Added<sup>2</sup></b>	<b>\$648.5</b>	<b>\$175.0</b>	<b>\$146.3</b>	<b>\$969.8</b>
<b>% of Industry Value-Added</b>	<b>66.9%</b>	<b>18.0%</b>	<b>15.1%</b>	
<b>Total Household Income</b>	<b>\$333.4</b>	<b>\$89.8</b>	<b>\$75.5</b>	<b>\$498.7</b>
<b>Total FTE Employment</b>	<b>5,613</b>	<b>1,509</b>	<b>1,330</b>	<b>8,452</b>

Note: Some totals do not add due to rounding

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

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



**The WA racing industry is responsible for generating close to \$970 million in Real Gross Value-Added to the WA economy**

## AT A GLANCE

930 Breeders

THOROUGHBRED	490
HARNESS	269
GREYHOUND	171

1,867 Foals & Pups  
Produced

THOROUGHBRED	940
HARNESS	421
GREYHOUND	506

12,067 Owners &  
Syndicate Members

THOROUGHBRED	9,099
HARNESS	2,142
GREYHOUND	826

1,149 Trainers

THOROUGHBRED	516
HARNESS	464
GREYHOUND	169

7,023 Horses &  
Greyhounds in  
Training

THOROUGHBRED	3,669
HARNESS	1,769
GREYHOUND	1,585

131 Jockeys, Drivers  
& Apprentices

THOROUGHBRED	81
HARNESS	50

More than  
**24,480 people  
participate**  
directly within  
the **racing  
industry in WA**  
as an employee,  
participant or  
volunteer

Participants are the lifeblood of the industry. They provide the investment, time, skills and passion that underpins horse and greyhound racing in the State.

In total, there are more than 24,480 individuals who participate in the racing industry. Many of these people find gainful employment of their specific skillset where they may find limited opportunities otherwise. Furthermore, many participants hold more than one role in the industry. This is generally more prominent within the harness and greyhound racing industries.

### EMPLOYEES AND VOLUNTEERS (TOTAL)

4,517  
RACING CLUB &  
INDUSTRY STAFF



567  
BREEDERS STAFF



1,699  
STABLE/KENNEL  
EMPLOYEES



131  
JOCKEYS & DRIVERS



900  
RACING CLUB  
VOLUNTEERS



2,526  
VOLUNTEERS  
ASSISTING  
PARTICIPANTS



KEY: = 1,000 PEOPLE

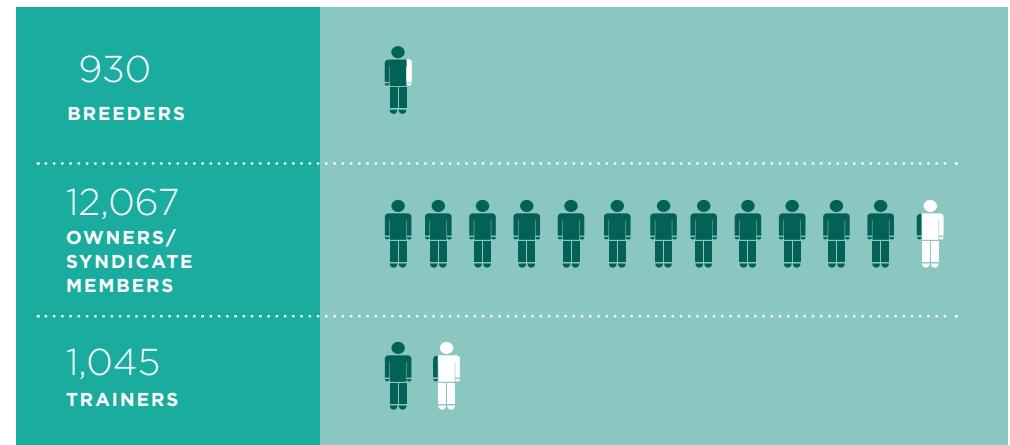


Owners are a key participant group, as they provide much of the investment from which the chain of activity follows. In WA, there are more than 12,000 people who have an ownership interest in a racehorse or greyhound. Many of these owners are involved in the industry as part of a group ownership initiative such as syndication or partnership.

The industry is also supported by more than 3,400 people who volunteer their time and resources. This is particularly prevalent in regional areas where many racing clubs are run almost entirely by volunteers.

KEY:  = 1,000 PEOPLE

#### PARTICIPANTS IN RACING (TOTAL)



## AT A GLANCE

### 50 Racing Clubs

THOROUGHBRED	37
HARNESS	12
GREYHOUND	1

### 854 Race Meetings

THOROUGHBRED	283
HARNESS	256
GREYHOUND	315

### 7,852 Races

THOROUGHBRED	2,140
HARNESS	2,207
GREYHOUND	3,505

### 8,450 Racing Club Members

THOROUGHBRED	7,095
HARNESS	1,345
GREYHOUND	10

### 579,805 Attendances

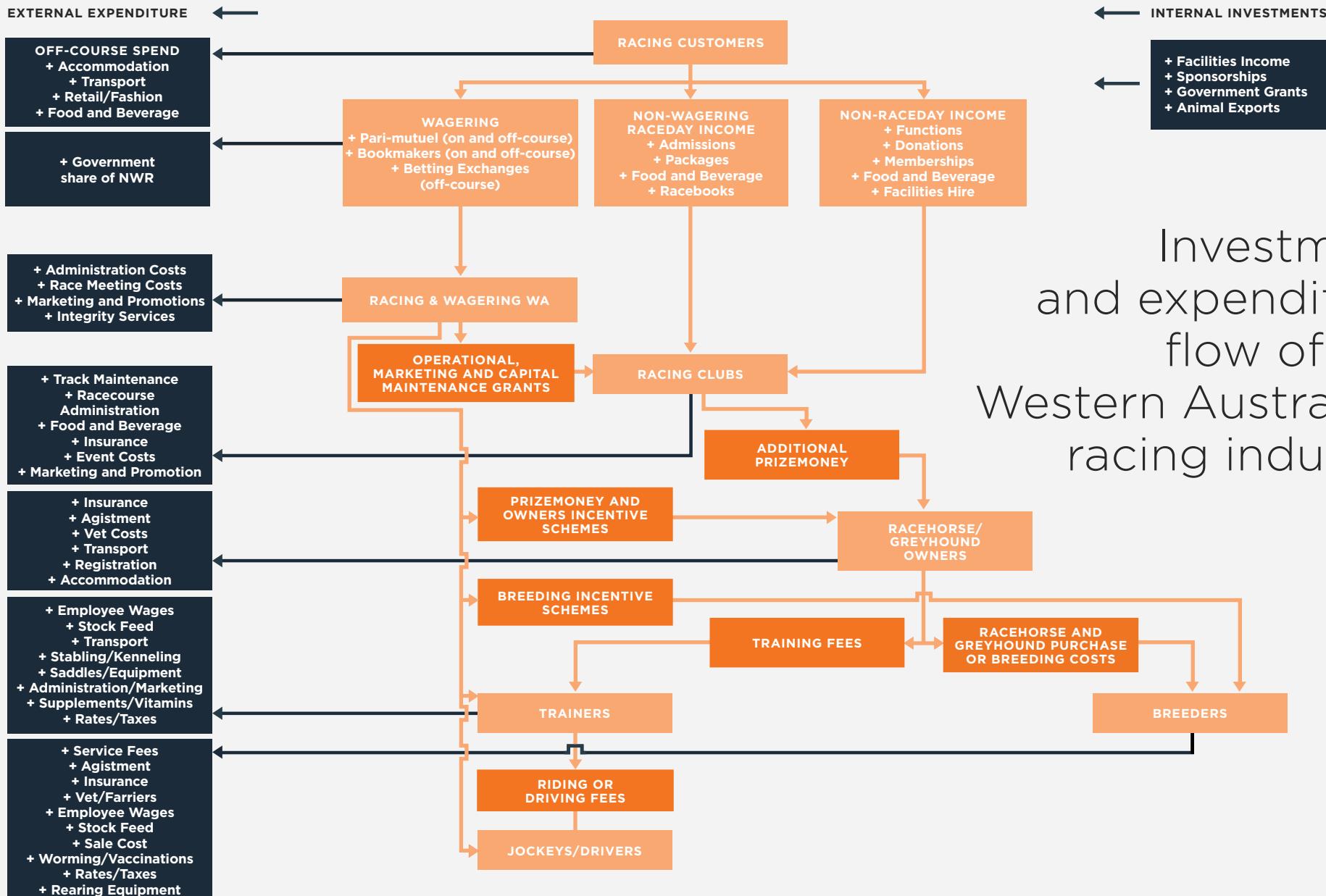
THOROUGHBRED	326,168
HARNESS	195,587
GREYHOUND	58,050



In 2018/19, more than 579,000 attendances were recorded at thoroughbred, harness and greyhound race meetings in WA. Around 48% of these attendances were made at regional racecourses, with Peel (83,750), South west (50,900) and Wheatbelt (33,872) representing the largest regions. The following table illustrates the attendances at race meetings, for each code within each region.

### ATTENDANCES (TOTAL)

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	3,400			3,400
Goldfields-Esperance	27,564			27,564
Great Southern	13,000	650		13,650
Kimberley	30,650			30,650
Mid West	24,850			24,850
Peel	26,500	26,250	31,000	83,750
Pilbara	13,500			13,500
South West	26,100	24,800		50,900
Wheatbelt	21,200	11,022	1,650	33,872
Total Regional	186,764	62,722	32,650	282,136
Perth	139,404	132,865	25,400	297,669
<b>Total</b>	<b>326,168</b>	<b>195,587</b>	<b>58,050</b>	<b>579,805</b>



Investment  
and expenditure  
flow of the  
Western Australian  
racing industry

# INTRODUCTION

Racing and Wagering WA (RWWA), commissioned IER to undertake a study into the size and scope of the racing industry in WA based on the 2018/19 racing season. This constitutes an update on the studies undertaken in 2010/11 and again in 2014/15. This study includes the activities of the three codes of racing; thoroughbred, harness and greyhound.

## PURPOSE OF THE STUDY

**The primary purpose of this study is to determine the economic contribution made to the Western Australian (WA) economy, by the three codes of racing. In addition to this, the study also aims to determine the following outcomes:**

- + The level of full-time equivalent employment generated by racing industry activities in WA
- + The number of participants in the racing industry related pursuits, in both a professional and non-professional capacity
- + The extent (in percentage terms) of the racing industry's contribution to the WA economy
- + The social and community importance of the WA Racing Industry
- + The economic value of the racing industry within each of the Royalties for Regions areas in WA

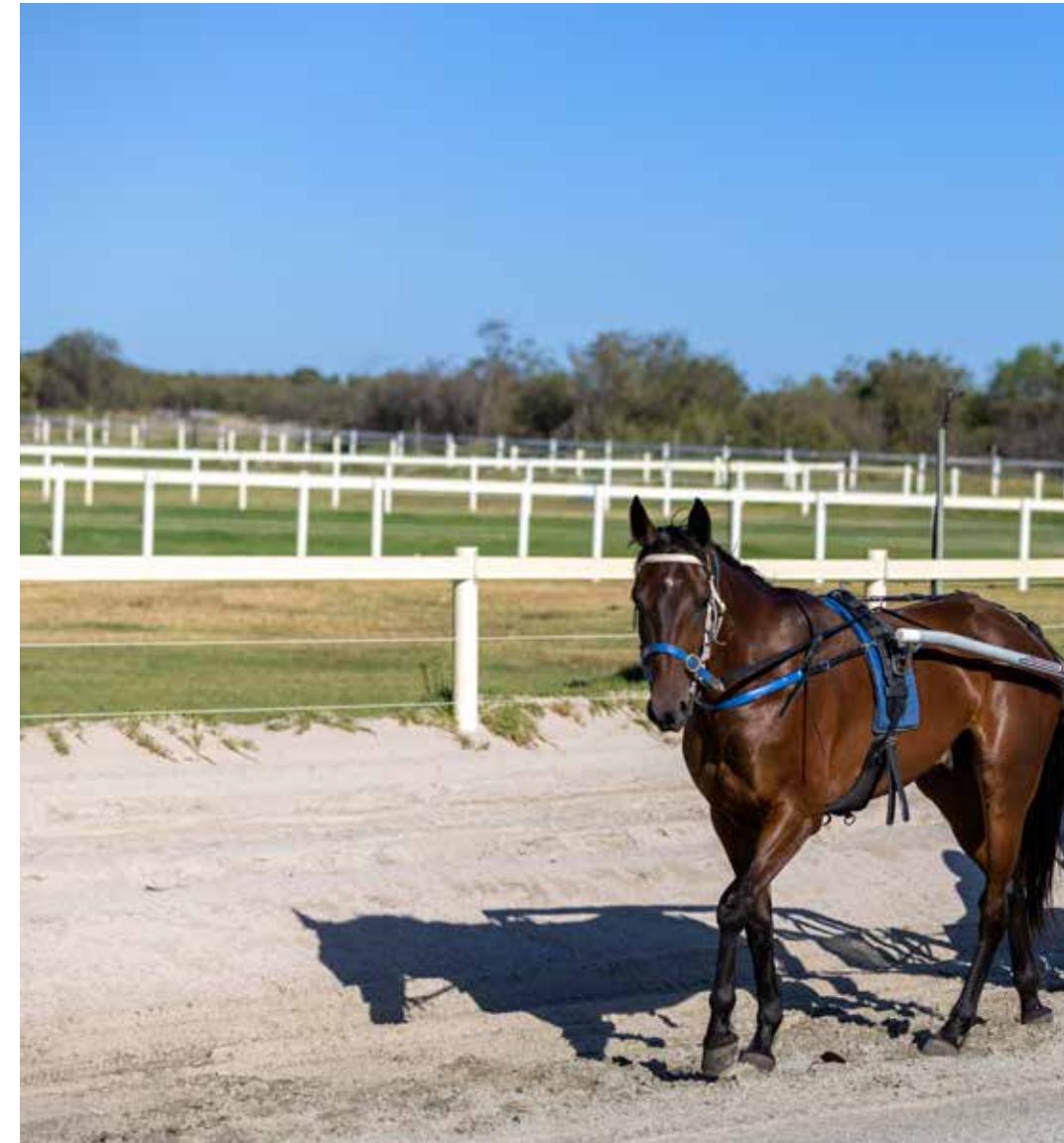
## STUDY METHODOLOGY

In assessing the size and scope of the industry, the study will take into account a number of the traditional measures adopted by the racing industry such as foal production, attendances, horse and greyhound training activities and wagering activities. For the purpose of this study, thoroughbred, harness and greyhound racing in

WA is defined as covering the full spectrum of activities associated with the conduct of racing within these codes. This study does not include other 'horse related industries' outside of the racing industry such as equestrian and pleasure horses. The data that underpins this study has been gathered from a number of sources. Peak racing bodies provided data related to registered participants and wagering related information. Racing clubs provided a considerable amount of data relating to their club and raceday operations. Existing research was synthesised with race club data in order to estimate racing customer expenditure impacts, whilst a sample of breeders, trainers and owners were interviewed in order to build a profile of the cost of production and preparation of racehorses and greyhounds. The detail required to identify and de-duplicate the participants who hold multiple roles within the industry was not available, therefore any reference to the total participants in the report does not represent the unique participant number in the industry. Throughout the report, data has been presented both within a state and regional framework. The regional level analysis is based on the nine defined Royalties for Regions areas, with the tenth region in the report constituting the Perth area.

## ECONOMIC METHODOLOGY

The development of an economic model of the racing industry requires a strong understanding of the internal and external flows of money. The analysis takes care to de-duplicate expenditures, ensuring that multiple rounds of spending within the industry are not counted. In this regard, the key is to identify the final expenditures – which then drive the assessment of the direct and indirect economic outputs.





**This study measures the economic contribution made by the three codes of racing in WA. The expenditure profile of the racing industry is based on the following elements:**

- + production (breeding related activities) of racehorses and greyhounds – the expenditure generated by the breeding sector in maintaining breeding animals and producing foals and pups
- + preparation of racehorses and greyhounds for racing (training related activities) – the expenditure by owners on training services as well as other non-training related expenses such as major veterinary, transport etc.
- + net revenues generated by wagering-related activities – this includes net wagering revenues generated from TAB wagering as well as product fees from interstate totalisators, corporate bookmakers and betting exchanges
- + other peak and kindred body expenditures – the expenditure generated by the peak racing bodies which are not funded by wagering-related revenues
- + on-course raceday customer expenditure – the expenditure generated oncourse at race meetings by attendees
- + off-course raceday customer expenditure – the expenditure generated in the community by racing customers as part of their raceday attendance
- + non-raceday customer expenditure – the expenditure generated, outside official racedays, through the use of racing club facilities and infrastructure at venues owned by racing clubs in WA

The study also excludes major capital expenditure items that have been incurred during the assessment period. It is assumed that the majority of capital expenditure is funded using revenue that is captured in other parts of this study. As such, its inclusion would amount to double counting of some expenditure impacts.

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

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

**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 groups. The majority of expenditures are classified within their relevant ANZSIC codes. A number of horse and greyhound racing activities are contained within ANZSIC classification segment 91 - Sports and Recreation Services.

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

It is important to note that this study determines the economic contribution made by the racing industry to the WA economy. This is different to a net economic impact study which measures only

the 'new money' or 'money that would be lost to the economy in the absence of the activity in question'.

It is also not a measure of the relative health of the industry. An industry can generate a significant economic impact but still be financially challenged and vice versa.

**Disclaimer:** IER has prepared this report for RWWA, for its sole use and within the scope of work set out in the project terms of reference. Much of the data provided by the industry, in particular the racing clubs, has been accepted without audit and in good faith. We do not assume or accept or owe any responsibility or duty of care to any person other than the intended recipient of this report, RWWA. We did not, and do not by consenting to publication of this report, assume or accept or owe any responsibility or duty of care to any other person.

# Direct Spending

The calculation of economic impacts, as identified in this study, is predicated on determining the extent to which the WA 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 WA economy.

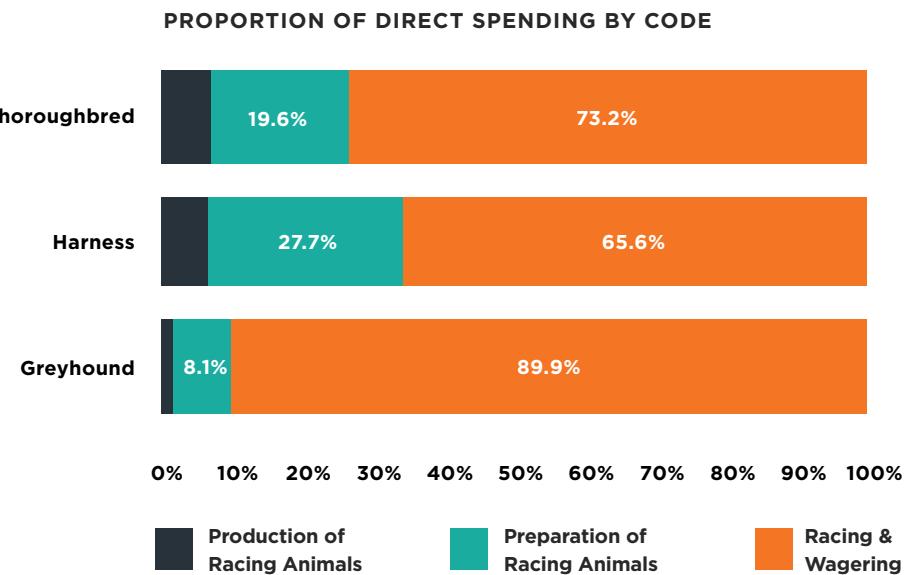
In 2018/19, the racing industry in Western Australia generated more than \$870 million in direct expenditure. Revenues generated from racing and wagering are the most significant driver of the industry's expenditure profile, comprising more than 74% of the total direct spending impact.

**Each of the key areas of racing industry expenditure assessed within this study are defined as follows:**

- + **Producing animals** - includes all expenditure on the production of foals and pups, the maintenance of sires and broodmares/breeding females and the preparation of yearlings/greyhounds for sale
- + **Preparing animals** - includes all expenditure on the breaking-in and training of racehorses and greyhounds (including spelling)
- + **Wagering related customer expenditure**
  - includes net wagering revenues from the totalisator wagering, corporate bookmaker revenues and the state's share of product fees
- + **Raceday customer expenditure** - includes all expenditure generated from on-course activities (raceday) such as sponsorship, catering, admission and race day functions. It also includes all expenditure generated outside the racecourse as part of attending the races (such as transport, accommodation, retail etc.). Finally, it also includes all spending on non-race day functions, facility hire, and membership. It does not however, include wagering as this is covered in the wagering related customer expenditure section

The chart opposite illustrates the proportional breakdown of direct expenditure within WA.

**In 2018/19, the racing industry in Western Australia generated more than \$870 million in direct expenditure**





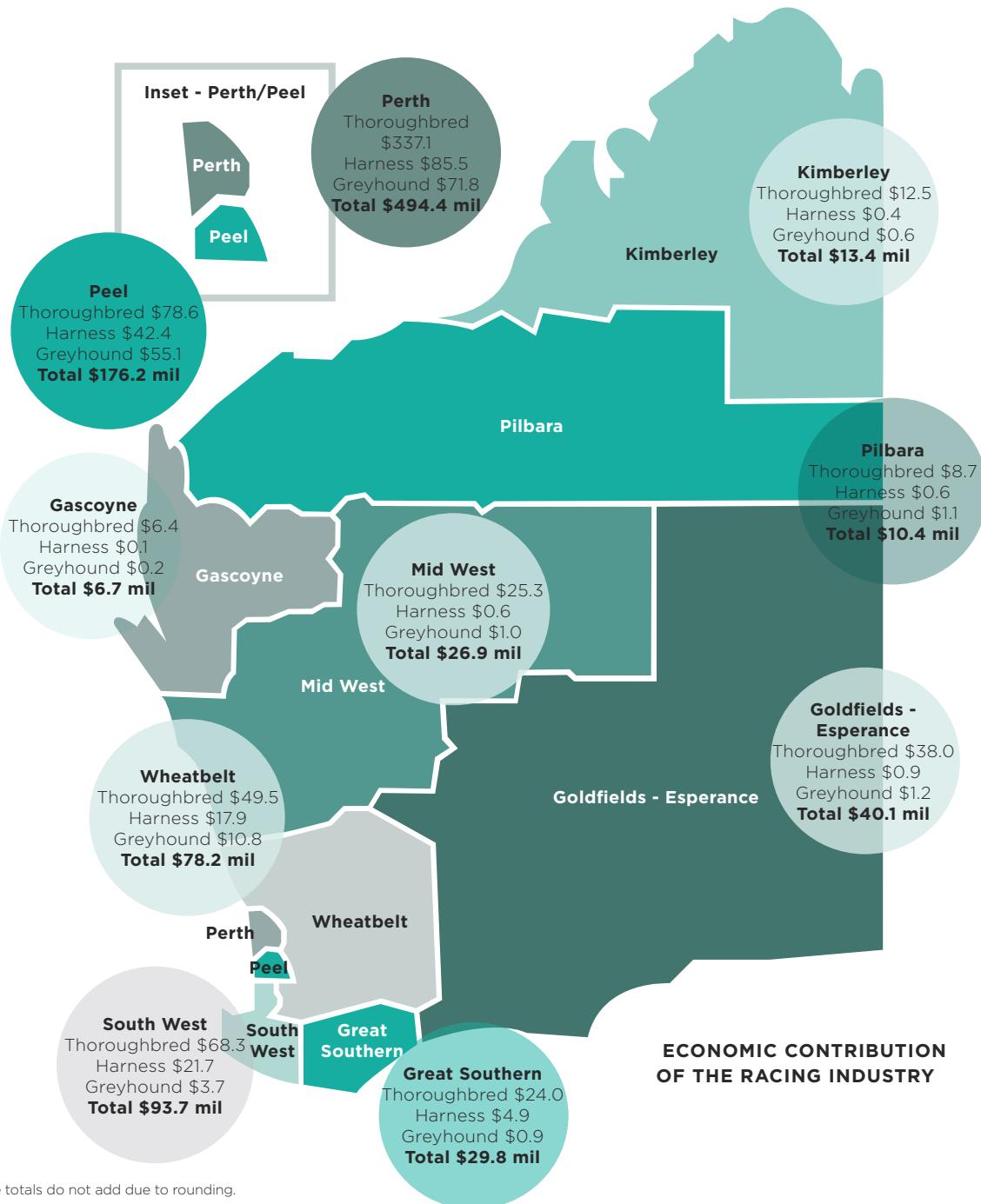
The thoroughbred racing industry is responsible for almost \$580.2 million (66.7%) of this recurrent expenditure. Racing and wagering related expenditure makes up the largest proportion of the industry's expenditure profile (73.2%), whilst close to 20% is generated by the training sector.

The harness racing industry is responsible for more than \$156 million (18.0%) of this recurrent expenditure. As with the thoroughbred racing sector, racing and wagering related expenditure makes up the largest proportion of the industry's expenditure profile (65.6%) whilst the preparation of racehorses (27.7%) makes up a large component of the remaining expenditure.

The greyhound racing industry is responsible for \$133.8 million (15.4%) of this recurrent expenditure.

More than 74% of the industry's expenditure impact is generated from racing and wagering related expenditure. This is largely a reflection of the greyhound racing industry's positioning as a strong wagering product.

# Economic Contribution of the Racing Industry



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, regions of WA). In any period of time, the value-added in an industry is essentially, 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 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).

As illustrated earlier, the level of economic activity will not proportionally follow the expenditure, 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.

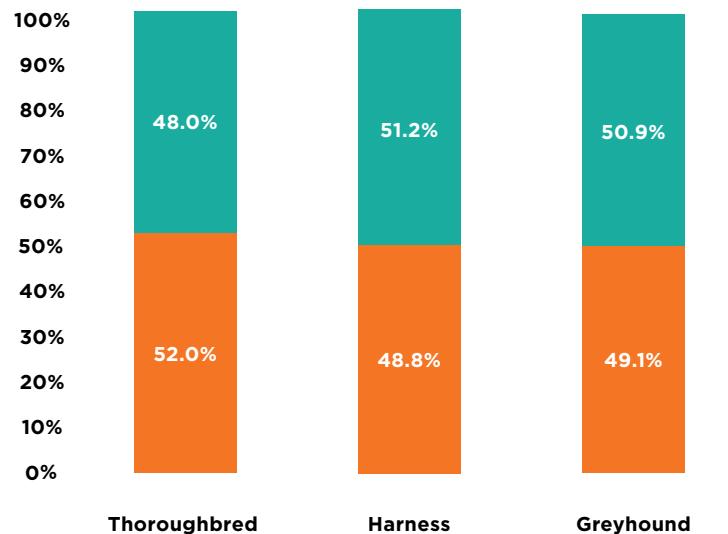
The table below illustrates the direct and flow-on value-added impacts generated by the WA racing industry.

Racing Code (\$ mil)	Direct Value Added	Flow-on	Total Value Added
Thoroughbred	\$251.1	\$397.4	\$648.5
Harness	\$67.8	\$107.1	\$175.0
Greyhound	\$54.0	\$92.3	\$146.3
<b>Total</b>	<b>\$373.0</b>	<b>\$596.8</b>	<b>\$969.8</b>

**The WA racing industry generates** almost \$970 million in direct and flow-on **value-added** impacts for the **WA economy**

Overall, more than 50% of the racing industry's contribution to the economy is generated in Perth.

**PROPORTIONAL VALUE-ADDED BY REGION**



When the direct value-added impacts are assessed by industry sector, the WA racing industry contributes most significantly to the following sectors:

- + **Arts & Recreational Services** - 6.0% of sector GSP
- + **Agriculture, Forestry & Fishing** - 0.9%
- + **Information, Media & Telecommunications** - 0.7%

The table below illustrates the value-added impact generated by the WA racing industry in each of the ANZSIC industry sectors:

(\$mil)	Racing Industry Direct VA	% Racing Industry Direct VA	WA Sector GSP	% Contribution to Sector GSP
Agriculture, Forestry & Fishing	\$37.7	10.1%	\$5,387	0.7%
Mining	\$0.0	0.0%	\$135,269	0.0%
Manufacturing	\$5.0	1.3%	\$12,909	0.0%
Electricity, Gas, Water & Waste	\$11.2	3.0%	\$4,888	0.2%
Construction	\$3.5	0.9%	\$17,261	0.0%
Wholesale Trade	\$22.2	6.0%	\$8,965	0.2%
Retail Trade	\$19.1	5.1%	\$8,606	0.2%
Accommodation & Food Services	\$10.9	2.9%	\$4,013	0.3%
Transport, Postal & Warehousing	\$22.8	6.1%	\$10,404	0.2%
Information Media & Telecommunications	\$26.1	7.0%	\$2,761	0.9%
Finance & Insurance Services	\$38.1	10.2%	\$11,641	0.3%
Ownership of Dwellings	\$0.0	0.0%	\$16,243	0.0%
Property Services	\$1.9	0.5%	\$5,144	0.0%
Professional, Scientific & Technical Services	\$21.8	5.8%	\$15,055	0.1%
Administrative Services	\$2.1	0.6%	\$6,300	0.0%
Public Administration & Safety	\$17.7	4.8%	\$9,997	0.2%
Education & Training	\$9.8	2.6%	\$9,143	0.1%
Health Care & Social Assistance	\$25.8	6.9%	\$15,718	0.2%
Arts & Recreation Services	\$78.7	21.1%	\$1,310	6.0%
Other Services	\$18.5	4.9%	\$4,205	0.4%
<b>Total</b>	<b>\$373.0</b>		<b>\$305,220</b>	

\*Some totals may not add due to rounding.





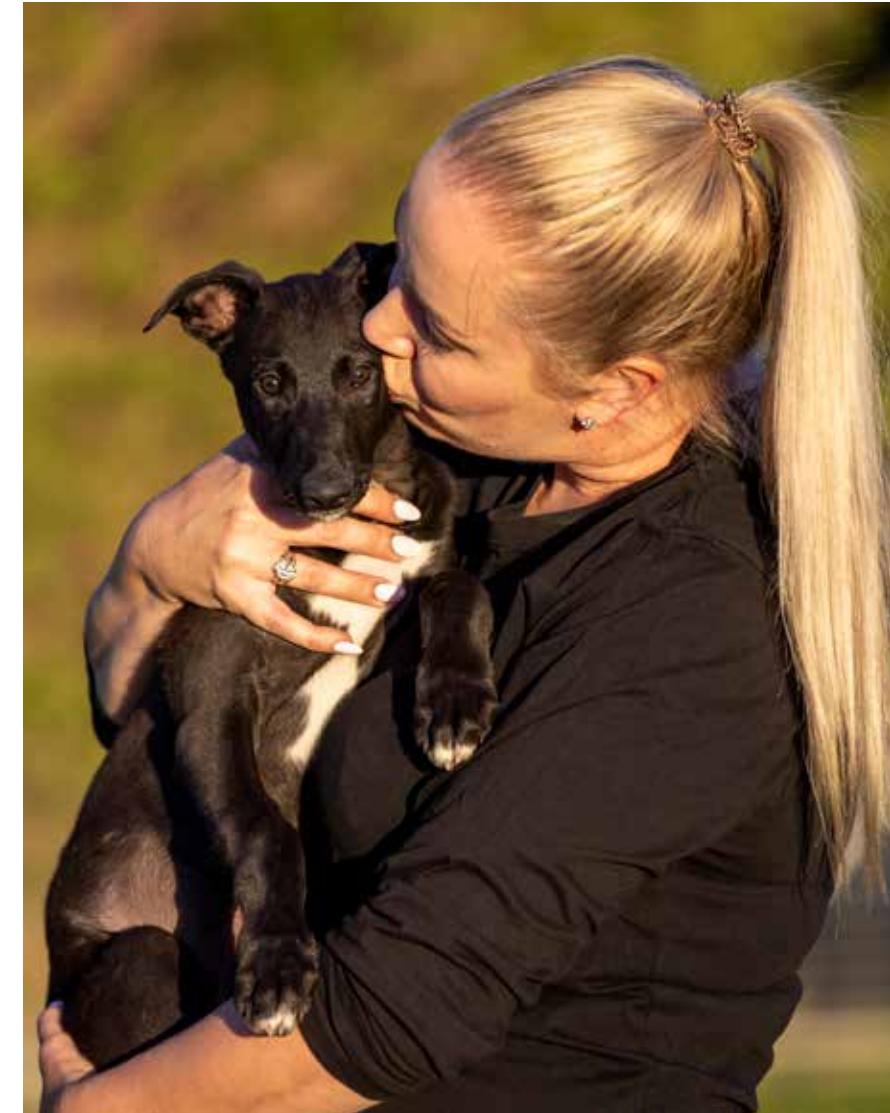
## EMPLOYMENT AND SUPPLY

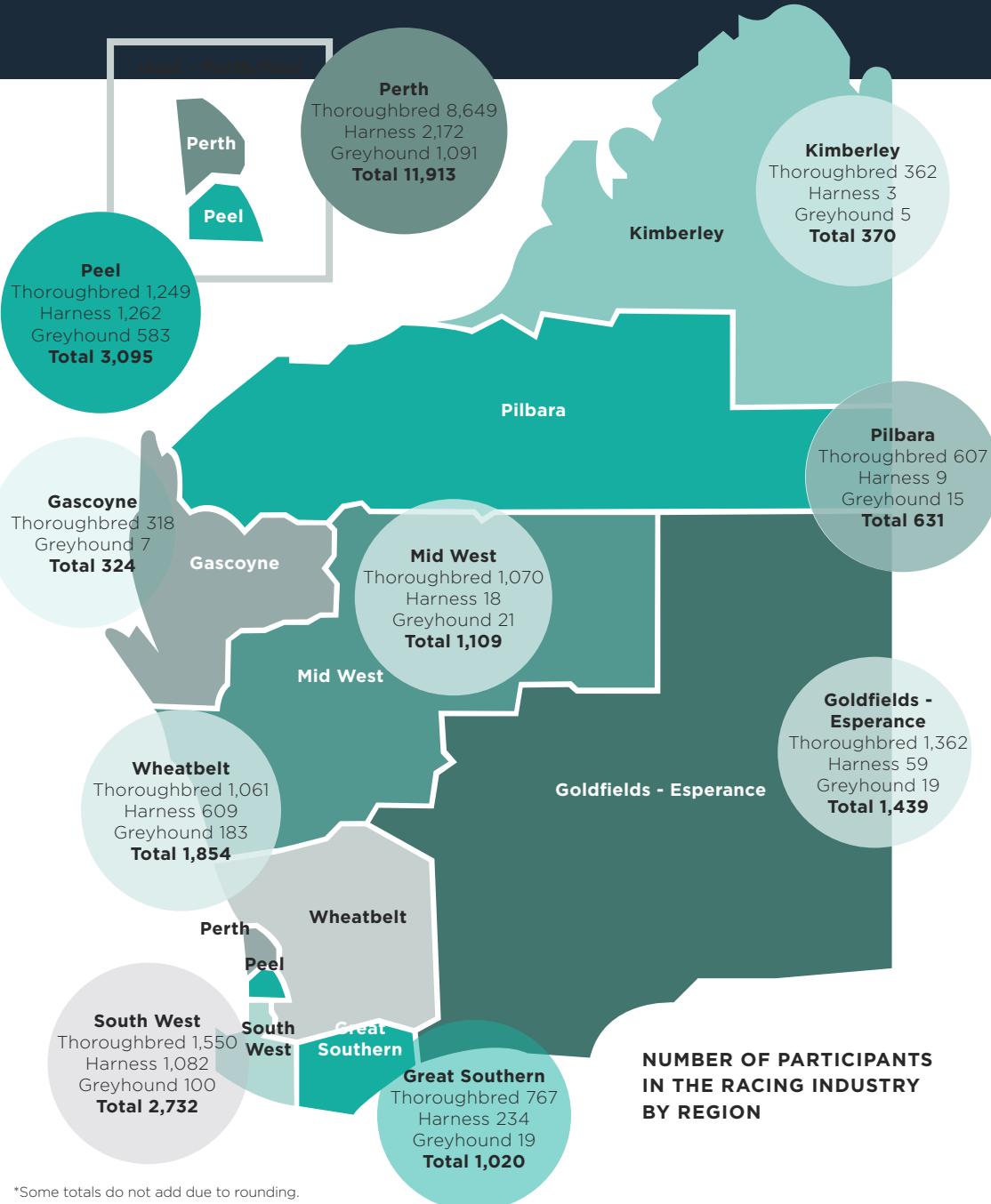
### Participants in the WA Racing Industry

NUMBER OF PARTICIPANTS IN THE WA RACING INDUSTRY

	Thoroughbred	Harness	Greyhound	Total
Breeders	490	269	171	930
Owners/Syndicate Members	9,099	2,142	826	12,067
Trainers	516	464	169	1,149
<b>Total Participants</b>	<b>10,105</b>	<b>2,875</b>	<b>1,166</b>	<b>14,146</b>
Racing Club & Industry Staff	3,540	544	433	4,517
Breeders Staff	297	135	135	567
Stable/Kennel Employees	1,336	299	64	1,699
Jockeys & Drivers	81	50		131
<b>Total Employees</b>	<b>5,254</b>	<b>1,028</b>	<b>632</b>	<b>6,914</b>
Racing Club Volunteers	696	204		900
Volunteers Assisting Participants	939	1,342	245	2,526
<b>Total Volunteers</b>	<b>1,635</b>	<b>1,546</b>	<b>245</b>	<b>3,426</b>
<b>Total</b>	<b>16,995</b>	<b>5,449</b>	<b>2,043</b>	<b>24,486</b>

\*Some totals do not add due to rounding.





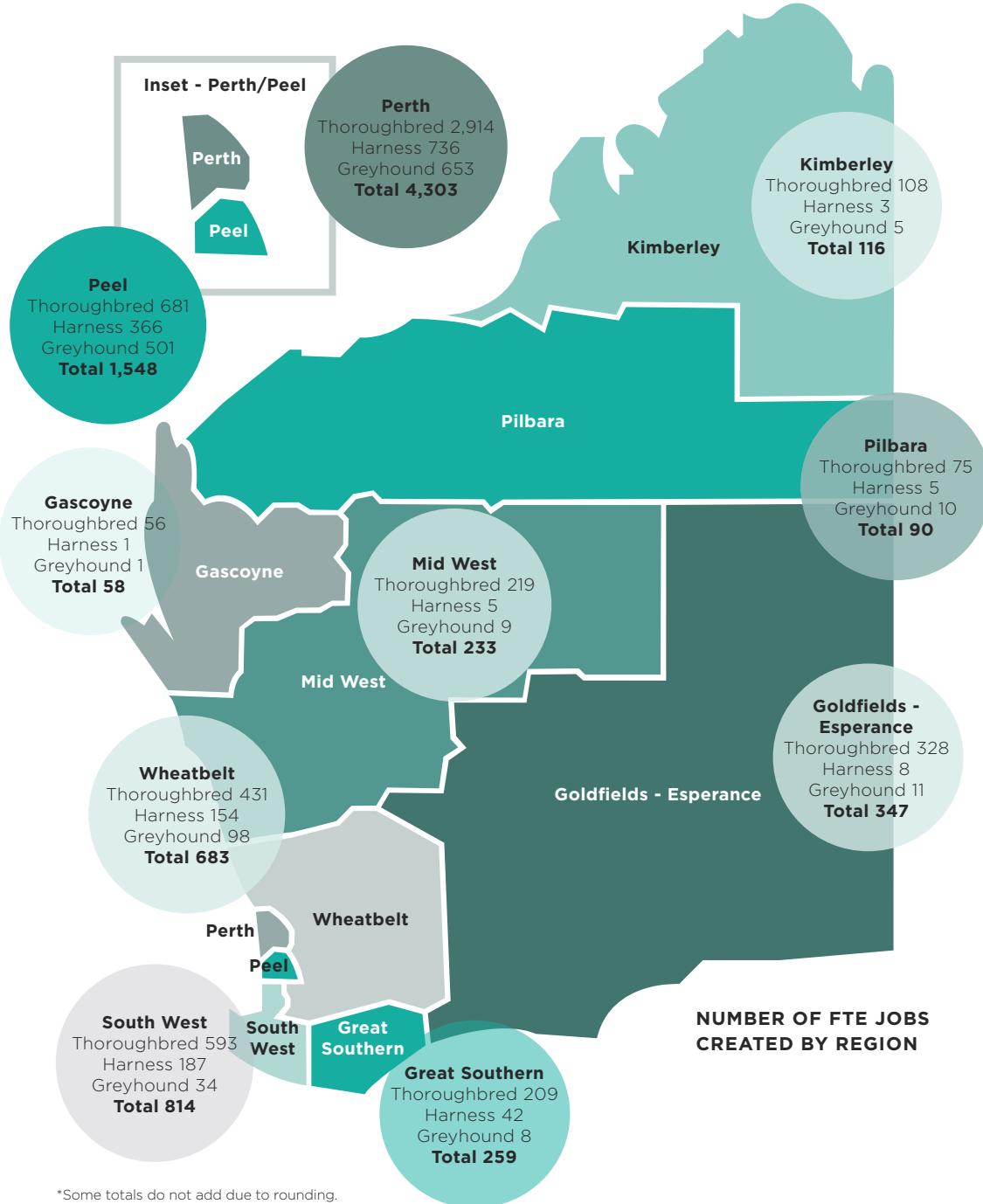
**More than  
24,400**  
individuals  
participate in  
the WA racing  
industry as an  
**employee,  
participant or  
volunteer**

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

Participants are the lifeblood of the racing industry. For the majority of participants, involvement is part business and part hobby. Passion drives many to pursue the challenges and opportunities available in horse and greyhound racing. 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, jockeys, drivers, farriers, vets and float hire businesses for whom racing provides significant opportunity to employ their specialist skills.

Breeders kick-start a chain of activity which leads to the production of a racing product that is consumed by audiences on most days of the year. Owners provide much of the investment from which the chain of activity follows. In Western Australia, there are more than 11,800 people who have an ownership interest in a racehorse or greyhound. A portion of these owners are involved in the industry as part of a group ownership initiative such as syndication or partnership.

In total, there are more than 24,400 individuals who participate in the WA racing industry.



# Employment Generated by Racing in Western Australia

There are approximately 24,400 participants directly involved in the WA racing industry. As outlined earlier, this is a statistical construct that takes into consideration participants, volunteers and employees (full time, part time, casual and contractor).

The direct impact on employment, generated specifically by the activities of the racing industry, sustains 4,546 FTE jobs each year. When the indirect impacts (generated by the flow-on of economic benefits to other industries) are taken into account, the total employment impact rises to more than 8,452 FTE positions.

The WA racing industry, like racing industries all over Australia, relies on a large number of parttime and casual labour. Further to that, it employs a large number of people in roles that are not plentiful in the marketplace (such as horse care). It is important to note that the FTE job creation does not necessarily directly follow direct spending within the WA economy. This is because some regions have a higher need to import labour (due to supply side constraints) than others.

The FTE positions that are sustained by the WA racing industry result in almost \$498.7 million in wages and salaries for the people employed in the racing industry as well as those employed in other down-the-line industries that receive increased demand as a result of racing. Some examples of the other industries that are stimulated by racing include; veterinary, feed, retail, tourism, accommodation, transport, entertainment and fashion.



## The Breeding Industry

The breeding sector provides and replenishes the racing animals for the WA racing industry. There are 930 registered breeders in WA 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 derive the majority of their income from service fees, managing the breeding stock and the public and private sale of their stock. 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. This process leads to significant opportunities for foreign investment to flow back to the state as a result of non-WA buyers purchasing WA-bred foals and pups.

**NUMBER OF BREEDERS**

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	3		1	4
Goldfields-Esperance	20	3	1	24
Great Southern	26	21	3	50
Kimberley	4			4
Mid West	24		1	25
Peel	74	74	56	204
Pilbara	2			2
South West	78	48	9	135
Wheatbelt	48	33	23	104
<b>Total Regional</b>	<b>279</b>	<b>179</b>	<b>94</b>	<b>552</b>
<b>Perth</b>	<b>211</b>	<b>90</b>	<b>77</b>	<b>378</b>
<b>Total</b>	<b>490</b>	<b>269</b>	<b>171</b>	<b>930</b>

**NUMBER OF STAFF EMPLOYED BY BREEDERS**

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	2		1	3
Goldfields-Esperance	12	2	1	14
Great Southern	16	11	2	29
Kimberley	2			2
Mid West	15		1	15
Peel	45	37	44	126
Pilbara	1			1
South West	47	24	7	78
Wheatbelt	29	17	18	64
<b>Total Regional</b>	<b>169</b>	<b>90</b>	<b>74</b>	<b>333</b>
<b>Perth</b>	<b>128</b>	<b>45</b>	<b>61</b>	<b>234</b>
<b>Total</b>	<b>297</b>	<b>135</b>	<b>135</b>	<b>567</b>





#### NUMBER OF REGISTERED STALLIONS & Sires

	Thoroughbred	Harness	Greyhound	Total
Gascoyne				
Goldfields-Esperance				
Great Southern	6	2		8
Kimberley				
Mid West	1			1
Peel	11	5	6	22
Pilbara				
South West	19	2		21
Wheatbelt	19	10		29
Total Regional	56	19	6	81
Perth	3	4	1	8
<b>Total</b>	<b>59</b>	<b>23</b>	<b>7</b>	<b>89</b>

#### NUMBER OF LIVE FOALS & PUPS BORN IN WESTERN AUSTRALIA

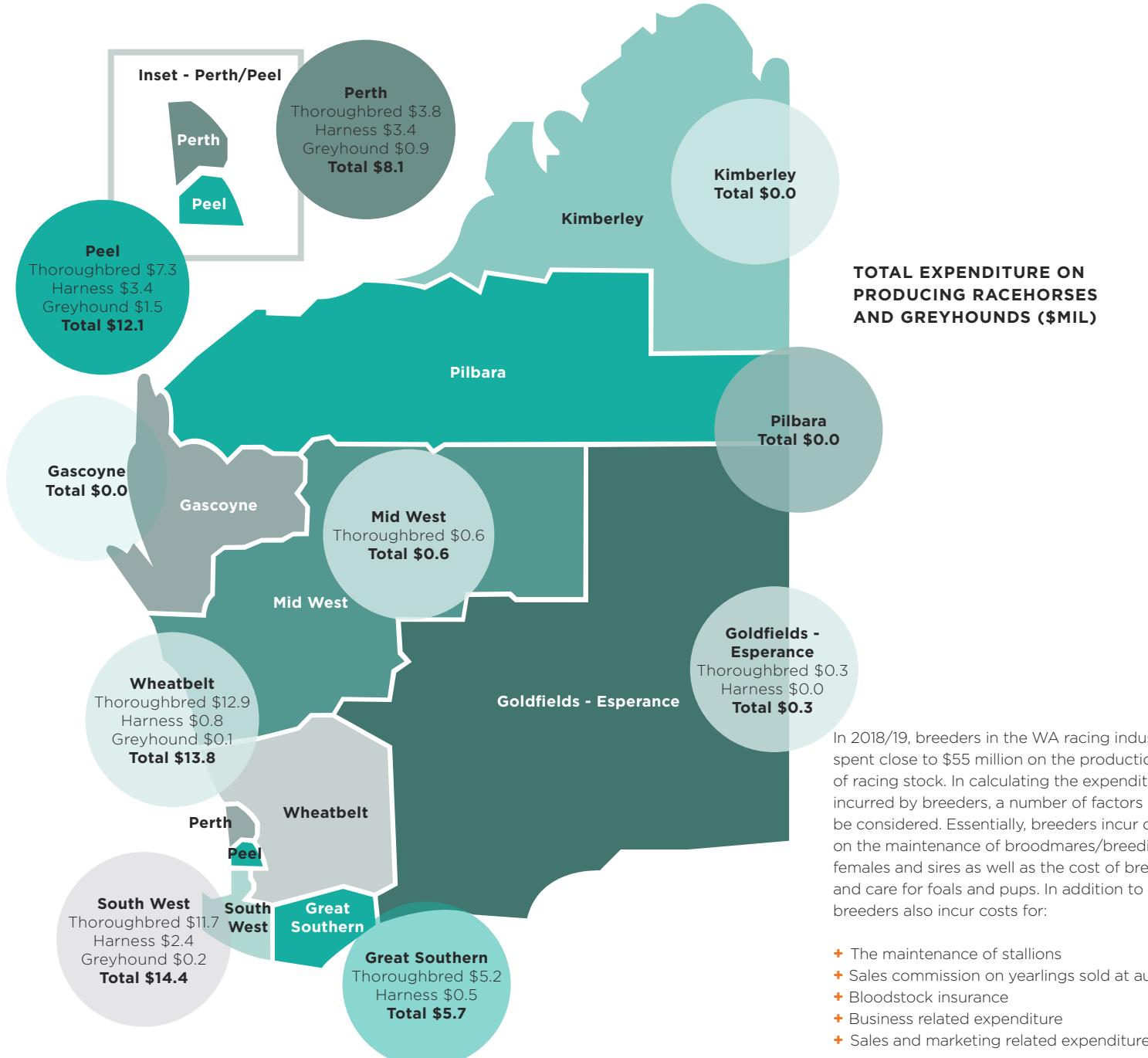
	Thoroughbred	Harness	Greyhound	Total
Gascoyne				
Goldfields-Esperance				
Great Southern	8			8
Kimberley				
Mid West	116	18		135
Peel				
Pilbara				
South West	15			15
Wheatbelt	180	124	282	586
Total Regional				
Perth	264	98	42	404
Total	261	30	14	304
<b>Total Regional</b>	<b>844</b>	<b>270</b>	<b>338</b>	<b>1,452</b>
Perth				
<b>Total</b>	<b>96</b>	<b>151</b>	<b>168</b>	<b>415</b>

#### NUMBER OF BROODMARES/FEMALES COVERED

	Thoroughbred	Harness	Greyhound	Total
Gascoyne				
Goldfields-Esperance	13	1		14
Great Southern	181	32		213
Kimberley				
Mid West	23			23
Peel	280	222	43	545
Pilbara				
South West	23	147	3	562
Wheatbelt	407	45		452
Total Regional	1,315	447	46	1,808
Perth	150	192	30	372
<b>Total</b>	<b>1,465</b>	<b>639</b>	<b>76</b>	<b>2,180</b>

#### TOTAL EXPENDITURE ON PRODUCING RACEHORSES & GREYHOUNDS (\$MIL)

	Thoroughbred	Harness	Greyhound	Total
Gascoyne				
Goldfields-Esperance	\$0.3	\$0.0		\$0.3
Great Southern	\$5.2	\$0.5		\$5.7
Kimberley				
Mid West	\$0.6			\$0.6
Peel	\$7.3	\$3.4	\$1.5	\$12.1
Pilbara				
South West	\$11.7	\$2.4	\$0.2	\$14.4
Wheatbelt	\$12.9	\$0.8	\$0.1	\$13.8
Total Regional	\$38.0	\$7.1	\$1.8	\$46.9
Perth	\$3.8	\$3.4	\$0.9	\$8.1
<b>Total</b>	<b>\$41.8</b>	<b>\$10.5</b>	<b>\$2.7</b>	<b>\$55.0</b>



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 WA. For thoroughbreds and standardbreds, the cost of production is assessed for both a private and commercial farm and additional costs are taken into consideration for horses being prepared for a yearling sale.

Over 73% of all breeding related expenditure occurs in three Western Australian regions. The South West (26.2%), Wheatbelt (25.0%) and Peel (22.0%) regions are the most active breeding areas in the State. From a racing code perspective, the Wheatbelt and South West generate 58.8% of the thoroughbred breeding activity whilst the Peel and South West generate a similar proportion of harness activity. More than 88% of greyhound breeding activity occurs in the Peel and Perth regions.

From an industry perspective, it is important to acknowledge that there are different costs associated with mares depending on their breeding activity in a given year. For example, mares and breeding females 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.

In 2018/19, breeders in the WA racing industry spent close to \$55 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/breeding females and sires as well as the cost of breeding and care for foals and pups. In addition to this, breeders also incur costs for:

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

\*Some totals do not add due to rounding.



**In 2018/19, breeders in the WA racing **industry spent close to \$55 million** on the production of racing stock**

#### THOROUGHBRED BREEDERS

In 2018/19, there were 1,465 broodmares covered in WA, producing 940 foals. This thoroughbred breeding activity is responsible for generating more than \$41.8 million in the production and care of racing stock. The Wheatbelt region is responsible for nearly 31% of this amount, followed by the South West (28.1%) and Peel (17.4%) regions.

#### HARNESS BREEDERS

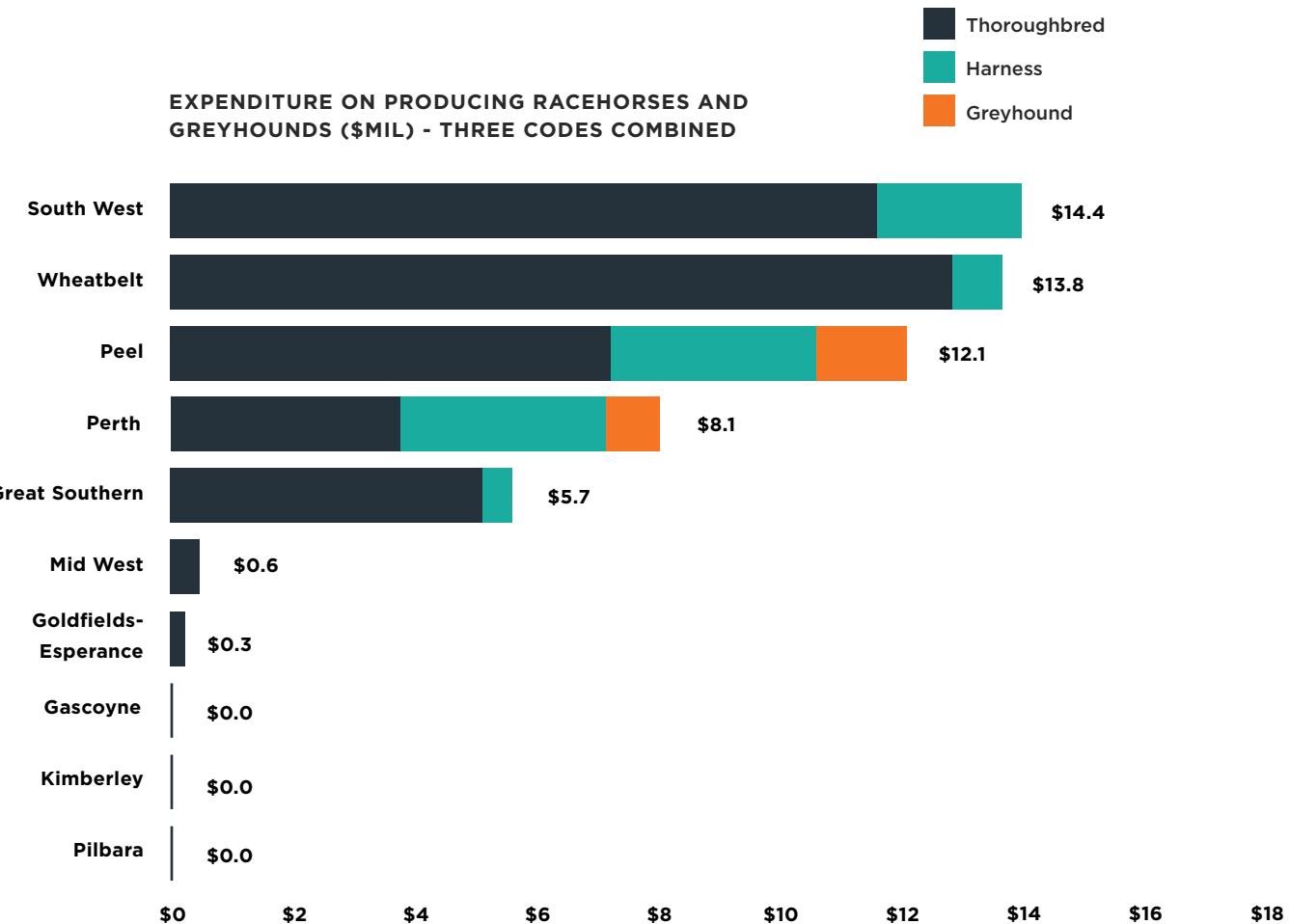
In 2018/19 there were 639 broodmares covered in WA, producing 421 foals. This standardbred breeding activity is responsible for generating over \$10 million in the production and care of racing stock. The Peel (32.1%) and Perth (32.0%) regions were responsible for a significant portion of this impact.

#### GREYHOUND BREEDERS

In 2018/19, 76 females were covered in WA, producing 506 pups. This greyhound breeding activity is responsible for generating nearly \$2.7 million in the production and care of greyhound racing stock. The Peel region is responsible for over half of this activity (55.7%), with a further 33.2% occurring in the Perth region.

The chart (opposite) illustrates the total expenditure, by region, on thoroughbred, harness and greyhound breeding activities generated in WA.

**EXPENDITURE ON PRODUCING RACEHORSES AND GREYHOUNDS (\$MIL) - THREE CODES COMBINED**



# The Training Industry

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 preparation of racehorses and greyhounds. In 2018/19 there were more than 12,000 individuals with an ownership interest in thoroughbred, harness and/or greyhound racing in Western Australia.

Almost 61% of owners reside in the Perth region, whilst the Peel (9.8%), South West (9.8%) and Wheatbelt (5.3%) regions make up a significant proportion of the remainder.

In 2018/19, owners of racehorses and greyhounds trained in Western Australia spent almost \$167.8

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.

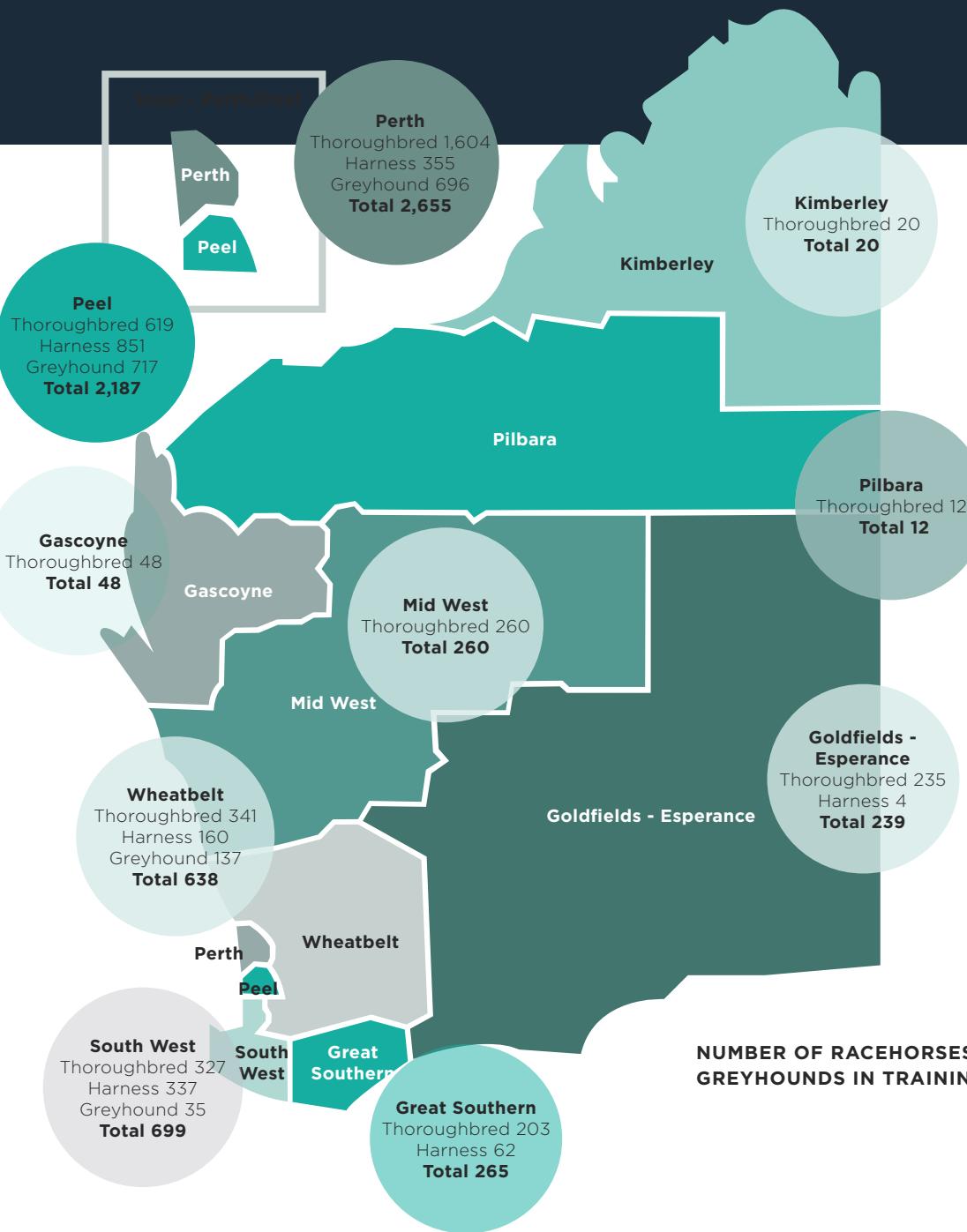
The development of expenditure profiles within each region is based upon the number of racehorses and greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the animal. For instance, expenditure during the education stage of the racehorse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

**TOTAL NUMBER OF OWNERS OF RACEHORSES AND GREYHOUNDS**

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	84		4	88
Goldfields-Esperance	413	32	14	459
Great Southern	247	81	9	337
Kimberley	143	3	5	151
Mid West	444	16	17	477
Peel	538	449	199	1,186
Pilbara	222	7	15	244
South West	797	335	50	1,182
Wheatbelt	387	194	53	634
<b>Total Regional</b>	<b>3,275</b>	<b>1,117</b>	<b>366</b>	<b>4,758</b>
<b>Perth</b>	<b>5,824</b>	<b>1,025</b>	<b>460</b>	<b>7,309</b>
<b>Total</b>	<b>9,099</b>	<b>2,142</b>	<b>826</b>	<b>12,067</b>

\*Includes Owner/Trainers which have also been counted within 'trainers' category





### NUMBER OF RACEHORSES AND GREYHOUNDS IN TRAINING

In 2018/19, there were more than 7,000 thoroughbreds, standardbreds and greyhounds in training in Western Australia. Almost two-thirds of this training activity occurred within regional areas of the State. The Perth region is a major centre for the training activity, with almost 38% of all training activity (across all codes) occurring in this region.

The majority of all training activity, in the thoroughbred and harness racing sector, occurs in the south western corner of the State. The Peel, Perth and South West regions account for more than 75% of all training activity across these codes.

Almost 90% of the training activity, in the greyhound racing sector, occurs in the Peel and Perth regions, with the Wheatbelt making up the majority of the remainder.

#### TOTAL NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	7			7
Goldfields-Esperance	46	4		50
Great Southern	27	18		45
Kimberley	4			4
Mid West	51	1	1	53
Peel	85	153	69	307
Pilbara	5	1		6
South West	69	87	12	168
Wheatbelt	48	48	20	116
Total Regional	342	312	102	756
Perth	174	152	67	393
<b>Total</b>	<b>516</b>	<b>464</b>	<b>169</b>	<b>1,149</b>

#### NUMBER OF JOCKEYS, DRIVERS AND APPRENTICES

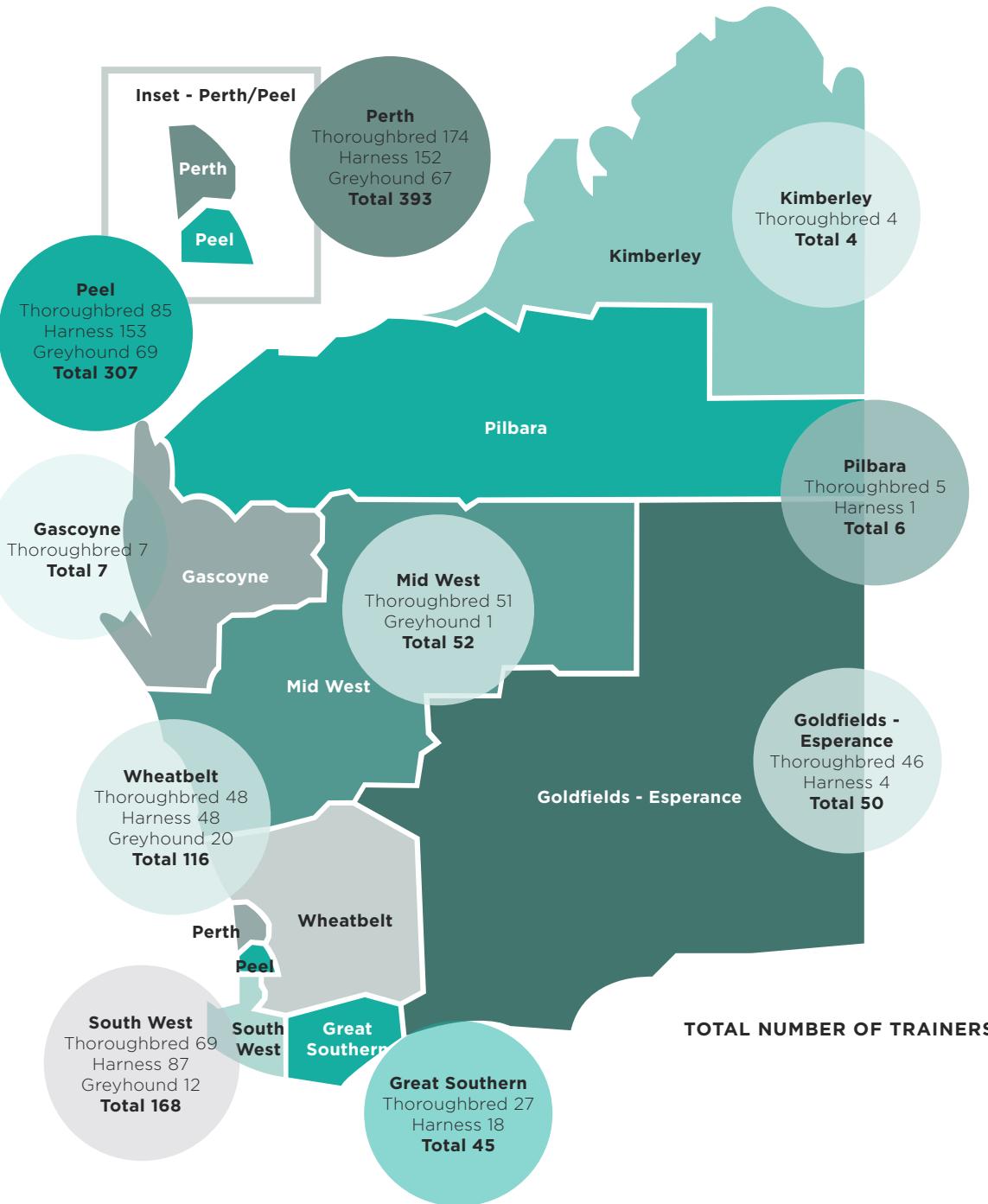
	Thoroughbred	Harness	Greyhound	Total
Gascoyne				
Goldfields-Esperance				1
Great Southern				5
Kimberley				
Mid West				2
Peel				30
Pilbara				
South West				16
Wheatbelt				6
Total Regional				60
Perth				71
<b>Total</b>	<b>81</b>	<b>50</b>		<b>131</b>

#### NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	21			21
Goldfields-Esperance	123	4		127
Great Southern	105	10		115
Kimberley	15			15
Mid West	121			121
Peel	195	83	24	302
Pilbara	21			21
South West	141	44	4	189
Wheatbelt	106	32	6	144
Total Regional	848	173	34	1,055
Perth	488	126	30	644
<b>Total</b>	<b>1,336</b>	<b>299</b>	<b>64</b>	<b>1,699</b>

#### NUMBER OF RACEHORSES & GREYHOUNDS IN TRAINING

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	48			48
Goldfields-Esperance	235	4		239
Great Southern	203	62		265
Kimberley	20			20
Mid West	260			260
Peel	619	851	717	2,187
Pilbara	12			12
South West	327	337	35	699
Wheatbelt	341	160	137	638
Total Regional	2,065	1,414	889	4,368
Perth	1,604	355	696	2,655
<b>Total</b>	<b>3,669</b>	<b>1,769</b>	<b>1,585</b>	<b>7,023</b>

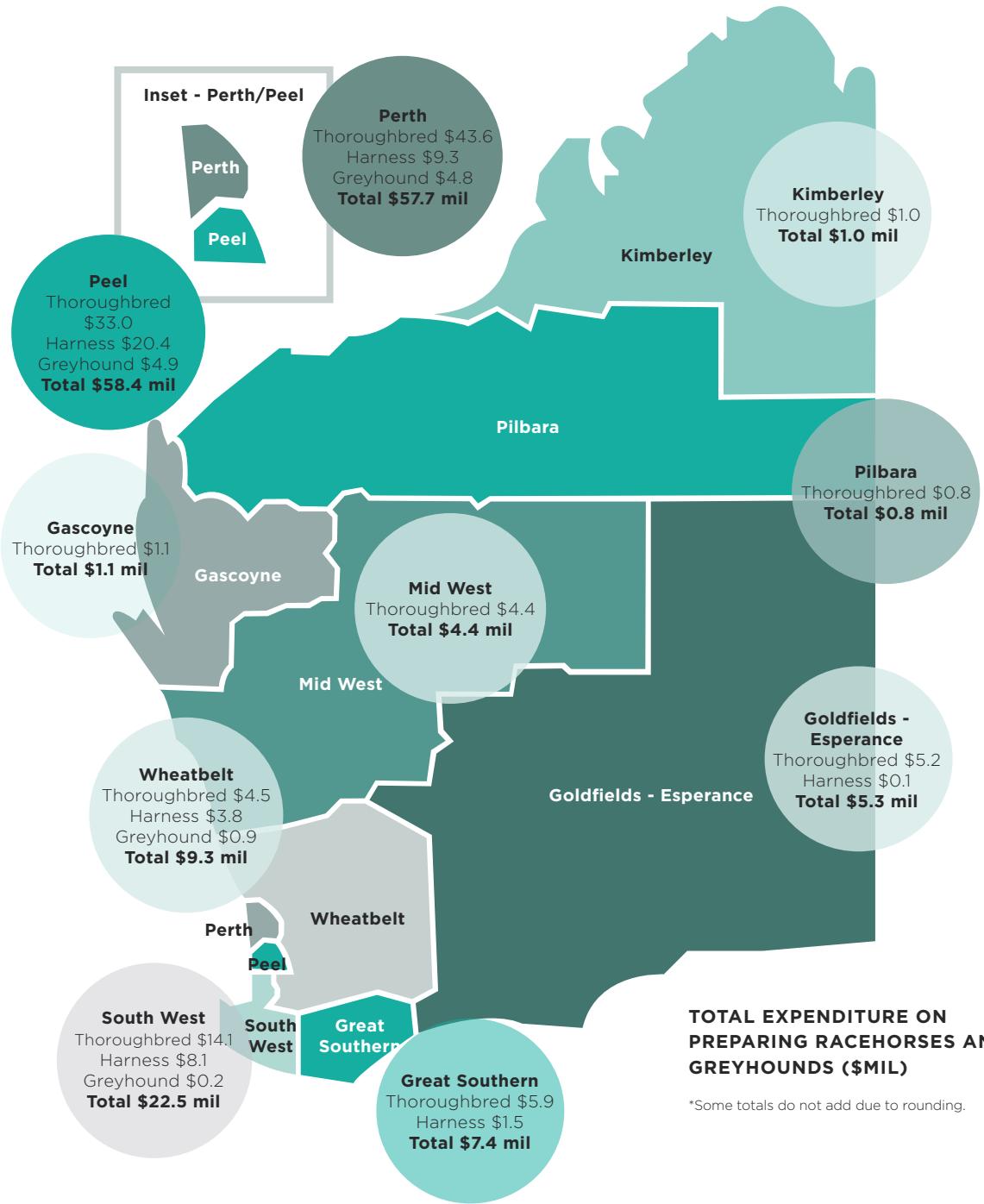


## Training

### NUMBER OF LICENSED TRAINERS

Trainers play an integral role in the racing 'service' industry. They employ the assistance of a variety of both skilled and unskilled labour in delivering their service. In particular, stable staff, track riders, drivers, farriers and vets are employed or contracted by trainers as part of the process of preparing racehorses and greyhounds. Training services generally incorporate pre and race training, trialling and raceday management of a racehorse or greyhound. Trainers' income is mostly generated through training fees charged to owners and a percentage of prize money won.

During the 2018/19 racing season, there were more than 1,140 horse and greyhound trainers providing services to owners in the Western Australian racing industry. Trainers also employ close to 1,700 stable employees to assist with the preparation of their horses or greyhounds for racing. For many of these people, the employment opportunities offered by trainers, utilise skills that are not easily transferrable to other employment sectors. More than 62% of these jobs are sustained within regional areas of Western Australia.



Cost of preparing  
racehorses and  
greyhounds

**In 2018/19,  
owners of  
racehorses and  
greyhounds  
trained in  
Western  
Australia spent  
almost  
\$168 million**

The expenditure figures outlined in this section have been derived through a combination of industry level consultation and surveying of a sample of owners and trainers in Western Australia. The analysis of the expenditure on the preparation of racehorses and greyhounds includes items such as training fees, insurance, vitamins and supplements, veterinarian fees, gear hire/purchase and racing/trialling fees, amongst others.

Training fees often cover a proportion of the expenditure incurred by the owner in the preparation of their horse/greyhound, however there are a number of expenses that are either billed separately, or borne separately by owners (particularly in thoroughbred and harness racing). As such, only using the training fees as a measure of the cost of production, would underestimate the true impact.

The arrangements between greyhound owners and trainers are different to their thoroughbred and harness counterparts. Greyhound owners and trainers employ a number of different payment structures, the most popular being where the trainer retains 50% of stakemoney and forgoes any training fee. In this case, it is important that all greyhound trainer expenditure is captured to determine direct expenditure.

**Generally, the involvement of owners in the industry delivers economic impacts through expenditure on the following items:**

**Items contained within the trainers accounts (whilst animal is in training)**

**EXPENDITURE ITEM:**

- + Training fees
- + Farriers
- + Feed & supplements
- + Veterinary bills (minor)
- + Transport costs
- + Track fees

**Items covered by owners directly (not generally included in trainer accounts)**

**EXPENDITURE ITEM:**

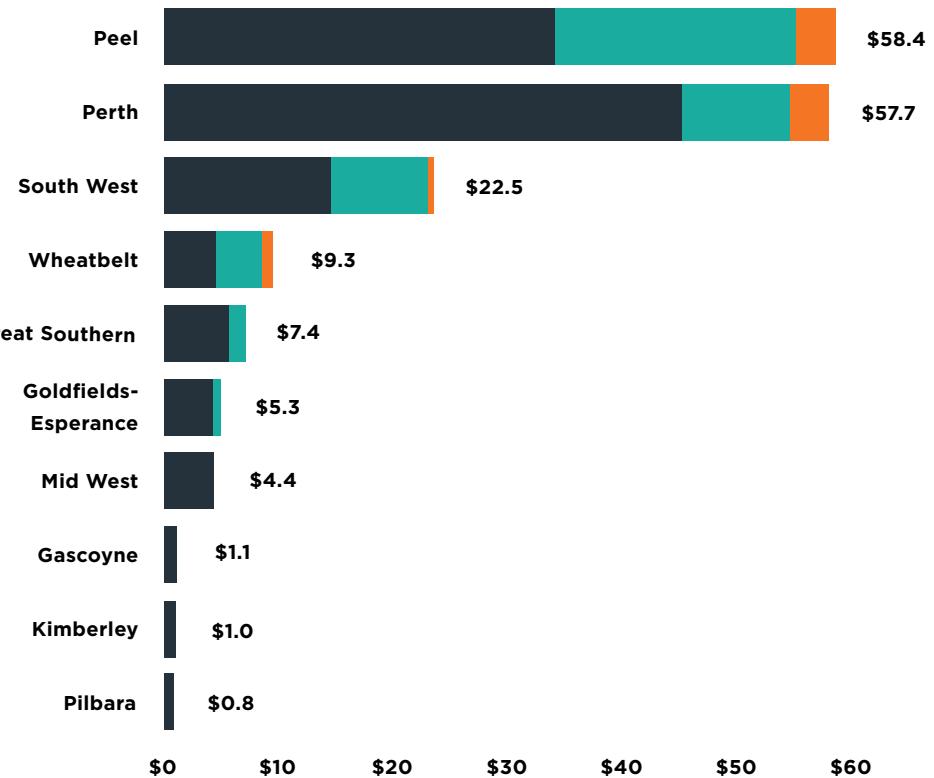
- + Insurance
- + Agistment/spelling
- + Registration fees
- + Breaking-in/pre-training/gelding
- + Entertainment
- + Accommodation
- + Trophies & prints

The chart opposite illustrates the total expenditure generated in the preparation of racehorses and greyhounds in each region.

Almost 35% of this expenditure occurs in Peel, with Perth (34.4%) and the South West region (13.4%) the net most significant. Overall, 65.6% of expenditure by racehorse and greyhound owners occurs in regional areas of WA.



**EXPENDITURE ON PREPARING RACEHORSES AND GREYHOUNDS FOR RACING (\$MIL) - THREE CODES COMBINED**





# Racing clubs in Western Australia

## Thoroughbred

### GASCOYNE

- + Carnarvon Race Club (Inc)
- + Eastern Gascoyne Racing Club
- + Junction Race Club

### GOLDFIELDS-ESPERANCE

- + Coolgardie Racing Club
- + Esperance Bay Turf Club
- + Kalgoorlie - Boulder Racing Club
- + Laverton Racing Club
- + Leinster Race Club (Inc)
- + Leonora Racing Club (Inc)
- + Norseman Turf Club

### GREAT SOUTHERN

- + Albany Racing Club
- + Kojonup Race Club
- + Mt Barker Turf Club (Inc)
- + Pingrup Race Club

### KIMBERLEY

- + Broome Turf Club
- + Kununurra Race Club
- + West Kimberley Turf Club (Derby)
- + Wyndham Turf Club

### MID WEST

- + Dongara - Irwin Race Club
- + Geraldton Turf Club
- + Meekatharra Racing Club
- + Mingenew Turf Club
- + Mt Magnet Race Club
- + Yalgoo Jockey Club

### PEEL

- + Pinjarra Race Club

### PERTH

- + Perth Racing

### PILBARA

- + East Pilbara Race Club (Newman)
- + Marble Bar Amateur Race Club

- + Nor-West Jockey Club (Roebourne)

- + Port Hedland Turf Club

### SOUTH WEST

- + Bunbury Turf Club
- + Collie Race Club (Inc)

### WHEATBELT

- + Moora Race Club
- + Narrogin Race & Pace (Inc)
- + Northam Race Club (Inc)
- + Toodyay Racing Club (Inc)
- + York Racing (Inc)

### Harness

### GREAT SOUTHERN

- + Albany Harness Racing Club

### PEEL

- + Pinjarra Harness Racing Club (Inc)
- + Williams Harness Racing Club (Inc)

### PERTH

- + Gloucester Park Harness Racing

### SOUTH WEST

- + Bridgetown Harness Racing Club
- + Bunbury Trotting Club
- + Busselton Trotting Club
- + Collie Harness Racing Club

### WHEATBELT

- + Central Wheatbelt Harness Racing Club
- + Narrogin Race & Pace (Inc)
- + Northam Harness Racing Club (Inc)
- + Wagin Trotting Club (Inc)

### Greyhound

### PERTH

- + WA Greyhound Racing Association



**50 racing clubs** in Western Australia host more than **850 race meetings annually**.



THOROUGHBRED CLUBS



HARNESS CLUBS



GREYHOUND CLUBS

#### NUMBER OF RACING CLUBS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	3			3
Goldfields-Esperance	7			7
Great Southern	4	1		5
Kimberley	4			4
Mid West	6			6
Peel	1	2		3
Pilbara	4			4
South West	2	4		6
Wheatbelt	5	4		9
<b>Total Regional</b>	<b>36</b>	<b>11</b>		<b>47</b>
Perth	1	1	1	3
<b>Total</b>	<b>37</b>	<b>12</b>	<b>1</b>	<b>50</b>

#### NUMBER OF RACETRACKS

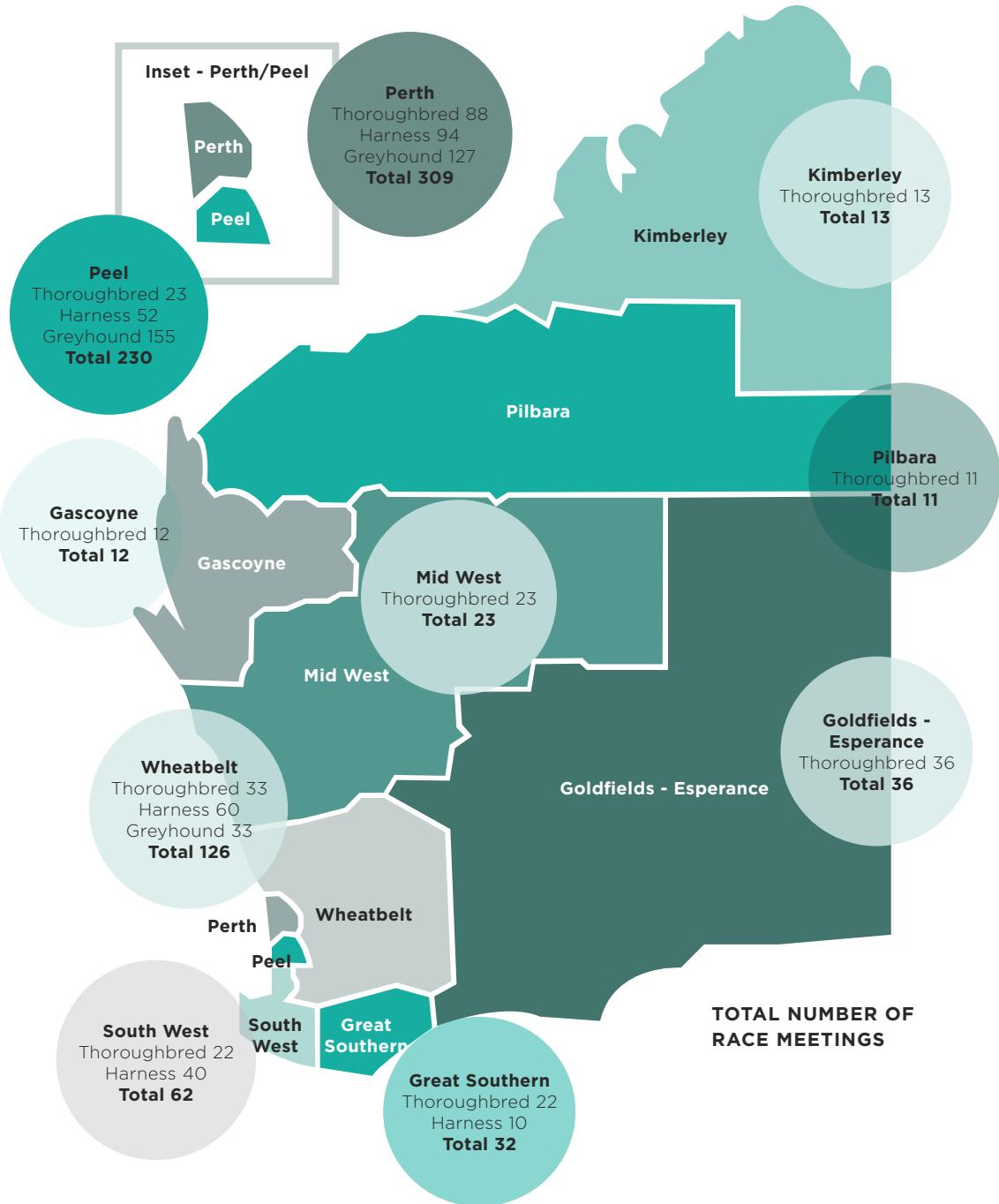
	Thoroughbred	Harness	Greyhound	Total
Gascoyne	3			3
Goldfields-Esperance	6			6
Great Southern	4	1		5
Kimberley	4			4
Mid West	6			6
Peel	1	2	1	4
Pilbara	4			4
South West	2	4		6
Wheatbelt	5	4	1	10
<b>Total Regional</b>	<b>35</b>	<b>11</b>	<b>2</b>	<b>48</b>
Perth	2	1	1	4
<b>Total</b>	<b>37</b>	<b>12</b>	<b>3</b>	<b>52</b>

#### TOTAL NUMBER OF RACE MEETINGS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	12			12
Goldfields-Esperance	36			36
Great Southern	22	10		32
Kimberley	13			13
Mid West	23			23
Peel	23	52	155	230
Pilbara	11			11
South West	22	40		62
Wheatbelt	33	60	33	126
<b>Total Regional</b>	<b>195</b>	<b>162</b>	<b>188</b>	<b>545</b>
Perth	88	94	127	309
<b>Total</b>	<b>283</b>	<b>256</b>	<b>315</b>	<b>854</b>

#### TOTAL NUMBER OF RACES

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	80			80
Goldfields-Esperance	246			246
Great Southern	161	88		249
Kimberley	88			88
Mid West	170			170
Peel	192	440	1,723	2,355
Pilbara	70			70
South West	175	317		492
Wheatbelt	254	503	368	1,125
<b>Total Regional</b>	<b>1,436</b>	<b>1,348</b>	<b>2,091</b>	<b>4,875</b>
Perth	704	859	1,414	2,977
<b>Total</b>	<b>2,140</b>	<b>2,207</b>	<b>3,505</b>	<b>7,852</b>



In 2018/19 there were  
**854 thoroughbred,  
harness and greyhound**  
 race meetings held in  
**Western Australia.**  
 The majority of these  
 race meetings (**63.8%**)  
**were held in regional**  
**parts of the State.**



There are 50 racing clubs, racing at 52 racetracks, across the three codes in Western Australia. In 2018/19, these racing clubs were responsible for hosting 854 race meetings. The following table illustrates the most active regions, in terms of race meetings, within each code:

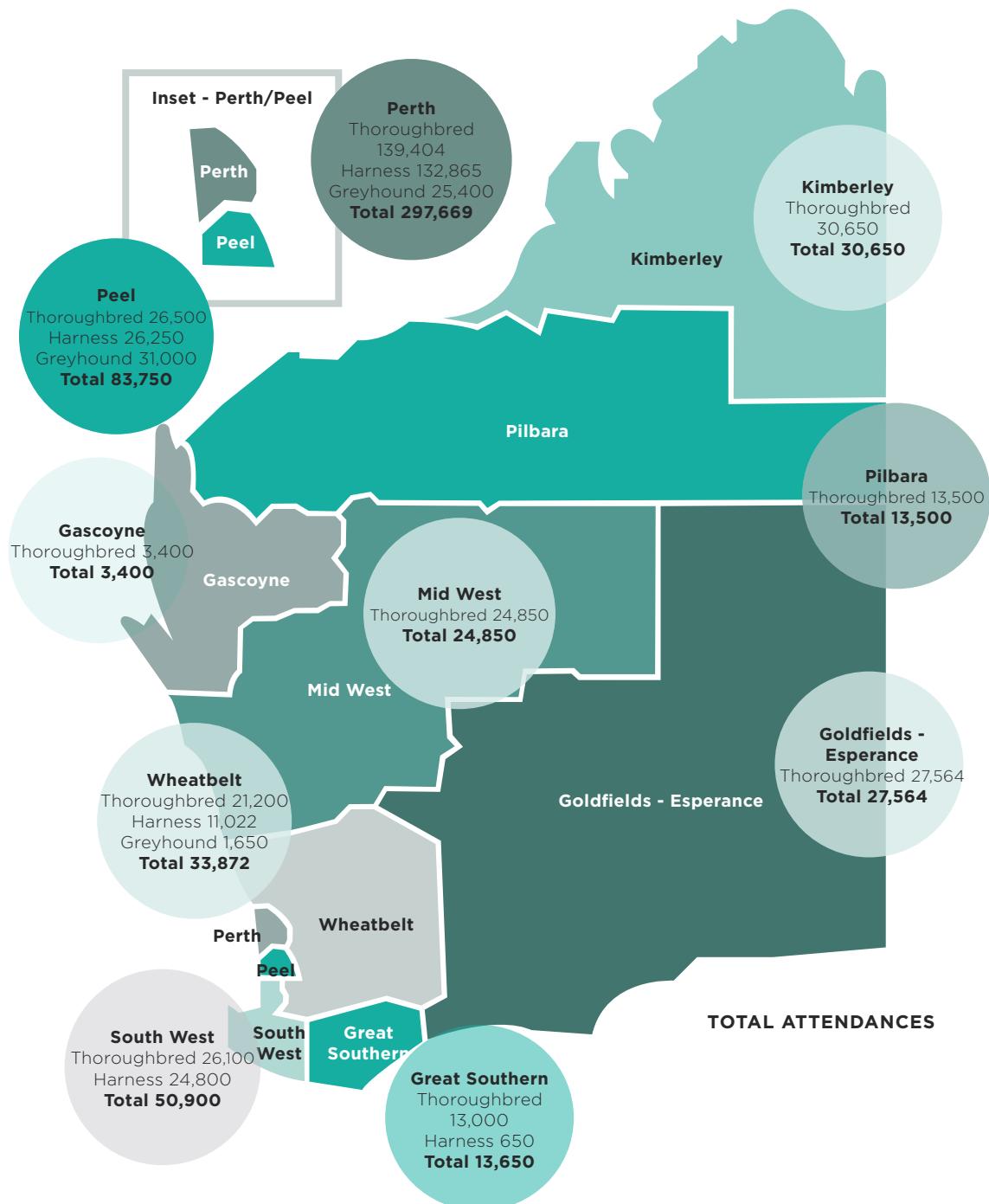
#### NUMBER OF RACE MEETINGS HELD IN WA (TOP 3 REGIONS)

Thoroughbred	Harness	Greyhound
Perth - 88	Perth - 94	Peel - 155
Goldfields-Esperance - 36	Wheatbelt - 60	Perth - 127
Wheatbelt - 33	Peel - 52	Wheatbelt - 33

In addition to hosting race meetings, a number of racing clubs also hold trials for the purposes of providing opportunities for horses to prepare under race-like conditions. Racing clubs also provide an important social community for their members. The table (below) illustrates that there are 8,450 members of racing clubs in Western Australia.

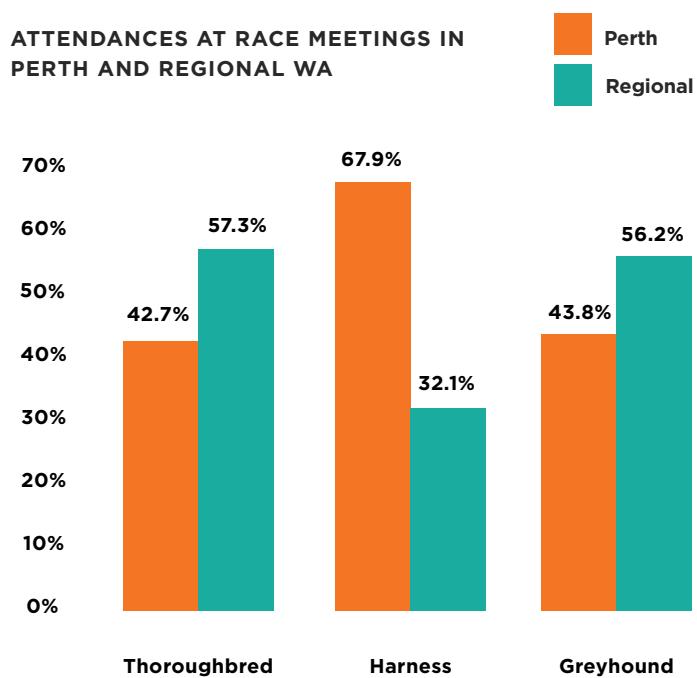
#### NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	30			30
Goldfields-Esperance	970			970
Great Southern	516	66		582
Kimberley	808			808
Mid West	792			785
Peel	350	205		555
Pilbara	730			730
South West	405	484		889
Wheatbelt	423	201		624
Total Regional	5,024	956		5,980
Perth	2,071	389	10	2,470
<b>Total</b>	<b>7,095</b>	<b>1,345</b>	<b>10</b>	<b>8,450</b>



During the 2018/19 racing season, thoroughbred, harness and greyhound race meetings in WA attracted attendances of nearly 580,000. The largest regions in terms of total attendance (three codes) are Perth (297,669), Peel (83,750) and the South West (50,900). The following chart illustrates the breakdown of attendances in WA for each code of racing:

**ATTENDANCES AT RACE MEETINGS IN PERTH AND REGIONAL WA**



# Expenditure Generated by Racing's Customers

In 2018/19 it is estimated that the total expenditure generated by racing customers was \$87.5 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 race day expenditure by customers (spending on on-course products, as well as yields from membership and sponsorship)
- Off-course race day 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-race days 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.

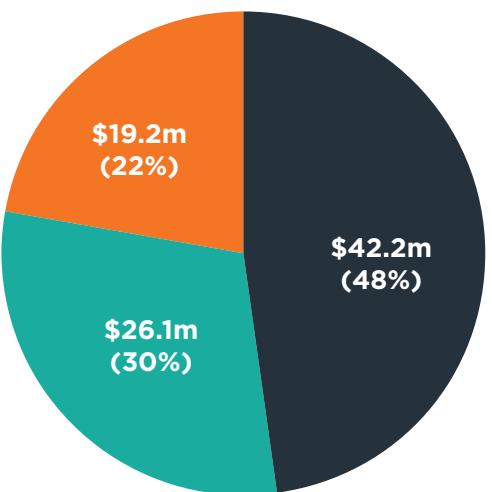
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. Major racing events have long proven their ability to extend the generation of economic stimulus into a broader cross-section of the local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

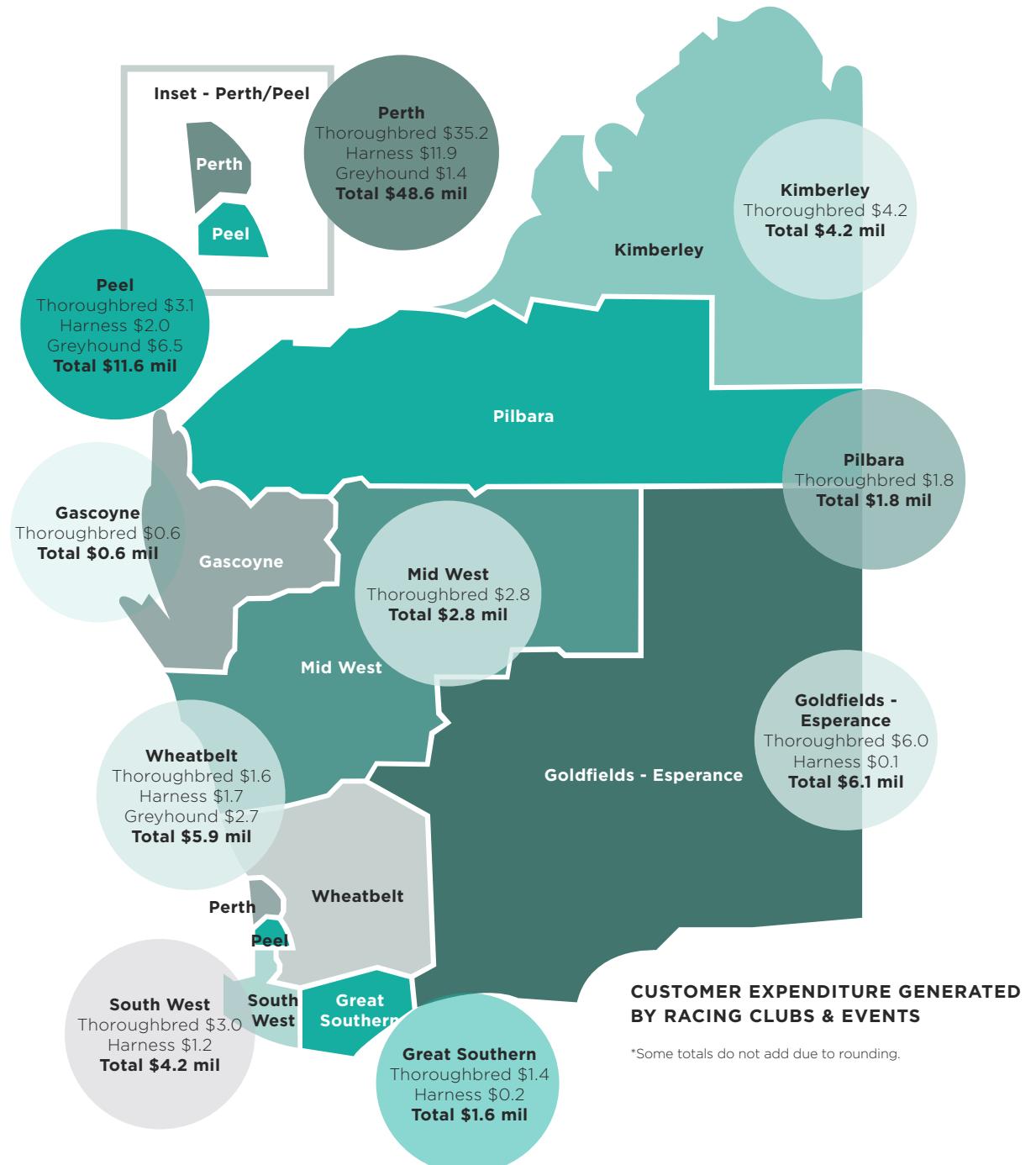
Whilst wagering is the largest component of customer spend, it is analysed in the section relating to wagering.

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





# Expenditure by the Principal Racing Authority and Clubs

In 2018/19, RWWA and the 50 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of almost \$451.1 million in Western Australia. This represents the expenditure incurred by these organisations in maintaining tracks, running race meetings, administration, marketing, cost of goods and prizemoney.

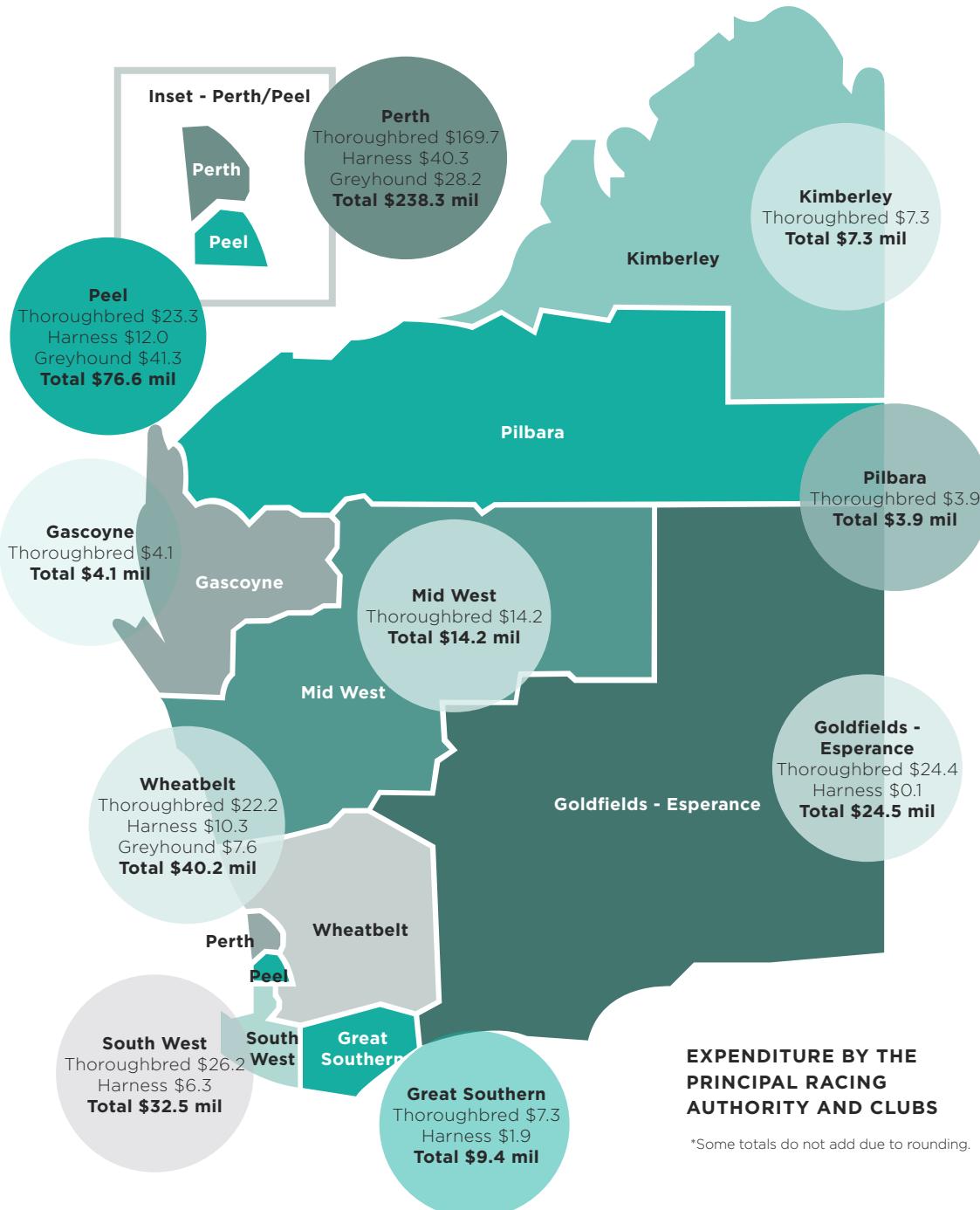
The majority of expenditure generated by the PRA and racing clubs is funded by racing customers. This includes:

- ✚ 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 and facilities maintenance
- ✚ Staff and personnel
- ✚ Cost of goods
- ✚ Marketing and promotions
- ✚ Utilities

Over 52% (\$238.3 million) of this expenditure impact occurred in Perth – 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. Peel (17.0%) generates the next most significant impact with the remainder spread around the state.



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

- ✚ Wagering, by Western Australian residents, on Western Australian Racing product through the WATAB (both on-course and off-course betting). The net wagering revenue (punter losses) remain in Western Australia and are used to fund racing, wagering operations and to pay wagering taxes to the Western Australian Government.
- ✚ Wagering on racing product through Interstate/Overseas TAB's. As a result of this wagering activity by non-WA residents, product fees are paid to the Western Australian racing industry for the use of their product.

**The following table illustrates the total wagering turnover generated on Western Australian racing product:**

(\$MIL)	Thoroughbred	Harness	Greyhound	Total
Wagering through WATAB	\$230.5	\$53.7	\$57.5	\$341.7
Wagering on Interstate/Overseas TAB's	\$567.5	\$122.0	\$156.4	\$845.9
Wagering by WA residents with Non-TAB WSP's	\$95.6	\$22.4	\$35.7	\$153.7
Wagering by Interstate/Overseas Residents with Non-TAB WSP's	\$860.3	\$201.6	\$321.7	\$1,383.6
<b>Total Wagering on WA Racing Product</b>	<b>\$1,753.9</b>	<b>\$399.7</b>	<b>\$571.3</b>	<b>\$2,724.9</b>



# Community and Social Benefits

Thoroughbred, harness and greyhound racing in Western Australia play an important role in the development and preservation of social and community benefits throughout rural, regional and metropolitan areas of the state. The majority of these social impacts are initiated through club activities, both on race days and non-race days, as well as the partnerships they form with many community organisations. This contribution to community social benefit enhances both individual and community wellbeing throughout the regions where racing exists.

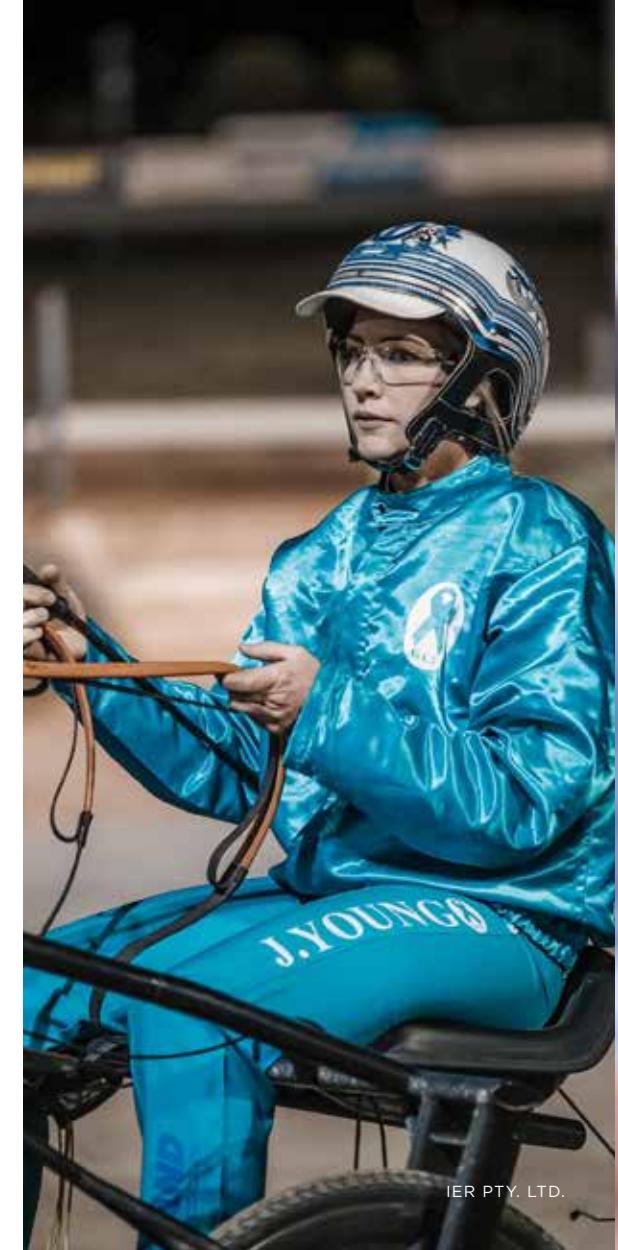
The economic activity generated by the Western Australian racing industry complements the social impacts, particularly in regional areas where racing events and facilities foster social cohesion and provide benefits for a broad range of individuals and community organisations. Racing and non-racing events attract community members, independent of socio-economic status, age or gender. This is highlighted within the racing industry throughout Western Australia, 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.

The sport of racing also demonstrates a rich cultural significance in terms of its history and heritage throughout Western Australia. The first recorded race meeting was held in Western Australia at Fremantle on 2 October 1833, although it was not until 1852 that the controlling body, The Western Australian Turf Club, was formed. The establishment of the Western Australian Trotting Association (WATA) occurred in September 1910 and by 1972 the Greyhound Racing Control Act was passed and the Greyhound Racing Control Board was formed to conduct greyhound racing in Western Australia.

The historical elements of all racetracks throughout the state are an important part of the fabric of many local communities. These tracks and clubs are the focal point for the achievements of some of Western Australia's great sportsmen and sportswomen, racing identities, horses and greyhounds.

The importance of racing clubs and tracks extends beyond simply those with an interest in racing. They are valuable community assets – particularly in regional parts of the State. 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 and 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, race day/night customers and other racing club event attendees

**+ Employment**

Creating a major source of employment and a variety of career opportunities for Western Australian residents

**+ Environment**

Adoption of many environmentally friendly practices that support Government and community expectations relating to the protection of the Western Australian environment



**Racing plays an important role in fostering a sense of worth and belonging to more than 3,200 volunteers**

#### **COMMUNITY AND SOCIAL BENEFITS**

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

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

- + Close to 200 community organisations or charities are assisted financially by racing clubs
- + Close to 70 community organisations share racing club facilities and resources
- + Racing clubs currently engage more than 900 volunteers who assist in various club, kindred body and industry related roles
- + Close to 9,500 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 3,228 people who provide volunteer time and services to racing clubs and participants. 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. selling raffle tickets)
- + Timekeepers, judges and barrier attendants
- + Preparing and maintaining the track and grounds
- + Administration (e.g. raceday secretary)
- + Plumbing and electrical work
- + Hospitality for attendees and officials (food and beverages)
- + Racing operations (parking, gate attendants, selling racebooks etc.)

- + Cleaning and gardening duties
- + Supporting trainers, breeders and other industry participants
- + Conducting horse and greyhound trials
- + Medical services

IER found that racing clubs financially assist and support 192 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 activities such 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:**

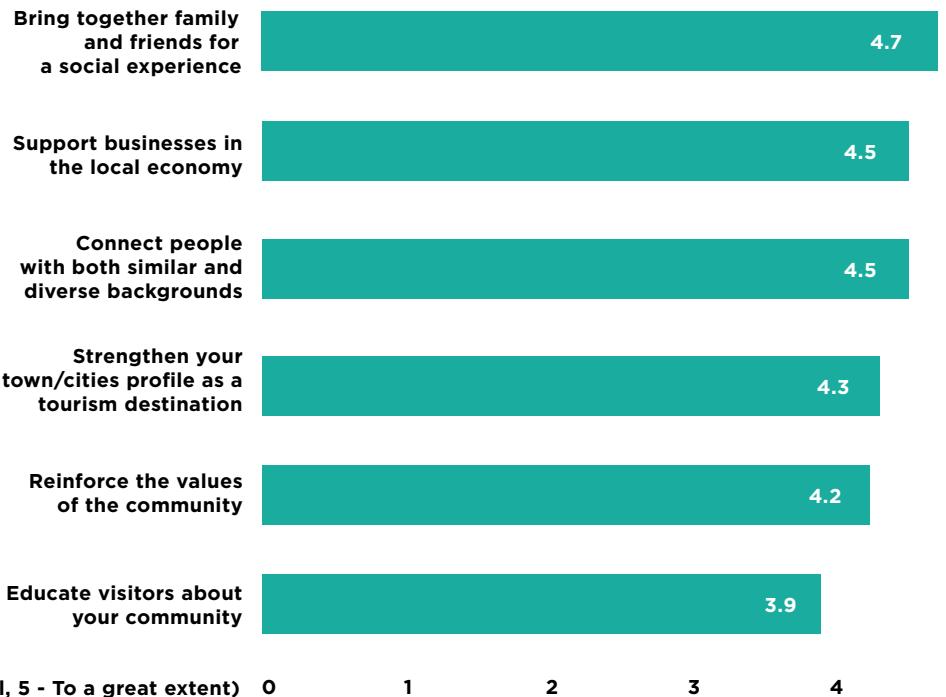
- + Health-charities (Men's Shed, Ovarian Cancer Research, Motor Neurone Disease Society, White Ribbon)
- + Children's charities (Ronald McDonald House, Give Me 5 for Kids)
- + Sporting clubs (Football, Fishing, Netball, Soccer, Karate, Cricket, Sports Associations, Jockey's Association, Surf Life Saving)
- + Schools, colleges and libraries
- + Rotary, Lions, Variety WA and Apex
- + Hospitals and health organisations
- + RSL
- + General charities (Salvation Army, Action Groups, Police Legacy, Neighborhood Centres, Lifeline WA, Wheatbelt Women's Health Hub)
- + Emergency services, bushfire appeals
- + Regional show societies
- + Riding for the Disabled
- + Rural Fire Services and St. Johns Ambulance
- + Community churches



The economic research in this study clearly demonstrates how racing supports businesses in the local economy, from both the production and preparation of racing horses and greyhounds through to consumer spending. In addition to this, attendee research conducted at many metropolitan and regional racing events supports the concept of 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. This is 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' (4.5) and to 'connect people with both similar and diverse backgrounds' (4.5). These indicators illustrate the position that racing clubs see themselves as holding within the fabric of the local community.

#### COMMUNITY ENGAGEMENT WITH WESTERN AUSTRALIAN RACING



## SUPPORTING FAMILY RELATIONSHIPS

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. 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 only host one race meeting each year. 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 race days have an underlying 'back to' theme, where people who once resided in that region make the journey back to see family members and friends.

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:

- ✚ Close to 50% of clubs offer special discounts for family group attendance and all clubs have free entry for children
- ✚ 100% of clubs offer activities and events for families and children on special racedays

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

- ✚ Free fruit for kids
- ✚ Kids' Big Day Out
- ✚ Petting zoos
- ✚ Free pony rides and bull riding
- ✚ Climbing walls
- ✚ Kids' Fashions on the Field
- ✚ Face painting, live music and clowns
- ✚ Pony trot exhibition races
- ✚ Silent discos
- ✚ Mini trots
- ✚ Playgrounds
- ✚ Sports giveaways
- ✚ Kid's running races
- ✚ Water slides
- ✚ Train rides
- ✚ Hobby horse races
- ✚ Basketball and gymnastics
- ✚ Stage shows
- ✚ Obstacle course rides
- ✚ Easter egg hunts
- ✚ Balloon artists



## 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 65 organisations which share facilities and resources with clubs include:**

- Variety and Rotary
- Show societies (regional agricultural societies) and equine events (e.g. pony clubs)
- Shire councils
- Charities e.g. Telethon
- St John Ambulance
- Schools (day care, P&C's, primary and high schools)
- Machine field days
- Riding for the Disabled
- Sporting clubs (golf, sport and recreation centres, archery, cricket, badminton, football, gymkhana, hockey, netball association, tennis, camp)
- Other codes of racing







## EDUCATION AND TRAINING

Education and training are vitally important for the continued growth and success of all three codes of racing across Western Australia. 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 throughout the state.

RWWA has established 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. There are a broad range of organisations which deliver variety of qualifications including certificates and diplomas to meet the needs of industry participants. Courses at the forefront of this offering include racing administration, breeding, horse educator/breaker, foreman, jockey/driver apprenticeships, track riding, horse and greyhound training and stablehand/strapper. These opportunities provide practical access and theoretical knowledge to many aspects of professional racing across the state.

Participants in the industry have access to RWWA's Racing Industry Training. The objectives of the training centre are to provide training to apprentice jockeys and harness drivers, provide race day and mentoring support to apprentice jockeys and assist interested parties with career advice.

Racing Industry Training also assists schools by providing meaningful work experience in the racing, harness and greyhound industries and supports schools and other training establishments to provide vocational training and school visits to the races and stables.

Furthermore, Racing Industry Training also attends career expos and other promotions where practicable to promote careers in racing.

The racing industry has the ability to offer modestly skilled and underprivileged members of the community the opportunity to involve themselves in meaningful pursuits. Many stables, kennels and breeding farms are supported by volunteers and employees on the minimum wage - their input not only provides valuable support to the trainers and breeders in Western Australia, but also provides a sense of pride, confidence and achievement.

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

- ✚ Close to 25% of clubs have staff members participating in further education, career development and training programs each year
- ✚ Close to 25% of clubs have partnerships with primary, secondary, trade and tertiary institutions
- ✚ One in every three clubs has placements available for work experience students

## PROMOTING HEALTHY RACING CLUB ENVIRONMENTS

Racing clubs in Western Australia have developed and applied a number of initiatives to improve the race day and non-race day 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 and practices in place to encourage responsible consumption of alcohol
- ✚ No racing clubs in Western Australia sells cigarettes or tobacco
- ✚ Over 80% of all clubs have policies and practices in place to reduce the consumption of tobacco
- ✚ 100% of clubs have access to shaded areas for attendees
- ✚ 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-race day 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 Western Australian environment. Racing clubs are actively implementing policies and

practices in key areas that impact positively on the environment. Over 60% of all clubs have policies in place to save water and re-use or recycle water.

### Examples include:

- ✚ Water Wise signage
- ✚ Use of bore water
- ✚ Timed irrigation and sprinkler systems
- ✚ Watering of facilities at night
- ✚ Rain storage tanks
- ✚ Development of water efficiency management plans
- ✚ Water Efficient Management plans with the Department of Water



## CLUB HISTORY AND HERITAGE

Thoroughbred, harness and greyhound racing in Western Australia has a long and celebrated history. The rich cultural, heritage and social significance of the sport has been recorded for more than 180 years. The historical elements of racecourses in Western Australia are an important part of the fabric of many local communities and many clubs actively promote past sporting participants, racing identities and special anniversaries.

Western Australian thoroughbred racing began in Fremantle on 2 October 1833, although it was not until 1852 that the controlling body, The Western Australian Turf Club, was formed. Western Australian thoroughbred racing has provided some of Australia's most recognised national icons, including J J Kelly, Angus Armanasco, Damian Oliver and Sir Ernest Lee Steere. The likes of Champion Western Australian horses - Northerly, Eurythmic and Placid Arc - have also become entrenched in the hearts and minds of many Australians.

James Brennan marked the start of organised harness racing in Western Australia when he called a public meeting that led to the formation of the Western Australian Trotting Association (WATA) in September 1910. Prior to this, the only regular harness racing was conducted at the annual Royal Perth Show.

James Brennan revived a concept of Dominion style championship racing between Australian and New Zealand standardbreds. The visionary Western Australian chairman promoted the first Australasian Trotting Championship in Perth in 1925. This later became the modern Inter Dominion Championships with the first series conducted in Perth in 1936 in recognition of the exemplary efforts of J.P. Stratton, president of the Western Australian Trotting Association, who had lobbied for such a series with great passion.

Harness racing in Western Australia has provided some of the sport's top names including the Kersley family, Gary Hall Snr and trotters and pacers such as Beau Don, Mount Eden, Village Kid and Preux Chevalier.

Greyhound race meetings became popular during the 1970's, in particular in venues surrounding Perth. In 1972 the Greyhound Racing Control Act was passed through the Parliament of Western Australia and the Greyhound Racing Control Board was formed. Greyhound racing in Western Australia has provided some of Australia's most iconic greyhounds including Bright Idea and Miata, with the latter winning 42 races from 51 starts, amassing over \$700,000 in prize money.

Close to 75% of racing clubs throughout Western Australia take an active approach to promote the history and heritage 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
- ✚ Integration with heritage precincts
- ✚ Publishing and contributions to history books written about the clubs (e.g. 100 Years of Racing in the Eastern Districts or 1000th race meeting in Northam)
- ✚ Promoting club and feature race anniversaries
- ✚ Promotion of history through on-course museums
- ✚ Restoration of memorabilia
- ✚ Displaying racing memorabilia through regional shires
- ✚ Use of social media to promote club history



**Participants, horses and greyhounds are acknowledged and celebrated through the Racing Industry Hall of Fame**



### CASE STUDY: COMMUNITY TAB SUPPORTS HORSEPOWER AUSTRALIA DURING COVID-19 RESTRICTIONS

Community TAB has driven Racing and Wagering Western Australia's commitment to corporate social responsibility since its inception in 2014, forming partnerships with a range of not-for-profit organisations to assist them in continuing to operate within their community. Community TAB is a major partner of HorsePower Australia, who assist 280 children and 160 adults with disabilities to enjoy safe, fun and therapeutic recreational riding. Each year Community TAB provides \$80,000 of financial support to HorsePower Australia to support major fundraising events, subsidise costs for participants, support upkeep of their therapy horses and assist their 14 centres throughout the state.

The restrictions of COVID-19 meant that all HorsePower Australia centres had to close the gates, however their 125 specially trained

assistance horses and ponies still required feed, hay, essential farrier, vet and dentist visits to ensure their health and wellbeing during this crisis.

HorsePower Australia Executive Officer Kelly Mansfield stated at the time, "the impact this crisis will have on some of our participants, who gain so much from attending our programs, is huge – both physically and mentally. It has never been so clear just how much the time they spend with our horses helps. In a bid to ensure the resilience of our centres, so programs can return as quickly as possible, we need to keep our horses and ponies fed, healthy and able to continue to support people with diversabilities when this crisis is over."

When HorsePower Australia started their 'Help our Horses' emergency campaign during this period, Community TAB immediately responded by matching community donations up to \$5,000 to ensure the ongoing viability of the work of HorsePower Australia.



### CASE STUDY: TEAM TEAL RAISING FUNDS FOR OVARIAN CANCER RESEARCH

The Team Teal campaign was created by Duncan McPherson OAM who lost his wife Lyn to ovarian cancer in 2010. It raises funds for the Australia New Zealand Gynaecological Oncology Group (ANZGOG) via WomenCan Fundraising for ovarian cancer research. Team Teal is a national six-week campaign, running from February to March, whereby reinswomen wear teal-coloured silks and pants to raise awareness of ovarian cancer. Racing and Wagering Western Australia's Community TAB supported the Western Australian Team Teal cohort with a \$200 donation every time a female reinswoman won a race during the campaign, raising \$7,400 from 37 wins in 2020. In total \$33,000 has been raised in Western Australia from harness racegoers, clubs and the wider community over recent years.

The Team Teal initiative provides much-needed funds to the WomenCan Supportive Research Nurse Grant program helping women take part

in clinical trials that offer new treatments, as well as the Survivors Teaching Students' program bringing the faces and voices of ovarian cancer survivors and carers into the classrooms of health and medical students to educate them about women's diagnosis and their lived experiences.

Jocelyn Young, 26, and Deni Roberts, 24, were the 2020 ambassadors proudly representing Western Australia's effort of the campaign. Deni said she was grateful for the opportunity to take part in the Team Teal initiative. "This campaign is a fantastic example of women coming together to support other women and I'm very excited to be part of it," she said. "It is important for me to use this campaign to spread awareness of ovarian cancer and the prevention testing that is already available, so that we can reduce the number of women who have to go through the tough battle of dealing with it."



### CASE STUDY: BUNBURY CUP RACEGOERS SUPPORT RIDING FOR THE DISABLED

The port city of Bunbury, 180km south of Perth, bustles every March when 6,000 racegoers attend the Bunbury Cup. Whilst their minds are on the field their hearts are open as they contribute to the collection tins rattling at the gate.

Dedicated volunteers and staff from Riding for the Disabled (RDA) South West have been onboard to rattle the collection tins and over the last five years have raised almost \$30,000. Funds raised on the day are matched up to \$5,000 by Racing and Wagering Western Australia (RWWA)'s Community TAB program.

RDA helps people with disabilities to experience enjoyment, challenge and a sense of achievement through participation in equestrian activities to improve their quality of life, attain personal goals and develop life skills. RDA run a range of equestrian activities including structured riding classes, recreational horse riding, hippotherapy, mounted games/competitive riding, vaulting, carriage driving and dressage.

The funds will assist in alleviating the operating costs for the RDA centres as they need to feed and house suitable horses, train volunteer helpers, provide accredited RDA coaches and riding and safety equipment.

CEO of the Bunbury Turf Club, Alex Doble said, "We are delighted to have an ongoing partnership with RDA on Cup Day. It's a great opportunity to engage with the local community and support a local charity."

In addition to the RDA South West and Bunbury Cup initiative the RWWA's Community TAB program along with local race clubs has raised over \$700,000 for community charities since its inception in 2014. The impact of the program is particularly beneficial for regional communities with 48 out of the 51 of the Western Australian race clubs in regional locations. Beneficiaries of the program have included Men's Shed, Lions Club, Royal Flying Doctor Service, local St John Ambulance sub centres, Muscular Dystrophy WA, Variety WA, Motor Neuron Disease WA and local sporting groups.

### CASE STUDY: GREYHOUNDS AS PETS WA VOLUNTEERS FIND THEIR CAREER PATHS

Greyhounds as Pets (GAP) WA is a program of Racing and Wagering Western Australia (RWWA) with the mission to promote, encourage and facilitate greyhound pet ownership to the wider community by the provision of healthy and behaviourally sound greyhounds to homes throughout Western Australia. In FY2019, GAP facilitated 203 greyhound adoptions.

GAP prepares greyhounds for adoption into the community once their racing careers are over. The program reflects the industry's commitment to looking after their retired animals and promoting the positive aspects of greyhounds in the community.

GAP engages a team of volunteers to assist in preparing the greyhounds to transition to a new home. Vaughn Armstrong initially volunteered at GAP for two months to complete requirements for his Certificate II in Animal Studies at South Metropolitan TAFE and enjoyed it so much he stayed on as a volunteer. He volunteers for three hours once a week taking the greyhounds for walks and assisting with assessments to ensure they are ready for their new family. Due to the role he undertook at GAP and the encouragement he received Vaughn has set his career path in the animal care industry and will shortly commence a Certificate IV in veterinary nursing.

When Year 10 student Chelsea Willock was looking for options for work experience she knew she wanted to work with animals. After her school-initiated contact with GAP, Chelsea spent eight days walking, playing and feeding the 25 greyhounds that were on-site at the time. "It was so fun and enjoyable" said Chelsea. "I would love to continue to volunteer and am considering becoming a veterinarian."





### CASE STUDY: GRANTS FOR GRASSROOTS SPORTS ORGANISATIONS

Grassroots sports organisations often struggle year on year for basic equipment and facilities, so the impact of funding support to enable increased participation and pride is immense. The Community TAB Sports Grants, administered by Racing and Wagering Western Australia, have assisted greatly by providing more than \$140,000 worth of grants to almost 100 Western Australian sporting clubs in regional and metropolitan communities over a two-year period.

There are many examples of the positive impact of Community TAB Sports Grants in all reaches of the large state of Western Australia.

For the Keralup Aboriginal Basketball Club, in the southern suburbs of Perth, it was the opportunity to purchase indigenous uniforms for team members not only providing financial relief for parents but to encourage and instil pride in participation when players step up to the mainstream competition for the first time.

In the Wheatbelt region of Western Australia, the Tammin Womens Hockey Club received a grant to replace old equipment that Club Secretary Georgie Crane, said "it enabled our club to continue to host games in our home town with

equipment of the appropriate standard necessary for both our own team and our opposition including juniors, to play safely and at a high standard."

Fundraising in small communities can be difficult as Ms Crane stated, "the same sponsors are being asked to support all the different groups within the community, so by receiving this grant we are able to continue to support our local businesses without again asking for financial assistance."

Further inland, the Kalgoorlie Triathlon Club, in the Goldfields, was extremely grateful for a Community TAB Sports Grant which allowed them to proceed with the upgrade of their database and timing system. Kalgoorlie Triathlon Club Treasurer Ryan McNally explained that "to a majority of our members, competing in triathlons is our chance to release from the everyday stresses of life and work towards an end goal and gradually improve, and the upgraded timing systems mean that members will now be able to easily monitor their constant improvement in performance."

To the north of Western Australia in the Pilbara region, a relatively new club Karratha Junior Rugby League, the grant meant the club would be able to grow and build a professional culture through education of its volunteers and new equipment.





### CASE STUDY: SECOND CAREERS FOR RETIRED RACEHORSES

Providing retired racehorses with a quality second career is a key objective of Racing and Wagering Western Australia, which is supported through a raft of initiatives through its Off The Track WA (OTTWA) program. One of these initiatives includes the recently established OTTWA Estate, located in North Dandalup, 60km south of Perth.

The estate is a multi-purpose racehorse welfare facility, with a capacity for up to 40 horses, and is used to facilitate the retraining of retired racehorses through the OTTWA Retraining Program. It also ensures sufficient space is available at all times for any emergency welfare cases, should they arise.

Horses accepted into the OTTWA Estate undergo an assessment upon arrival before being allocated to off-site official retrainers who teach them the necessary skills to transition from the fast-paced world of racing to a second career as a pleasure or performance horse.

Norvic Nightowl NZ, or fondly known as Hoots, an 11 year old black-brown standardbred gelding is one of the first to graduate through the OTTWA Retraining Program. Hoots had 74 career starts throughout New Zealand and Western Australia earning prize money of \$243,328 across his racing career. Hoots undertook retraining with official OTTWA retrainer Bayley Thomas at Lokenzo Park in the outer suburbs of Perth. Hoots' temperament enabled him to make the transition from racing to pleasure riding horse easily. He has now been rehomed with Alison and they are looking forward to sharing their lives together.



Other initiatives of RWWA's OTTWA program to assist retiring racehorses to transition to a second career include:

- ✚ Dedicated OTTWA website, which includes educational resources and a free platform to advertise retired racehorses for sale.
- ✚ Hosting of educational clinics in both metropolitan and regional locations for off the track horses.
- ✚ Sponsoring equestrian events across the state that promote and encourage high participation rates of retired racehorses.
- ✚ OTTWA Passport available to all Western Australian thoroughbred and standardbred horses bred for the purposes of racing to create greater traceability post-racing.



#### CASE STUDY: **LADIES OF PACING WELFARE AWARD**

Bayley Thomas was the winner of the inaugural RWWA Ladies of Pacing Welfare Award in 2020 to recognise an individual who has demonstrated a commitment to the care of retired standardbreds. Here is her journey...

Bayley Thomas in an office job just didn't seem right. Having grown up in a harness racing family, with her first pony at just three years of age, pony club by age eight and having saddle broken her first horse by age 15, the yearning to be outdoors and around horses was strong. So when she was made redundant from the office job she knew exactly where she was going – back to the paddocks.

Bayley established Lokenzo Park in 2017 to retrain and rehome horses post-racing. Retired horses adapt very well to a wide range of new lifestyles from taking trail rides, competing in events such as carriage driving, endurance racing and showing, to becoming therapy horses with the Riding for the Disabled Association (RDA).

As Bayley explains, her approach is to "see what the horses will be the most happiest doing."

The other critical aspect of rehoming is to locate suitable new owners. Bayley spends considerable time ensuring a perfect match, speaking with potential new owners to understand that their abilities and goals are consistent with the horse. Bayley said, "It is of utmost importance to me that horses go to good homes and the right home. I will tell potential owners the good and bad about the horse so there are no surprises when they get it home."

Bayley has also been recognised as an Official Retrainer for RWWA's Off the Track WA Retraining Program, ensuring retired racehorses have the appropriate skillsets and training to transition from racing to new pursuits.

Over the past three years Bayley has successfully connected over 100 horses to new homes and provided them with amazing new lives.



#### CASE STUDY: **LADIES OF CHASING WELFARE AWARD**

Cheryl Isaac's long time commitment to the care of retired greyhounds resulted in her recent winning of the inaugural RWWA Ladies of Chasing Welfare Award in 2020.

Growing up in a family that ran a boarding kennel and grooming parlour she was surrounded by dogs of many breeds, but when she was introduced to a greyhound over 25 years ago, she fell in love. Her first dog was Minstrel, a handsome white and brindle ex-racing dog who took over her couch and there was no turning back from there.

In 2004, she became involved with RWWA's Greyhounds as Pets (GAP), fostering greyhounds whilst they waited to be admitted to the program. The greyhounds are cared for at her home in Perth, becoming part of the family and the furniture, so it's often not easy to let them go. As Cheryl recalls, "one of the hardest to let go was little Jaffa, she was with us for about eight months and pretty much slept on our bed for

that entire time. We really had a close bond so we often refer to her, and say to ourselves, if we could let Jaffa go then we know we can do the same for the next one. Jaffa found a fabulous family to call her own and is living an incredible life."

In recent years Cheryl has been able to step up her involvement as work and life allowed more time to devote to her passion and has successfully rehomed around 30 greyhounds.

Cheryl never stops spreading the word about the wonder and benefits of greyhounds as pets. When she takes her own greyhounds to the local dog friendly café or pub, they are always a conversation starter about the life of greyhounds after racing. Cheryl says, "there have been many times when someone has wanted to take one of our greyhounds home with them, you can see they have an instant connection with people. We hope that the people we meet during these times will consider a greyhound for a pet when the opportunity is right for them."



### CASE STUDY: MARBLE BAR RACE BALL CONNECTING THE COMMUNITY

When your town is founded in 1893, what is one of the first things its citizens should do? Establish a race club along with a Cup Race and ball of course. With only a few years off during the world wars and in 2020 due to the COVID-19 pandemic, the Marble Bar Ball is an historic event and has become the highlight and pride of the town.

The ball is run the night before the Marble Bar Cup attracting upwards of 3,000 people to the small regional centre, with the ball specifically attracting around 220 attendees on the night.

The small community of Marble Bar is very isolated, located in Western Australia's north-west Pilbara region. With limited economic and social opportunities the running of the Marble Bar Cup and ball generates a significant boost to the economy and is the biggest event on the Marble Bar social calendar.

The ball brings together people from the regional centres, remote pastoral station workers, mining workers and indigenous communities in a fun and positive way. It connects communities and

increases the liveability of the region, positively affecting the local residents, small businesses and providing a unique experience for visitors during the event. Not only is this event a great economic boost to the town, it also promotes mental health through its connection to other people in the region, particularly for station workers, who often find themselves working in isolated environments.

Every year, the Marble Bar Ball creates a theme for the evening and chooses a charity to support that aligns with the regional community. In 2019, the Marble Bar Ball raised \$3,500 for Drought Angles in support of Australian farmers facing continuing drought conditions and in 2018, the local community fundraised \$10,000 for Dolly's Dream to raise awareness of the devastating effects of bullying.

Marble Bar Ball traditions include the famous Belle and Beau of the Ball awards for best dressed male and female, and the 'Batting Above Your Weight' award for the couple who is outclassed by their partner.

## REGIONAL SUMMARIES

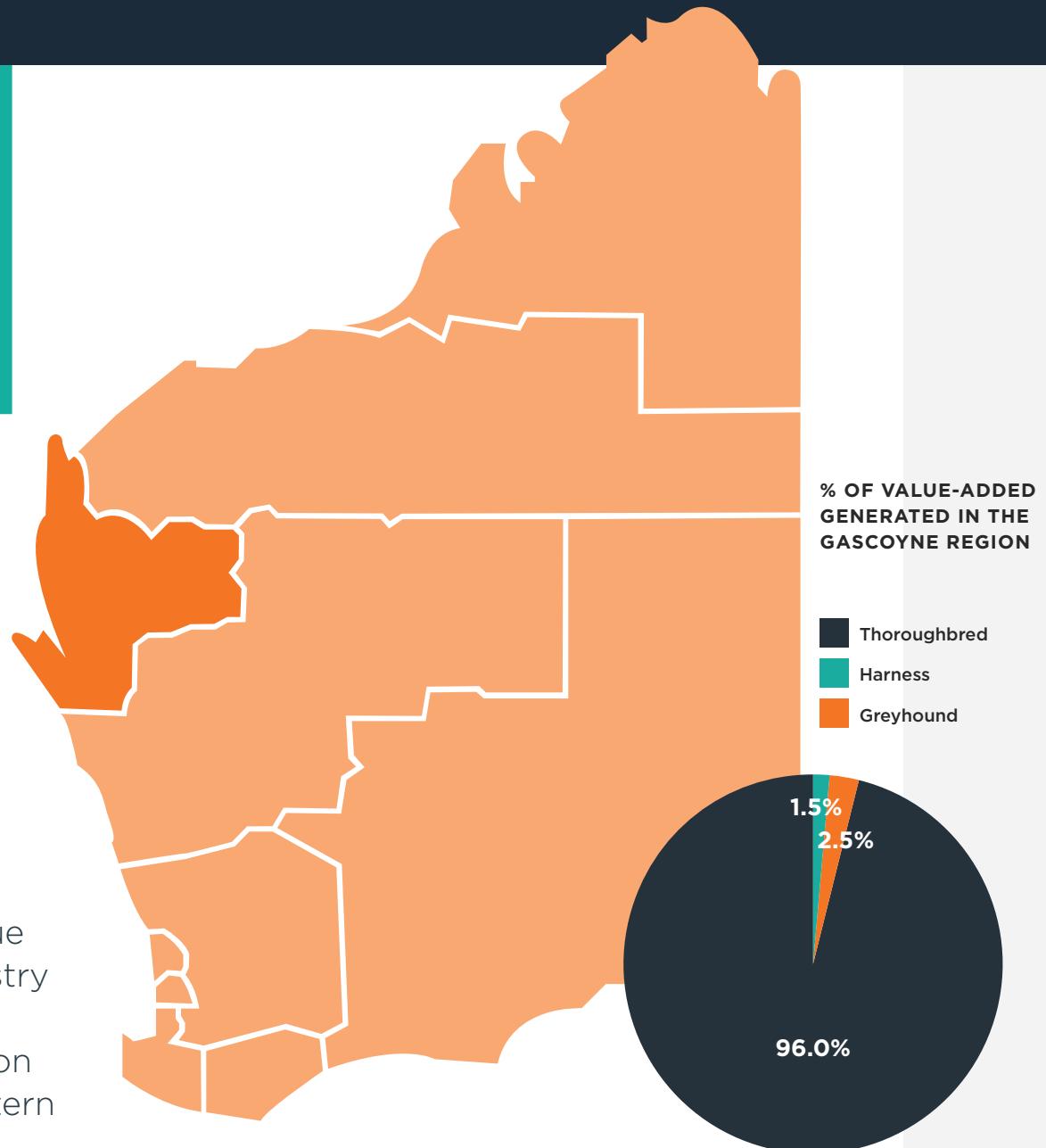
### Gascoyne

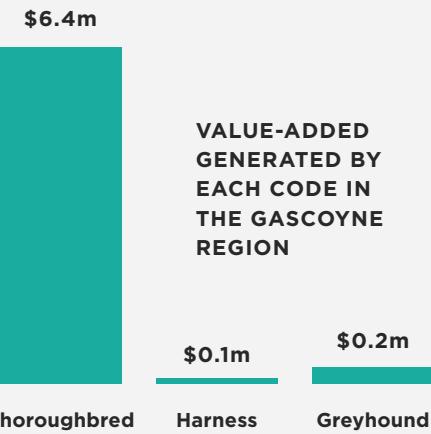
- The Gascoyne is located in the north west of Western Australia and covers more than 137,938 square kilometres, representing about 5.5 per cent of the state's total area. The region has more than 600 kilometres of Indian Ocean coastline, and stretches more than 500 kilometres inland through to the remote outback. The population of the Gascoyne region is 9,959 (Royalties for Regions, 2017).
- There are a total of three racing clubs operating in the region, all of which are thoroughbred clubs.
- The racing industry in the Gascoyne region is responsible for generating close to \$6.7 million in value-added contribution to Gross State Product. This equates to 0.7% of the total impact generated by the Western Australian racing industry.
- The economic impact generated by the racing industry in this region is responsible for sustaining a total of 58 full-time equivalent (FTE) jobs in the region.
- There are 324 individuals participating in the racing industry as an employee, volunteer or participant in the region.

#### RACING CLUBS IN THE REGION

##### Thoroughbred

- + Carnarvon Race Club (Inc)
- + Eastern Gascoyne Racing Club
- + Junction Race Club





There are 324 people who participate in the racing industry in the Gascoyne region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	3		1	4
Owners/Syndicate Members	84		4	88
Trainers	7			7
Total Participants in Producing Racing Animals	94		5	99
Breeders Staff	2		1	2
Stable/Kennel Employees	21			21
Racing Club & Industry Staff	106			106
Jockeys, Drivers & Apprentices				
Racing Club Volunteers	85			85
Volunteers Assisting Participants	10		1	11
Total Participants in Producing Racing Product	224		2	225
<b>Total Participants</b>	<b>318</b>		<b>7</b>	<b>324</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure				
Training Expenditure	\$1.1 mil			\$1.1 mil
Total Direct Expenditure	\$5.8 mil	\$0.1 mil	\$0.2 mil	\$6.0 mil
Total Value-Added	\$6.4 mil	\$0.1 mil	\$0.2 mil	\$6.7 mil
Full-time Equivalent Employment	56	1	1	58

\*Some totals may not add due to rounding

Race meetings in the Gascoyne region attract attendances of 3,400 or 0.6% of total attendances at race meetings in Western Australia

#### AT A GLANCE

3 Racing Clubs

THOROUGHBRED 3

12 Race Meetings

THOROUGHBRED 12

80 Races

THOROUGHBRED 80

30 Racing Club Members

THOROUGHBRED 30

3,400 Attendances

THOROUGHBRED 3,400

# Goldfields- Esperance

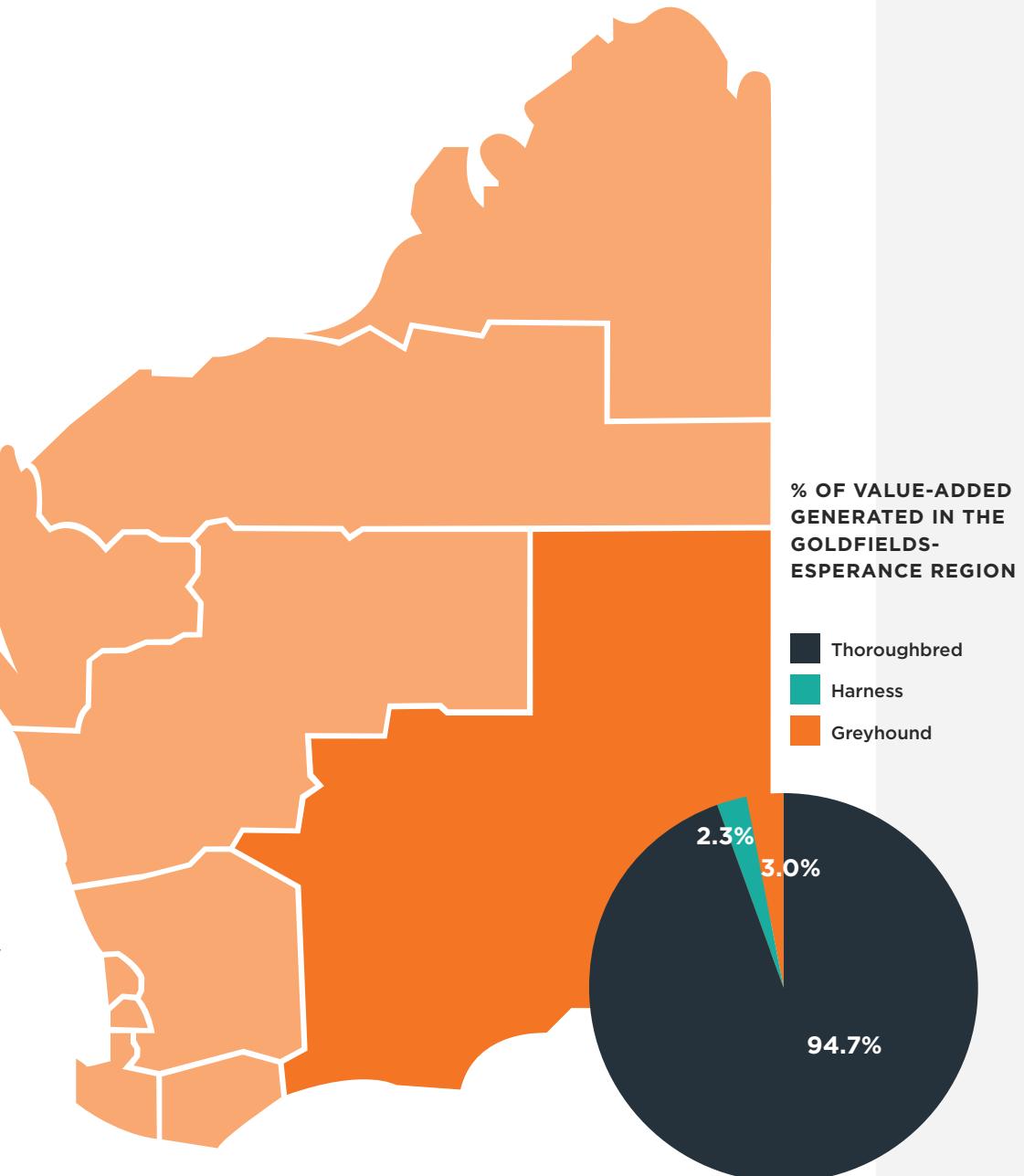
- + The Goldfields-Esperance is located in the south-eastern corner of Western Australia and is the largest region in the state with a land area of 771,276 square kilometres. The region is three times the size of the state of Victoria and just under a third of Western Australia's total land mass. It is bounded by the Pilbara region to the north, the Wheatbelt region to the west, the Great Southern region to the south-west, the Southern Ocean to the south and the WA border to the east. The population of the Goldfields-Esperance region is 68,400 (Royalties for Regions, 2017).
- + There are a total of seven racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Goldfields Esperance region is responsible for generating \$40.1 million in value-added contribution to Gross State Product. This equates to 4.1% of the total impact generated by the Western Australian racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 347 full-time equivalent (FTE) jobs in the region.
- + With 1,439 individuals participating in the racing industry as an employee, volunteer or participant in the region.

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Coolgardie Racing Club
- + Esperance Bay Turf Club
- + Kalgoorlie -Boulder Racing Club
- + Laverton Racing Club
- + Leinster Race Club (Inc)
- + Leonora Racing Club (Inc)
- + Norseman Turf Club

The economic value of the racing industry in the Goldfields-Esperance region is \$40.1 million – 4.1% of the Western Australian total





There are 1,439 people who participate in the racing industry in the Goldfields-Esperance region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	20	3	1	24
Owners/Syndicate Members	413	32	14	459
Trainers	46	4		50
Total Participants in Producing Racing Animals	479	39	15	533
Breeders Staff	12	2	1	14
Stable/Kennel Employees	123	4		127
Racing Club & Industry Staff	589	0	2	591
Jockeys, Drivers & Apprentices		1		1
Racing Club Volunteers	93			93
Volunteers Assisting Participants	66	13	1	79
Total Participants in Producing Racing Product	883	20	4	906
<b>Total Participants</b>	<b>1,362</b>	<b>59</b>	<b>19</b>	<b>1,439</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure	\$0.3 mil			\$0.3 mil
Training Expenditure	\$5.2 mil	\$0.1 mil		\$5.3 mil
Total Direct Expenditure	\$34.1 mil	\$0.8 mil	\$1.1 mil	\$36.0 mil
Total Value-Added	\$38.0 mil	\$0.9 mil	\$1.2 mil	\$40.1 mil
Full-time Equivalent Employment	328	8	11	347

\*Some totals may not add due to rounding

Race meetings in the Goldfields-Esperance region attract attendances in excess of 27,500 or 4.8% of total attendances at race meetings in Western Australia

#### AT A GLANCE

7 Racing Clubs

THOROUGHBRED 7

36 Race Meetings

THOROUGHBRED 36

246 Races

THOROUGHBRED 246

970 Racing Club Members

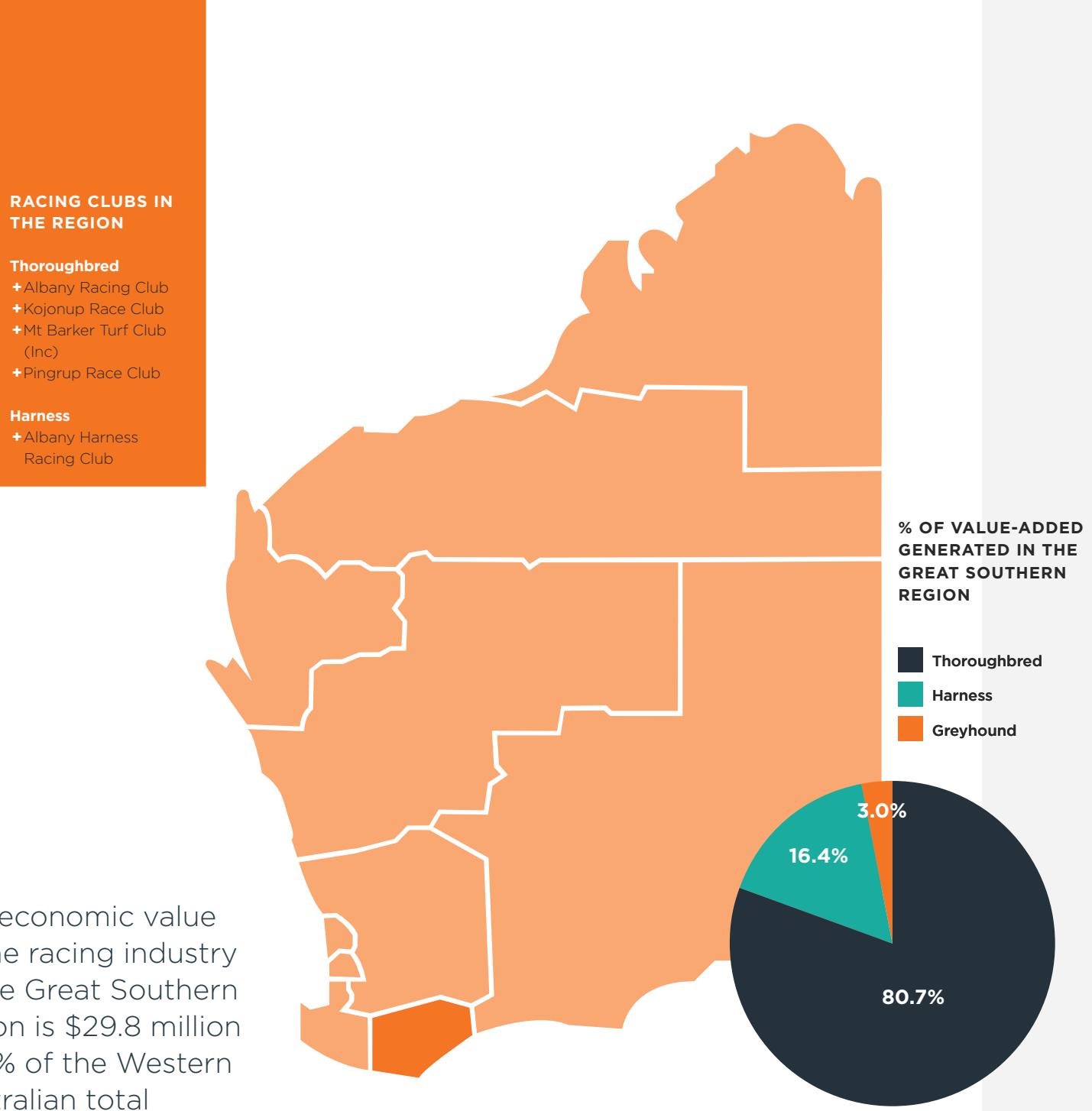
THOROUGHBRED 970

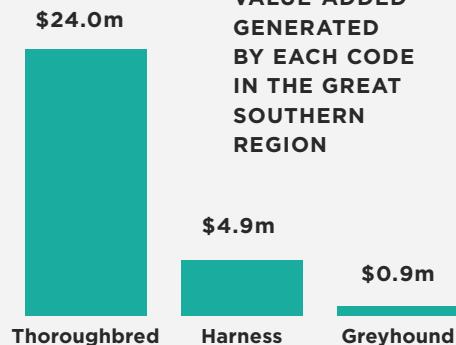
27,564 Attendances

THOROUGHBRED 27,564

# Great Southern

- The Great Southern region is located on the south coast of Western Australia, adjoining the Southern Ocean, where the coast extends for approximately 250 kilometres. Bounded by the South West region on the west and Wheatbelt region to the north, the total land area of 39,007 square kilometres represents approximately 1.5 per cent of the state's total area. The population of the Great Southern region is 54,000 (Royalties for Regions, 2017).
- There are a total of five racing clubs operating in the region, four of which are thoroughbred clubs, with one harness racing club.
- The racing industry in the Great Southern region is responsible for generating almost \$29.8 million in value-added contribution to Gross State Product. This equates to 3.1% of the total impact generated by the Western Australian racing industry.
- The economic impact generated by the racing industry in this region is responsible for sustaining a total of 259 full-time equivalent (FTE) jobs in the region.
- With 1,020 individuals participating in the racing industry as an employee, volunteer or participant in the region.





There are 1,020 people who participate in the racing industry in the Great Southern region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	26	21	3	50
Owners/Syndicate Members	247	81	9	337
Trainers	27	18		45
Total Participants in Producing Racing Animals	300	120	12	432
Breeders Staff	16	11	2	29
Stable/Kennel Employees	105	10		115
Racing Club & Industry Staff	206	11	2	219
Jockeys, Drivers & Apprentices	4	1		5
Racing Club Volunteers	87	1		88
Volunteers Assisting Participants	49	80	2	132
Total Participants in Producing Racing Product	467	114	7	588
<b>Total Participants</b>	<b>767</b>	<b>234</b>	<b>19</b>	<b>1,020</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure	\$5.2 mil	\$0.5 mil		\$5.7 mil
Training Expenditure	\$5.9 mil	\$1.5 mil		\$7.4 mil
Total Direct Expenditure	\$21.3 mil	\$4.3 mil	\$0.8 mil	\$26.4 mil
Total Value-Added	\$24.0 mil	\$4.9 mil	\$0.9 mil	\$29.8 mil
Full-time Equivalent Employment	209	42	8	259

\*Some totals may not add due to rounding

Race meetings in the Great Southern region attract attendances of 13,650 or 2.4% of total attendances at race meetings in Western Australia

#### AT A GLANCE

##### 5 Racing Clubs

THOROUGHBRED	4
HARNESS	1

##### 32 Race Meetings

THOROUGHBRED	22
HARNESS	10

##### 249 Races

THOROUGHBRED	161
HARNESS	88

##### 582 Racing Club Members

THOROUGHBRED	516
HARNESS	66

##### 13,650 Attendances

THOROUGHBRED	13,000
HARNESS	650

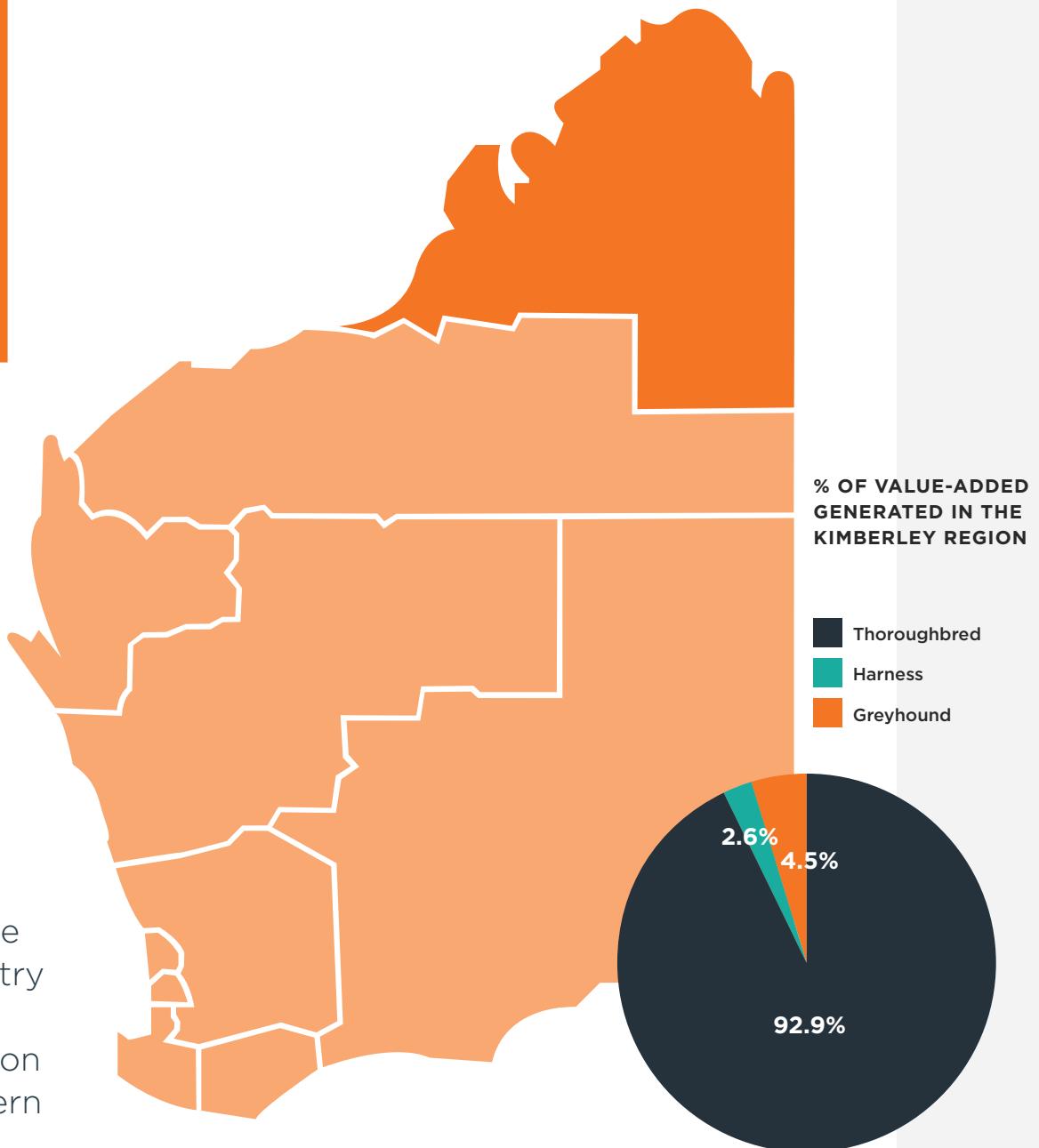
# Kimberley

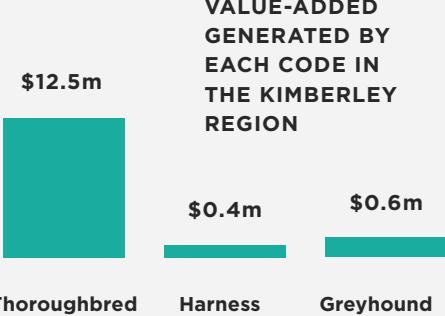
- + The Kimberley is Western Australia's most northern region, with the Broome coastline closer to South-East Asia than it is to Perth. Bordered by the Pilbara region to the south and Northern Territory to the east, the 424,517 square kilometres region has fewer people per square kilometre than almost any other place on Earth. The population of the Kimberley region is 36,230 (Royalties for Regions, 2017).
- + There are a total of four racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Kimberley region is responsible for generating more than \$13.4 million in value-added contribution to Gross State Product. This equates to 1.4% of the total impact generated by the Western Australian racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 116 full-time equivalent (FTE) jobs in the region.
- + With 370 individuals participating in the racing industry as an employee, volunteer or participant in the region.

## RACING CLUBS IN THE REGION

### Thoroughbred

- + Broome Turf Club
- + Kununurra Race Club
- + West Kimberley Turf Club (Derby)
- + Wyndham Turf Club





There are 370 people who participate in the racing industry in the Kimberley region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	4			4
Owners/Syndicate Members	143	3	5	151
Trainers	4			4
Total Participants in Producing Racing Animals	151	3	5	159
Breeders Staff	2			2
Stable/Kennel Employees	15			15
Racing Club & Industry Staff	136			136
Jockeys, Drivers & Apprentices				
Racing Club Volunteers	50			50
Volunteers Assisting Participants	7			7
Total Participants in Producing Racing Product	211			211
<b>Total Participants</b>	<b>362</b>	<b>3</b>	<b>5</b>	<b>370</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure				
Training Expenditure	\$1.0 mil			\$1.0 mil
Total Direct Expenditure	\$11.2 mil	\$0.3 mil	\$0.6 mil	\$12.1 mil
Total Value-Added	\$12.5 mil	\$0.4 mil	\$0.6 mil	\$13.4 mil
Full-time Equivalent Employment	108	3	5	116

\*Some totals may not add due to rounding

Race meetings in the Kimberley region attract attendances of 30,650 or 5.3% of total attendances at race meetings in Western Australia

#### AT A GLANCE

4 Racing Clubs

THOROUGHBRED 4

13 Race Meetings

THOROUGHBRED 13

88 Races

THOROUGHBRED 88

808 Racing Club Members

THOROUGHBRED 808

30,650 Attendances

THOROUGHBRED 30,650

## Mid West

- The Mid West region covers nearly one fifth of Western Australia's land area, spanning around 478,000 square kilometres from Green Head to Kalbarri and more than 800km inland to Wiluna in the Gibson Desert. The region is divided into three subregions which demonstrate similarities in environment, land use, demography and industry. The population of the Mid West region is 57,901 (Royalties for Regions, 2017).
- There are a total of six racing clubs operating in the region, all of which are thoroughbred clubs.
- The racing industry in the Mid West region is responsible for generating \$26.9 million in value-added contribution to Gross State Product. This equates to 2.8% of the total impact generated by the Western Australian racing industry.
- The economic impact generated by the racing industry in this region is responsible for sustaining a total of 233 full-time equivalent (FTE) jobs in the region.
- With 1,109 individuals participating in the racing industry as an employee, volunteer or participant in the region.

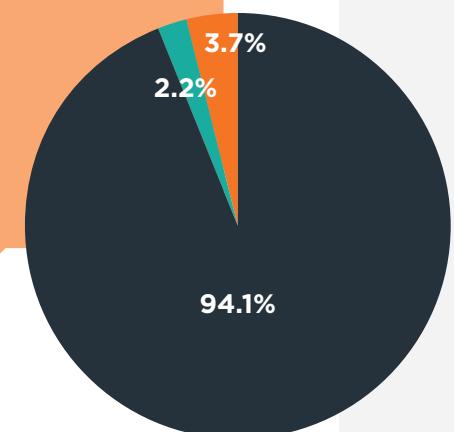
### RACING CLUBS IN THE REGION

#### Thoroughbred

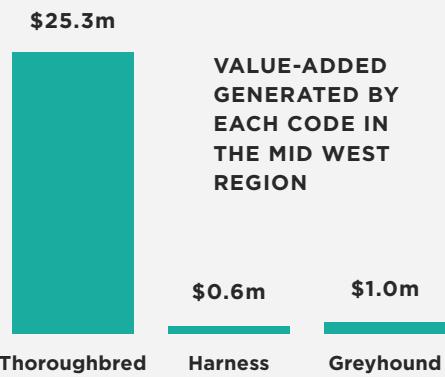
- + Dongara - Irwin Race Club
- + Geraldton Turf Club
- + Meekathara Racing Club
- + Mingenew Turf Club
- + Mt Magnet Race Club
- + Yalgoo Jockey Club

% OF VALUE-ADDED GENERATED IN THE MID WEST REGION

- Thoroughbred
- Harness
- Greyhound



The economic value of the racing industry in the Mid West region is \$26.9 million – 2.8% of the Western Australian total



There are 1,109 people who participate in the racing industry in the Mid West region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	24		1	25
Owners/Syndicate Members	444	16	17	477
Trainers	51	1	1	53
Total Participants in Producing Racing Animals	519	17	19	555
Breeders Staff	15		1	15
Stable/Kennel Employees	121			121
Racing Club & Industry Staff	211			211
Jockeys, Drivers & Apprentices	2			2
Racing Club Volunteers	128			128
Volunteers Assisting Participants	74	1	1	77
Total Participants in Producing Racing Product	551	1	2	554
<b>Total Participants</b>	<b>1,070</b>	<b>18</b>	<b>21</b>	<b>1,109</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure	\$0.6 mil			\$0.6 mil
Training Expenditure	\$4.4 mil			\$4.4 mil
Total Direct Expenditure	\$22.7 mil	\$0.5 mil	\$0.9 mil	\$24.1 mil
Total Value-Added	\$25.3 mil	\$0.6 mil	\$1.0 mil	\$26.9 mil
Full-time Equivalent Employment	219	5	9	233

\*Some totals may not add due to rounding

Race meetings in the Mid West region attract attendances of 24,850 or 4.3% of total attendances at race meetings in Western Australia

#### AT A GLANCE

6 Racing Clubs

THOROUGHBRED 6

23 Race Meetings

THOROUGHBRED 23

170 Races

THOROUGHBRED 170

792 Racing Club Members

THOROUGHBRED 792

24,850 Attendances

THOROUGHBRED 24,850

# Peel

The Peel region is located only 75 kilometres south of Perth, with a diverse landscape incorporating 50 kilometres of pristine coastline and urban, agricultural and horticultural land. With a coastal plain bordered inland by the Darling Scarp, the Peel region is situated among the highest rainfall areas of South Western Australia. This climate, along with 23 rivers, streams and creeks, provides an extensive wetland system that is of international and national significance, supporting diverse and unique flora and fauna. The population of the Peel region is 136,854 (Royalties for Regions, 2017).

- There are a total of three racing clubs operating in the region, two of which are harness racing clubs and one thoroughbred racing club. Mandurah greyhound racing track is located in the Peel region, forming part of the WA Greyhound Racing Association.
- The racing industry in the Peel region is responsible for generating almost \$176.2 million in value added contribution to Gross State Product. This equates to 18.2% of the total impact generated by the Western Australian racing industry.
- The economic impact generated by the racing industry in this region is responsible for sustaining a total of 1,548 full-time equivalent (FTE) jobs in the region.
- With 3,095 individuals participating in the racing industry as an employee, volunteer or participant in the region.

## RACING CLUBS IN THE REGION

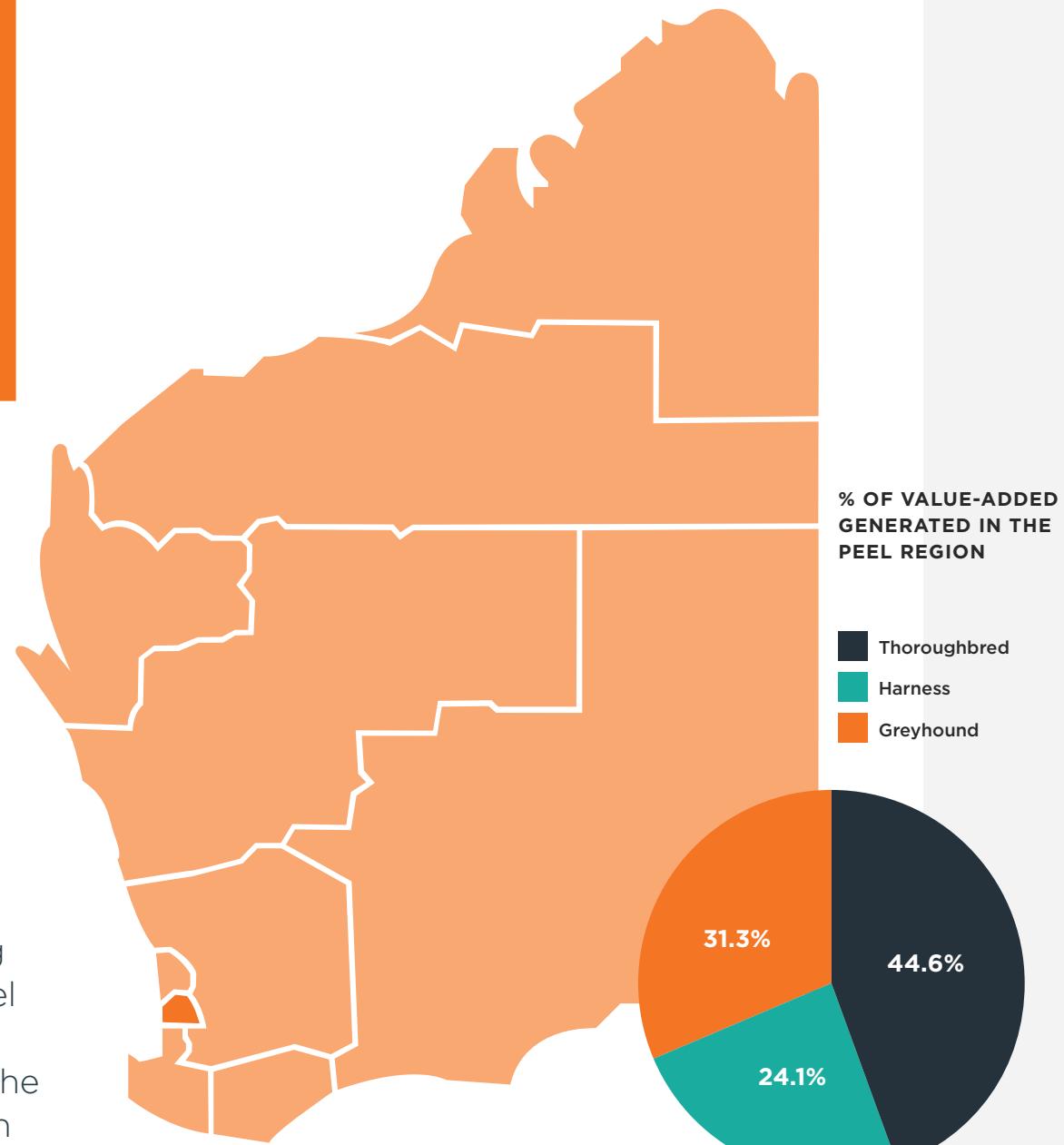
### Thoroughbred

+ Pinjarra Race Club

### Harness

+ Pinjarra Harness Racing Club (Inc)

+ Williams Harness Racing Club (Inc)





There are 3,095 people who participate in the racing industry in the Peel region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	74	74	56	204
Owners/Syndicate Members	538	449	199	1,186
Trainers	85	153	69	307
Total Participants in Producing Racing Animals	697	676	324	1,697
Breeders Staff	45	37	44	126
Stable/Kennel Employees	195	83	24	302
Racing Club & Industry Staff	140	32	102	274
Jockeys, Drivers & Apprentices	14	16		30
Racing Club Volunteers	9	28		37
Volunteers Assisting Participants	150	390	89	628
Total Participants in Producing Racing Product	552	586	259	1,398
<b>Total Participants</b>	<b>1,249</b>	<b>1,262</b>	<b>583</b>	<b>3,095</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure	\$7.3 mil	\$3.4 mil	\$1.5 mil	\$12.1 mil
Training Expenditure	\$33.0 mil	\$20.4 mil	\$4.9 mil	\$58.4 mil
Total Direct Expenditure	\$70.2 mil	\$37.9 mil	\$50.3 mil	\$158.4 mil
Total Value-Added	\$78.6 mil	\$42.4 mil	\$55.1 mil	\$176.2 mil
Full-time Equivalent Employment	681	366	501	1,548

\*Some totals may not add due to rounding

Race meetings in the Peel region attract attendances of 83,750 or 14.4% of total attendances at race meetings in Western Australia

#### AT A GLANCE

**3 Racing Clubs**

THOROUGHBRED	1
HARNESS	2

**230 Race Meetings**

THOROUGHBRED	23
HARNESS	52
GREYHOUND	155

**2,355 Races**

THOROUGHBRED	192
HARNESS	440
GREYHOUND	1,723

**555 Racing Club Members**

THOROUGHBRED	350
HARNESS	205

**83,750 Attendances**

THOROUGHBRED	26,500
HARNESS	26,250
GREYHOUND	31,000

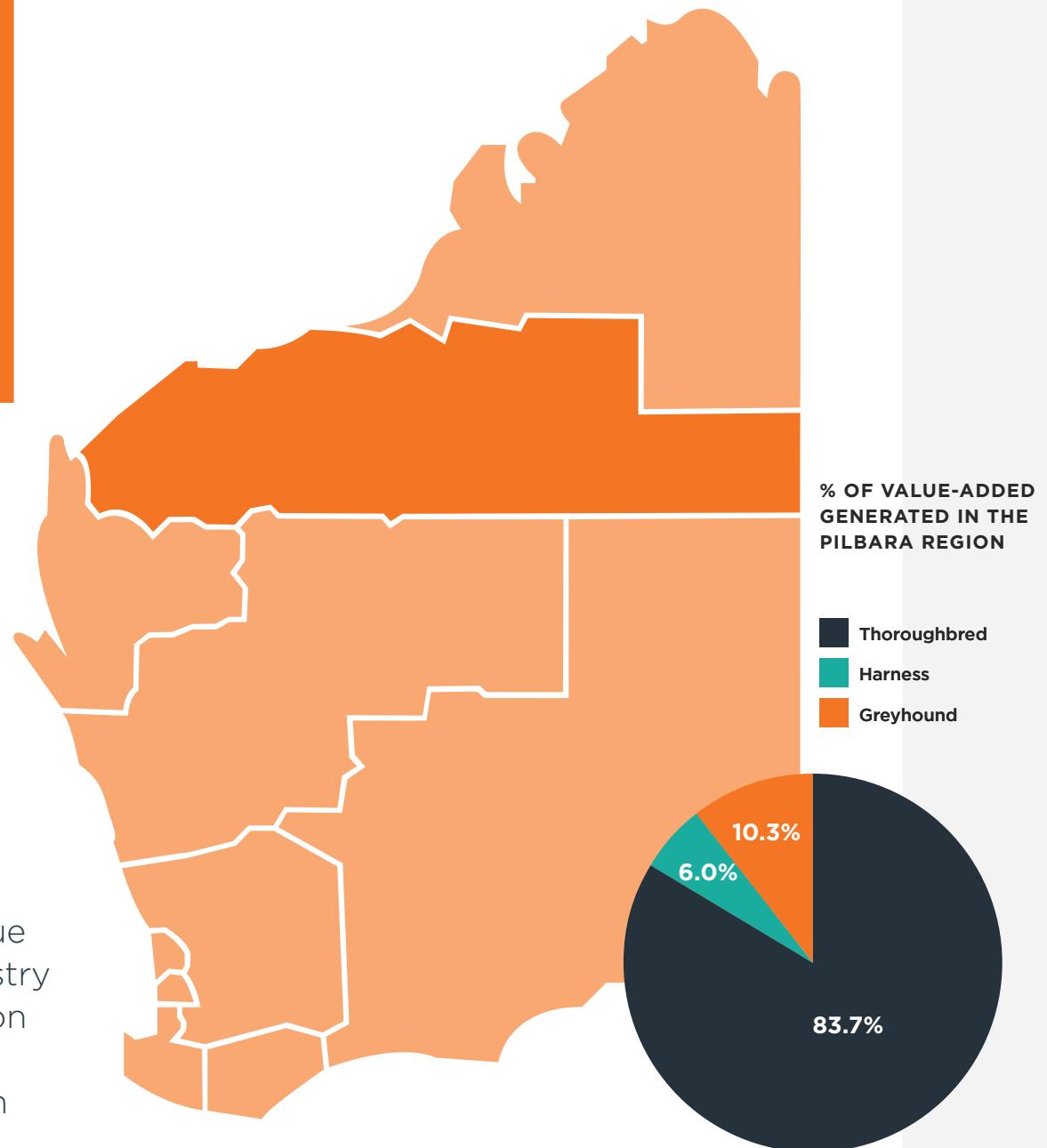
# Pilbara

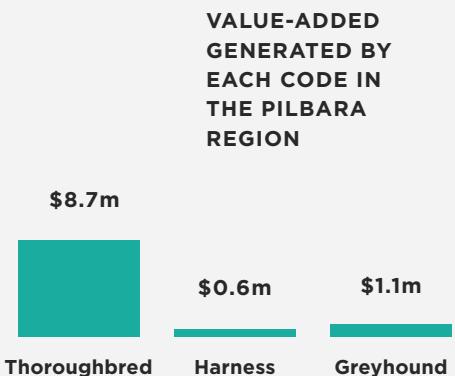
- + The Pilbara is located in the north of the state, bordered by the Indian Ocean to the west and extending across the Great Sandy Desert to the Northern Territory border in the east. One of the largest regions in Western Australia, the Pilbara covers 507,896 square kilometres of unique and breathtaking natural landscape. The population of the Pilbara region is 67,503 (Royalties for Regions, 2017).
- + There are a total of four racing clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Pilbara region is responsible for generating more than \$10.4 million in value-added contribution to Gross State Product. This equates to 1.1% of the total impact generated by the Western Australian racing industry.
- + The economic impact generated by the racing industry in this region is responsible for sustaining a total of 90 full-time equivalent (FTE) jobs in the region.
- + With 631 individuals participating in the racing industry as an employee, volunteer or participant in the region.

## RACING CLUBS IN THE REGION

### Thoroughbred

- + East Pilbara Race Club (Newman)
- + Marble Bar Amateur Race Club
- + Nor-West Jockey Club (Roebourne)
- + Port Hedland Turf Club





There are 631 people who participate in the racing industry in the Pilbara region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	2			2
Owners/Syndicate Members	222	7	15	244
Trainers	5	1		6
Total Participants in Producing Racing Animals	229	8	15	252
Breeders Staff	1			1
Stable/Kennel Employees	21			21
Racing Club & Industry Staff	274			274
Jockeys, Drivers & Apprentices				
Racing Club Volunteers	75			75
Volunteers Assisting Participants	7	1		8
Total Participants in Producing Racing Product	378	1		379
<b>Total Participants</b>	<b>607</b>	<b>9</b>	<b>15</b>	<b>631</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure				
Training Expenditure	\$0.8 mil			\$0.8 mil
Total Direct Expenditure	\$7.8 mil	\$0.6 mil	\$1.0 mil	\$9.4 mil
Total Value-Added	\$8.7 mil	\$0.6 mil	\$1.1 mil	\$10.4 mil
Full-time Equivalent Employment	75	5	10	90

\*Some totals may not add due to rounding

Race meetings in the Pilbara region attracted attendances of 13,500 or 2.3% of total attendances at race meetings in Western Australia

#### AT A GLANCE

4 Racing Clubs

THOROUGHBRED 4

11 Race Meetings

THOROUGHBRED 11

70 Races

THOROUGHBRED 70

730 Racing Club Members

THOROUGHBRED 730

13,500 Attendances

THOROUGHBRED 13,500

## South West

- The South West is located in the south-western corner of Australia and covers an area of nearly 24,000 square kilometres. Western Australia's most popular tourist destination, the South West boasts a unique biodiversity hotspot which includes a rich and varied natural environment. The population of the South West region is 190,000 (Royalties for Regions, 2017).
- There are a total of six racing clubs operating in the region, four of which are harness clubs, with two thoroughbred racing club.
- The racing industry in the South West region is responsible for generating more than \$93.7 million in value-added contribution to Gross State Product. This equates to 9.7% of the total impact generated by the Western Australian racing industry.
- The economic impact generated by the racing industry in this region is responsible for sustaining a total of 814 full-time equivalent (FTE) jobs in the region.
- With 2,732 individuals participating in the racing industry as an employee, volunteer or participant in the region.

### RACING CLUBS IN THE REGION

#### Thoroughbred

- + Bunbury Turf Club
- + Collie Race Club (Inc)

#### Harness

- + Bridgetown Harness Racing Club
- + Bunbury Trotting Club
- + Busselton Trotting Club
- + Collie Harness Racing Club

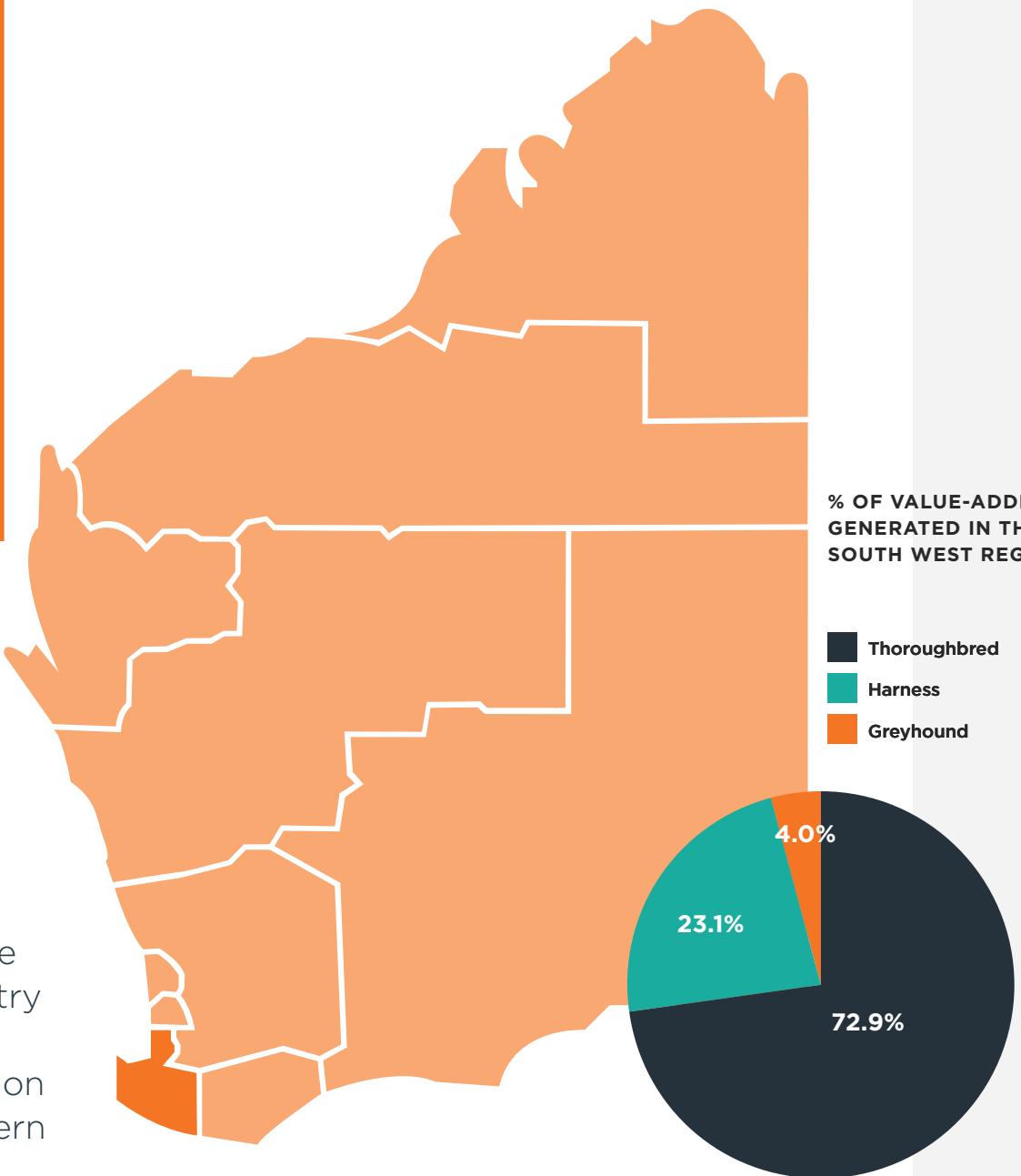
% OF VALUE-ADDED GENERATED IN THE SOUTH WEST REGION

Thoroughbred

Harness

Greyhound

The economic value of the racing industry in the South West region is \$93.7 million – 9.7% of the Western Australian total





There are 2,732 people who participate in the racing industry in the South West region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	78	48	9	135
Owners/Syndicate Members	797	335	50	1,182
Trainers	69	87	12	168
<b>Total Participants in Producing Racing Animals</b>	<b>944</b>	<b>470</b>	<b>71</b>	<b>1,485</b>
Breeders Staff	47	24	7	78
Stable/Kennel Employees	141	44	4	189
Racing Club & Industry Staff	247	167	3	417
Jockeys, Drivers & Apprentices	6	10		16
Racing Club Volunteers	29	129		158
Volunteers Assisting Participants	135	238	15	388
<b>Total Participants in Producing Racing Product</b>	<b>606</b>	<b>612</b>	<b>29</b>	<b>1,247</b>
<b>Total Participants</b>	<b>1,550</b>	<b>1082</b>	<b>100</b>	<b>2,732</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure	\$11.7 mil	\$2.4 mil	\$0.2 mil	\$14.4 mil
Training Expenditure	\$14.1 mil	\$8.1 mil	\$0.2 mil	\$22.5 mil
Total Direct Expenditure	\$60.7 mil	\$19.3 mil	\$3.4 mil	\$83.4 mil
<b>Total Value-Added</b>	<b>\$68.3 mil</b>	<b>\$21.7 mil</b>	<b>\$3.7 mil</b>	<b>\$93.7 mil</b>
Full-time Equivalent Employment	593	187	34	814

\*Some totals may not add due to rounding

Race meetings in the South West region attracted attendances of 50,900 or 8.8% of total attendances at race meetings in Western Australia

#### AT A GLANCE

##### 6 Racing Clubs

THOROUGHBRED	2
HARNESS	4

##### 62 Race Meetings

THOROUGHBRED	22
HARNESS	40

##### 492 Races

THOROUGHBRED	175
HARNESS	317

##### 889 Racing Club Members

THOROUGHBRED	405
HARNESS	484

##### 50,900 Attendances

THOROUGHBRED	26,100
HARNESS	24,800

# Wheatbelt

- The Wheatbelt spans across 154,862 square kilometres in the south west of Western Australia and has five subregions: Avon, Central Coast, Central East, Central Midlands and Wheatbelt South. The region has a diverse landscape across its subregions, from the pristine white beaches and clear turquoise waters of Cervantes and Jurien Bay, to rolling hills and winding streams in the Avon Valley, to the rugged and magnificent terrain along the Wheatbelt Way. The population of the Wheatbelt region is 75,000 (Royalties for Regions, 2017).
- There are a total of nine racing clubs operating in the region, five of which are thoroughbred clubs, and a further four harness racing clubs. Northam greyhound racing track is located in the Peel region, forming part of the WA Greyhound Racing Association.
- The racing industry in the Wheatbelt region is responsible for generating more than \$78.2 million in value-added contribution to Gross State Product. This equates to 8.1% of the total impact generated by the Western Australian racing industry.
- The economic impact generated by the racing industry in this region is responsible for sustaining a total of 683 full-time equivalent (FTE) jobs in the region.
- With 1,854 individuals participating in the racing industry as an employee, volunteer or participant in the region.

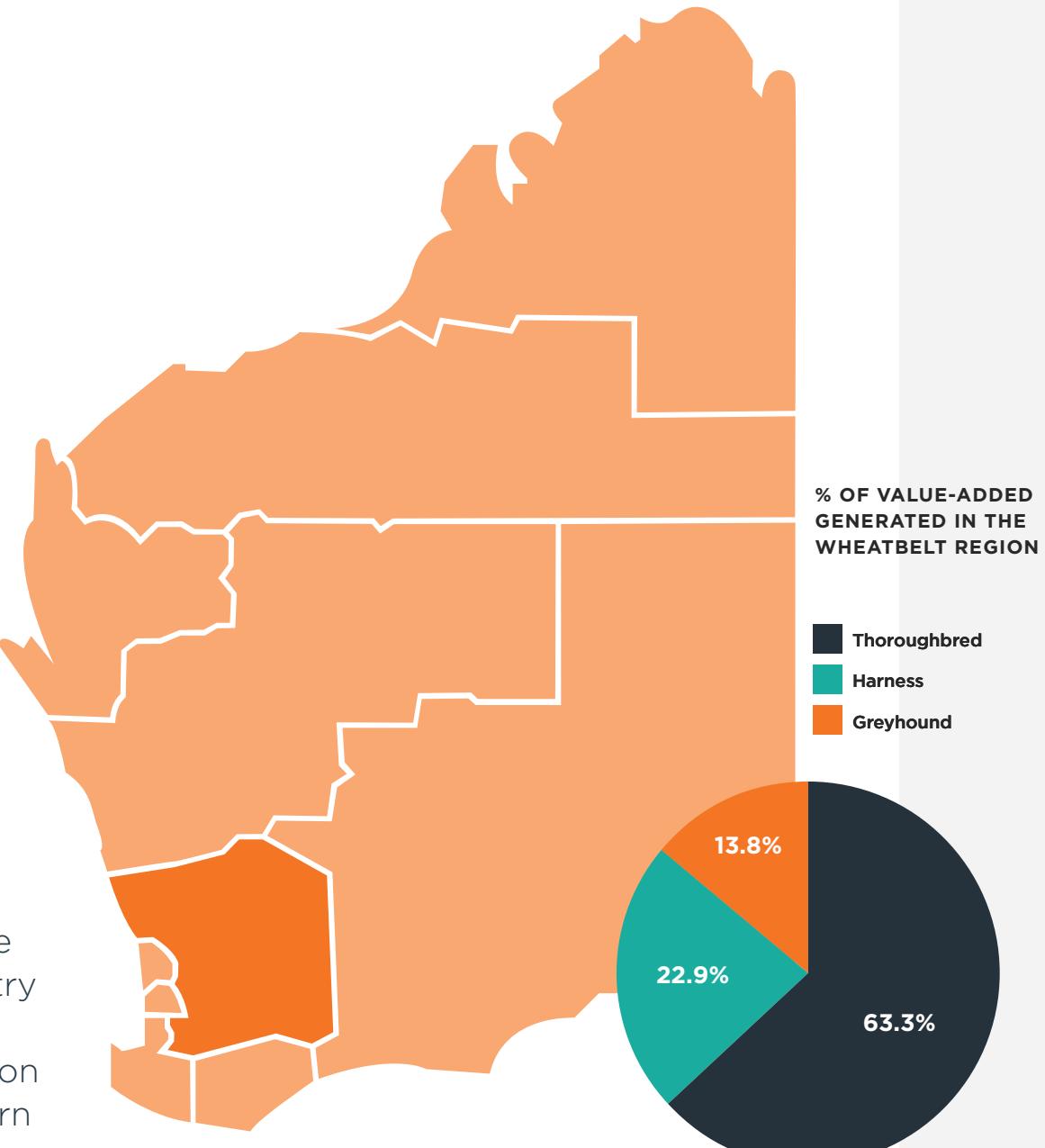
## RACING CLUBS IN THE REGION

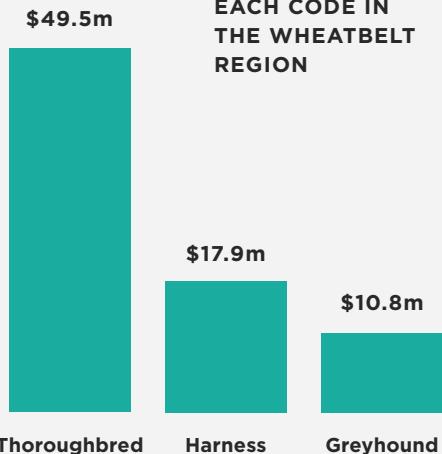
### Thoroughbred

- + Moora Race Club
- + Narrogin Racing
- + Northam Race Club (Inc)
- + Toodyay Racing Club (Inc)
- + York Racing (Inc)

### Harness

- + Central Wheatbelt Harness Racing Club
- + Narrogin Race & Pace (Inc)
- + Northam Harness Racing Club (Inc)
- + Wagin Trotting Club (Inc)





There are 1,854 people who participate in the racing industry in the Wheatbelt region

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	48	33	23	104
Owners/Syndicate Members	387	194	53	634
Trainers	48	48	20	116
Total Participants in Producing Racing Animals	483	275	96	854
Breeders Staff	29	17	18	64
Stable/Kennel Employees	106	32	6	144
Racing Club & Industry Staff	212	95	32	339
Jockeys, Drivers & Apprentices	2	4		6
Racing Club Volunteers	140	37		177
Volunteers Assisting Participants	89	150	31	270
Total Participants in Producing Racing Product	578	334	87	1,000
<b>Total Participants</b>	<b>1,061</b>	<b>609</b>	<b>183</b>	<b>1,854</b>

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure	\$12.9 mil	\$0.8 mil	\$0.1 mil	\$13.8 mil
Training Expenditure	\$4.5 mil	\$3.8 mil	\$0.9 mil	\$9.3 mil
Total Direct Expenditure	\$43.7 mil	\$16.0 mil	\$9.9 mil	\$69.6 mil
Total Value-Added	\$49.5 mil	\$17.9 mil	\$10.8 mil	\$78.2 mil
Full-time Equivalent Employment	431	154	98	683

\*Some totals may not add due to rounding

Race meetings in the Wheatbelt region attracted attendances of 33,872 or 5.8% of total attendances at race meetings in Western Australia

#### AT A GLANCE

9 Racing Clubs

THOROUGHBRED 5  
HARNESS 4

126 Race Meetings

THOROUGHBRED 33  
HARNESS 60  
GREYHOUND 33

1,125 Races

THOROUGHBRED 254  
HARNESS 503  
GREYHOUND 368

624 Racing Club Members

THOROUGHBRED 423  
HARNESS 201

33,872 Attendances

THOROUGHBRED 21,200  
HARNESS 11,022  
GREYHOUND 1,650

# Perth

- The Perth region of Western Australia takes in thirty local government areas and more than two hundred and fifty suburbs. The population of the Perth region is 2,085,973 (Royalties for Regions, 2017).
- There are a total of three racing clubs operating in the region, one of which is a thoroughbred club, with one harness racing club and one greyhound racing club.
- The racing industry in the Perth region is responsible for generating \$494.4 million in value-added contribution to Gross State Product. This equates to 51.0% of the total impact generated by the Western Australian racing industry.
- The economic impact generated by the racing industry in this region is responsible for sustaining a total of 4,303 full-time equivalent (FTE) jobs in the region.
- With 11,913 individuals participating in the racing industry as an employee, volunteer or participant in the region.

## RACING CLUBS IN THE REGION

### Thoroughbred

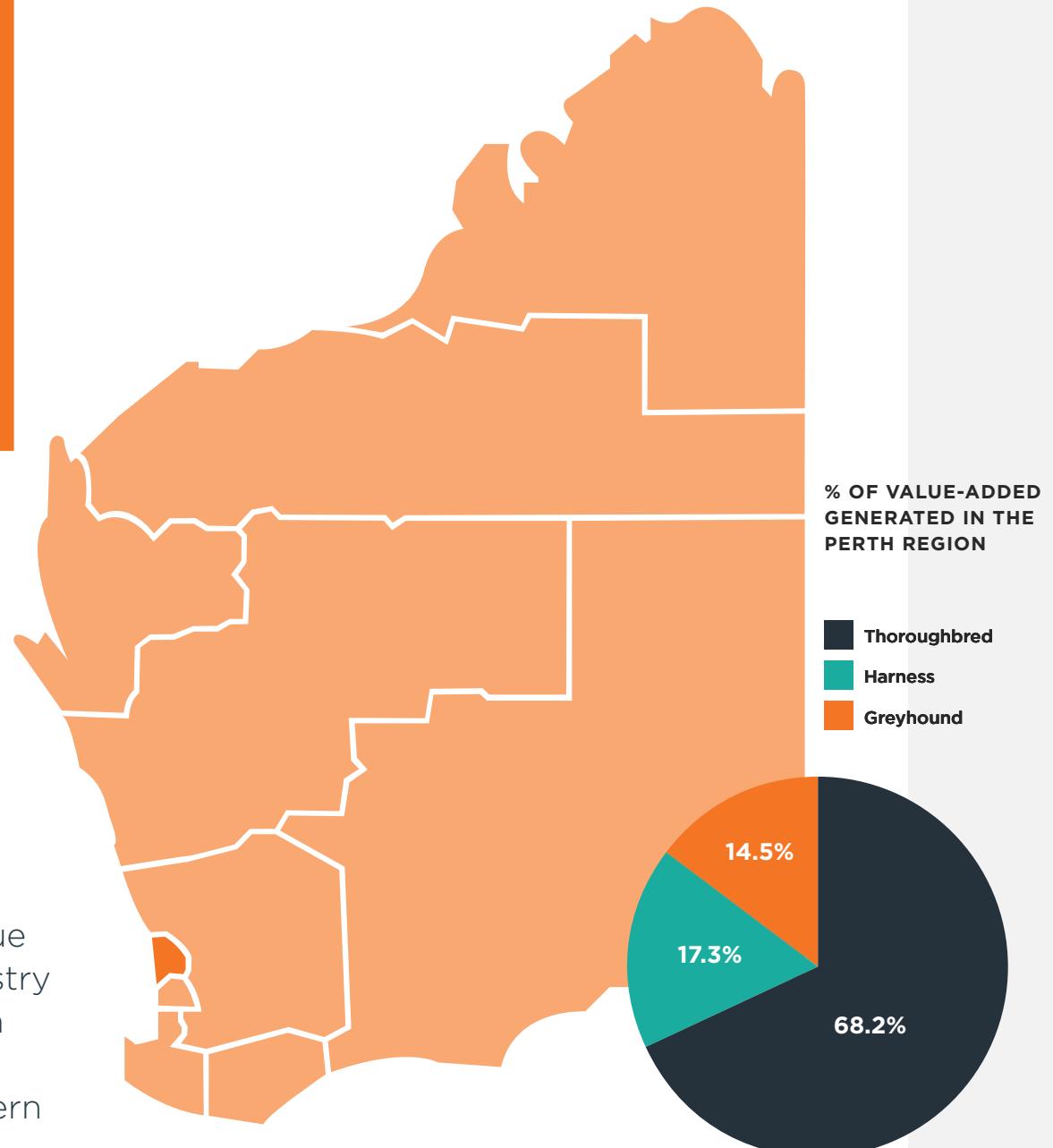
+ Perth Racing

### Harness

+ Gloucester Park  
Harness Racing

### Greyhound

+ WA Greyhound  
Racing Association  
- Cannington



**\$337.1m**



Thoroughbred

**\$85.5m**

Harness



Greyhound

**VALUE-ADDED  
GENERATED BY  
EACH CODE IN  
THE PERTH  
REGION**

#### PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	211	90	77	378
Owners/Syndicate Members	5,824	1,025	460	7,309
Trainers	174	152	67	393
Total Participants in Producing Racing Animals	6,209	1,267	604	8,080
Breeders Staff	128	45	61	234
Stable/Kennel Employees	488	126	30	644
Racing Club & Industry Staff	1,419	239	292	1,950
Jockeys, Drivers & Apprentices	53	18		71
Racing Club Volunteers		9		9
Volunteers Assisting Participants	352	468	104	925
Total Participants in Producing Racing Product	2,440	905	487	3,833
<b>Total Participants</b>	<b>8,649</b>	<b>2,172</b>	<b>1,091</b>	<b>11,913</b>

There are 11,913 people who participate in the racing industry in the Perth region

#### ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding Expenditure	\$38.0 mil	\$7.1 mil	\$1.8 mil	\$46.9 mil
Training Expenditure	\$70.1 mil	\$34.0 mil	\$6.1 mil	\$110.1 mil
Total Direct Expenditure	\$277.5 mil	\$79.9 mil	\$68.1 mil	\$425.5 mil
Total Value-Added	\$337.1 mil	\$85.5 mil	\$71.8 mil	\$494.4 mil
Full-time Equivalent Employment	2,914	736	653	4,303

\*Some totals may not add due to rounding

Race meetings in the Perth region attracted attendances of 297,669 or 51.3% of total attendances at race meetings in Western Australia

#### AT A GLANCE

**3 Racing Clubs**

THOROUGHBRED	1
HARNESS	1
GREYHOUND	1

**309 Race Meetings**

THOROUGHBRED	88
HARNESS	94
GREYHOUND	127

**2,977 Races**

THOROUGHBRED	704
HARNESS	859
GREYHOUND	1,414

**2,470 Racing Club Members**

THOROUGHBRED	2,071
HARNESS	389
GREYHOUND	10

**297,669 Attendances**

THOROUGHBRED	139,404
HARNESS	132,865
GREYHOUND	25,400

# About IER

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

In particular, IER has specialised in consulting on a variety of projects related to the horse and greyhound racing industries in Australasia over this time.

This study constitutes an economic and social impact evaluation of the entire thoroughbred, harness and greyhound racing industry in Western Australia. 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)
- Asian Racing Federation
- Northern Territory Thoroughbred Racing Industry
- Australian Football League
- Lifesaving Victoria
- 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 CGE 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 (2020)
- Economic and Social Impact Study of the Thoroughbred Racing in Australia (2020)
- 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 (2020)
- Size and Scope study of the Tasmanian Racing Industry (2020)
- Annual assessment of the Adelaide Fringe, WOMAdelaide and Clipsal 500 (over the last 5-10 years)

Barry provides the economic modelling and advisory services to IER.

### ACKNOWLEDGEMENTS

IER would like to acknowledge the contribution of the following organisations and individuals:

- Australian Bureau of Statistics
- Harness Racing Australia
- Perth Racing
- Racing & Wagering WA
- Racing Australia
- Royalties for Regions Commission
- Western Australian Thoroughbred, Harness & Greyhound Racing clubs

# Economic Methodology

The purpose of this study is to measure the racing industry's contribution to the WA economy. In this way, it is a generalised measure of the industry's contribution to the State's economy. The economic contribution of an industry refers to the contribution that the industry makes in terms of:

- gross state or regional product,
- household income, and
- the employment that these income measures support.

Industries do this in two ways – by the employment and activity it supports directly (and in the industries that depend on it as a customer); and the flow-on effects which filters through the economy. The importance of the expenditures generated by an industry in the production process is that they will sustain turnover in the local industry, and more importantly this will support local jobs and incomes. It is the jobs and incomes that are taken to be the measure of economic impact or benefit (after netting out leaked expenditure on items such as imports).

It is also generally acknowledged that, in addition to the jobs in direct suppliers of services to the production processes of the industry, the production expenditure also has a multiplier effect within the community. In this way, the direct expenditure impact of the racing industry generates a 'flow-on impact' on other sectors

through the expenditure of wages and purchases of the direct suppliers to the racing industry. The use of multipliers, derived from input/output tables, has been a prominent process for translating directly created expenditure (a final demand stimulus) of industries or projects into jobs and incomes. The multipliers allow for the measurement of the extent of the flow-on impact generated in the economy, as a result of the racing industry expenditure. There has been some level of academic argument about appropriate models for converting increases in external expenditure (final demand) into regional economic impacts. The critics of using input/output tables often argue that multipliers are used to overstate the value of an industry – with the term multiplier taken as ratcheting up the value (or overstating the impact). This criticism used to be valid when analysts applied turnover multipliers, but is not the case with the more appropriate use of value-added multipliers – which translate the expenditure estimates to a national accounting framework measure with a whole of economy context. Indeed value-added multipliers (the value-added impact (direct and induced) relative to a dollar of created expenditure) are often less than one. Used correctly, multipliers provide a more appropriate measure.

In short, the use of these input/output based multipliers allow for reporting of the estimated outcomes of that industry in terms of:

- the effect of expenditure or turnover on value-added across a regional economy, and
- its impact on the labour market in terms of job creation

These measures are consistent with national accounting frameworks.

It should be emphasised that this methodology – of identifying the local expenditure associated with production by the industry and tracing the expenditure through the rest of the economy – cannot be interpreted as saying that Gross State Product or employment would fall by this amount if the industry somehow did not exist. In the first instance local people would spend their money on other activities and the contribution of those other sectors would rise and replace most or all of that which was previously generated by the racing industry. What this study calculates is the level of direct and induced employment and income that is linked to people choosing to spend their entertainment dollar on racing (after allowing for imports which are used in the production process). This could be considered as being the gross economic impact of the sector, and is therefore a measure of its significance generally. If a similar gross impact was calculated for every other sector of the economy, then

the sum of the impacts would be considerably greater than the size of the economy in total. An alternative methodology would be to measure the net economic impact – which is the extent to which this industry expenditure is supported by revenues that can be considered new to the state. This would include the supply of services by the local industry to racing activities interstate (i.e. serving a visiting mare from another state).

It would also focus only on spending by tourists or visitors to the state who attend the races rather than the stimulus created by spending by all attendees where it is associated with engagement with the racing industry. Under this scenario, it would reasonably be expected that some race attendees would attend events interstate if they were not available in Western Australia, and that some operators would base their operations interstate if this was the case. Whilst a valid approach, this particular approach (net economic impact) does not fit the purpose of this study.

The methodology used in this report is consistent with that used in recent studies of the Australian Racing industry and the Asian Racing Federation.



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FOCUSED THINKING



RACING AND WAGERING  
WESTERN AUSTRALIA