

Size and Scope of the

WESTERN AUSTRALIAN RACING INDUSTRY

PREPARED BY IER | MAY 2023







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KEY FINDINGS

Overview of Results

DIRECT SPENDING IMPACTS

(\$mil)	Thoroughbred	Harness	Greyhound	Total
Total direct expenditure¹	\$710.4	\$198.2	\$182.1	\$1,090.7

¹ Direct expenditure is defined as expenditure associated with producing foals and pups (breeding and rearing), preparing racehorses and greyhounds (training), wagering related revenues, racing customer expenditure and non-race day revenues

In 2021/22, the WA racing industry generated total direct spending of \$1,090.7 million. This expenditure is responsible for creating a direct value-added impact (or wages, salaries and part of the gross operating surplus of the industry) of \$475.2 million.

However, the flow-on effects linked to this expenditure increases the size of the industry's value-added contribution to just over \$1,332.6 million.

The economic output generated by the racing industry in WA is responsible for sustaining 10,249 full-time equivalent jobs in the State.

Just over 54% of the total value-added impact occurs in the Perth region, with the Peel (17.1%), Wheatbelt (7.0%) and South West (6.8%) regions representing the largest areas of racing-related economic activity. Thoroughbred racing is responsible for generating 65% of this impact, with harness racing (18.1%) and greyhound racing (16.9%) generating the remainder.

ECONOMIC IMPACTS

	Thoroughbred	Harness	Greyhound	Total
Total value-added²	\$866.4	\$241.1	\$225.1	\$1,332.6
% of industry value-added	65.0%	18.1%	16.9%	
Total household income	\$498.8	\$138.1	\$132.9	\$769.7
Total FTE employment	6,673	1,847	1,729	10,249

Note:

1. Some totals do not add due to rounding

2. 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 part of the gross operating surplus of the industry) generated in production

3. 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 more than **\$1.3 billion in Real Gross Value-Added** to the WA economy

AT A GLANCE

1,192 Breeders

THOROUGHBRED	437
HARNESS	592
GREYHOUND	163

1,688 Foals & pups produced

THOROUGHBRED	870
HARNESS	316
GREYHOUND	502

11,262 Owners & syndicate members

THOROUGHBRED	8,169
HARNESS	2,107
GREYHOUND	986

1,016 Trainers

THOROUGHBRED	450
HARNESS	412
GREYHOUND	154

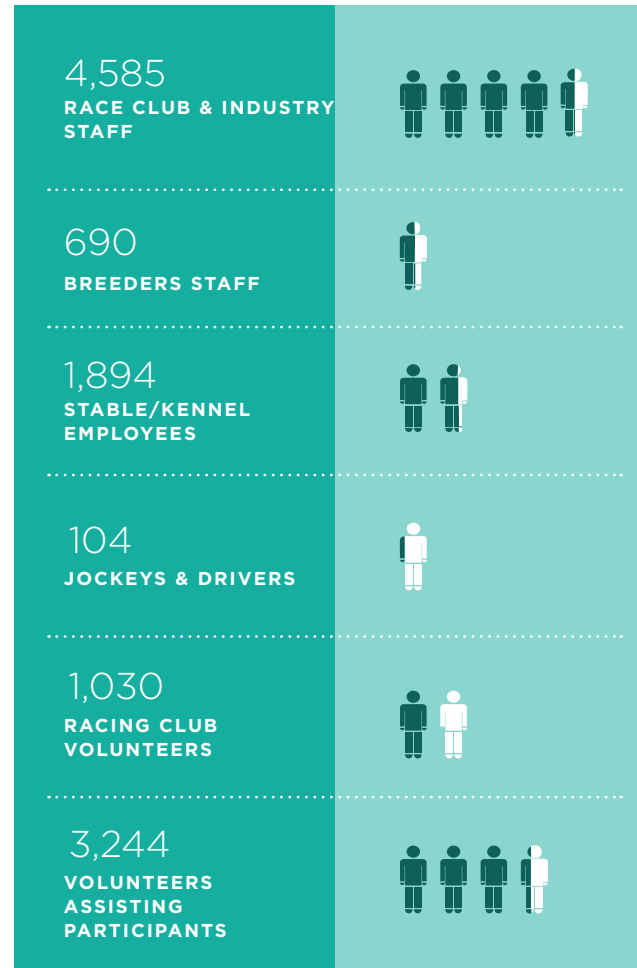
7,119 Horses & greyhounds in training

THOROUGHBRED	3,773
HARNESS	1,693
GREYHOUND	1,653

104 Jockeys, drivers & apprentices

THOROUGHBRED	55
HARNESS	49

EMPLOYEES AND VOLUNTEERS (TOTAL)



KEY: = 1,000 PEOPLE

More than **25,000 people** participate directly in the **WA racing industry** as an employee, participant or volunteer

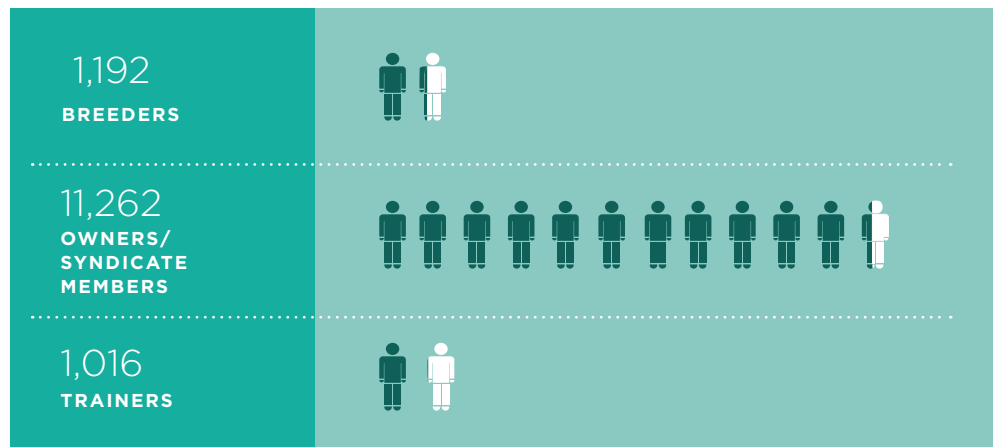
Participants are the lifeblood of the industry. They provide the investment, time, skills and passion that underpins horse and greyhound racing in the State.

In total, there are more than 25,000 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 in the harness and greyhound racing industries.

Owners are a key participant group, because they provide much of the investment from which the chain of activity follows. In WA, there are close to 11,300 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 3,200 people who volunteer their time and resources. This is particularly prevalent in regional areas where many race clubs are run almost entirely by volunteers.

PARTICIPANTS IN RACING (TOTAL)



KEY: = 1,000 PEOPLE



AT A GLANCE

50 Race clubs

THOROUGHBRED	37
HARNESS	12
GREYHOUND	1

885 Race meetings

THOROUGHBRED	274
HARNESS	255
GREYHOUND	356

8,372 Races

THOROUGHBRED	2,172
HARNESS	2,151
GREYHOUND	4,049

9,067 Racing club members

THOROUGHBRED	7,780
HARNESS	1,287

475,726 Attendances

THOROUGHBRED	293,748
HARNESS	120,450
GREYHOUND	61,528

In 2021/22, close to 475,800 attendances were recorded at thoroughbred, harness and greyhound race meetings in WA. Around 54% of these attendances were made at regional racecourses, with Peel (72,016), South West (51,800) and Kimberley (35,800) 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	6,400	0	0	6,400
Goldfields-Esperance	23,689	0	0	23,689
Great Southern	12,250	0	0	12,250
Kimberley	35,800	0	0	35,800
Mid West	17,850	0	0	17,850
Peel	21,661	13,500	36,855	72,016
Pilbara	13,900	0	0	13,900
South West	20,600	31,200	0	51,800
Wheatbelt	11,565	9,750	62	21,377
Total Regional	163,715	54,450	36,917	255,082
Perth	130,033	66,000	24,611	220,644
Total	293,748	120,450	61,528	475,726



EXTERNAL EXPENDITURE ←

- OFF-COURSE SPEND
 - + Accommodation
 - + Transport
 - + Retail/fashion
 - + Food and beverage
- + Government share of net wagering revenue

- + Administration costs
- + Race meeting costs
- + Marketing and promotions
- + Integrity services

- + Track maintenance
- + Racecourse Administration
- + Food and beverage
- + Insurance
- + Event costs
- + Marketing and promotion

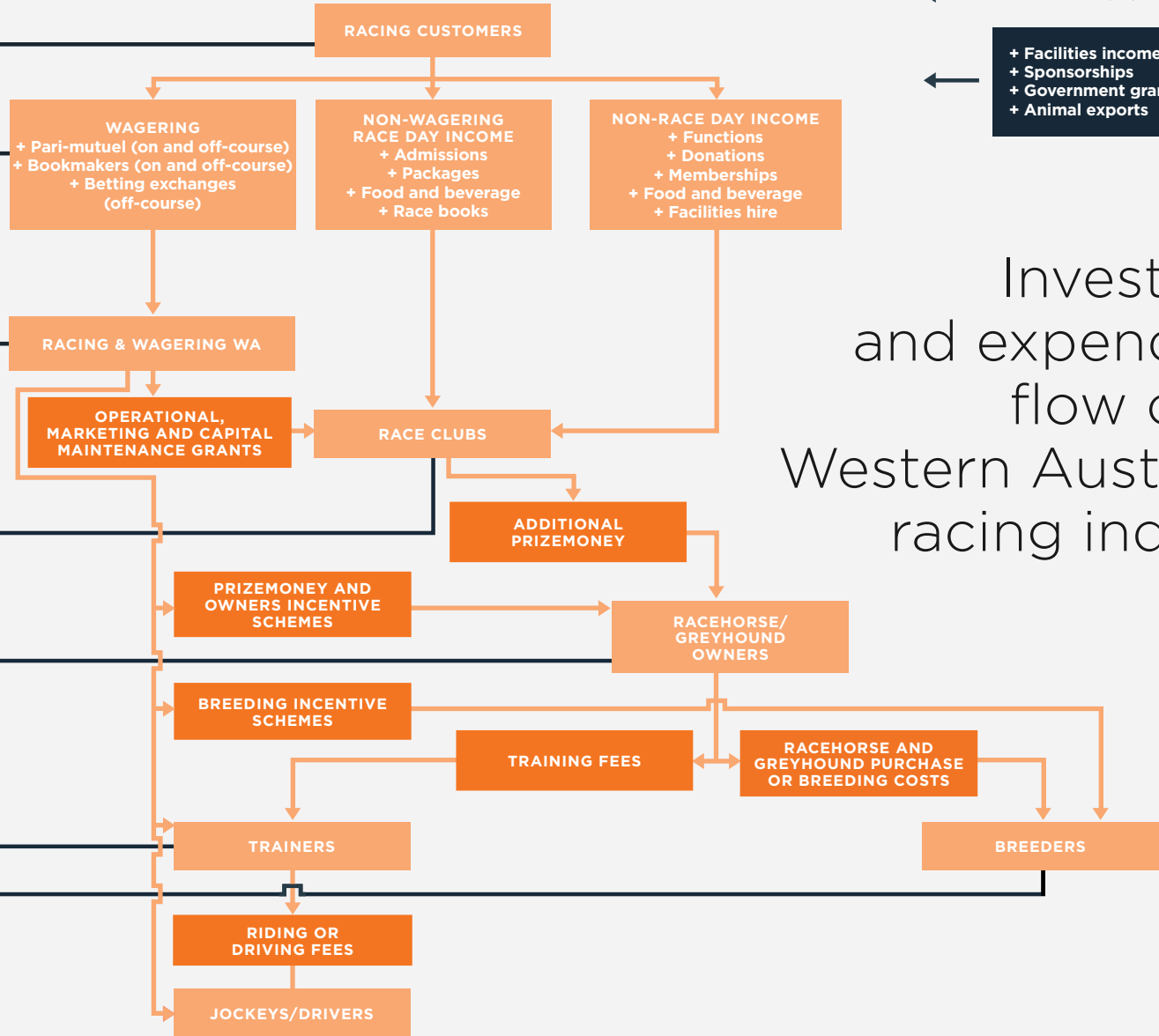
- + Insurance
- + Agistment
- + Vet costs
- + Transport
- + Registration
- + Accommodation

- + Employee wages
- + Stock feed
- + Transport
- + Stabling/kennelling
- + Saddles/equipment
- + Administration/marketing
- + Supplements/vitamins
- + Rates/taxes

- + Service fees
- + Agistment
- + Insurance
- + Vet/farriers
- + Employee wages
- + Stock feed
- + Sale cost
- + Worming/vaccinations
- + Rates/taxes
- + Rearing equipment

← **INTERNAL INVESTMENTS**

- + Facilities income
- + Sponsorships
- + Government grants
- + Animal exports



Investment and expenditure flow of the Western Australian racing industry

INTRODUCTION

Racing and Wagering Western Australia (RWWA), commissioned IER to undertake a study into the size and scope of the racing industry in WA based on the 2021/22 racing season. This constitutes an update on the studies undertaken in 2010/11, 2014/15 and again in 2018/19. 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 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 activities in WA
- + The number of participants in racing-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 WA regions

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 breeding and training activities, attendance and wagering) as well as calculating a range of economic measures.

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

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

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

Throughout the report, data has been presented both within a state and regional framework. The regional level analysis is based on the nine defined regions, with the tenth region in the report constituting the Perth area.

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





ECONOMIC METHODOLOGY

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

- + 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 race day customer expenditure - the expenditure generated oncourse at race meetings by attendees

- + off-course race day customer expenditure - the expenditure generated in the community by racing customers as part of their race day attendance
- + non-race day customer expenditure - the expenditure generated, outside official race days, through the use of racing club facilities and infrastructure at venues owned by race clubs in WA

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

1. Gathering Industry Expenditure This has been explained in more detail previously; however this is the most important step, 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.

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

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

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

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

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

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

Direct spending by the Western Australian racing industry

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

In 2021/22, the Western Australian racing industry generated close to \$1.1 billion in direct expenditure. The calculation of direct

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

The Western Australian racing industry is responsible for **generating more than \$1.1 billion in expenditure** in Western Australia. Close to 46% of this expenditure was **generated in regional parts of the State.**

The breakdown of final expenditures is outlined below:

Sources of final expenditure	Funded by	Amount	% of Final expenditure
Production of racing horses and greyhounds (Breeding)	+ Private investment + Service fees revenue + Industry bonuses & incentives	\$55.5m	5.1%
Preparation of racing horses and greyhounds (Training)	+ Private investment + Prizemoney + Industry bonuses & incentives	\$181.1m	16.6%
Racing club & industry expenditure	+ Wagering product fees + Race day revenues + Sponsorship & membership + Non-race day revenues + Nominations	\$550.0m	50.4%
Other wagering operator expenditure	+ Taxation on wagering revenue generated in Western Australia + Non TAB wagering operator operating expenditure in WA	\$281.0m	25.8%
Racing customer expenditure off-course	+ Private investment	\$23.2m	2.1%
Total		\$1,090.7m	

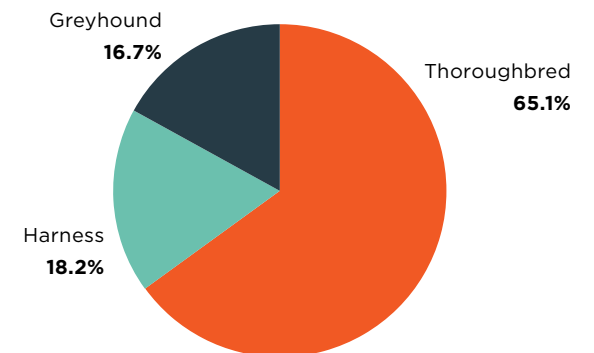


Thoroughbred racing is responsible for over \$710.4 million (65.1%) of this recurrent expenditure. Racing and wagering related expenditure makes up the largest proportion of the industry's expenditure profile (76.7%), while more than 17% is generated by the training sector.

Harness racing is responsible for more than \$198 million (18.2%) 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 (71.6%) while the preparation of racehorses (23.7%) makes up a large component of the remaining expenditure.

Greyhound racing is responsible for \$182.1 million (16.7%) of this recurrent expenditure. Close to 92% 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.

DIRECT SPENDING BY CODE



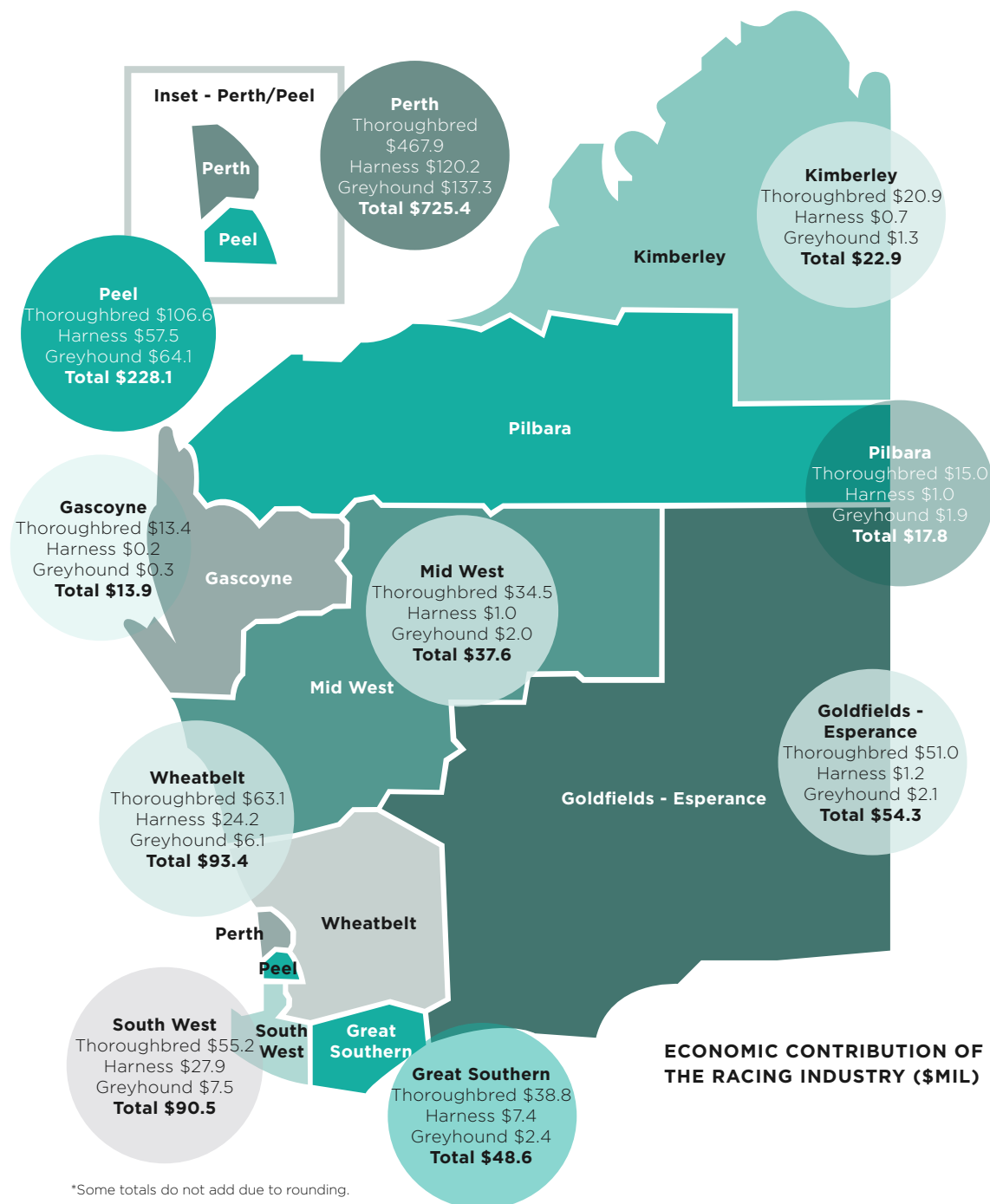
Economic contribution of the racing industry

Western Australian racing is responsible for generating a real gross value-added contribution of \$1,332.6 million for the Western Australian economy. Real gross value-added is the generally accepted measure of the value of production from economic activity. It is the sum of value-added by all industries in a region (in this case, all regions of Western Australia). In any period of time, the value-added contribution in an industry equates to the value of sales less the value of inputs used in production. This means value-added is equal to the income (wages, salaries and profits) generated in the course of production.

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

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	\$308.9	\$557.5	\$866.4
Harness	\$86.7	\$154.4	\$241.1
Greyhound	\$79.6	\$145.5	\$225.1
Total	\$475.2	\$857.3	\$1,332.6



*Some totals do not add due to rounding.

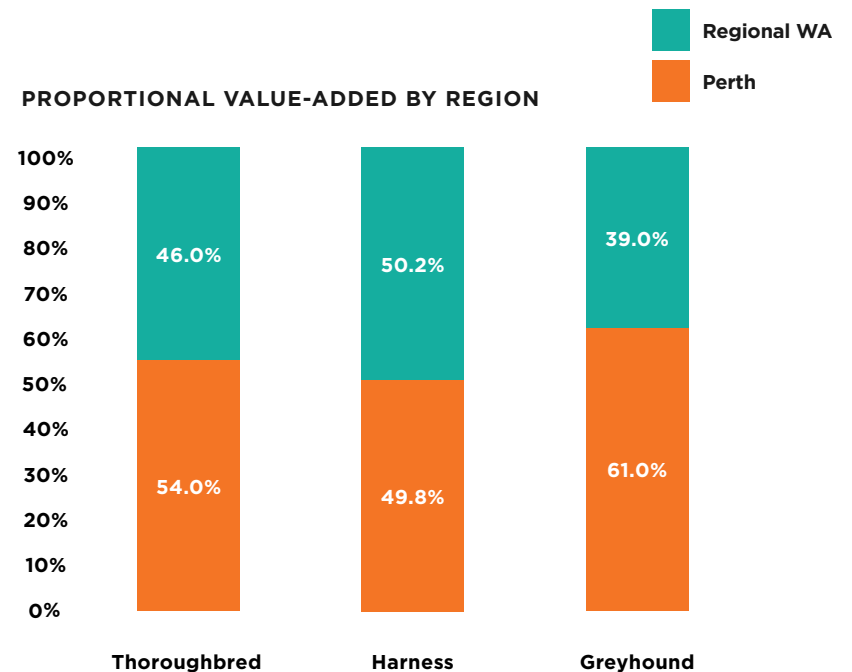
Generally, the level of economic activity will not always proportionally follow the final expenditures, as regional areas generally have higher import penetrations than metropolitan areas - i.e. a lot of the expenditure is on product imported from the metropolitan area. As such, the model takes into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

When considering the value-added contribution of \$1,332.6 million generated by the Western Australian racing industry, it is important to note that it is made up of:

- ✦ Direct value-added (\$475.2 million) - this represents the amount of income included in the direct in scope expenditure. It is the amount of gross wages and salaries in the racing industry and the direct provision of services to racing activity, plus part of the gross operating surplus (profits, interest payment and direct taxes) directly created in supplying these services and product. This is also equal to the direct in scope expenditure less the purchases that the provider of the goods and services makes in providing the goods and services (both supplied from within the region, as well as externally such as imported).
- ✦ Indirect (Induced) value-added (\$857.3 million) - represents the value-added activity (wages, salaries and gross operating surplus) generated to support the purchases made in providing the inputs to the providers of the direct services, along with the value-added impact in providing households with goods and services as they spend their wages, and the trickle on effect of this.

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

The WA racing industry generates over \$1.3 billion in direct and flow-on value-added impacts for the WA economy



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** - 8.1% of sector Gross State Product (GSP)
- + **Administrative Services** - 0.7%
- + **Accommodation & Food Services** - 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	\$28.9	6.1%	\$10,829	0.3%
Mining	\$0.1	0.0%	\$186,798	0.0%
Manufacturing	\$5.1	1.1%	\$18,830	0.0%
Electricity, gas, water & waste	\$3.7	0.8%	\$5,131	0.1%
Construction	\$2.9	0.6%	\$21,029	0.0%
Wholesale trade	\$12.5	2.6%	\$8,933	0.1%
Retail trade	\$4.1	0.9%	\$9,999	0.0%
Accommodation & food services	\$33.2	7.0%	\$4,661	0.7%
Transport, postal & warehousing	\$15.9	3.4%	\$11,146	0.1%
Information media & telecommunications	\$0.3	0.1%	\$2,961	0.0%
Finance & insurance services	\$0.4	0.1%	\$12,194	0.0%
Ownership of dwellings	\$1.6	0.3%	\$19,178	0.0%
Property services	\$0.0	0.0%	\$6,530	0.0%
Professional, scientific & technical services	\$51.8	10.9%	\$17,576	0.3%
Administrative services	\$59.5	12.5%	\$7,937	0.7%
Public administration & safety	\$38.5	8.1%	\$11,576	0.3%
Education & training	\$31.3	6.6%	\$10,607	0.3%
Health care & social assistance	\$43.4	9.1%	\$18,671	0.2%
Arts & recreation services	\$117.4	24.7%	\$1,455	8.1%
Other services	\$24.5	5.2%	\$4,931	0.5%
Total	\$475.2		\$390,546	

*Some totals may not add due to rounding.





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CASE STUDY: RACING ON COUNTRY LEADS THE WAY TOWARDS RECONCILIATION

Racing on Country was created in 2022 from a desire to strengthen community links and highlight racing as a way to unite people from different backgrounds and culture. Originally conceived as a tribute to life member and revered horseman Billy Mitchell, the Carnarvon Race Club developed the concept into a celebration of the Indigenous contribution to racetracks, the WA outback and beyond.

On May 21, Carnarvon became the first club in Australia to establish an Indigenous race meeting to open their racing carnival. Local Indigenous artists were on site for the inaugural event, with specially commissioned artwork including a giant mural representing the racetrack as a place of gathering, happiness and yarn sharing. The traditional country of the Yinggarda people was recognised and the mounting enclosure was named in honour of Billy Mitchell, along with a wider salute to the long-term Indigenous

contribution to the club from trackwork riders and jockeys, farriers, trainers, clerks, vet staff and barrier attendants. Billy's daughter Lynne said culture centred on family and inclusiveness to her father. "He spent a lot of his life in that mounting yard and we're just so proud. It's very special," she said.

Organiser Tessa Daly added: "The community that racing brings breaks down so many barriers. Racing on Country is about a story, a journey through time connecting all walks of life." The 140-year-old club has called on other race clubs around Australia to adopt the Racing on Country theme.



CASE STUDY: DEVELOPING ABILITIES WITH HORSEPOWER AUSTRALIA

Horses and ponies, at HorsePower's 12 centres across Western Australia, have welfare costs covered by Racing and Wagering WA, allowing volunteers to focus on therapy. RWWA's eight-year community partnership with HorsePower, formerly known as Riding for the Disabled, supports equine programs for people with physical, intellectual, emotional and social challenges.

In 2022, RWWA's \$80,000 financial assistance included \$30,000 for the annual upkeep of around 120 therapy horses across the State. Hearts and Horses Scholarships enabled 12 people to access vital programs and other funding was tagged for organisation and event support. HorsePower Executive Officer Kelly Mansfield said RWWA helped the program to thrive.

"The support is huge because it means our volunteers can concentrate on caring for horses

and providing opportunities to people with disabilities instead of running sausage sizzles to meet the costs of caring for these special animals," she said.

"Our driving, vaulting, riding, hippotherapy and walking with horses programs help people achieve milestones and develop life skills. Hippotherapy, or horse therapy, uses the natural movement of a horse to improve coordination and core strength and provide sensory input, so it's useful for a range of mental, behavioural and physical disorders. We've seen children take their first steps, we've heard children say their first words - and it's magical."

RWWA also assists HorsePower by retraining and donating suitable retired racehorses to become therapy horses. "We have a lot of ponies and older retirees. The horses from Off the Track WA are younger, sturdier and bigger so they allow our riders to develop their abilities and progress to independent riding. The ex-racehorses are fantastic for older and larger riders, who form long-term connections with the horses," Kelly said.



CASE STUDY: TEAM TEAL RACES TO BEAT OVARIAN CANCER AT THE TROTS

Women in harness racing pull on Team Teal silks and pants for six weeks each year to raise money for ovarian cancer research. The campaign, organised by the Australia New Zealand Gynaecological Oncology Group (ANZGOG), has been embraced by the harness racing community, with Western Australian reinswomen and clerks flaunting the Team Teal colours on the racetrack to promote the cause and raising both awareness and funds with every win.

Racing and Wagering Western Australia and The Trots WA are major sponsors for the campaign in WA, pledging \$15,000 to the cause every year. In total more than \$76,000 has been raised to support the cause by RWWA, Western Australian harness racing participants and fundraising efforts through race clubs.

In 2022, WomenCAN Head of Fundraising and Development Karen Livingstone said men were also empowered and encouraged by Team Teal,

which was founded in 2010 by harness enthusiast Duncan McPherson OAM following the wishes of his wife Lyn, who died from ovarian cancer. “One trainer relayed his experience of taking a Team Teal pamphlet home to his wife to share information about ovarian cancer after she had been experiencing symptoms,” she said.

“Prompted by her husband, she was investigated and found to have a border-line ovarian tumour. She was very fortunate as 1,720 Australian people will be diagnosed with ovarian cancer this year and 1,040 women will die. It is the most lethal of all the women’s cancers with a 48 per cent survival to five years. Breast cancer by comparison is a 92 per cent survival to five years. As a charity we are extremely grateful to the harness racing industry for their passion and drive for people with ovarian cancer.”

Participants in the Western Australian racing industry

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

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

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

Around 13,470 breeders, owners and trainers provide the capital and the skills to produce

and prepare racing horses and greyhounds for racing. These participants drive a chain of activity which leads to the creation of the product that is consumed by audiences on almost every day of the year.

There are 4,274 individuals who volunteer their time and skills in a variety of roles in the industry. In the participant space, this often includes family members whose connection goes back many generations.

In total, there are 25,017 individuals who participate in the Western Australian racing industry as a participant, employee or volunteer. Close to 55% of the participants are in regional parts of the State.

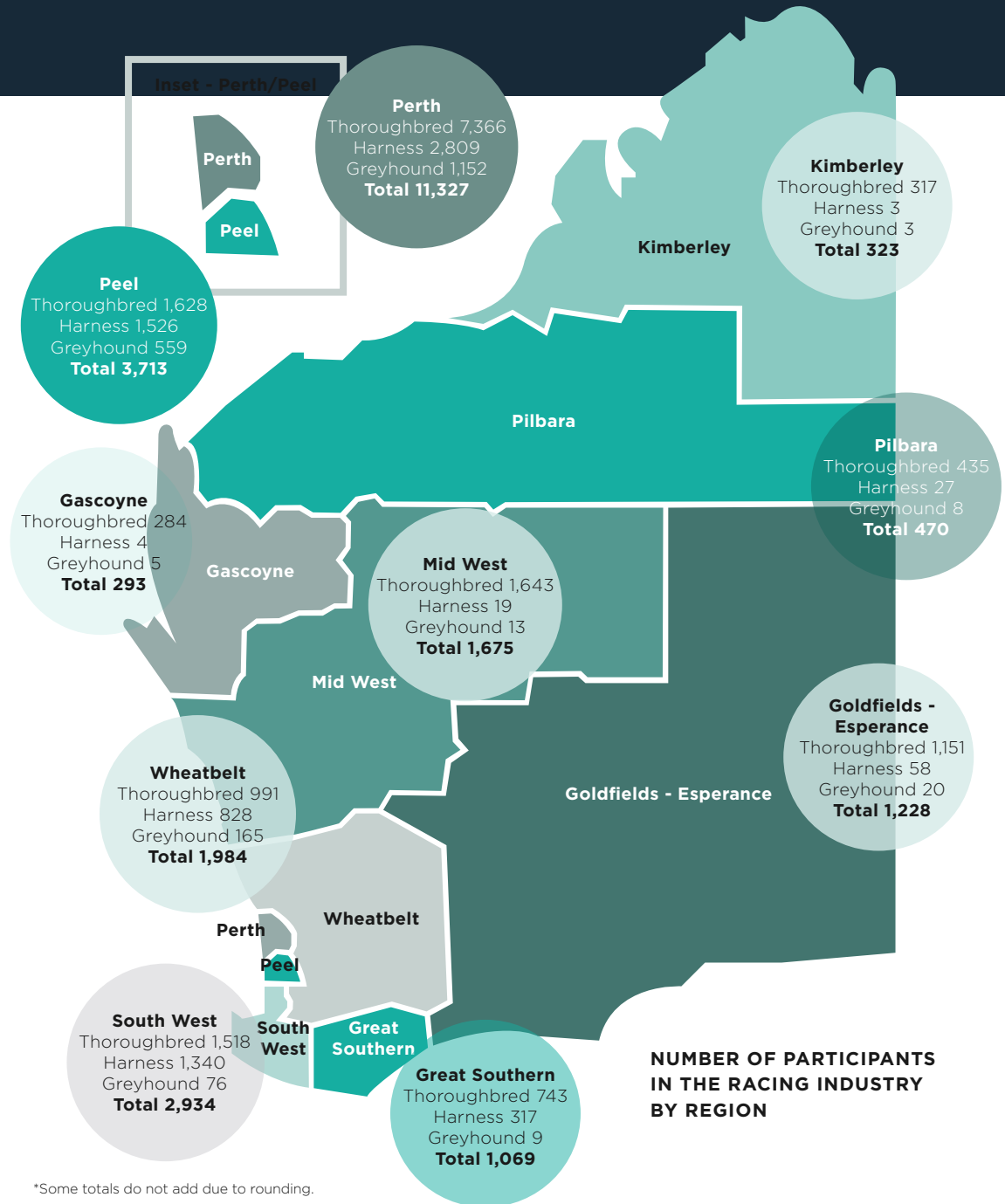
NUMBER OF PARTICIPANTS IN THE WA RACING INDUSTRY

	Thoroughbred	Harness	Greyhound	Total
Breeders	437	592	163	1,192
Owners/syndicate members	8,169	2,107	986	11,262
Trainers	450	412	154	1,016
Total participants	9,056	3,111	1,303	13,470
Race club & industry staff	3,547	790	248	4,585
Breeders staff	265	296	129	690
Stable/kennel employees	1,447	345	102	1,894
Jockeys & drivers	55	49	0	104
Total employees	5,314	1,480	479	7,273
Race club volunteers	822	208	0	1,030
Volunteers assisting participants	885	2,130	229	3,244
Total volunteers	1,707	2,338	229	4,274
Total	16,077	6,929	2,011	25,017

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

*Racing Club & Industry staff includes:

- Racing club
- RWWA staff
- TAB staff



*Some totals do not add due to rounding.

**NUMBER OF PARTICIPANTS
IN THE RACING INDUSTRY
BY REGION**



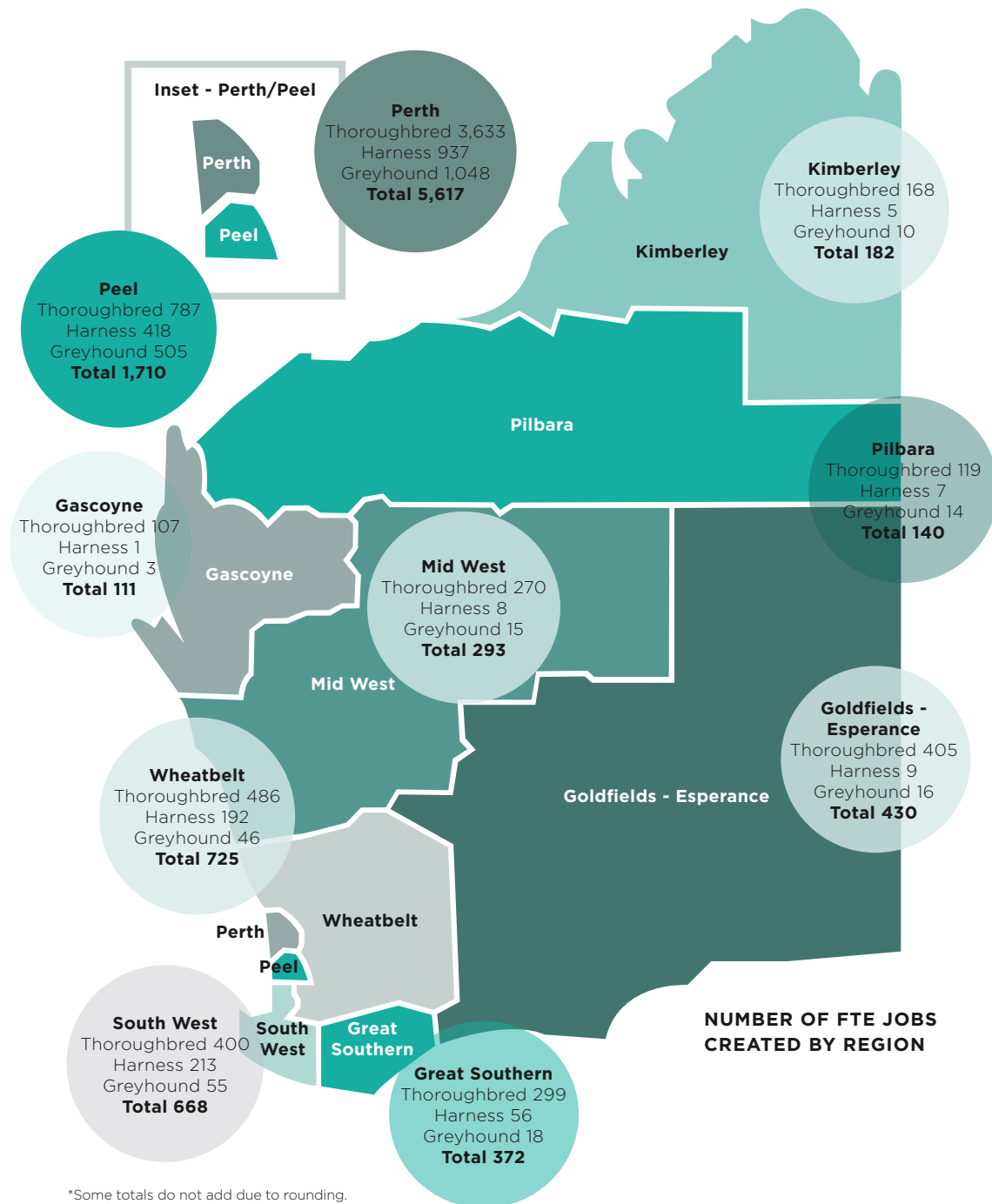
Employment generated by racing in Western Australia

There are approximately 25,000 participants directly involved in Western Australian racing. As outlined earlier, this takes into consideration participants, volunteers and employees (full time, part time, casual and contractor).

In 2021/22, the economic activity generated by racing in Western Australia directly sustained 4,948 full-time equivalent positions in the State. In addition to the direct employment impact, the activities of the racing industry also help to sustain a further 5,301 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the Western Australian racing industry was 10,249 FTE jobs.

The FTE positions that are sustained by the Western Australian racing industry resulted in close to \$769.7 million in wages and salaries for the people employed directly within the industry as well as those employed in down-the-line industries that receive increased demand as a result of racing activity. Some examples of the other industries that are stimulated by racing include; veterinary, feed, retail, tourism, accommodation, transport, manufacturing and construction.

Racing in **Western Australia** sustained **10,249 FTE jobs** in 2021/22



The breeding industry

The breeding sector provides and replenishes the racing horses and greyhounds for the Western Australian racing industry. There are 1,192 registered breeders in Western Australia across the three codes of racing. At the top end of the breeding sector, large stud farms employ many staff and produce large numbers of foals each year. At the other end of the scale, there are a large number of hobby breeders also producing foals and pups.

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

Breeders derive the majority of their income from service fees, agistment and the public and private sale of their stock. In the thoroughbred sector, breeders may occasionally also lease shares in their bloodstock. This particular sector of the industry has great potential to generate economic impacts for the State, as breeders often sell their stock to interstate and overseas buyers at sales events. 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	1	0	0	1
Goldfields-Esperance	19	4	0	23
Great Southern	23	36	1	60
Kimberley	2	0	0	2
Mid West	24	0	0	24
Peel	65	131	59	255
Pilbara	1	3	0	4
South West	78	114	9	201
Wheatbelt	42	61	21	124
Total Regional	255	350	90	695
Perth	182	242	73	497
Total	437	592	163	1,192

NUMBER OF STAFF EMPLOYED BY BREEDERS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	1	0	0	1
Goldfields-Esperance	12	2	0	14
Great Southern	14	18	1	33
Kimberley	1	0	0	1
Mid West	15	0	0	15
Peel	39	66	47	152
Pilbara	1	2	0	2
South West	47	57	7	112
Wheatbelt	25	30	17	72
Total Regional	155	175	71	401
Perth	110	121	58	289
Total	265	296	129	690

*Some totals do not add due to rounding.





NUMBER OF REGISTERED STALLIONS & SIRES

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	0	0	0	0
Goldfields-Esperance	0	0	0	0
Great Southern	3	3	0	6
Kimberley	0	0	0	0
Mid West	1	0	0	1
Peel	12	4	3	19
Pilbara	0	0	0	0
South West	19	4	0	23
Wheatbelt	14	4	0	18
Total Regional	49	15	3	67
Perth	1	2	4	7
Total	50	17	7	74

NUMBER OF LIVE FOALS & PUPS BORN IN WESTERN AUSTRALIA

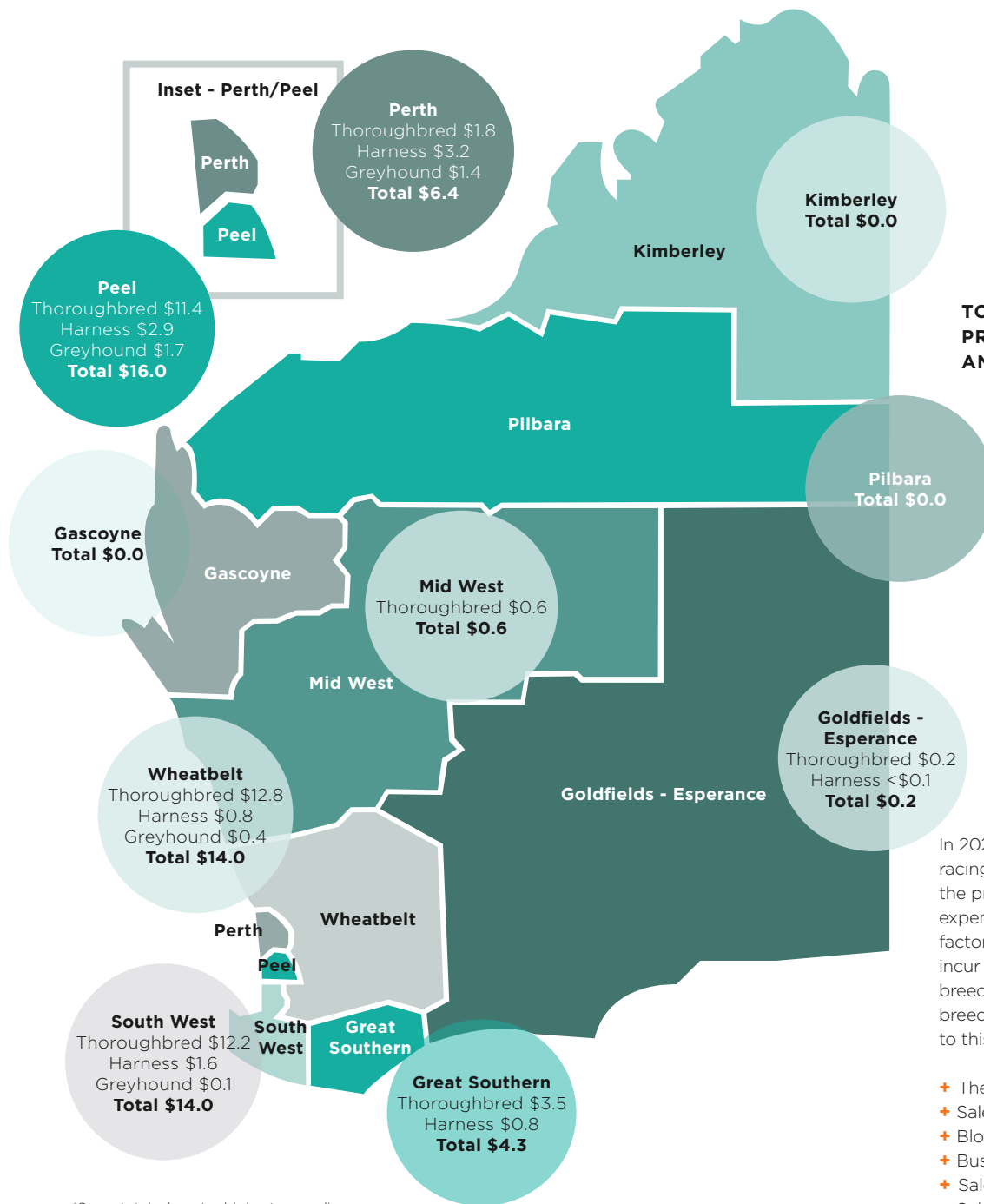
	Thoroughbred	Harness	Greyhound	Total
Gascoyne	0	0	0	0
Goldfields-Esperance	4	0	0	4
Great Southern	74	23	0	97
Kimberley	0	0	0	0
Mid West	15	0	0	15
Peel	224	109	245	578
Pilbara	0	0	0	0
South West	267	48	18	333
Wheatbelt	247	27	50	324
Total Regional	831	207	313	1,351
Perth	39	109	189	337
Total	870	316	502	1,688

NUMBER OF BROODMARES/FEMALES COVERED

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	0	0	0	0
Goldfields-Esperance	6	2	0	9
Great Southern	120	51	0	171
Kimberley	0	0	0	0
Mid West	24	0	0	24
Peel	364	154	15	533
Pilbara	0	0	0	0
South West	434	99	4	536
Wheatbelt	401	42	7	450
Total Regional	1,350	348	26	1,723
Perth	63	191	21	276
Total	1,413	539	47	1,999

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

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	\$0.0	\$0.0	\$0.0	\$0.0
Goldfields-Esperance	\$0.2	\$0.0	\$0.0	\$0.2
Great Southern	\$3.5	\$0.8	\$0.0	\$4.3
Kimberley	\$0.0	\$0.0	\$0.0	\$0.0
Mid West	\$0.6	\$0.0	\$0.0	\$0.6
Peel	\$11.4	\$2.9	\$1.7	\$16.0
Pilbara	\$0.0	\$0.0	\$0.0	\$0.0
South West	\$12.2	\$1.6	\$0.1	\$14.0
Wheatbelt	\$12.8	\$0.8	\$0.4	\$14.0
Total Regional	\$40.7	\$6.2	\$2.2	\$49.1
Perth	\$1.8	\$3.2	\$1.4	\$6.4
Total	\$42.5	\$9.4	\$3.6	\$55.5



TOTAL EXPENDITURE ON PRODUCING RACEHORSES AND GREYHOUNDS (\$MIL)

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

The expenditure figures outlined in this section have been derived through a combination of industry-level consultation and primary research among 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 79% of all breeding-related expenditure occurs in three Western Australian regions. The Peel (28.9%), Wheatbelt (25.3%) and South West (25.2%) 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 while Perth and Peel generate 65.0% of harness activity. Almost 86% of greyhound breeding activity occurs in the Peel and Perth regions.

In 2021/22, breeders in the Western Australian racing industry spent close to \$55.5 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
- + Sales commission on yearlings sold at auction
- + Infrastructure and maintenance

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.

*Some totals do not add due to rounding.



In 2021/22, breeders in the Western Australian racing industry spent close to **\$55.5 million** on the production of racing stock

THOROUGHBRED BREEDERS

In 2021/22, there were 1,413 broodmares covered in WA, producing 870 foals. This thoroughbred breeding activity is responsible for generating more than \$42.5 million in the production and care of racing stock. The Wheatbelt region is responsible for over 30.1% of this amount, followed by the South West (28.7%) and Peel (26.9%) regions.

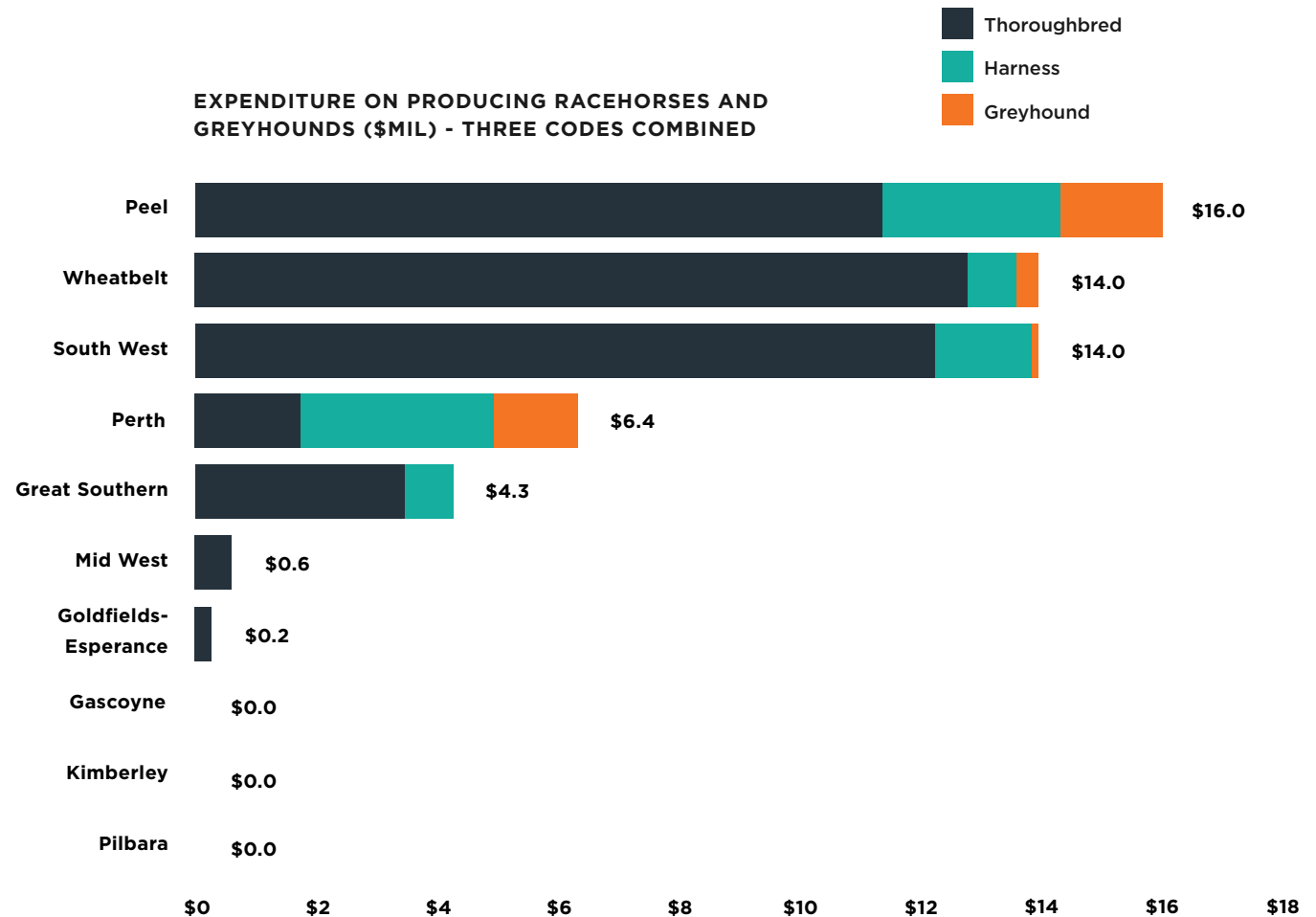
HARNES BREEDERS

In 2021/22 there were 539 broodmares covered in WA, producing 316 foals. This standardbred breeding activity is responsible for generating close to \$9.4 million in the production and care of racing stock. The Perth (34.1%) and Peel (30.9%) regions were responsible for a significant portion of this impact.

GREYHOUND BREEDERS

In 2021/22, 47 females were covered in WA, producing 502 pups. This greyhound breeding activity is responsible for generating nearly \$3.6 million in the production and care of greyhound racing stock. The Peel region is responsible for close to half of this activity (47.6%), with a further 38.1% occurring in the Perth region.

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



THE TRAINING INDUSTRY

Ownership

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 2021/22 there were more than 11,000 individuals with an ownership interest in thoroughbred, harness and/or greyhound racing in Western Australia.

Over 54% of owners reside in the Perth region, while the Peel (14.0%), South West (10.8%) and Wheatbelt (6.3%) regions make up a significant proportion of the remainder.

In 2021/22, owners of racehorses and greyhounds trained in Western Australia spent more than

\$181.1 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 in each region is based on 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 three-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 they are also included in the assessment.

TOTAL NUMBER OF OWNERS OF RACEHORSES AND GREYHOUNDS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	93	4	5	102
Goldfields-Esperance	431	28	19	478
Great Southern	282	62	6	350
Kimberley	115	3	3	121
Mid West	400	14	13	427
Peel	872	450	257	1,579
Pilbara	128	10	8	146
South West	780	400	35	1,215
Wheatbelt	457	176	74	707
Total Regional	3,558	1,147	420	5,125
Perth	4,611	960	566	6,137
Total	8,169	2,107	986	11,262

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



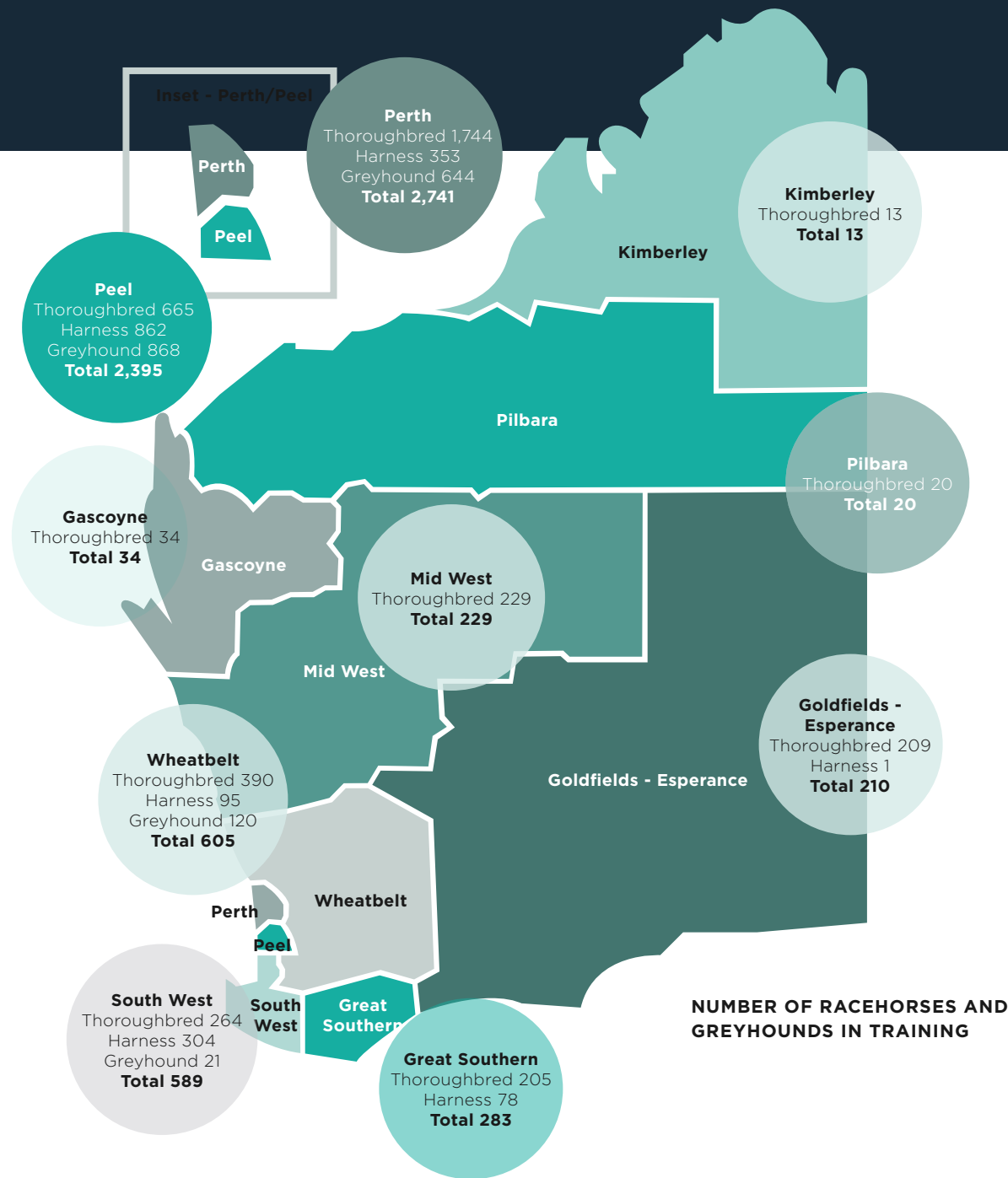


NUMBER OF RACEHORSES AND GREYHOUNDS IN TRAINING

In 2021/22, there were more than 7,100 thoroughbreds, standardbreds and greyhounds in training in Western Australia. Almost two-thirds of this training activity occurred in regional areas of the State. The Perth region is a major centre for the training activity, with almost 39% 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 Wheatbelt regions account for more than 75% of all training activity across these codes.

Just over 91% 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.



NUMBER OF RACEHORSES AND GREYHOUNDS IN TRAINING

TOTAL NUMBER OF TRAINERS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	7	0	0	7
Goldfields-Esperance	38	3	0	41
Great Southern	26	19	0	45
Kimberley	1	0	0	1
Mid West	43	2	0	45
Peel	91	146	64	301
Pilbara	5	1	0	6
South West	61	73	9	143
Wheatbelt	43	37	18	98
Total Regional	315	281	91	687
Perth	135	131	63	329
Total	450	412	154	1,016

NUMBER OF JOCKEYS, DRIVERS AND APPRENTICES

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	0	0	0	0
Goldfields-Esperance	0	1	0	1
Great Southern	0	0	0	0
Kimberley	0	0	0	0
Mid West	1	0	0	1
Peel	8	16	0	24
Pilbara	0	0	0	0
South West	4	6	0	10
Wheatbelt	2	4	0	6
Total Regional	15	27	0	42
Perth	40	22	0	62
Total	55	49	0	104

NUMBER OF STABLE/KENNEL EMPLOYEES

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	18	0	0	18
Goldfields-Esperance	138	3	0	141
Great Southern	113	13	0	126
Kimberley	9	0	0	9
Mid West	125	0	0	125
Peel	228	89	42	359
Pilbara	20	1	0	21
South West	145	56	3	204
Wheatbelt	110	41	7	158
Total Regional	906	203	52	1,161
Perth	541	142	50	733
Total	1,447	345	102	1,894

NUMBER OF RACEHORSES & GREYHOUNDS IN TRAINING

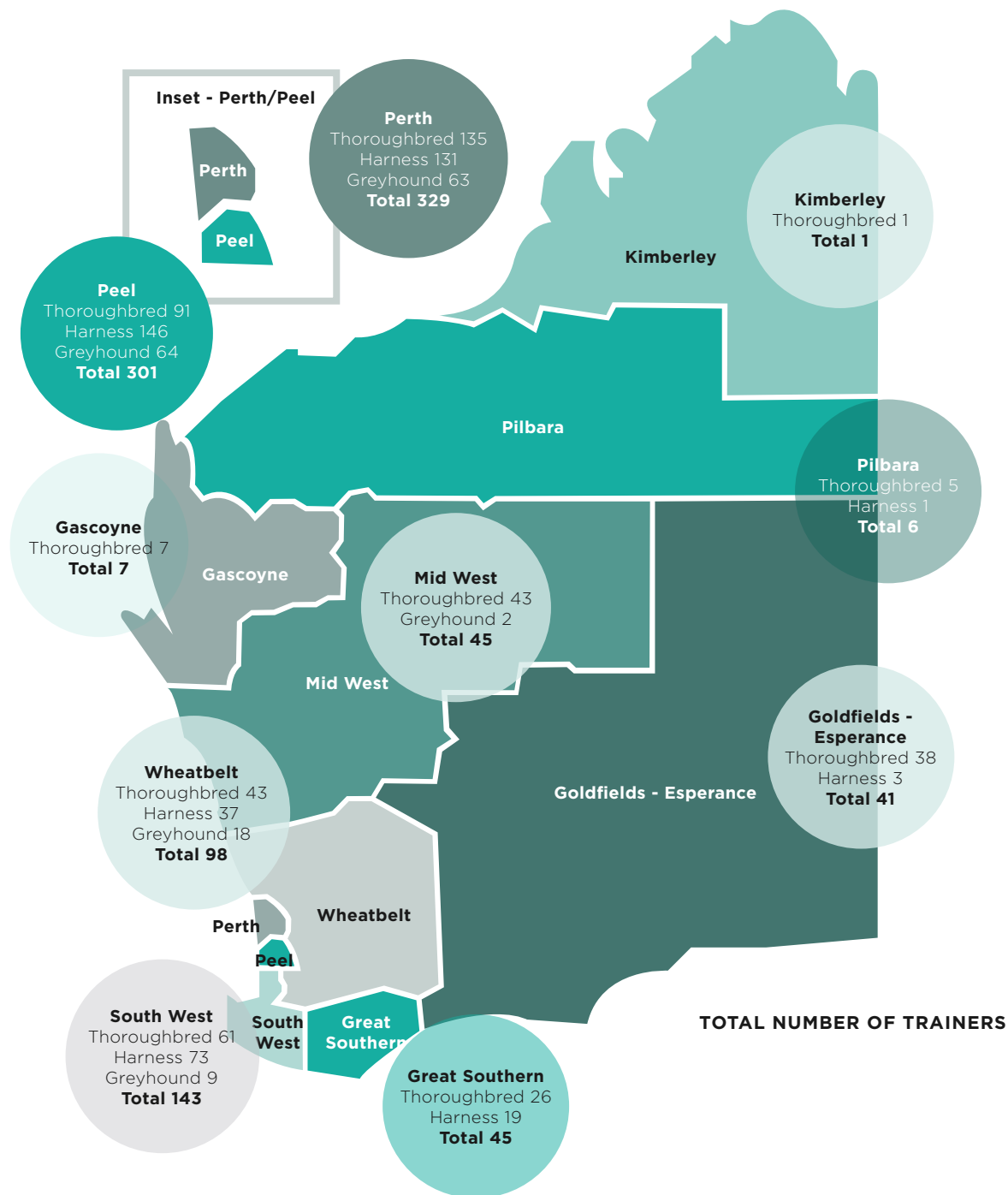
	Thoroughbred	Harness	Greyhound	Total
Gascoyne	34	0	0	34
Goldfields-Esperance	209	1	0	210
Great Southern	205	78	0	283
Kimberley	13	0	0	13
Mid West	229	0	0	229
Peel	665	862	868	2,395
Pilbara	20	0	0	20
South West	264	304	21	589
Wheatbelt	390	95	120	605
Total Regional	2,029	1,340	1,009	4,378
Perth	1,744	353	644	2,741
Total	3,773	1,693	1,653	7,119

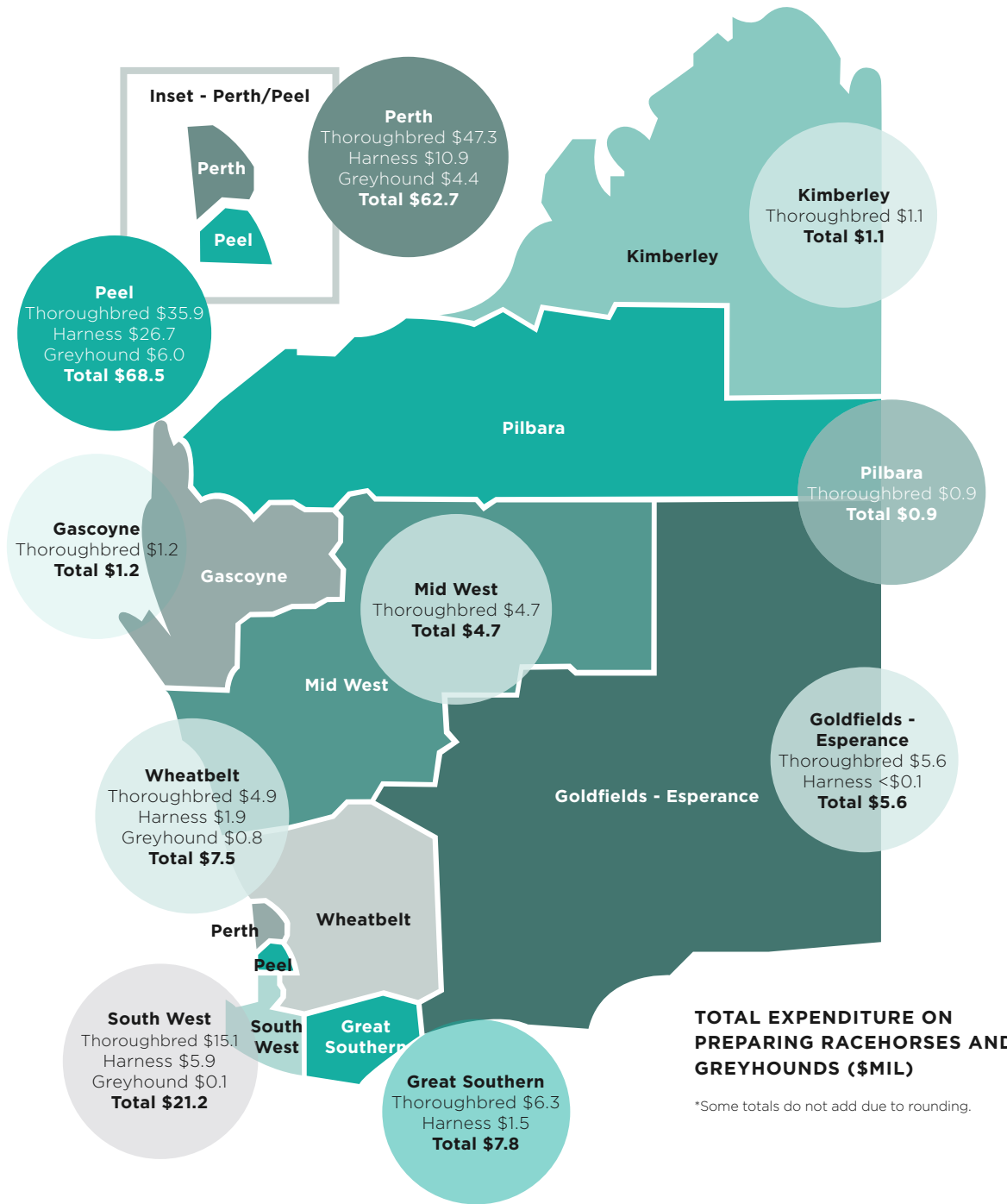
Training

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-race training, trialling and race day 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 2021/22 racing season, there were more than 1,000 horse and greyhound trainers providing services to owners in the Western Australian racing industry. Trainers also employ just over 1,890 stable employees to assist with trialling 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 61% of these jobs are sustained within regional areas of Western Australia.





Cost of preparing racehorses and greyhounds

In 2021/22, owners of **racehorses** and **greyhounds** trained **in Western Australia** spent just over **\$181 million**

TOTAL EXPENDITURE ON PREPARING RACEHORSES AND GREYHOUNDS (\$MIL)

*Some totals do not add due to rounding.

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 expenses 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 understate 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 (while animal is in training)

EXPENDITURE ITEM:

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

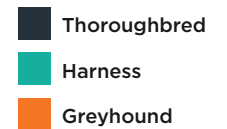
Items covered by owners directly (not generally included in trainer accounts)

EXPENDITURE ITEM:

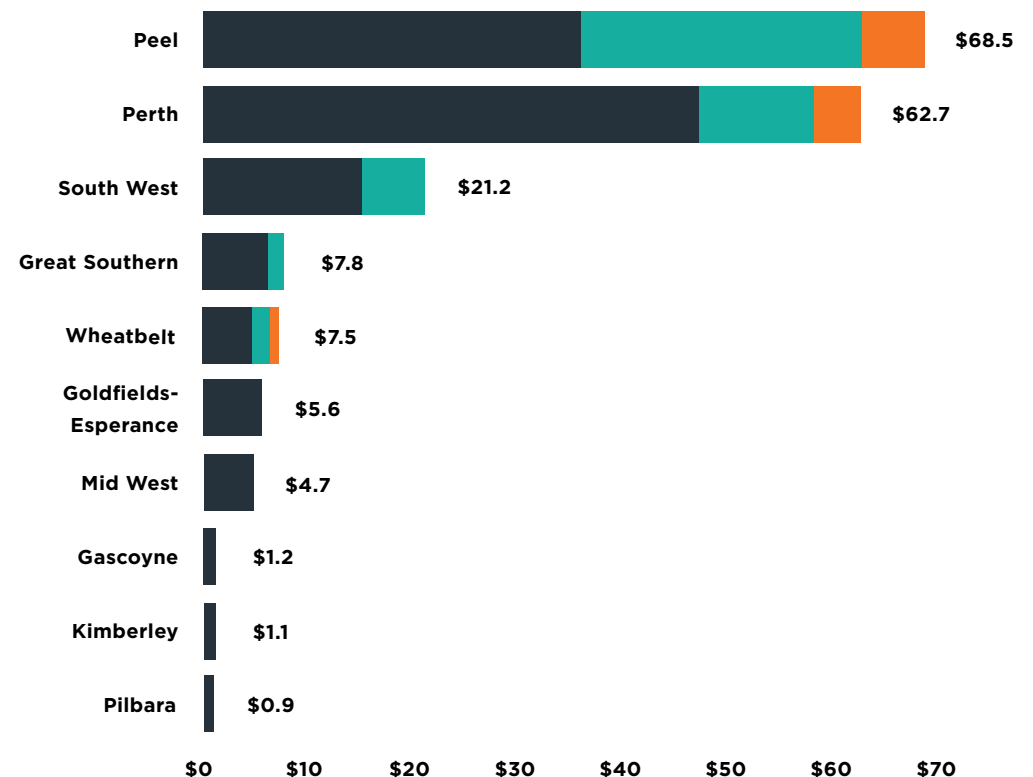
- + Insurance
- + Agistment/spelling
- + Registration fees
- + Breaking-in/pre-training/gelding
- + Entertainment
- + Accommodation
- + Trophies & prints

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

Almost 38% of this expenditure occurs in Peel, with Perth (34.6%) and the South West region (11.7%) the next most significant. Overall, 65.4% 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



CASE STUDY: CENTRAL WHEATBELT HARNESS RACING CLUB (KELLERBERRIN)

The harness race club in Kellerberrin works alongside the local football club, netball association, pony club, agricultural society, cricket club and the Kellerberrin & Districts Club to share facilities and resources such as:

- + A multipurpose facility
- + Community facility grant funding for the collective sporting groups in the shire
- + Staff such as Central Wheatbelt Harness Racing Club secretary Jenna Saunders
- + Stockpiling of manure for public to collect and use on gardens
- + Facilitating the selling of raffle tickets for groups on race days, previously have raised for fire brigades, school P&Cs, St John Ambulance as well as kids fundraising for their camps

Race days are about providing a relaxing family friendly atmosphere, every race day has free entry along with free entertainment for kids. Every meeting, the club spends between \$200 and \$2,000 providing free entertainment for families such as bouncy castles, Zumba, face painting, clown, live music, ice cream and coffee vans, alongside the attraction of racing.

The club is very inclusive and encourages all members of our community to come along and be involved. With free entry, a nice venue, food and drinks, great areas for the kids to play, it is a very welcoming and relatively cheap afternoon for the whole family. On Cup days they try their best to cater for the whole community. Along with the usual attractions they like to assist in promoting local businesses showcasing what they offer. The trots in Kellerberrin are very important for the community and their Sunday afternoon racing is very well supported by locals and travellers alike.







Race clubs in Western Australia

Thoroughbred

GASCOYNE

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

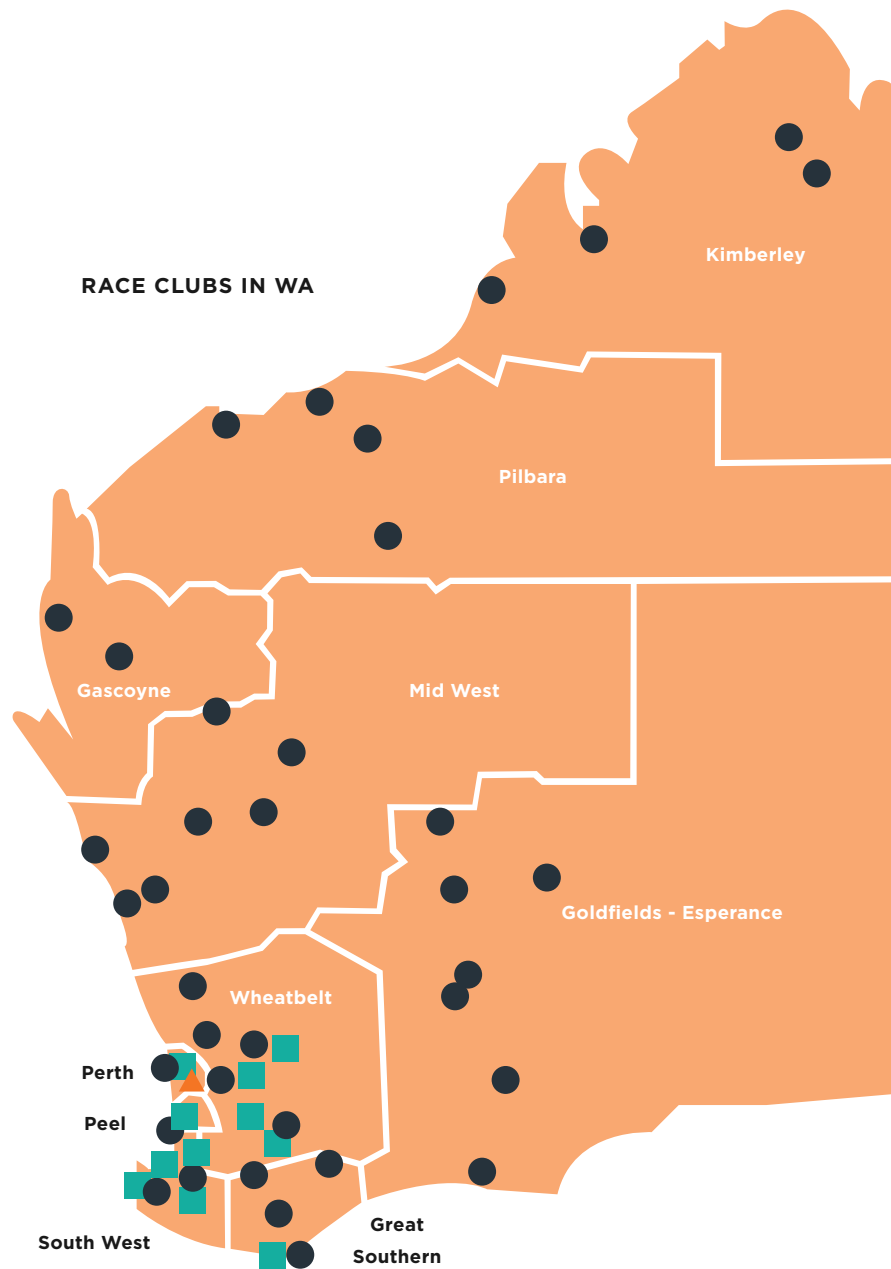
WHEATBELT

- + 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 race clubs in Western Australia host more than **880 race meetings annually.**

NUMBER OF RACE CLUBS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	2	0	0	2
Goldfields-Esperance	7	0	0	7
Great Southern	4	1	0	5
Kimberley	4	0	0	4
Mid West	7	0	0	7
Peel	1	2	0	3
Pilbara	4	0	0	4
South West	2	4	0	6
Wheatbelt	5	4	0	9
Total Regional	36	11	0	47
Perth	1	1	1	3
Total	37	12	1	50

NUMBER OF RACETRACKS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	2	0	0	2
Goldfields-Esperance	6	0	0	6
Great Southern	4	1	0	5
Kimberley	4	0	0	4
Mid West	7	0	0	7
Peel	2	2	1	5
Pilbara	4	0	0	4
South West	2	4	0	6
Wheatbelt	5	4	1	10
Total Regional	36	11	2	49
Perth	2	1	1	4
Total	38	12	3	53

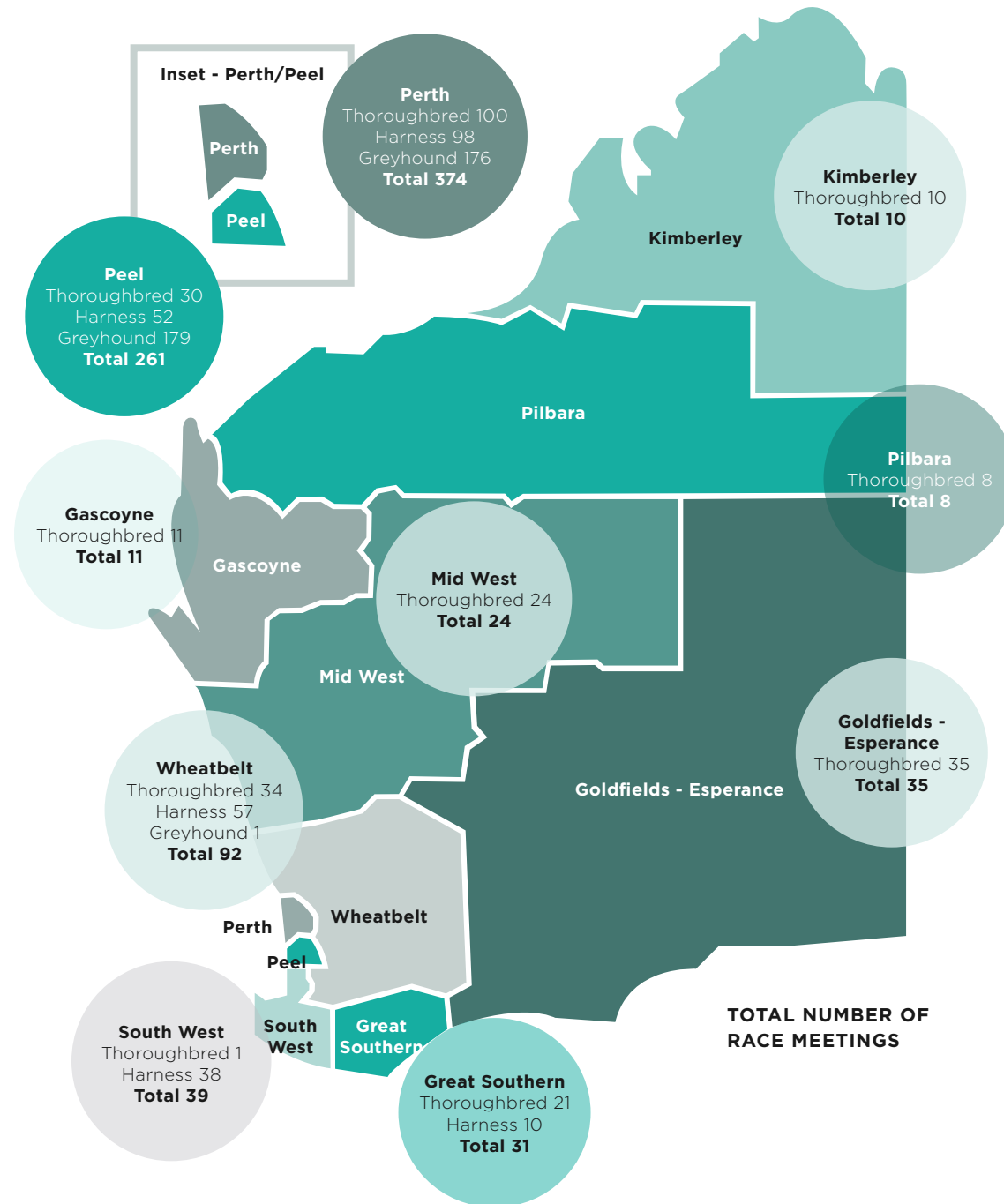
TOTAL NUMBER OF RACE MEETINGS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	11	0	0	11
Goldfields-Esperance	35	0	0	35
Great Southern	21	10	0	31
Kimberley	10	0	0	10
Mid West	24	0	0	24
Peel	30	52	179	261
Pilbara	8	0	0	8
South West	1	38	0	39
Wheatbelt	34	57	1	92
Total Regional	174	157	180	511
Perth	100	98	176	374
Total	274	255	356	885

TOTAL NUMBER OF RACES

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	70	0	0	70
Goldfields-Esperance	254	0	0	254
Great Southern	154	86	0	240
Kimberley	69	0	0	69
Mid West	175	0	0	175
Peel	249	440	1,973	2,662
Pilbara	55	0	0	55
South West	6	289	0	295
Wheatbelt	271	445	5	721
Total Regional	1,303	1,260	1,978	4,541
Perth	869	891	2,071	3,831
Total	2,172	2,151	4,049	8,372

In 2021/22 there were **885 thoroughbred, harness and greyhound** race meetings held in **Western Australia**. The majority of these race meetings (**57.7%**) were held in regional parts of the State.





There are 50 race clubs, racing at 53 racetracks, across the three codes in Western Australia. In 2021/22, these race clubs were responsible for hosting 885 race meetings. The following table illustrates the most active regions, in terms of race meetings, in each code:

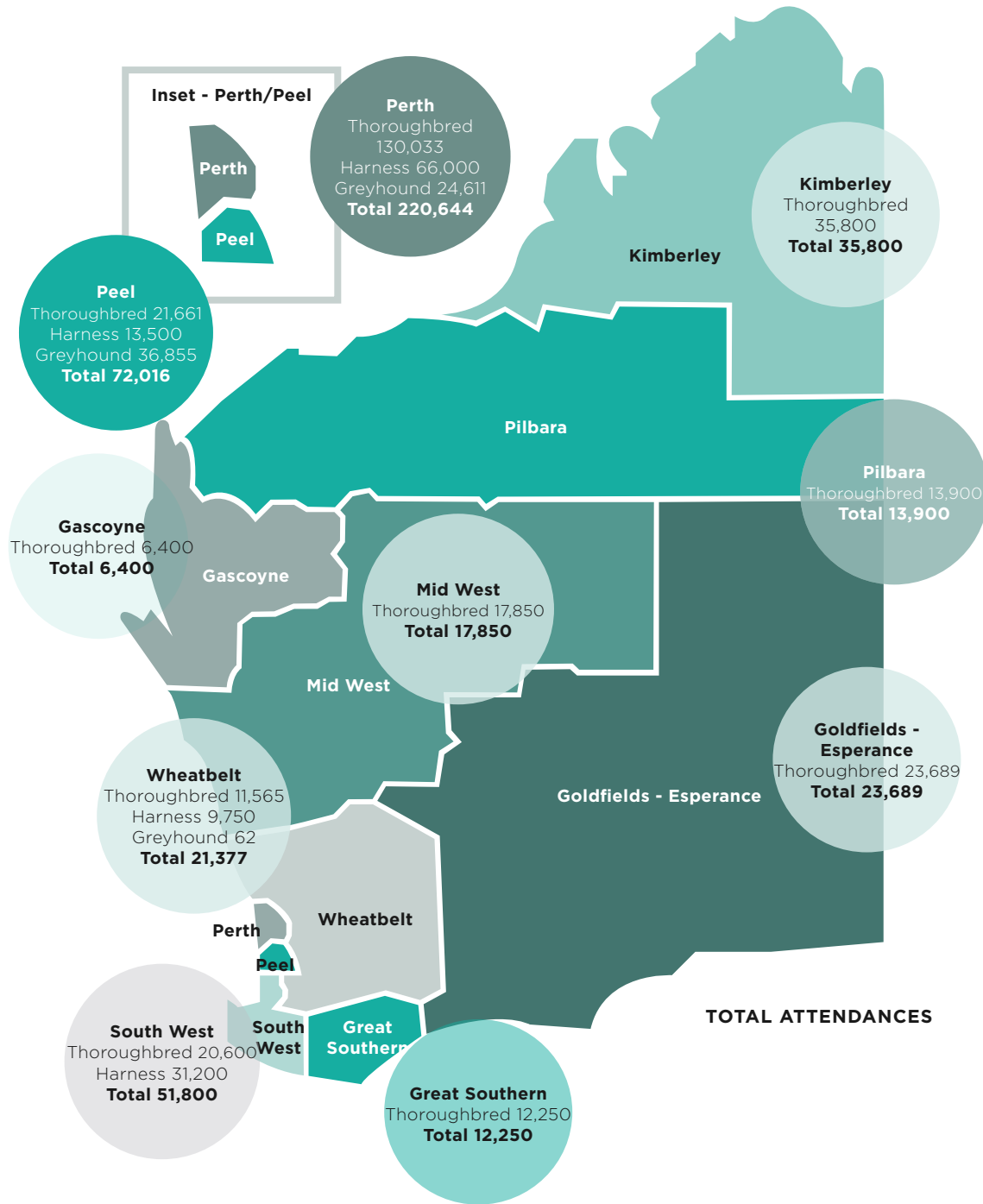
NUMBER OF RACE MEETINGS HELD IN WA (TOP 3 REGIONS)

Thoroughbred	Harness	Greyhound
Perth – 100	Perth – 98	Peel – 179
Goldfields-Esperance – 35	Wheatbelt – 57	Perth – 176
Wheatbelt – 34	Peel – 52	Wheatbelt – 1

In addition to hosting race meetings, a number of race clubs also hold trials to provide opportunities for horses to prepare under race-like conditions. Race clubs also provide an important social community for their members. The table (below) illustrates that there are 9,067 members of race clubs in Western Australia.

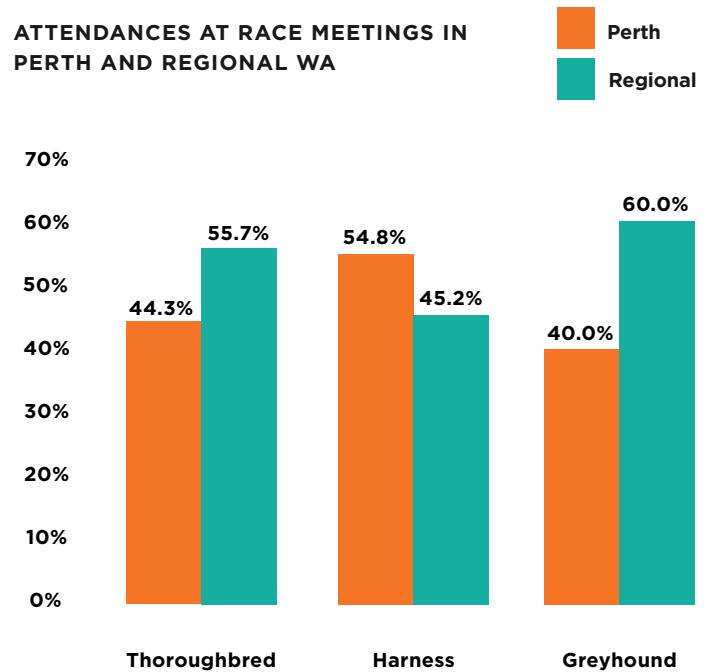
NUMBER OF RACING CLUB MEMBERS

	Thoroughbred	Harness	Greyhound	Total
Gascoyne	350	0	0	350
Goldfields-Esperance	1,005	0	0	1,005
Great Southern	306	104	0	410
Kimberley	971	0	0	971
Mid West	332	0	0	332
Peel	134	237	0	371
Pilbara	1,380	0	0	1,380
South West	375	355	0	730
Wheatbelt	508	221	0	729
Total Regional	5,361	917	0	6,278
Perth	2,419	370	0	2,789
Total	7,780	1,287	0	9,067



During the 2021/22 racing season, thoroughbred, harness and greyhound race meetings in WA attracted attendances of close to 475,700. The largest regions in terms of total attendance (three codes) are Perth (220,644), Peel (72,016) and the South West (51,800). 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 customers

In 2021/22 it is estimated that the total expenditure generated by racing customers was \$81.6 million (excluding wagering on the races). Racing 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-race day related expenditure (spending with race clubs on non-race days on items such as hiring arrangements for facility use, fundraising, investments, track fees, etc.)

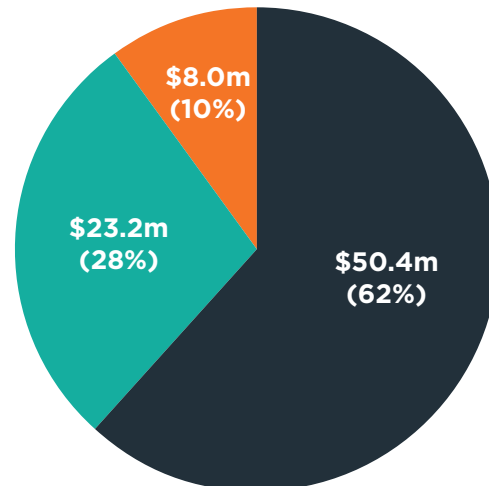
On-course customer expenditure funds the administration, operation and other costs that race clubs incur.

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.

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

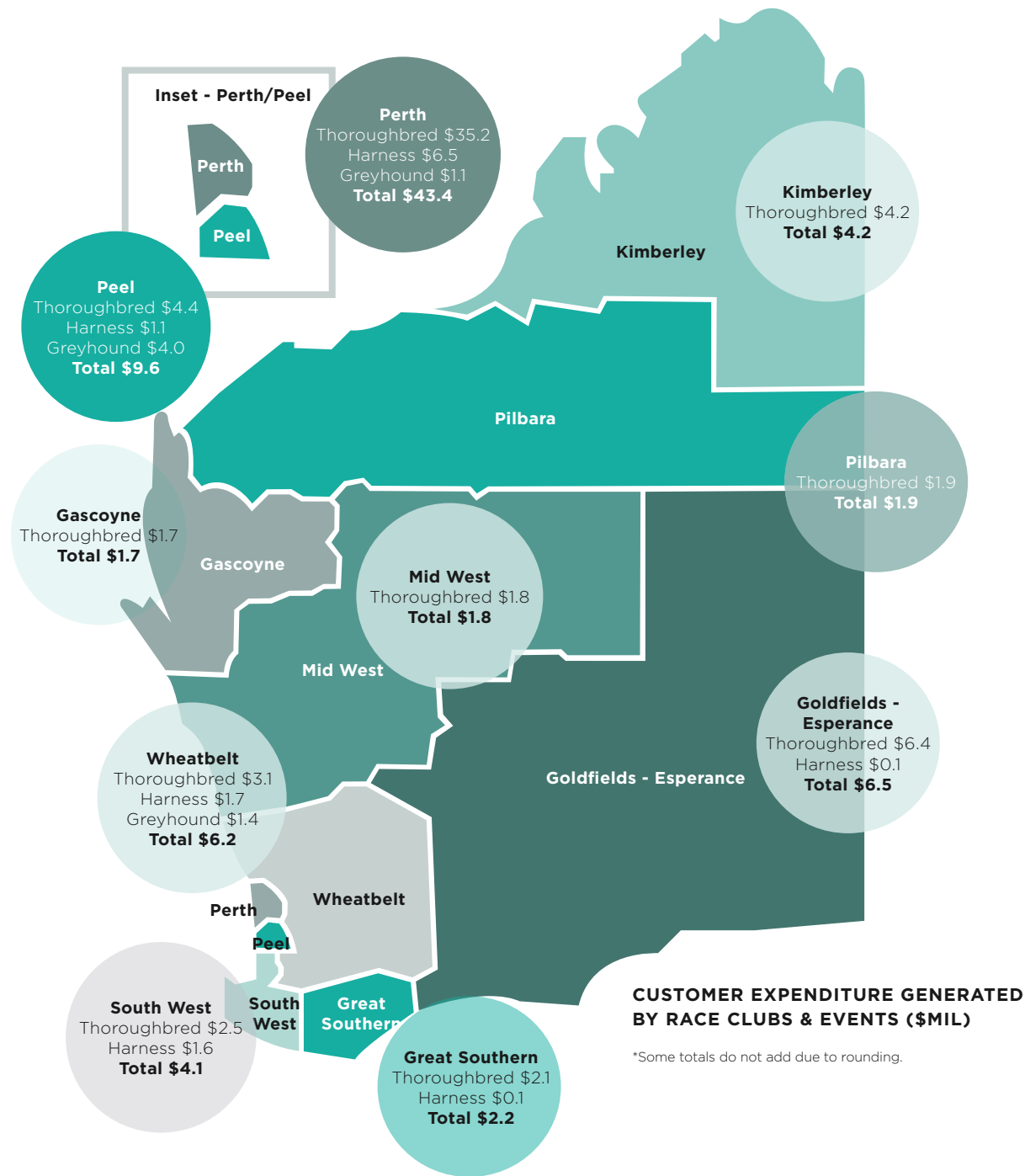
The following chart illustrates the make-up of customer expenditure. It shows that for every dollar spent on-course by racing attendees, a further dollar is spent off-course. This is more heavily driven by feature race meetings where the links to fashion and retail, as well as larger travel distances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

BREAKDOWN OF RACING CUSTOMER SPENDING



- On-course race day
- Off-course race day
- Non-race day





Expenditure by the Principal Racing Authority and Clubs

In 2021/22, Racing and Wagering Western Australia (RWWA) and the 50 thoroughbred, harness and greyhound clubs combined to generate an expenditure impact of over \$491.5 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.

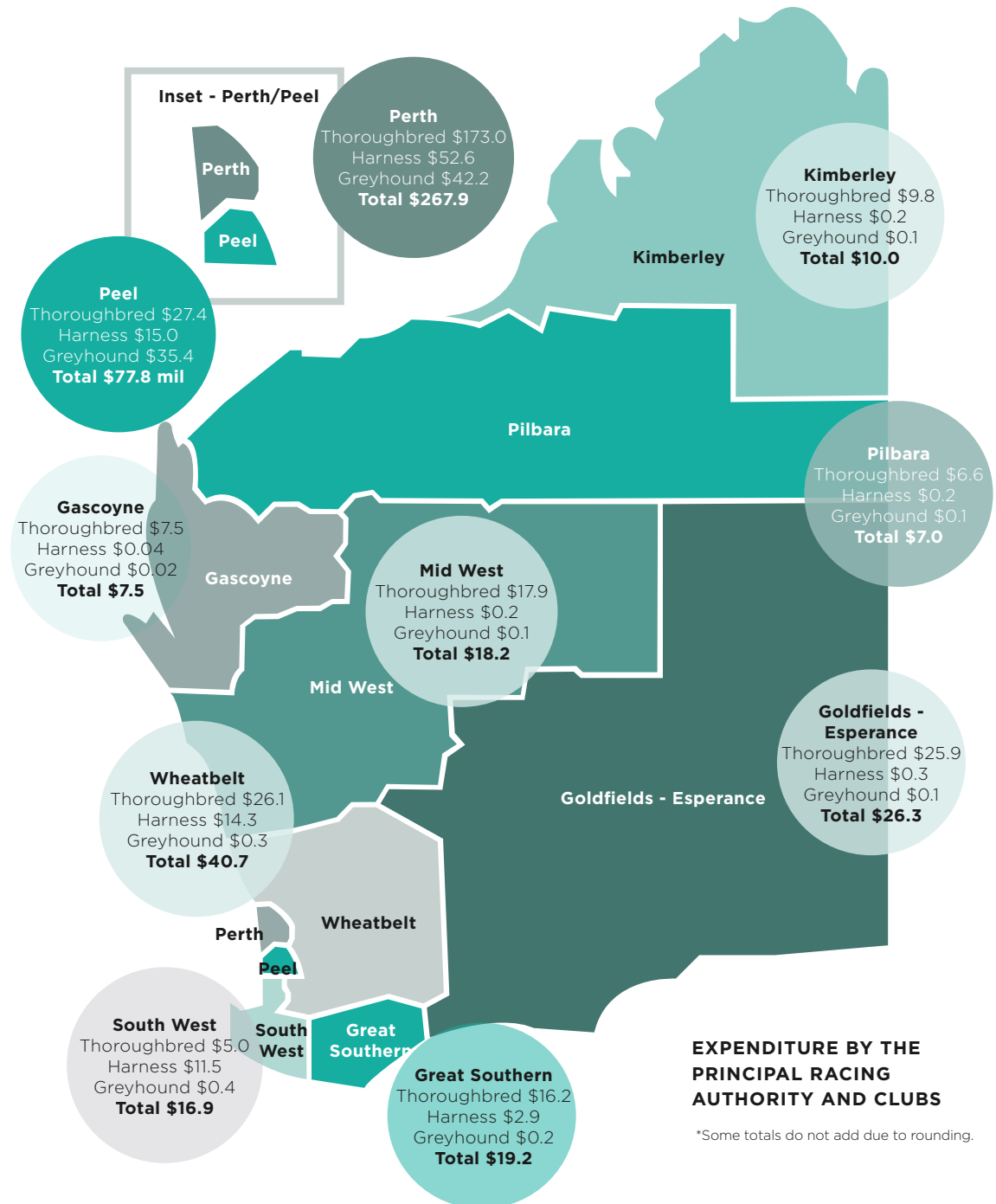
The majority of expenditure generated by the Principal Racing Authority (PRA) and race clubs is funded by racing customers. This includes:

- + Spending by customers on-course when attending a racing event
- + Non race day utilisations of racing industry assets
- + Sponsorship and membership associated with race 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 54% (\$267.9 million) of this expenditure impact occurred in Perth – a result largely driven by the presence of the largest race clubs (in terms of size and financial impact) as well as the PRA. Peel (15.8%) generates the next most significant impact with the remainder spread around the State.



*Some totals do not add due to rounding.

Wagering customers represent one of the key funding sources for the Western Australian racing industry. In 2021/22, racing industry funding was generated through the following sources:

- + Wagering 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 the racing industry and wagering operations.
- + Wagering on Western Australian product through various wagering service providers (WSP) including interstate TABs, corporate bookmakers, and betting exchanges. For all betting activity, product fees are paid to the Western Australian racing industry for the use of their product. Additionally, corporate bookmakers spend a portion of their operating expenditures in Western Australia in order to generate wagering revenues and grow their business.

For any wagering activities that occur by Western Australian residents, point of consumption taxes are generated for the WA Government.

Racing clubs in Western Australia also receive funding via the sale of international and domestic rights on their racing product.

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

(\$MIL)	Thoroughbred	Harness	Greyhound	Total
Wagering through WATAB and WA on-course venues	\$271.2	\$50.7	\$70.9	\$392.8
Wagering by interstate TABs	\$576.4	\$97.3	\$155.3	\$829.1
Wagering by WA residents with non-TAB WSPs	\$179.5	\$35.5	\$82.4	\$297.5
Wagering by interstate/overseas residents with non-TAB WSPs	\$1,615.9	\$319.8	\$741.8	\$2,677.5
Total wagering on WA racing product	\$2,643.1	\$503.4	\$1,050.4	\$4,196.9





CASE STUDY: CLUB AND COMMUNITY CONNECTION

Race clubs across Western Australia are encouraged and supported in their community-giving endeavours. Through corporate social responsibility efforts, each year Racing and Wagering Western Australia (RWVA) partners with WA race clubs to raise funds for local not-for-profit community groups.

Race clubs select a local community group or charity to support and RWVA matches the funds raised on special race days, up to \$5000. This allows race club members to engage with

and assist local groups they believe are making a positive difference in the areas where they live. Since the program began in 2014, more than \$850,000 has been raised by race clubs and RWVA.

The program has especially high impact in remote and rural communities, since 48 of the State's 50 race clubs are 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: EDUCATION AND CAREERS THROUGH GREYHOUNDS AS PETS WA

Greyhounds as Pets (GAP) WA helps greyhounds make the transition from racing to home life, with families matched to their individual personalities. The program, run by RWVA, has dedicated animal behaviourists who use their expertise in canine behaviour to guide greyhounds through the adjustment, with a tailored plan to suit the needs of each dog. GAP rehomes more than half of the retiring greyhounds in WA and in FY2022 facilitated 337 adoptions.

Alongside GAP staff, volunteers play an important role in exercise and care for the greyhounds as well as providing foster homes to give the dogs insight into life as a pet and set them up for success.

Serial greyhound foster mum Kelly Roads won the 2022 Kerry Vernon Award for Excellence in Greyhound Welfare. She and her husband have fostered about 30 greyhounds over three years, keeping two along the way.

"At any time we have three dogs here. We have all types from young dogs chewing everything

to older ones who are a bit shy and don't know about homes yet," she said.

"It's lovely to see them blossom, their personalities come out and they move on to happy new lives."

GAP has partnered with Applied Vocational Training (AVT) to facilitate a short-term intensive course in animal care and welfare. AVT's nationally recognised course, ACM20121 Certificate II in Animal Care, provides training for students seeking a career with animals.

GAP also engages in educational and careers programs including the South Metropolitan TAFE foster program, accepting students for work experience and hosting educational visits. Outreach opportunities include attending community events and a week-long animal showcase at the Perth Royal Show where families could get up close and personal with greyhounds.

In addition, GAP hosted Adoption Month in April 2022 as part of a nation-wide push to boost awareness of greyhounds as pets. The Western Australian event was hosted at the GAP facility and 65 greyhounds were adopted during the month.



CASE STUDY: OFF THE TRACK WA

Off the Track WA supports and promotes retired racehorses in their second careers as companion, pleasure or performance horses. Created by Racing and Wagering Western Australia, the program includes an ever-expanding range of initiatives to help racehorses make the transition from racing to lives with ongoing health and purpose.

The Off the Track WA Retraining Program encompasses the OTTWA Estate and a network of official retrainers, who give retired racehorses the skills and experiences needed to thrive in new homes. In the 2022 financial year, 42 horses

were accepted into the program and 932 horses registered for the OTTWA Passport. In total, more than 3000 passports have been claimed.

Also in 2022, OTTWA partnered with Applied Vocational Training (AVT) to launch an online equine care course to give vet nurses a broader knowledge of the handling and treatment of large animals.

AVT Assessor Ann-Marie Moyles said the course relied heavily on videos so the students could see and understand the processes for basics such as approaching horses safely to physical examinations and administering injections.

“Equine practices throughout WA are struggling to find veterinary nurses with the necessary knowledge to care for horses. There is a lack of resources and education available in this area,” Ann-Marie said.

“By filming with a RWWA vet on-site at the Off the Track Estate, we could ensure our content was relevant to the equine industry.”

RWWA regulatory veterinarian Caroline McMullen helped to create the videos, demonstrating and explaining a range of techniques with former racehorses at the estate.

“Off the Track WA has the facility and resources to support educational programs such as this and it’s an opportunity to expand awareness and promote good veterinary industry horsemanship,” she said.

Other OTTWA initiatives include:

- + Dedicated OTTWA website, which includes educational resources and a free platform to advertise retired racehorses for sale
- + Hosting educational clinics in both metropolitan and regional locations to help people with off the track horses develop their skills and relationships together
- + Sponsoring equestrian events across the State that promote and encourage high participation rates of retired racehorses.
- + Sponsoring individual riders competing on retired racehorses at a high level, representing either the State or Australia
- + OTTWA Passports available to all Western Australian thoroughbred and standardbred horses bred for racing in order to create greater traceability post-racing.

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, maintaining and building the trust and respect of communities.

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 race 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 race 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 in the industry

+ Leisure

Providing enjoyable leisure opportunities for hobby owners, trainers and breeders, race day/night customers and other race 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 close to 4,300 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 in 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:

- + More than 140 community organisations or charities are assisted financially by race clubs
- + Close to 70 community organisations share racing club facilities and resources
- + Race clubs currently engage more than 1,000 volunteers who assist in various club, kindred body and industry related roles
- + Close to 9,100 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging to 4,274 people who provide volunteer time and services to race clubs and participants. Socially, volunteering is recognised as a means of enhancing the quality of life, particularly among the aged, while 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. race day secretary)
- + Hospitality for attendees and officials (food and beverages)
- + Racing operations (parking, gate attendants, selling race books etc.)

- + Race day activities (e.g. activities for children, fashions on the field)
- + Cleaning and gardening duties
- + Supporting trainers, breeders and other industry participants
- + Conducting horse and greyhound trials
- + First aid services

IER found that race 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 community and charitable organisations supported by racing include:

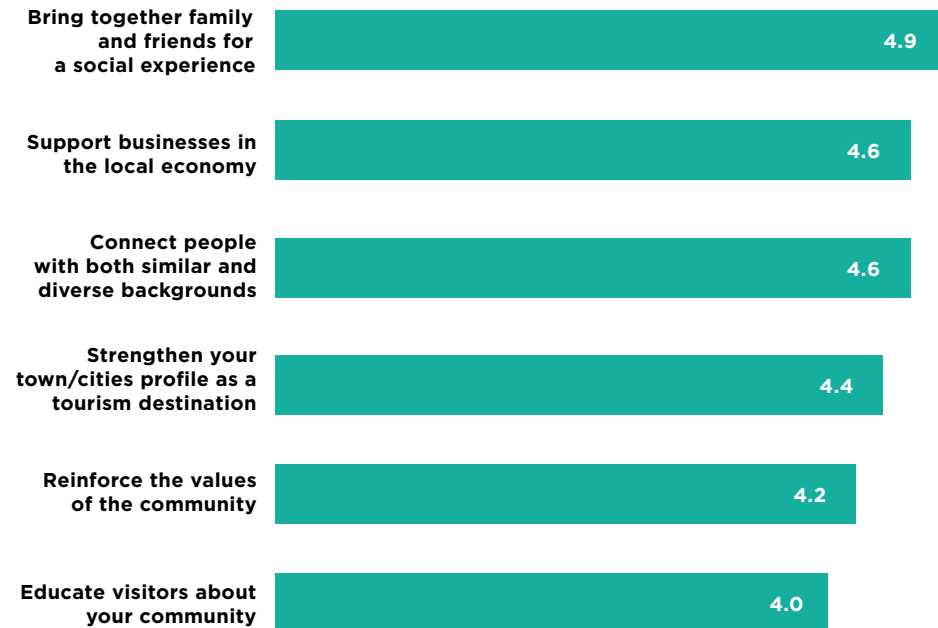
- + Health-charities (Men's Shed, Cystic Fibrosis, Breast Cancer Care, Motor Neurone Disease Society, Royal Flying Doctor Service)
- + Children's charities (Ronald McDonald House, Heart Care for Kids)
- + Sporting clubs (Football, Fishing, Netball, Basketball, Hockey, Soccer, Karate, Cricket, Motocross, Jockey's Association, Surf Life Saving)
- + Schools
- + Rotary, Lions, Scout groups
- + Hospitals and health organisations
- + RSL
- + General charities (Police Legacy)
- + Regional show societies
- + Riding for the disabled and pony clubs
- + Rural Fire Services and St. John 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 race 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 had 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' (4.9), to 'support businesses in the local economy' (4.6) and to 'connect people with both similar and diverse backgrounds' (4.6). These indicators illustrate the position that race clubs see themselves as holding in the fabric of the local community.

COMMUNITY ENGAGEMENT WITH WESTERN AUSTRALIAN RACING



(1 - Not at all, 5 - To a great extent) 0 1 2 3 4 5

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 race 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 race days form a venue or meeting place for families and friends to socialise. This is especially prevalent at smaller clubs which 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.

Race 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:

- + A third of all clubs offer special discounts for family group attendance and all clubs have free entry for children
- + Almost all clubs offer activities and events for families and children on special race days

In addition to this, some of the specific race day initiatives undertaken by race clubs in Western Australia include:

- + Free fruit for kids
- + Kids' Big Day Out
- + Petting zoos
- + Ice cream trucks
- + Free pony rides
- + Kids' Fashions on the Field
- + Face painting
- + Live music and stage shows
- + Pony trot exhibition races
- + Silent discos
- + Playgrounds
- + Kids' running races
- + Water slides
- + Train rides
- + Hobby horse races
- + Easter egg hunts
- + Children entertainers (e.g. Balloon artists, magicians and clowns)



SHARING FACILITIES WITHIN THE COMMUNITY

Race clubs, in particular regional race 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 race clubs engage with community groups including sporting clubs, community organisations, 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 67 organisations which share facilities and resources with clubs include:

- + Community organisations (Rotary, Variety, Police legacy, surf lifesaving clubs, Royal Flying Doctor Service, Dolly's Dream, Breast Cancer WA, Ladies on the Land, Progressive Women)
- + Shire councils
- + Bushfire evacuation centres
- + Recreational clubs (e.g. Poultry clubs and light car clubs)
- + Machine field days
- + Riding for the Disabled and pony clubs
- + Sporting clubs (soccer, squash, cricket, football, gymkhana, hockey, netball, bowls, campdraft)
- + 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 in the industry to further their professional or tertiary development and to assist those looking for opportunities to enter the industry. There is a broad range of organisations which deliver a 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, 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 thoroughbred, harness and greyhound 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 is highlighted at career expos and other events 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.

Race 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, race clubs have adopted a number of initiatives.

- + Over 20% of clubs have staff members participating in further education, career development and training programs each year
- + Close to 20% of clubs have partnerships with primary, secondary, trade and tertiary institutions
- + Almost half of the clubs have placements available for work experience students

PROMOTING HEALTHY RACE CLUB ENVIRONMENTS

Race clubs in Western Australia have developed 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.

Race clubs play an active role in providing healthy environments for their customers and racing participants.

Some examples include:

- + The provision of healthy food and drink 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 race club in Western Australia sells cigarettes or 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.

Race 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 race 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. Close to half of all clubs have policies in place to save water and re-use or recycle water.

Examples include:

- + Push taps in toilets
- + Waste water on gardens
- + Use of bore water
- + Timed irrigation and sprinkler systems
- + Watering of facilities at night
- + Rain storage tanks
- + Development of water efficiency management plans



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 Ark – 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 sports 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 1970s, 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.

Over 75% of race 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
- + Displaying and restoration of racing memorabilia
- + Promotion of history through historical societies, local papers, television, race books, social media and websites
- + Recognising heroes of the sport and families on dedicated race days and memorial races
- + Plaques, trophy cabinets, honour boards and historical photographs throughout racecourses

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



RACE CLUBS IN THE REGION

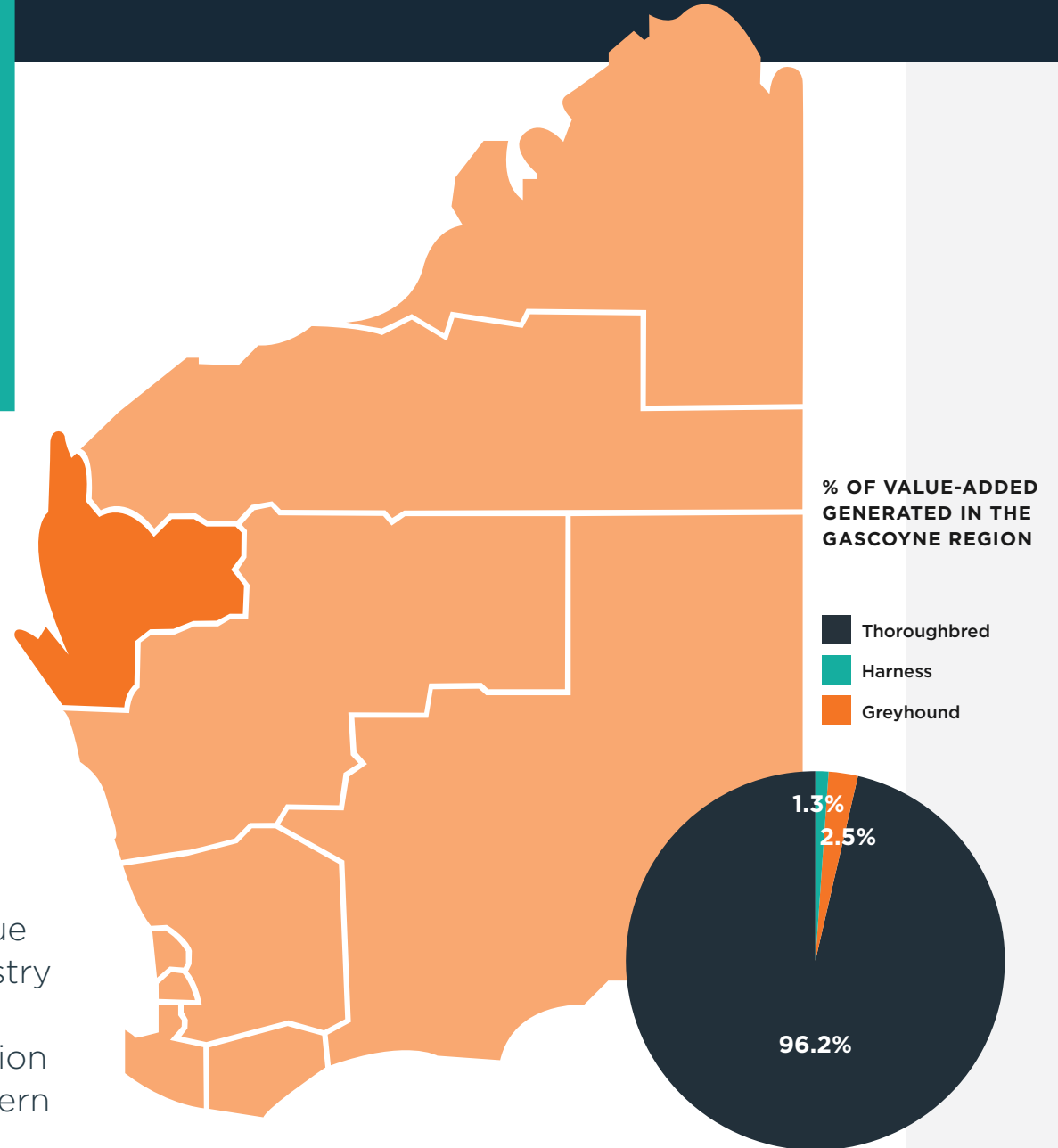
Thoroughbred

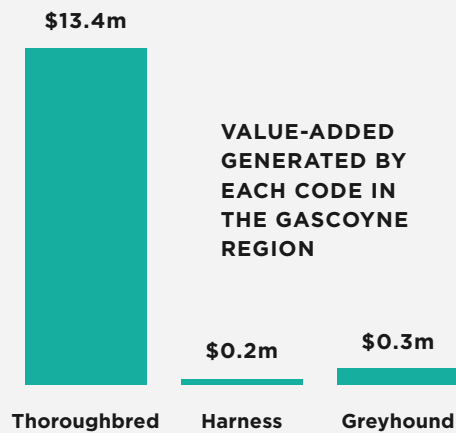
- + Carnarvon Race Club (Inc)
- + Junction Race Club

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 9,277 (Census, 2021).
- + There is a total of two race clubs operating in the region, both thoroughbred clubs.
- + Racing in the Gascoyne region is responsible for generating over \$13.9 million in value-added contribution to Gross State Product. This equates to 1.0% 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 111 full-time equivalent (FTE) jobs in the region.
- + 293 individuals participate in the racing industry as an employee, volunteer or participant in the region.

The economic value of the racing industry in the Gascoyne region is \$13.9 million – 1.0% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	1	0	0	1
Owners/syndicate members	93	4	5	102
Trainers	7	0	0	7
Total participants in producing racing animals	101	4	5	110
Breeders' staff	1	0	0	1
Stable/kennel employees	18	0	0	18
Racing club & industry staff	59	0	0	59
Jockeys, drivers & apprentices	0	0	0	0
Racing club volunteers	95	0	0	95
Volunteers assisting participants	11	0	0	11
Total participants in producing racing product	183	0	0	183
Total	284	4	5	293

Race meetings in the Gascoyne region attract attendances of 6,400 or 1.3% of total attendances at race meetings in Western Australia

AT A GLANCE

2 Race clubs

THOROUGHBRED 2

11 Race meetings

THOROUGHBRED 11

70 Races

THOROUGHBRED 70

350 Racing club members

THOROUGHBRED 350

6,400 Attendances

THOROUGHBRED 6,400

There are 293 people who participate in the racing industry in the Gascoyne region

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$0.0m	\$0.0m	\$0.0m	\$0.0m
Training expenditure	\$1.2m	\$0.0m	\$0.0m	\$1.2m
Total direct expenditure	\$11.0m	\$0.1m	\$0.3m	\$11.4m
Total value-added	\$13.4m	\$0.2m	\$0.3m	\$13.9m
Full-time equivalent employment	107	1	3	111

*Some totals may not add due to rounding

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 57,330 (Census, 2021).

+ There is a total of seven race clubs operating in the region, all are thoroughbred clubs.

+ Racing in the Goldfields Esperance region is responsible for generating \$54.3 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 430 full-time equivalent (FTE) jobs in the region.

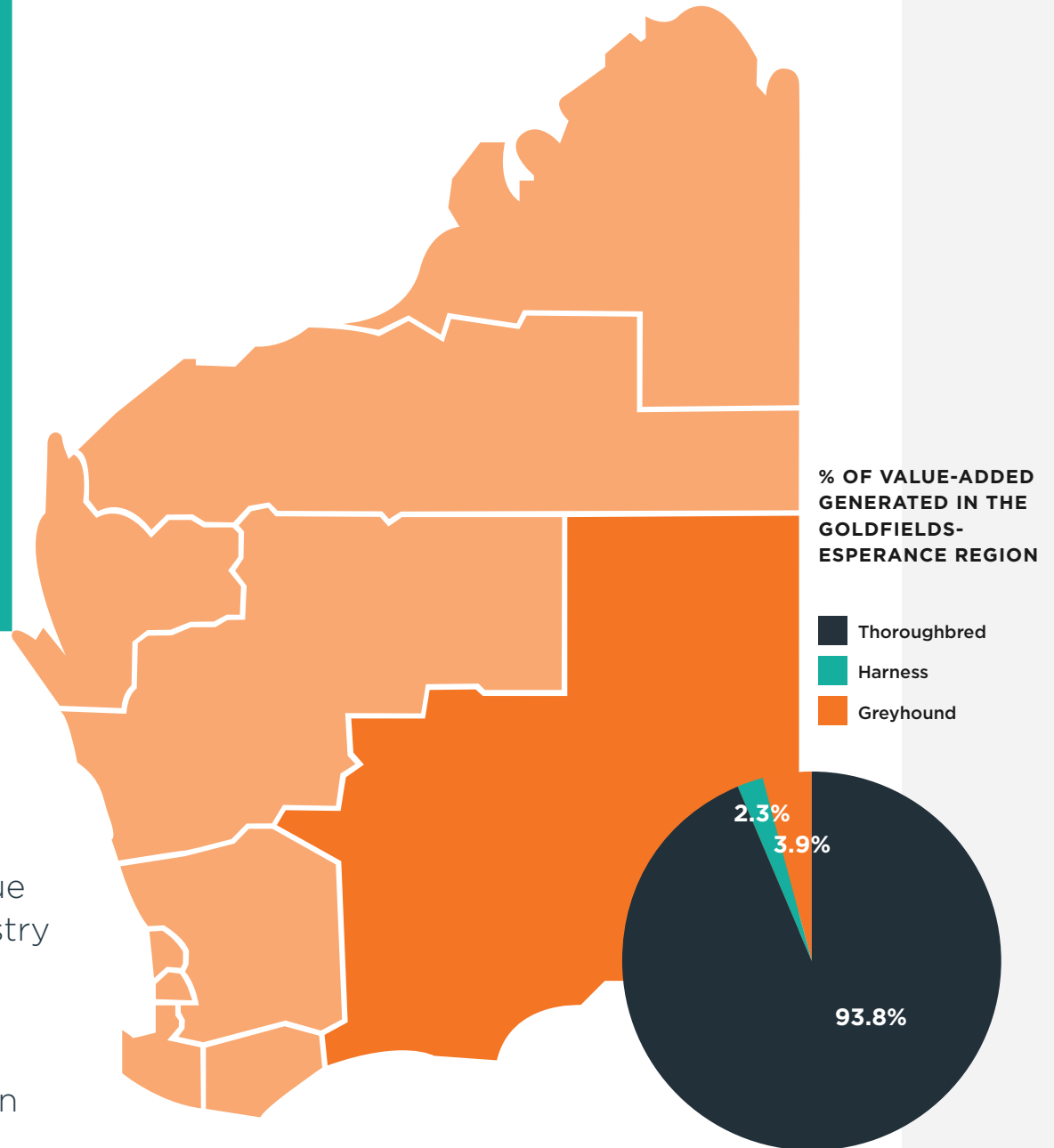
+ 1,228 individuals participate in the racing industry as an employee, volunteer or participant in the region.

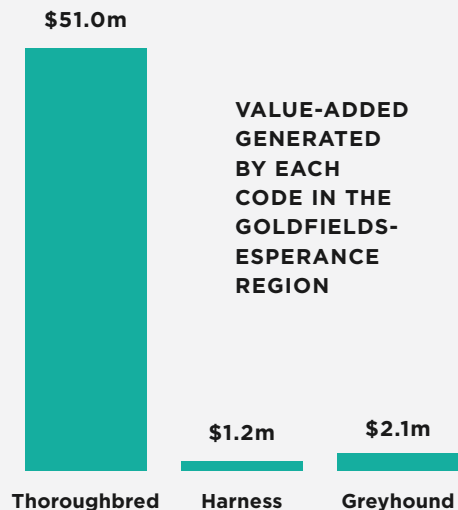
RACE CLUBS IN THE REGION

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 \$54.3 million - 4.1% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	19	4	0	23
Owners/syndicate members	431	28	19	478
Trainers	38	3	0	41
Total participants in producing racing animals	488	35	19	542
Breeders' staff	12	2	0	14
Stable/kennel employees	138	3	0	141
Racing club & industry staff	315	1	1	316
Jockeys, drivers & apprentices	0	1	0	1
Racing club volunteers	130	0	0	130
Volunteers assisting participants	68	16	0	84
Total participants in producing racing product	663	22	1	686
Total	1,151	58	20	1,228

Race meetings in the Goldfields-Esperance region attracted attendances of 23,689 or 5.0% of total attendances at race meetings in Western Australia

AT A GLANCE

7 Race clubs

THOROUGHBRED 7

35 Race meetings

THOROUGHBRED 35

254 Races

THOROUGHBRED 254

1,005 Racing club members

THOROUGHBRED 1,005

23,689 Attendances

THOROUGHBRED 23,689

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$0.2m	\$0.0m	\$0.0m	\$0.2m
Training expenditure	\$5.6m	\$0.0m	\$0.0m	\$5.6m
Total direct expenditure	\$41.8m	\$1.0m	\$1.7m	\$44.5m
Total value-added	\$51.0m	\$1.2m	\$2.1m	\$54.3m
Full-time equivalent employment	405	9	16	430

*Some totals may not add due to rounding

There are 1,228 people who participate in the racing industry in the Goldfields-Esperance region

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 63,963 (Census, 2021).
- + There is a total of five race clubs operating in the region, four of which are thoroughbred clubs, with one harness racing club.
- + Racing in the Great Southern region is responsible for generating over \$48.6 million in value-added contribution to Gross State Product. This equates to 3.6% 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 372 full-time equivalent (FTE) jobs in the region.
- + 1,069 individuals participate in the racing industry as an employee, volunteer or participant in the region.

RACE CLUBS IN THE REGION

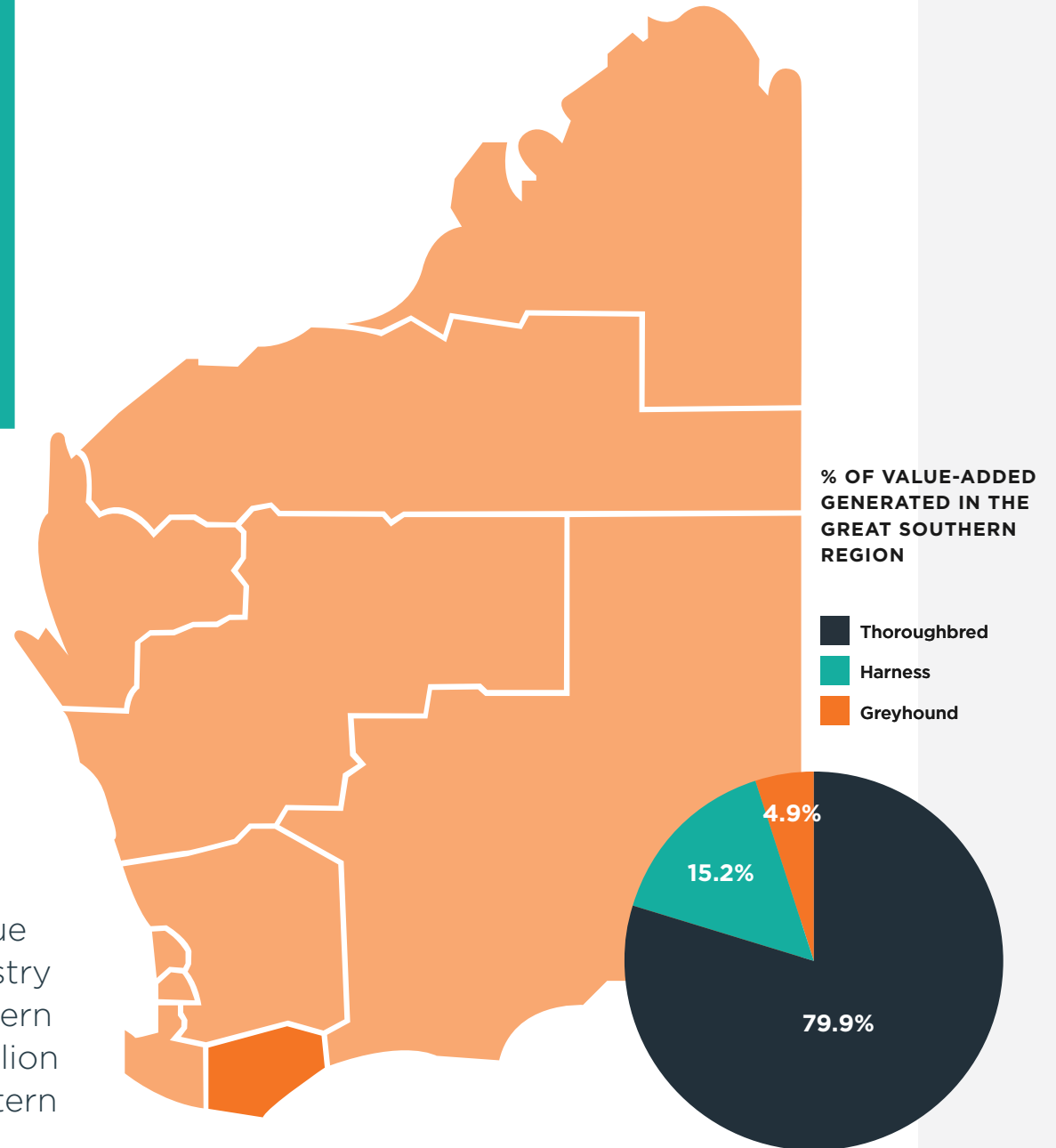
Thoroughbred

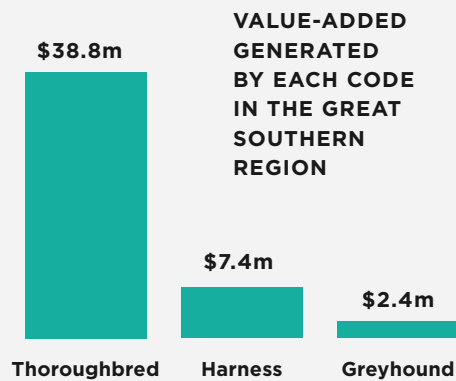
- + Albany Racing Club
- + Kojonup Race Club
- + Mt Barker Turf Club (Inc)
- + Pingrup Race Club

Harness

- + Albany Harness Racing Club

The economic value of the racing industry in the Great Southern region is \$48.6 million – 3.6% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	23	36	1	60
Owners/syndicate members	282	62	6	350
Trainers	26	19	0	45
Total participants in producing racing animals	331	117	7	455
Breeders' staff	14	18	1	33
Stable/kennel employees	113	13	0	126
Racing club & industry staff	145	24	0	170
Jockeys, drivers & apprentices	0	0	0	0
Racing club volunteers	85	20	0	105
Volunteers assisting participants	55	124	1	180
Total participants in producing racing product	412	200	2	614
Total	743	317	9	1,069

Race meetings in the Great Southern region attract attendances of 12,250 or 2.6% of total attendances at race meetings in Western Australia

AT A GLANCE

5 Race clubs

THOROUGHBRED 4
HARNESS 1

31 Race meetings

THOROUGHBRED 21
HARNESS 10

240 Races

THOROUGHBRED 154
HARNESS 86

410 Racing club members

THOROUGHBRED 306
HARNESS 104

12,250 Attendances

THOROUGHBRED 12,250

There are 1,069 people who participate in the racing industry in the Great Southern region

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$3.5m	\$0.8m	\$0.0m	\$4.3m
Training expenditure	\$6.3m	\$1.5m	\$0.0m	\$7.8m
Total direct expenditure	\$31.9m	\$6.1m	\$1.9m	\$39.9m
Total value-added	\$38.8m	\$7.4m	\$2.4m	\$48.6m
Full-time equivalent employment	299	56	18	372

*Some totals may not add due to rounding

RACE CLUBS IN THE REGION

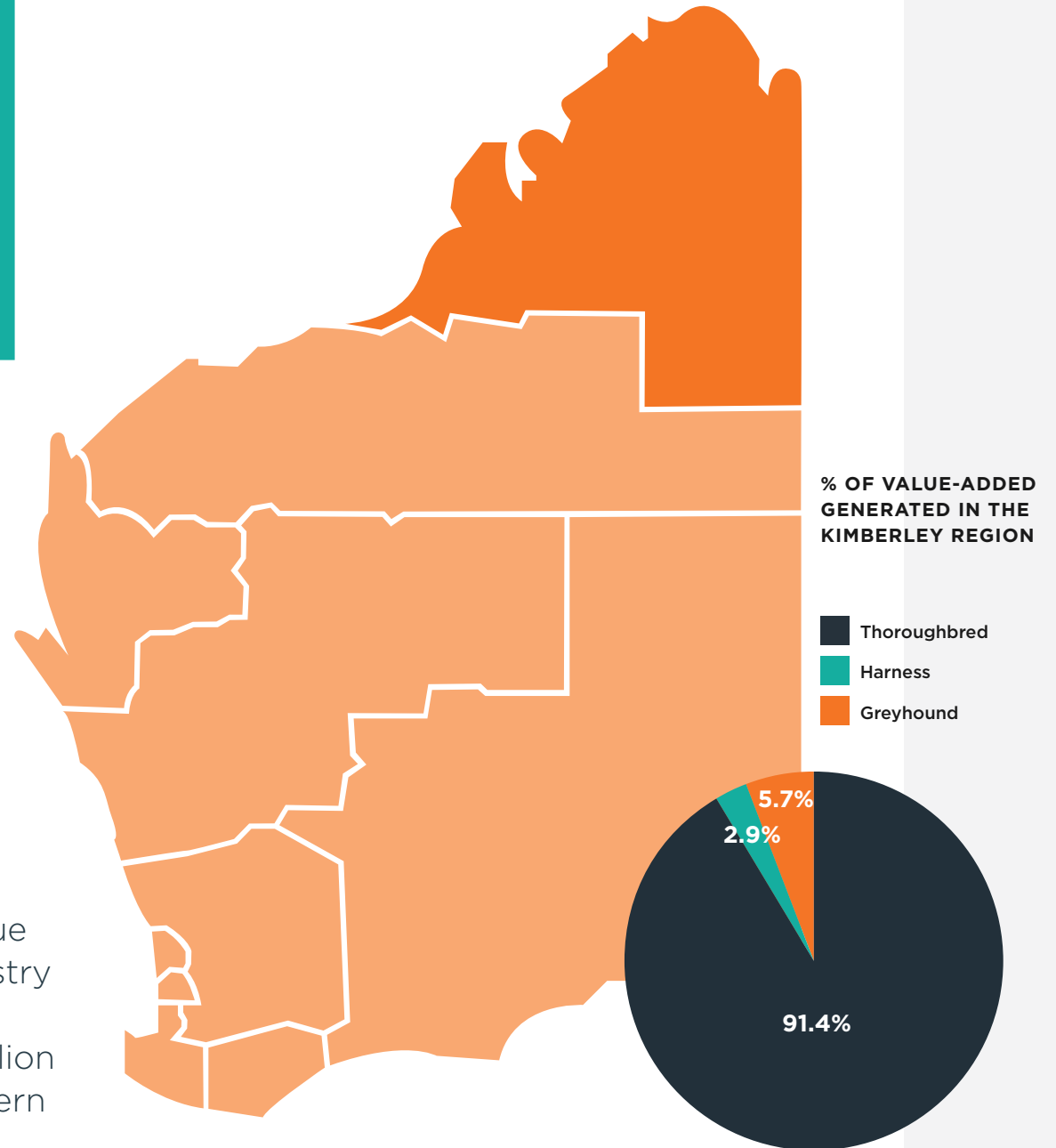
Thoroughbred

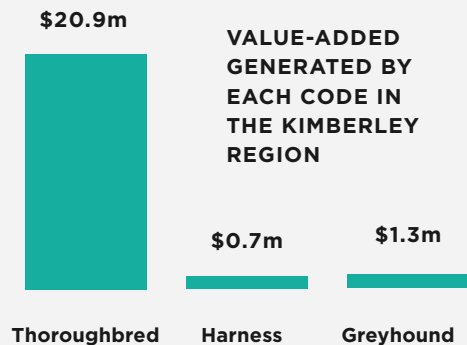
- +Broome Turf Club
- +Kununurra Race Club
- +West Kimberley Turf Club (Derby)
- +Wyndham Turf Club

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 kilometre region has fewer people per square kilometre than almost any other place on Earth. The population of the Kimberley region is 35,085 (Census, 2021).
- + There is a total of four race clubs operating in the region, all of which are thoroughbred clubs.
- + Racing in the Kimberley region is responsible for generating close to \$22.9 million in value-added contribution to Gross State Product. This equates to 1.7% 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 182 full-time equivalent (FTE) jobs in the region.
- + 323 individuals participate in the racing industry as an employee, volunteer or participant in the region.

The economic value of the racing industry in the Kimberley region is \$22.9 million – 1.7% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	2	0	0	2
Owners/syndicate members	115	3	3	121
Trainers	1	0	0	1
Total participants in producing racing animals	118	3	3	124
Breeders' staff	1	0	0	1
Stable/kennel employees	9	0	0	9
Racing club & industry staff	129	0	0	130
Jockeys, drivers & apprentices	0	0	0	0
Racing club volunteers	56	0	0	56
Volunteers assisting participants	3	0	0	3
Total participants in producing racing product	199	0	0	199
Total	317	3	3	323

Race meetings in the Kimberley region attract attendances of 35,800 or 7.5% of total attendances at race meetings in Western Australia

AT A GLANCE

4 Race clubs

THOROUGHBRED 4

10 Race meetings

THOROUGHBRED 10

69 Races

THOROUGHBRED 69

971 Racing club members

THOROUGHBRED 971

35,800 Attendances

THOROUGHBRED 35,800

There are 323 people who participate in the racing industry in the Kimberley region

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$0.0m	\$0.0m	\$0.0m	\$0.0m
Training expenditure	\$1.1m	\$0.0m	\$0.0m	\$1.1m
Total direct expenditure	\$17.1m	\$0.5m	\$1.0m	\$18.7m
Total value-added	\$20.9m	\$0.7m	\$1.3m	\$22.9m
Full-time equivalent employment	168	5	10	182

*Some totals may not add due to rounding

Mid West

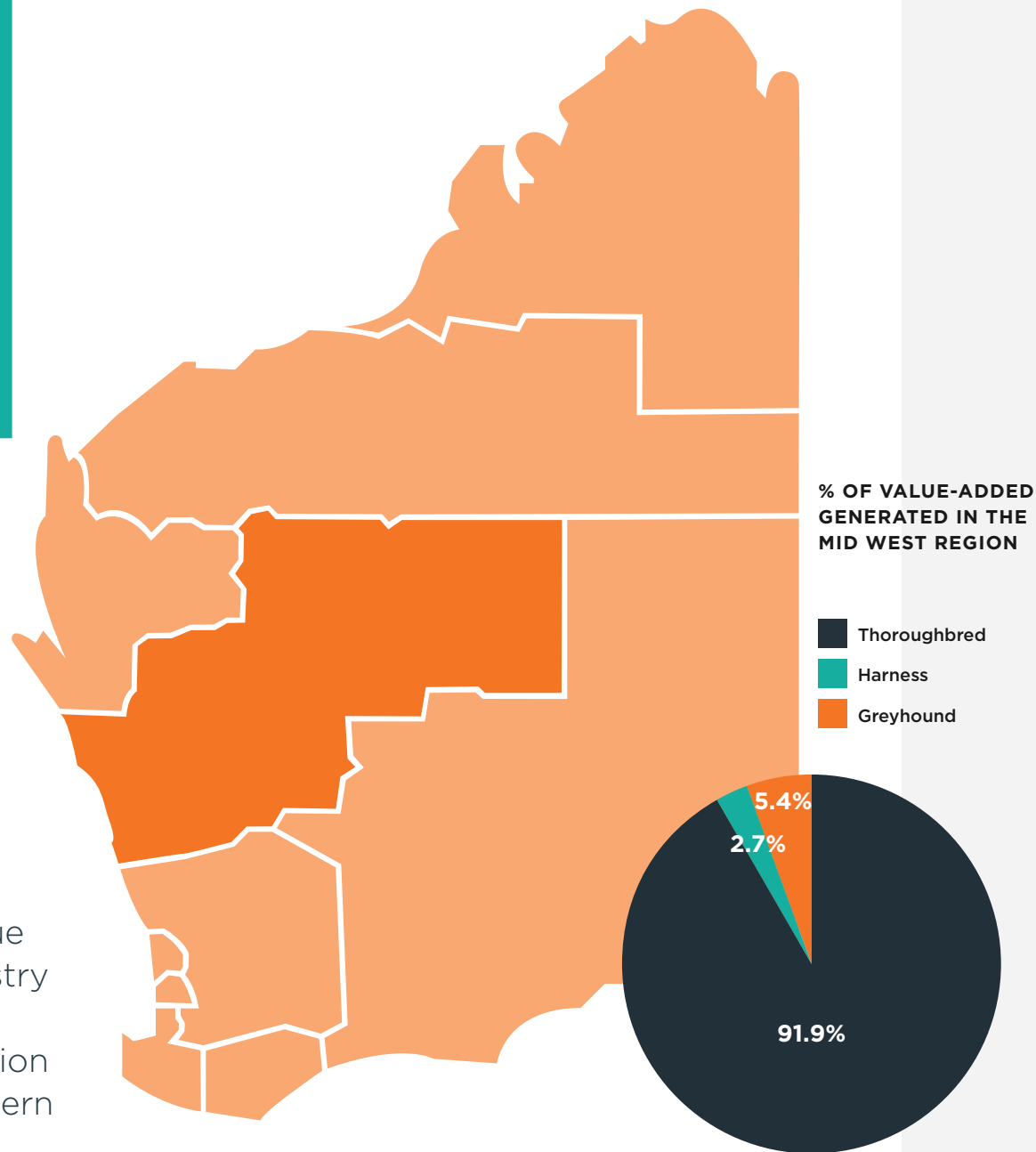
- + The Mid West region covers nearly one fifth of Western Australia's land area, spanning around 478,000 square kilometres from Green Head to Kalbarri and more than 800km inland to Wiluna in the Gibson Desert. The region is divided into three subregions which demonstrate similarities in environment, land use, demography and industry. The population of the Mid West region is 54,019 (Census, 2021).
- + There is a total of six race clubs operating in the region, all of which are thoroughbred clubs.
- + The racing industry in the Mid West region is responsible for generating \$37.6 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.
- + Racing generated by the racing industry in this region is responsible for sustaining a total of 293 full-time equivalent (FTE) jobs in the region.
- + 1,675 individuals participate in the racing industry as an employee, volunteer or participant in the region.

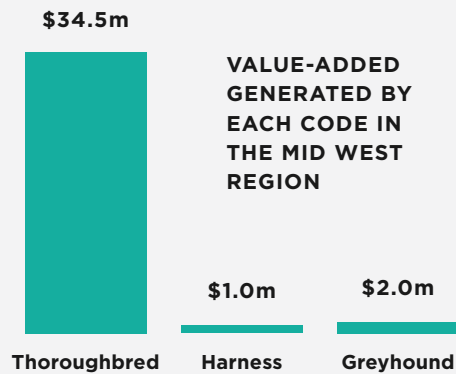
RACE CLUBS IN THE REGION

Thoroughbred

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

The economic value of the racing industry in the Mid West region is \$37.6 million – 2.8% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	24	0	0	24
Owners/syndicate members	400	14	13	427
Trainers	43	2	0	45
Total participants in producing racing animals	467	16	13	496
Breeders' staff	15	0	0	15
Stable/kennel employees	125	0	0	125
Racing club & industry staff	791	0	0	792
Jockeys, drivers & apprentices	1	0	0	1
Racing club volunteers	165	0	0	165
Volunteers assisting participants	79	2	0	82
Total participants in producing racing product	1,176	3	0	1,179
Total	1,643	19	13	1,675

Race meetings in the Mid West region attract attendances of 17,850 or 3.8% of total attendances at race meetings in Western Australia

AT A GLANCE

7 Race clubs

THOROUGHBRED 7

24 Race meetings

THOROUGHBRED 24

175 Races

THOROUGHBRED 175

332 Racing club members

THOROUGHBRED 332

17,850 Attendances

THOROUGHBRED 17,850

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$0.6m	\$0.0m	\$0.0m	\$0.6m
Training expenditure	\$4.7m	\$0.0m	\$0.0m	\$4.7m
Total direct expenditure	\$28.4m	\$0.8m	\$1.6m	\$30.8m
Total value-added	\$34.5m	\$1.0m	\$2.0m	\$37.6m
Full-time equivalent employment	270	8	15	293

There are 1,675 people who participate in the racing industry in the Mid West region

*Some totals may not add due to rounding

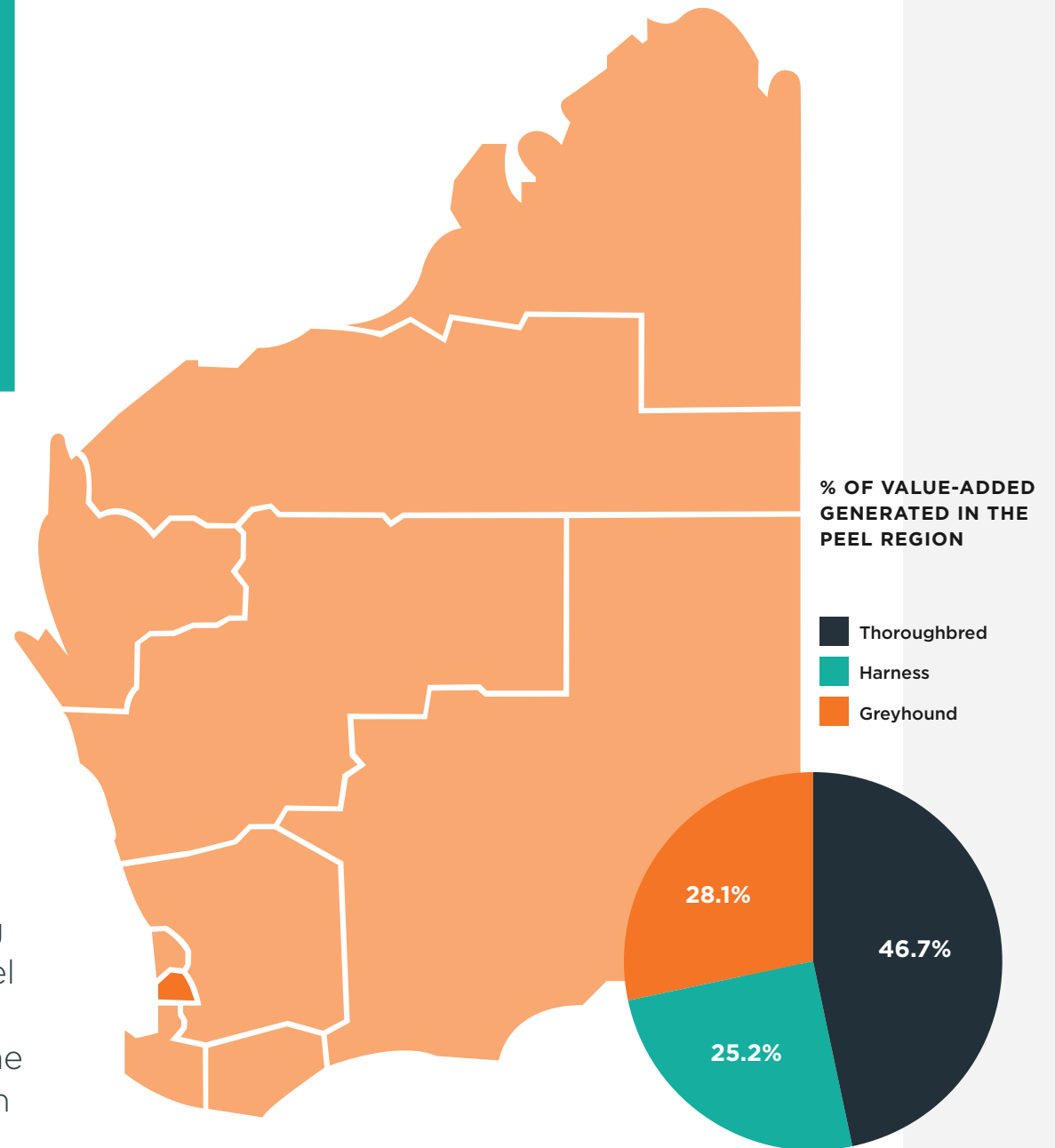
Peel

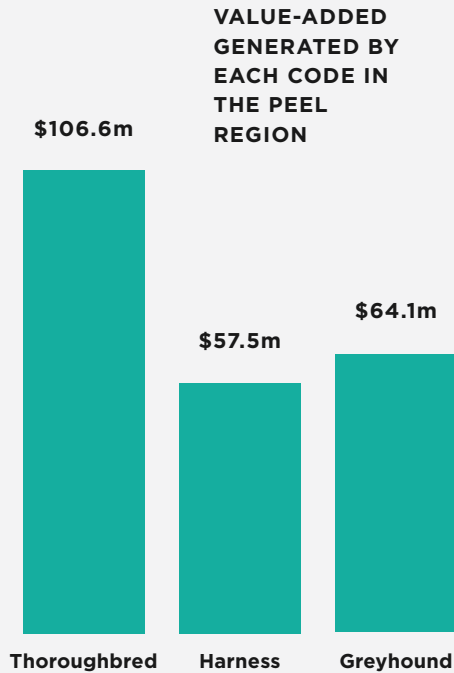
- + The Peel region is located only 75 kilometres south of Perth, with a diverse landscape incorporating 50 kilometres of pristine coastline and urban, agricultural and horticultural land. With a coastal plain bordered inland by the Darling Scarp, the Peel region is situated among the highest rainfall 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 142,960 (Census, 2021).
- + There is a total of three race clubs operating in the region, two of which are harness race clubs and one thoroughbred racing club. Mandurah greyhound racing track is located in the Peel region, forming part of the WA Greyhound Racing Association.
- + Racing in the Peel region is responsible for generating more than \$228.1 million in value-added contribution to Gross State Product. This equates to 17.1% 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 1,710 full-time equivalent (FTE) jobs in the region.
- + 3,713 individuals participate in the racing industry as an employee, volunteer or participant in the region.

RACE CLUBS IN THE REGION

- Thoroughbred**
- + Pinjarra Race Club
- Harness**
- + Pinjarra Harness Racing Club (Inc)
 - + Williams Harness Racing Club (Inc)

The economic value of the racing industry in the Peel region is \$228.1 million - 17.1% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	65	131	59	255
Owners/syndicate members	872	450	257	1,579
Trainers	91	146	64	301
Total participants in producing racing animals	1,028	727	380	2,135
Breeders' staff	39	66	47	152
Stable/kennel employees	228	89	42	359
Racing club & industry staff	138	52	2	193
Jockeys, drivers & apprentices	8	16	0	24
Racing club volunteers	7	34	0	41
Volunteers assisting participants	179	542	88	809
Total participants in producing racing product	600	799	179	1,578
Total	1,628	1,526	559	3,713

Race meetings in the Peel region attract attendances of 72,016 or 15.1% of total attendances at race meetings in Western Australia

AT A GLANCE

3 Race clubs

THOROUGHBRED 1
HARNESS 2

261 Race meetings

THOROUGHBRED 30
HARNESS 52
GREYHOUND 179

2,662 Races

THOROUGHBRED 249
HARNESS 440
GREYHOUND 1,973

371 Racing club members

THOROUGHBRED 134
HARNESS 237

72,016 Attendances

THOROUGHBRED 21,661
HARNESS 13,500
GREYHOUND 36,855

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$11.4m	\$2.9m	\$1.7m	\$16.0m
Training expenditure	\$35.9m	\$26.7m	\$6.0m	\$68.5m
Total direct expenditure	\$87.8m	\$47.6m	\$52.4m	\$187.8m
Total value-added	\$106.6m	\$57.5m	\$64.1m	\$228.1m
Full-time equivalent employment	787	418	505	1,710

There are 3,713 people who participate in the racing industry in the Peel region

*Some totals may not add due to rounding

Pilbara

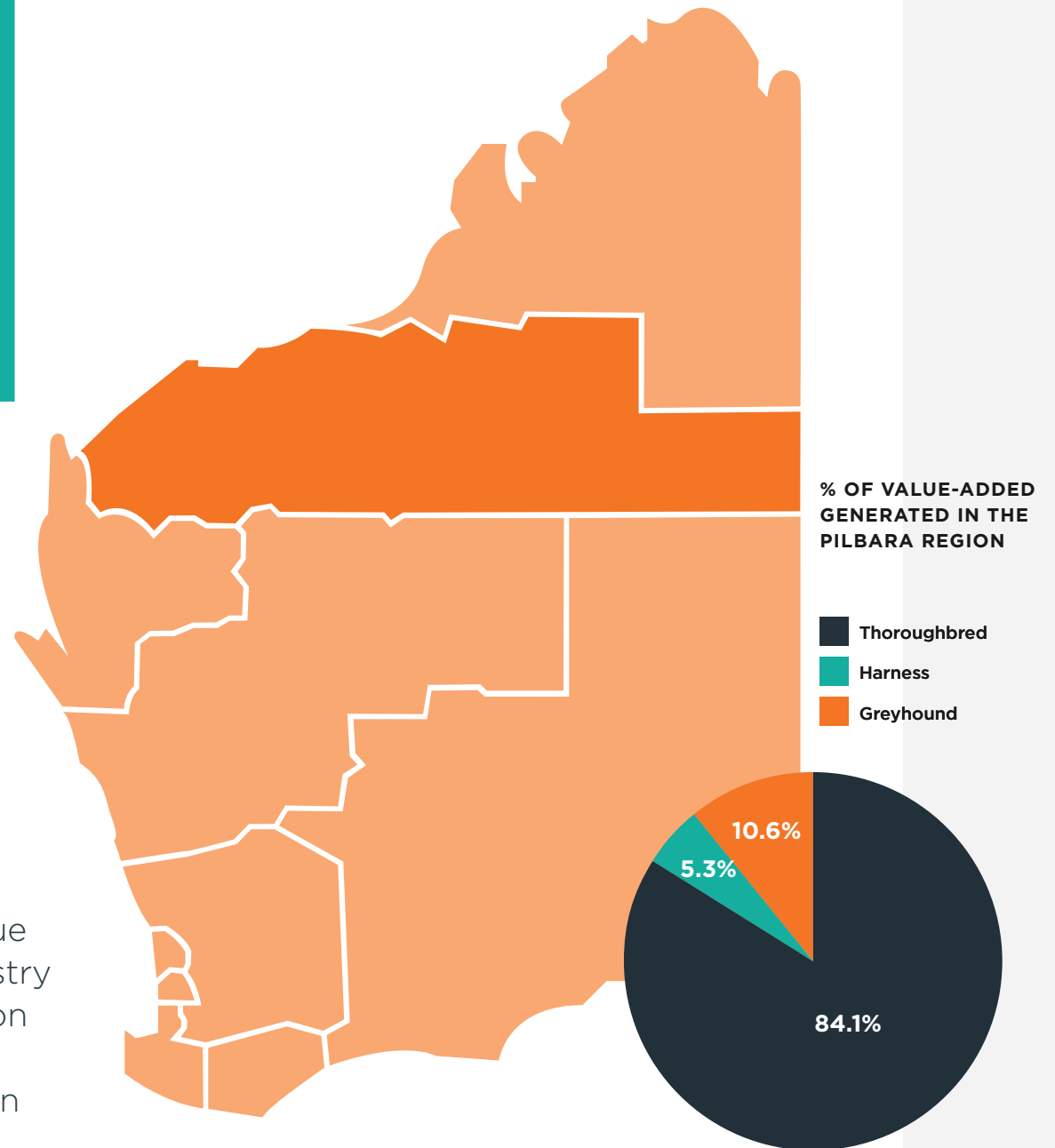
- + The Pilbara is located in the north of the State, bordered by the Indian Ocean to the west and extending across the Great Sandy Desert to the Northern Territory border in the east. One of the largest regions in Western Australia, the Pilbara covers 507,896 square kilometres of unique and breathtaking natural landscape. The population of the Pilbara region is 50,224 (Census, 2021).
- + There is a total of four race clubs operating in the region, all of which are thoroughbred clubs.
- + Racing in the Pilbara region is responsible for generating more than \$17.8 million in value-added contribution to Gross State Product. This equates to 1.3% 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 140 full-time equivalent (FTE) jobs in the region.
- + 470 individuals participate in the racing industry as an employee, volunteer or participant in the region.

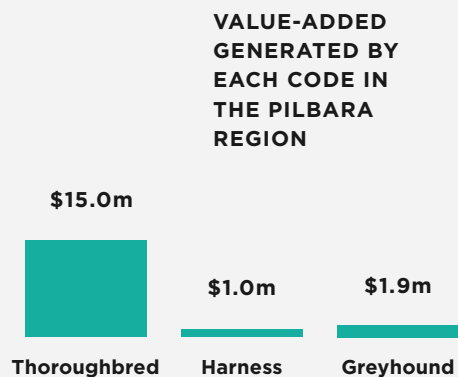
RACE CLUBS IN THE REGION

Thoroughbred

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

The economic value of the racing industry in the Pilbara region is \$17.8 million - 1.3% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	1	3	0	4
Owners/syndicate members	128	10	8	146
Trainers	5	1	0	6
Total participants in producing racing animals	134	14	8	156
Breeders' staff	1	2	0	2
Stable/kennel employees	20	1	0	21
Racing club & industry staff	128	0	0	128
Jockeys, drivers & apprentices	0	0	0	0
Racing club volunteers	145	0	0	145
Volunteers assisting participants	8	10	0	18
Total participants in producing racing product	301	13	0	314
Total	435	27	8	470

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$0.0m	\$0.0m	\$0.0m	\$0.0m
Training expenditure	\$0.9m	\$0.0m	\$0.0m	\$0.9m
Total direct expenditure	\$12.3m	\$0.8m	\$1.5m	\$14.5m
Total value-added	\$15.0m	\$1.0m	\$1.9m	\$17.8m
Full-time equivalent employment	119	7	14	140

*Some totals may not add due to rounding

There are 470 people who participate in the racing industry in the Pilbara region

Race meetings in the Pilbara region attracted attendances of 13,900 or 2.9% of total attendances at race meetings in Western Australia

AT A GLANCE

4 Race clubs

THOROUGHBRED 4

8 Race meetings

THOROUGHBRED 8

55 Races

THOROUGHBRED 55

1,380 Racing club members

THOROUGHBRED 1,380

13,900 Attendances

THOROUGHBRED 13,900

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 190,637 (Census, 2021).
- + There is a total of six race clubs operating in the region, four of which are harness clubs, with two thoroughbred race clubs.
- + Racing in the South West region is responsible for generating more than \$90.5 million in value-added contribution to Gross State Product. This equates to 6.8% 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 668 full-time equivalent (FTE) jobs in the region.
- + 2,934 individuals participate in the racing industry as an employee, volunteer or participant in the region.

RACE CLUBS IN THE REGION

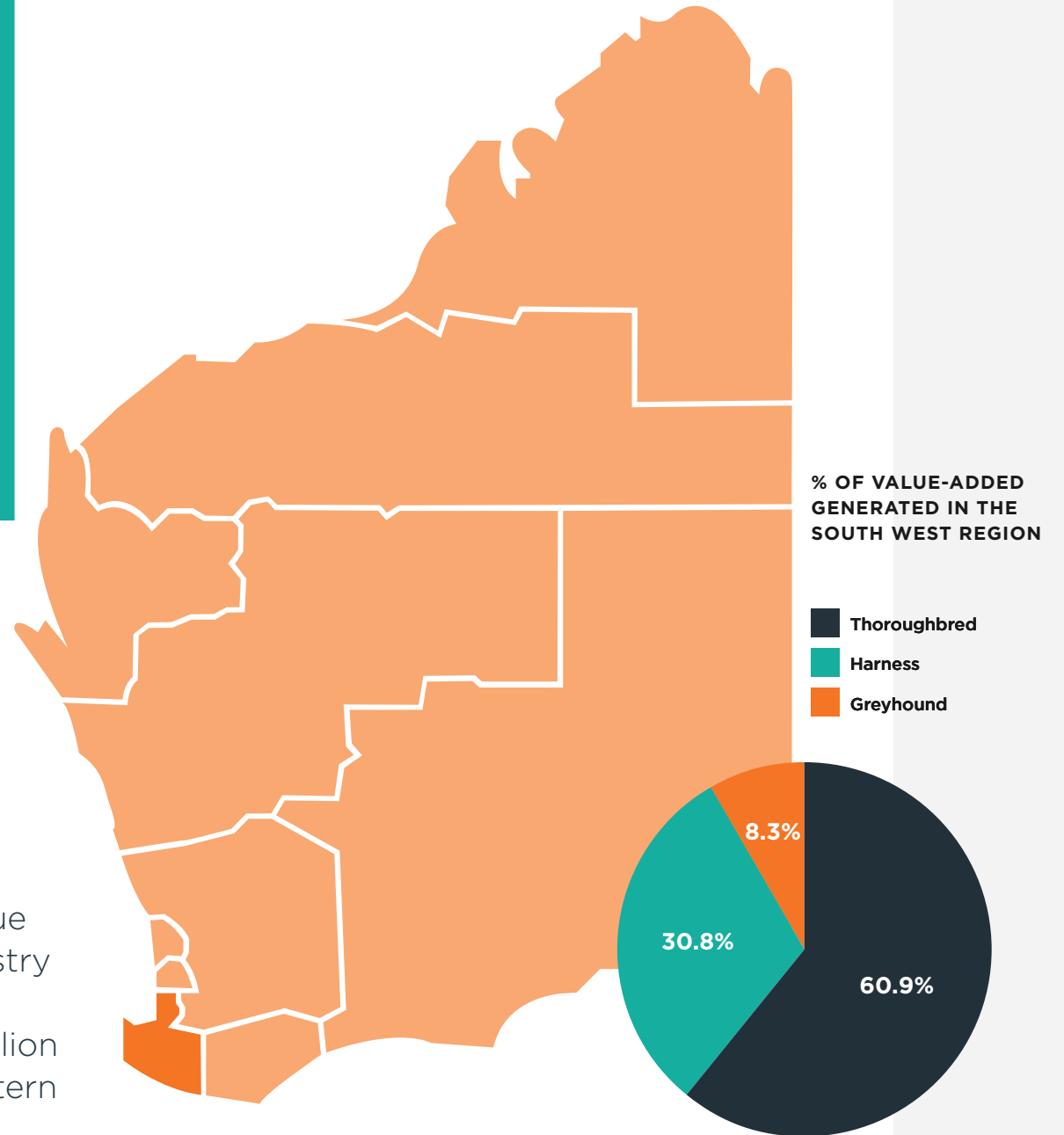
Thoroughbred

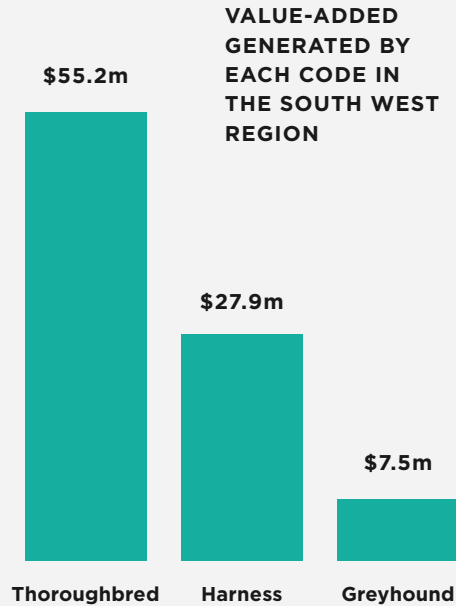
- + Bunbury Turf Club
- + Collie Race Club (Inc)

Harness

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

The economic value of the racing industry in the South West region is \$90.5 million – 6.8% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	78	114	9	201
Owners/syndicate members	780	400	35	1,215
Trainers	61	73	9	143
Total participants in producing racing animals	919	587	53	1,559
Breeders' staff	47	57	7	112
Stable/kennel employees	145	56	3	204
Racing club & industry staff	196	132	0	328
Jockeys, drivers & apprentices	4	6	0	10
Racing club volunteers	59	95	0	154
Volunteers assisting participants	148	407	13	567
Total participants in producing racing product	599	753	23	1,375
Total	1,518	1,340	76	2,934

Race meetings in the South West region attracted attendances of 51,800 or 10.9% of total attendances at race meetings in Western Australia

AT A GLANCE

6 Race clubs

THOROUGHBRED	2
HARNESS	4

39 Race meetings

THOROUGHBRED	1
HARNESS	38

295 Races

THOROUGHBRED	6
HARNESS	289

730 Racing club members

THOROUGHBRED	375
HARNESS	355

51,800 Attendances

THOROUGHBRED	20,600
HARNESS	31,200

There are 2,934 people who participate in the racing industry in the South West region

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$12.2m	\$1.6m	\$0.1m	\$14.0m
Training expenditure	\$15.1m	\$5.9m	\$0.1m	\$21.2m
Total direct expenditure	\$45.3m	\$22.9m	\$6.0m	\$74.2m
Total value-added	\$55.2m	\$27.9m	\$7.5m	\$90.5m
Full-time equivalent employment	400	213	55	668

*Some totals may not add due to rounding

Wheatbelt

- + The Wheatbelt region covers 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 72,924 (Census, 2021).
- + There is a total of nine race clubs operating in the region, five of which are thoroughbred clubs, and a further four harness race clubs.
- + Racing in the Wheatbelt region is responsible for generating close to \$93.4 million in value-added contribution to Gross State Product. This equates to 7.0% 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 725 full-time equivalent (FTE) jobs in the region.
- + 1,984 individuals participate in the racing industry as an employee, volunteer or participant in the region.

RACE CLUBS IN THE REGION

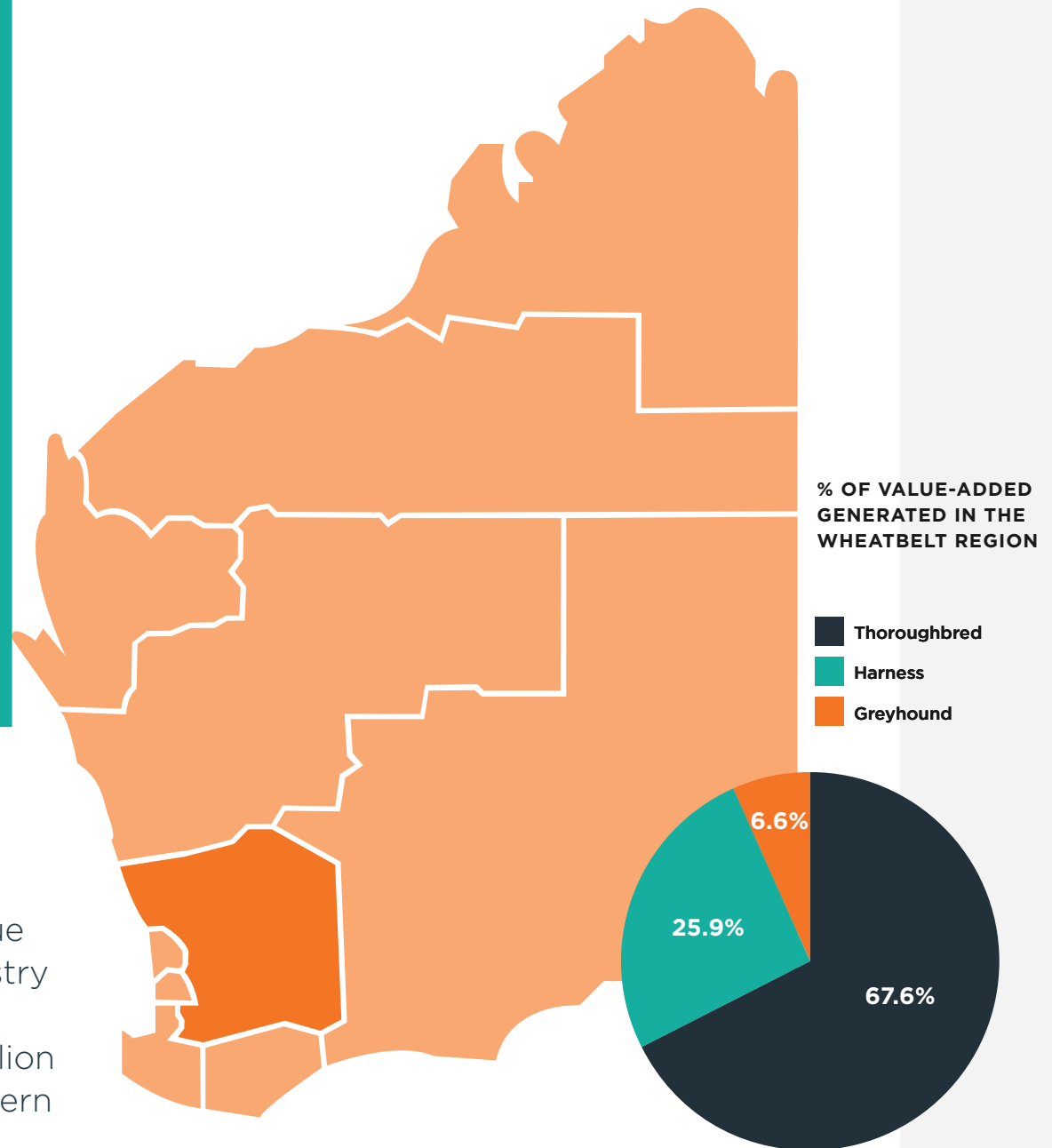
Thoroughbred

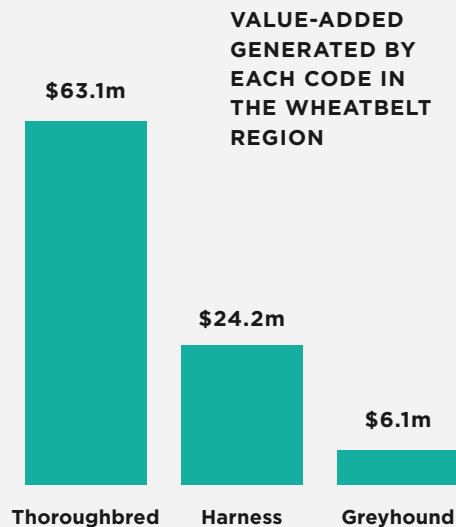
- + Moora Race Club
- + Narrogin Racing
- + Northam Race Club (Inc)
- + Toodyay Racing Club (Inc)
- + York Racing (Inc)

Harness

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

The economic value of the racing industry in the Wheatbelt region is \$93.4 million – 7.0% of the Western Australian total





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	42	61	21	124
Owners/syndicate members	457	176	74	707
Trainers	43	37	18	98
Total participants in producing racing animals	542	274	113	929
Breeders' staff	25	30	17	72
Stable/kennel employees	110	41	7	158
Racing club & industry staff	147	205	0	352
Jockeys, drivers & apprentices	2	4	0	6
Racing club volunteers	71	59	0	130
Volunteers assisting participants	94	214	28	336
Total participants in producing racing product	449	554	52	1,055
Total	991	828	165	1,984

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$12.8m	\$0.8m	\$0.4m	\$14.0m
Training expenditure	\$4.9m	\$1.9m	\$0.8m	\$7.5m
Total direct expenditure	\$51.5m	\$19.8m	\$4.9m	\$76.3m
Total value-added	\$63.1m	\$24.2m	\$6.1m	\$93.4m
Full-time equivalent employment	486	192	46	725

*Some totals may not add due to rounding

There are 1,984 people who participate in the racing industry in the Wheatbelt region

Race meetings in the Wheatbelt region attracted attendances of 21,377 or 4.5% of total attendances at race meetings in Western Australia

AT A GLANCE

9 Race clubs

THOROUGHBRED 5
HARNESS 4

92 Race meetings

THOROUGHBRED 34
HARNESS 57
GREYHOUND 1

721 Races

THOROUGHBRED 271
HARNESS 445
GREYHOUND 5

729 Racing club members

THOROUGHBRED 508
HARNESS 221

21,377 Attendances

THOROUGHBRED 11,565
HARNESS 9,750
GREYHOUND 62

Perth

- + The Perth region of Western Australia takes in 30 local government areas and more than 250 suburbs. The population of the Perth region is 2,192,229 (Census, 2021).
- + There is a total of three race clubs operating in the region, one of which is a thoroughbred club, with one harness racing club and one greyhound racing club.
- + Racing in the Perth region is responsible for generating \$725.4 million in value-added contribution to Gross State Product. This equates to 54.4% 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 5,617 full-time equivalent (FTE) jobs in the region.
- + 11,327 individuals participate in the racing industry as an employee, volunteer or participant in the region.

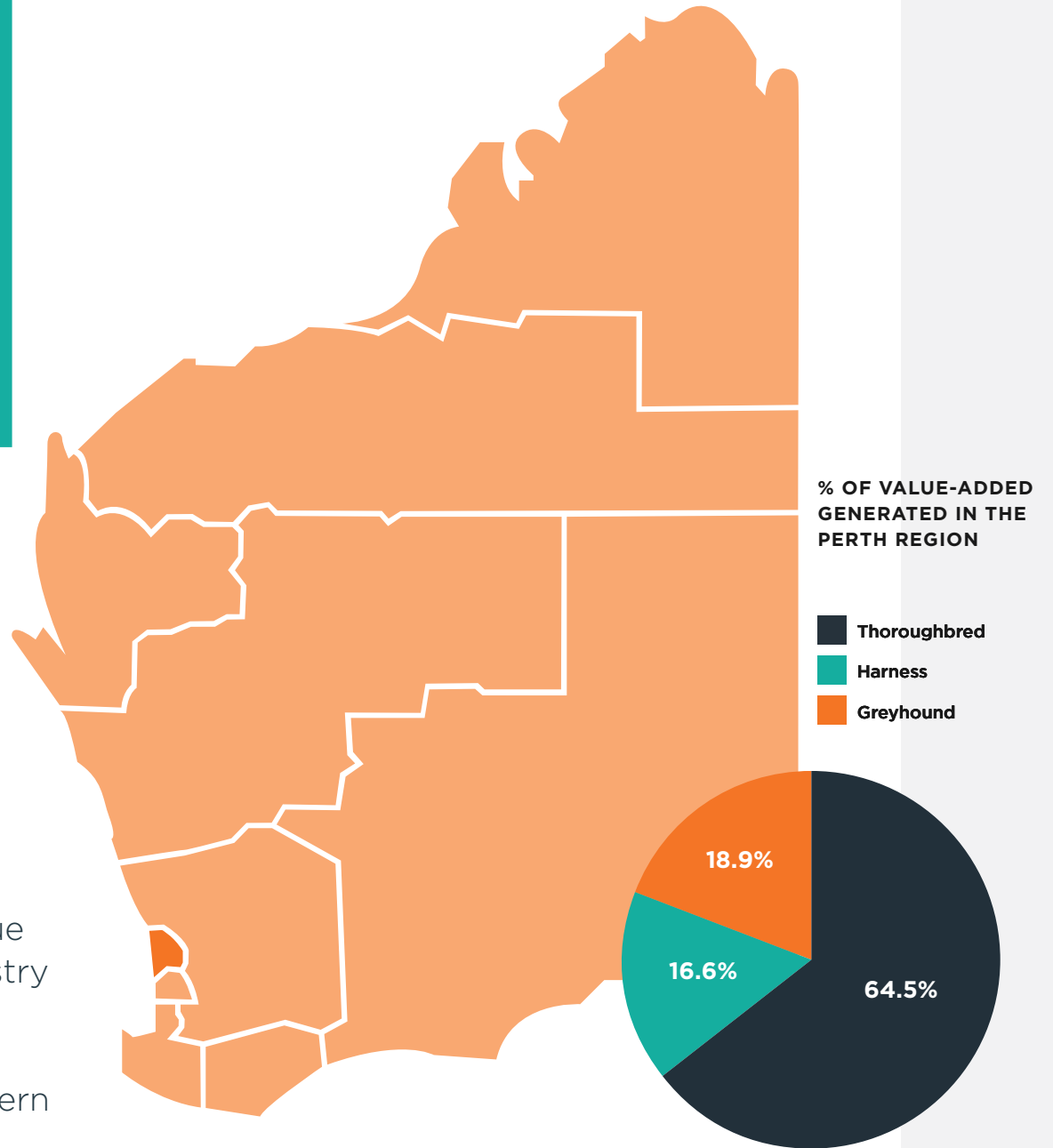
The economic value of the racing industry in the Perth region is \$725.4 million - 54.4% of the Western Australian total

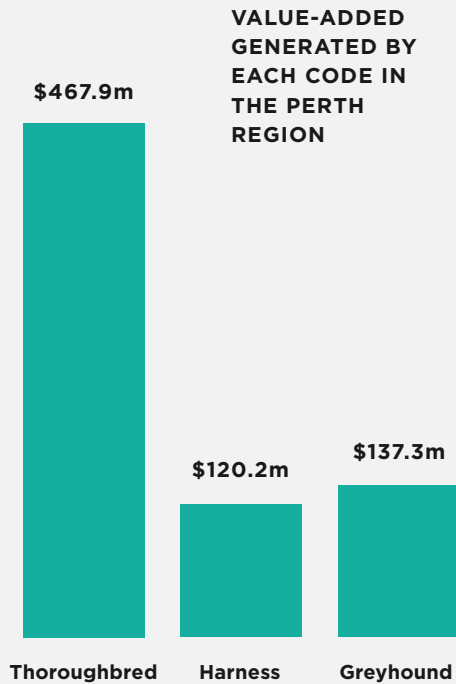
RACE CLUBS IN THE REGION

Thoroughbred
+ Perth Racing

Harness
+ Gloucester Park Harness Racing

Greyhound
+ WA Greyhound Racing Association - Cannington





PARTICIPANT TYPE (NUMBER OF)

	Thoroughbred	Harness	Greyhound	Total
Breeders	182	242	73	497
Owners/syndicate members	4,611	960	566	6,137
Trainers	135	131	63	329
Total participants in producing racing animals	4,928	1,333	702	6,963
Breeders' staff	110	121	58	289
Stable/kennel employees	541	142	50	733
Racing club & industry staff	1,498	375	244	2,117
Jockeys, drivers & apprentices	40	22	0	62
Racing club volunteers	9	0	0	9
Volunteers assisting participants	240	815	99	1,154
Total participants in producing racing product	2,438	1,475	450	4,364
Total	7,366	2,809	1,152	11,327

ECONOMIC IMPACT

	Thoroughbred	Harness	Greyhound	Total
Breeding expenditure	\$1.8m	\$3.2m	\$1.4m	\$6.4m
Training expenditure	\$47.3m	\$10.9m	\$4.4m	\$62.7m
Total direct expenditure	\$383.4m	\$98.5m	\$110.8m	\$592.7m
Total value-added	\$467.9m	\$120.2m	\$137.3m	\$725.4m
Full-time equivalent employment	3,633	937	1,048	5,617

*Some totals may not add due to rounding

There are 11,327 people who participate in the racing industry in the Perth region

Race meetings in the Perth region attracted attendances of 220,644 or 51.3% of total attendances at race meetings in Western Australia

AT A GLANCE

3 Race clubs

THOROUGHBRED	1
HARNES	1
GREYHOUND	1

374 Race meetings

THOROUGHBRED	100
HARNES	98
GREYHOUND	176

3,831 Races

THOROUGHBRED	869
HARNES	891
GREYHOUND	2,071

2,789 Racing club members

THOROUGHBRED	2,419
HARNES	370

220,644 Attendances

THOROUGHBRED	130,033
HARNES	66,000
GREYHOUND	24,611

About IER

IER is a leading strategic consulting business specialising in the tourism, events and sporting industries. For over 20 years, IER has provided economic impact evaluations for both private and government clients.

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

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

It has been developed utilising the following source data:

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

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

- + Australian greyhound racing industry
- + Australian thoroughbred racing industry
- + New South Wales greyhound racing industry
- + New South Wales harness racing industry

- + New Zealand racing industry (3 Codes)
- + Northern Territory thoroughbred racing industry
- + Queensland racing industry (3 Codes)
- + Australian Football League
- + Tasmanian racing industry (3 Codes)
- + Victorian racing industry (3 Codes)

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

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

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

- + Size and scope of the Queensland racing industry (2023)
- + Size and scope of the New South Wales greyhound racing industry (2023)

- + Size and scope of the New South Wales harness racing industry (2023)
- + Size and scope of the Australian Football League (2022)
- + Size and scope of Thoroughbred racing industry in the Northern Territory (2022)
- + Size and scope of the Victorian racing industry (2022)
- + Size and scope study of the Tasmanian racing industry (2021)
- + Size and scope of the Western Australian racing industry (2021)
- + Size and scope of the Asian Racing Federation (2020)
- + Size and scope of the South Australian racing industry (2019)
- + Economic and social impact study of harness racing in Australia (2012)

Barry provides the economic modelling and advisory services to IER.

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

Economic Methodology

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

BASIS OF EVALUATION

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

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

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

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

netting out leakages such as expenditure on imports etc.

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

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

The result of an unconstrained whole of economy or general equilibrium model underpinned by input-output tables, is a prominent process for translating direct created expenditure (a final demand stimulus) of industries or projects into jobs and incomes, and for establishing the extent of the flow on impact. There is some level of academic argument about appropriate models for converting increases in external expenditure (final demand) into regional economic impacts. The critics of using unconstrained models such as input-output tables often argue that they overstate the value of an industry - and reference that "multiplier" impacts are taken as a method of ratcheting up the Stated value (noting that this study uses an

impact assessment rather than multipliers per se). This criticism would be valid when analysts applied turnover multipliers but is not the case with the more appropriate use of value-added multipliers - which translate the expenditure estimates to national accounting framework measure with a whole of economy context.

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

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

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

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

It should be emphasised that this methodology includes the identification and inclusion of local (WA) expenditure associated with racing. The economic impacts determined by this approach

do not represent the value that would be lost to the State if the industry did not exist. Generally, when considering expenditure by locals it is often held that substitution is a significant factor in whether that spending would be lost to the economy. Taking the racing industry as an example, it is likely (under a scenario where it no longer existed) that much of the local resident spend would substitute to other activities. Depending on where this spending occurs the overall economic impact of that spending could be higher or lower than it was when spent on racing.

The study calculates the level of direct and induced employment and income that is linked to people choosing to spend their entertainment dollar on racing (after allowing for imports which are used in the production process). This could be considered the gross economic impact of the sector and is therefore a measure of its significance generally. If a similar gross impact was calculated for every other sector of the economy, then the sum of the impacts would be considerably greater than the size of the economy in total. An alternative methodology would be to measure the net economic impact. Such a study would represent the extent to which this industry expenditure is supported by revenues that can be considered new to the State or region. This would include the supply of services by the local industry to racing activities interstate. It would also include the spending made by tourists or visitors to the State whose main reason for visiting is to attend/participate in the races and wagering by out-of-state residents on local racing product. Finally, it would include

Definitions

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

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

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

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

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

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

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

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

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



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