



SCOTTISH RACING

AYR HAMILTON PARK KELSO MUSSELBURGH PERTH



**Annual Review
and Outlook 2019**

BOARD & STAFF MEMBERS

The Board

- | | |
|------------------|----------|
| • Sir Ian Good | Chairman |
| • John Gellatly | Director |
| • Mark Hunter | Director |
| • Alan Macdonald | Director |
| • John Prideaux | Director |

Scottish Racing

- | | |
|---------------------|--|
| • Delly Innes | Manager |
| • Eleanor Boden | Community Engagement & Education Manager |
| • Stacey MacPherson | Administrative & Marketing Assistant |

Racecourse Chief Executives

- | | |
|--------------------|---------------|
| • David Brown | Ayr |
| • Vivien Currie | Hamilton Park |
| • Jonathan Garratt | Kelso |
| • Bill Farnsworth | Musselburgh |
| • Hazel Peplinski | Perth |



Scotland is well represented amongst all sectors within British racing, and over half of the senior management team are female.



■ SCOTTISH RACING EXECUTIVES

David Brown:

David became Finance Director for Ayr Racecourse in July 2007, and was then appointed Managing Director in 2012 and is a member of the Large Independent Racecourse Group.

Vivien Currie:

Vivien was appointed as Chief Executive at Hamilton Park in June 2008. She was a Director of the British Horseracing Authority from 2016 to 2019, a former Vice Chairman of the RCA, and a member of the Development Board of the Marie Curie Hospice in Glasgow. Prior to this, Vivien was Chief Executive of Livingston Football Club, bringing the club out of Administration, and also sat on the Scottish Football League Management Committee.

Jonathan Garratt:

Jonathan took on the role of Managing Director at Kelso Racecourse in 2018, having been Managing Director of Cartmel Racecourse since August 2010. Jonathan represents small independent racecourses as a director of the RMG, and also serves on the RCA specialist groups committee for race planning and betting.

Bill Farnsworth:

Bill has been General Manager of Musselburgh for 16 years. He has served on the board of the BHA and the RMG, and currently represents independent racecourses on the Board of the RCA.

Hazel Peplinski:

Hazel has built an enviable reputation in Scottish racing holding positions that include Chief Executive, Director, Racing Manager and Clerk of the Course at Hamilton Park, as well as further Clerking roles at both Kelso and Ayr Racecourse. Earlier in her career Hazel was a Public Relations Officer for the Racecourse Association (RCA) and obtained Event Management experience in the golf and tennis arenas. Hazel has been a trustee of the Injured Jockeys Fund since 2013.

Delly Innes:

Delly took up her post as Manager of Scottish Racing in 2016, following her position as Head of Political Research for the Countryside Alliance and then their Wessex Regional Director from 2004 to 2010. She also sits on the BHA Public Affairs Steering Group which develops and implements agreed industry strategy on political engagement, and is a member of the Racing Futures Steering Group,

Eleanor Boden:

Eleanor is a PHD student, charity worker and is also stable manager at Cartmel Racecourse. She has gained a wide-range of experience from her time as as a Senior Lecturer and as Education and Training Development Manager at the HEROS Charity. Eleanor carries out all community engagement activity and is also leading on the project to address education and training provisions in Scotland. She also sits on the Industry Recruitment, Retention & Training Programme Board.

■ CONTENTS

- Chairman’s Introduction 5
- Manager’s Summary 6

SCOTTISH RACING:

- Customer Growth 7-10
- Commercial Partnerships 11-12
- Equine Welfare 13-17
- People 18-19
- Public Affairs & Communications 20

RACING IN SCOTLAND:

- Industry Overview & Data Map 21-22
- Ownership 23-24
- Racehorse Development 25-26
- Contact Details 27

■ ABOUT SCOTTISH RACING

Scottish Racing is the only organisation that promotes and supports the sport of horseracing throughout Scotland and its five racecourses: Ayr; Hamilton Park; Kelso; Musselburgh and Perth.

The organisation promotes all sectors of the industry north of the border, by lobbying on political issues in both Westminster and Holyrood, generating coverage in broadcast, printed and social media, updating existing racegoers on all racing news, and campaigning to attract new audiences to racing. Scottish Racing plays an integral part in delivering long-term prosperity and sustainability to the sport in Scotland.

Our vision is to increase the popularity of horseracing as a spectator sport in Scotland.

Our mission is to promote and support the five racecourses in Scotland and assist in the development of a sustainable Scottish horseracing industry and its success on a global scale.



CHAIRMAN'S INTRODUCTION



I am delighted to introduce Scottish Racing's Review, where we take a look back on our work over the past two years and review the state of the horseracing industry in Scotland.

Racing has its highs and lows, and this has been no more apparent than in Scottish racing. On the back of 2017's success in the Grand National and the Ebor, 2018 saw the Racehorse Owners' Association award nearly all the Scottish courses with their Gold Standard, and Hamilton Park was rightly crowned Champion Racecourse by the Racecourse Association; the first time a Scottish course has won the award. A particular highlight was seeing Catch Bissett, from Nick Alexander's yard, being crowned Employee of the Year at the 2019 Godolphin Stud and Stable Awards, with a total of four nominees from Scotland - an excellent achievement.

However, we have also faced tribulations with the Beast from the East and equine flu, which had an obvious impact on attendances and the number of races run.

Scottish Racing continues to play a key role within the British racing industry and informs and engages both the racegoing public, stakeholders and parliamentarians through a variety of

channels, events and projects. We are now seeing the benefits of the racecourses' investment in prize money, fixtures and infrastructure, with attendances having risen by over a fifth, and runners having expanded by over a quarter, in the last twenty years.

Scottish Racing has also increased community engagement activity which reflects the value that diverse charitable groups place on the racing industry's ability to reach a wide demographic, and we very much recognise how much racing can give back to local and national communities.

2018 saw us develop our partnership with William Hill, so that all Scottish courses will have their betting shops, enabling us to enhance our customer experience on the courses.

We were delighted to receive support from the Racing Foundation to research and review Scotland's education and training provision, and work is in progress to create a charitable organisation to address the current gap in the recruitment and retention of stable staff in Scotland.

I hope you enjoy reading our Review and I look forward to welcoming you to a Scottish racecourse soon.

Sir Ian Good
Chairman

■ MANAGER'S SUMMARY



Horseracing continues to make a substantial contribution to the Scottish economy and is a key part of Scotland's cultural, sporting and tourism offering. Since our last Review in 2016, we have seen a significant growth in many areas of the racing industry north of the Border,

not least from those of the racecourses themselves, which has seen their economic impact rise by a phenomenal 35% in the last two years.

With Scottish Racing's mission to promote and support both the racecourses, and assist in the long-term sustainability of the sport in Scotland, in 2018, we focused our priorities into five key areas: Customer Growth, Commercial Partnerships, Equine Welfare, People, Public Affairs and Communications, all of which are detailed throughout this Review.

As Sir Ian has mentioned in his introduction, the sport in Scotland has expanded significantly over the last twenty years, when we have seen attendances rise by more than a fifth (21%), the number of runners increase by more than a quarter (28%) and the number of fixtures expand by almost a third (32%). Racing has unquestionably earned its place as Scotland's second largest spectator sport.

However, horseracing is an industry that always strives to improve itself, and benchmarking

racing's position amongst other sectors allows the sport to identify areas for new approach.

For example, it is interesting to note that racing generated a turnover of £306.3m in Scotland in 2018, an increase of £5.1m in the past two years, more than that of the TV & Radio industry which saw a turnover of £249.2m. Horseracing sustains 3,400 FTE jobs, and the oil refining industry in Scotland supports 1,750 jobs. With attendances of 280,000, racing remains Scotland's second biggest spectator sport after football, and more than rugby who welcomed 150,000 attendances. Racing paid out £9.1m in total prize money in 2018; £1m more than prize money for The Open.

Thanks to constant innovation from the racecourses themselves, economic impact from the racecourses rose by more than a third from £37.7m in 2016, to £51.1m in 2018. £3m of this was generated by the racecourses for construction, building & landscaping services in Scotland.

Collectively, the five racecourses generated £23.9m of revenues and sustained 180 full time equivalent jobs directly, whilst simultaneously contributing £33.3m and 390 jobs to their local economies in near-course activity.

These are impressive figures indeed, but I have no doubt that racing in Scotland will not remain complacent and will continue to search for areas to grow further.

One such area is that of education and training, and one of the most exciting developments of 2018, was the opportunity to improve on the

recruitment and retention of staff into, and within, the industry in Scotland. The ongoing project to create a charitable organisation to address the gap in education and training provision currently available in Scotland, reflects the importance of Scottish racing within the wider industry and we look forward to updating you on its progress.

It would be remiss of me not to mention the tragic death of work rider, Natasha Galpin in January 2019. Natasha sadly passed away following a tragic accident on the gallops of Iain Jardine, and her dedication to horses, her skill and her remarkable work ethic exemplify the qualities which we celebrate within the horseracing industry in Scotland, and we extend our sympathies and best wishes to her family and friends.

Finally, we were thrilled to see two members of the Scottish racing "family" recognised for their hard work and dedication by the wider industry. For Catch Bissett to be named Employee of the Year when the sport in Britain employs 6,000 people, was a huge achievement. Hamilton Park's crowning of Racecourse Champion at the Racecourse Association's Showcase Awards was a defining moment of the whole year. The Award was the culmination of many years work by their talented team and we look forward to seeing more exciting initiatives at Hamilton Park, and all the Scottish racecourses, for many years to come.

Delly Innes
Manager

■ SCOTTISH RACING CUSTOMER GROWTH

Attendances, Runners and Fixtures

Racing is the second most popular spectator sport in Scotland after football and ahead of ice hockey, rugby and golf. Scotland’s racecourses enjoyed nearly 280,000 attendances in 2018 with an average of 2,600 people attending each race meeting.

Attendances, Runners & Fixtures at Scottish Racecourses (2018)

ATTENDANCES	276,300
FIXTURES	115
ABANDONMENTS	10
AVERAGE ATTENDANCE	2,600

Source: Horseracing Betting Levy Board



Between 1998 and 2018 the number of attendances, runners and fixtures in Scotland has increased significantly. Over the last twenty years the number of attendances has risen by more than one fifth (21%), the number of runners has increased by more than one quarter (28%) and the number of fixtures has expanded by almost one third (32%). Racecourse attendances have risen significantly over the last twenty

years due to the drive in a long-term programme of capital investment across Scotland’s racecourses.

In the last two decades, the number of attendances, runners and fixtures in Scotland has grown more quickly compared to Great Britain as a whole. Attendances at Scottish racecourses rose by 21%, compared to an increase of 16% across Great Britain as a whole.

Scottish Racecourse Attendances, Runners and Fixtures (1998-2018)

Racecourse	1998	2003	2008	2013	2018
ATTENDANCES	228,000	284,000	309,000	285,000	276,000
RUNNERS	5,000	5,600	6,400	5,900	6,300
FIXTURES	87	97	98	98	115
ABANDONMENTS	1	6	6	5	10

Source: Horseracing Betting Levy Board (2018)



Scotland & GB Racing Attendances, Runners and Fixtures (1998-2018)

SCOTLAND				GREAT BRITAIN		
	1998	2018	Change	1998	2018	Change
ATTENDANCES	228,000	276,000	+21%	4,988,000	5,772,000	+16%
RUNNERS	5,000	6,300	+28%	77,600	93,900	+21%
FIXTURES	87	115	+32%	1,200	1,600	+31%

Source: British Horseracing Association, Horseracing Betting Levy Board

Attendances at Scottish racecourses were nearly 100,000 higher than ice hockey and nearly double that of rugby in 2018. Attendances from football, ice-hockey and rugby are taken from the attendances of Scottish teams in their respective premier leagues (Scottish Premiership, EIHL and Guinness Pro 14).

An average day's admission to racing in Scotland is £16, cheaper than ice-hockey (£18), football (£23) or rugby (£23), making racing the cheapest major sport to attend in Scotland, as seen in the table below.

Attendances at major sports (2018)	
SPORT	ATTENDANCES
FOOTBALL	3,700,000
RACING	276,000
ICE HOCKEY	185,000
RUGBY	150,000
Source: Various sources (2018)	

Average cost of Scottish sports	
SPORT	COST OF DAY'S ADMISSION
RUGBY	£23
FOOTBALL	£23
ICE HOCKEY	£18
HORSERACING	£16
Source: Various sources (2018)	



■ PRIZE MONEY

The value of prize money in Scotland has risen by more than one fifth (21.8%) since 2016. This is slightly ahead of the rise in the value of prize money across Great Britain as a whole (21.6%) over the same period.

Perth saw the biggest increase in the value of prize money (43.5%) with the value of prize money at Hamilton Park also rising significantly (37.2%). Ayr accounted for more than one third (37%) of the value of all Scottish racing's prize money in 2018.

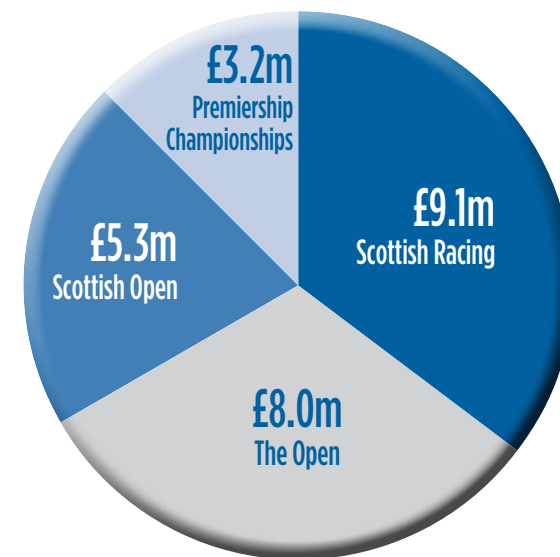
Prize Money at Scottish Racecourses

Racecourse	2016	2018	Change
SCOTLAND TOTAL	£7.5	£9.1	+21.8%

Source: British Horseracing Association

The chart on the right shows the prize money in Scottish racing compared to other major sporting events in Scotland. Racing in Scotland brought in around £9.1m in prize money throughout the 2018 fixtures. Golf's Open Championship in 2018 paid out around £8.0m in prize money to the whole tournament in 2018, £1.1m less than the prize money for Scottish racing.

Football is the most attended sport in Scotland, however, the prize money paid out in Scottish racing was almost three times the amount paid to the Scottish Premiership champions (£3.2m), and Scottish racing's prize money was nearly double that of golf's Scottish Open (£5.3m).



Source: British Horseracing Association, sports and events bodies



■ ECONOMIC IMPACT OF THE SCOTTISH RACECOURSES

The combined turnover of Scotland's five racecourses was £23.9m in 2018. Revenues came from a mix of sources, with media rights, the betting levy and ticket sales providing the main sources of income, and the five racecourses employed the equivalent of 180 full time employees in 2018.

The economic activity at racecourses spreads through the local economy and further afield. Revenues generated by the racecourses are then recycled to suppliers, employees and (via taxes) government. These 'indirect' impacts are then further amplified as suppliers, employees and government generate further economic activity across the country and beyond.



Together these further economic impacts are called 'secondary' impacts to distinguish them from the direct economic activity of the industry. For example, using the Scottish Government model, the secondary impacts from racecourses generated nearly £3m for construction, building and landscaping services in Scotland. This reflects Scotland's construction industry benefiting from ongoing investment and ongoing maintenance of facilities at Scotland's racecourses.

Economic Impact of Off-course Expenditure

Racedays generate economic activity as racegoers travel to the course and build their leisure activities around a day's racing. Racing in Scotland draws spectators from well beyond the local communities around the racecourse. Overall, off course economic activity generated £33.3m of turnover in Scotland and sustained 390 FTE jobs.

Economic impact of racecourses in Scotland

	TURNOVER			JOBS		
	Direct	Secondary	Total	Direct	Secondary	Total
SCOTLAND'S RACECOURSES	£23.9m	£27.2m	£51.1	180	220	400

Source: Scottish Government Input-Output model and 4-consulting

Economic impact of off-course expenditure

	TURNOVER			JOBS		
	Direct	Secondary	Total	Direct	Secondary	Total
OFF-COURSE ACTIVITY	£19.1m	£14.2m	£33.3m	220	170	390

Source: Scottish Government Input-Output model and 4-consulting

■ SCOTTISH RACING COMMERCIAL PARTNERSHIPS

Racing TV Partnership

Scottish Racing is proud to be partnered with Racecourse Media Group (RMG).

Media rights revenues provide racecourses with the opportunity to invest not only in prize money, but also in new facilities and developments on-course as well as part-funding the integrity services that underpin the reputation of the sport.

RMG's Pay TV channel, Racing TV, broadcasts every race live from 61 of Britain and Ireland's best racecourses, plus a host of additional benefits to enjoy as part of a membership package.

The value of the Racing TV membership is enhanced by including free admission and ticket and hospitality offers, and through our partnership, the Scottish Season Ticket offers free admission to nearly all racedays in Scotland

throughout September, as well as discounted offers to all Racecourse Annual Members.

Racing Media

Racing in Scotland is a popular sport that attracts considerable media coverage on television, radio, in the press and on the Internet. The production, distribution of media content on racing is a significant segment of the industry that generates considerable turnover and employment of journalists, production crew, editors and their suppliers.

An estimate of media activity associated with horseracing in Scotland was published as part of the 2016 industry review. Media activity impacts were adjusted to 2018 prices to estimate media activities associated with Scottish racing during 2018. Employment outcomes were assumed to have remained similar to outcomes in 2016.



The economic impact of the racing media in Scotland

	TURNOVER			JOBS		
	Direct	Secondary	Total	Direct	Secondary	Total
MEDIA	£14.1m	£10.6m	£24.7	160	70	230

Source: Scottish Government Input-Output model and 4-consulting calculations



William Hill Partnership

Scottish Racing was delighted to announce the partnership with William Hill in 2018, which saw the bookmaker open betting facilities on all the racecourses in Scotland. This agreement between Scottish Racing and William Hill follows on from the long-term sponsorship of the Ayr Gold Cup, the Scottish Sprint Cup at Musselburgh and previous sponsorship of Hamilton Park's Braveheart Night.

By partnering with William Hill, Scotland's largest high-street bookmaker, we are providing customers at all our racecourses with a complete betting experience. Racegoers can now enjoy the action on the track, whilst also being able to watch and bet on other race meetings and sports. William Hill's facilities are well placed to meet all customers' needs and thrive in the years ahead.

The Bookmaking Sector

Sports betting is a major leisure pastime in Scotland, with gambling on racing a significant component of that. As well as providing income for the industry via the Horserace Betting Levy and media rights, betting is an important industry in itself. This represents a major part of racing's overall contribution to economic activity in Scotland.

This segment of the racing sector includes high street bookmakers and remote gambling and the suppliers to these businesses and their associated expenditure and employment.

The turnover of gambling and betting operations can overstate the value of these activities. Other reports on the sector industry draw on measures of net income from customers or gross gambling

yields taking into account the amounts paid out to customers.

The latest data shows gambling and betting activities in Scotland accounted for 7,000 FTE jobs in 2013 and this had declined to around 6,500 FTE jobs by 2017. Gambling Commission data shows that horseracing accounted for 53% of the value of over the counter betting, which in turn accounts for under a half of betting shop revenues.

Horseracing accounts for just under one third of activity in off-course betting shops in Scotland. A conservative estimate is therefore made here that around one fifth of the overall value of turnover and FTE in the gambling sector can be assumed to be associated with horseracing.

Impact of betting on horseracing in Scotland

	TURNOVER			JOBS		
	Direct	Secondary	Total	Direct	Secondary	Total
BETTING ON HORSERACING	£116.8m	£37.7m	£154.5m	1,390	590	1,980

Source: Scottish Government Input-Output model and 4-consulting calculations



■ SCOTTISH RACING

EQUINE WELFARE

Regulating Welfare

The welfare of our participants is the number one priority for the British Horseracing Authority (BHA), the Government recognised, independent body responsible for the regulation of horseracing in Scotland. It demands the highest standards of welfare from all licensed jockeys, trainers and racecourses and the **290 stable staff whose role it is to care for the 500+ horses in training in Scotland.**

The BHA is responsible for setting and enforcing the welfare standards that all participants must adhere to.

"Horseracing in Scotland is governed and regulated by the British Horseracing Authority (BHA). The BHA ensures racehorse welfare, including compliance with all aspects of the Animal Health and Welfare (Scotland) 2006 Act, through its Rules of Racing, the licensing and inspection of participants, education, training and monitoring. The BHA also works closely with a range of animal welfare organisations such as World Horse Welfare to maintain and promote horse welfare. The BHA also seeks to minimise the risk of injury and fatalities to thoroughbred horses on racecourses, and records and analyses injuries sustained with a view to future prevention. The Scottish SPCA work in conjunction with the BHA and racecourse officials to ensure that welfare standards for racehorses in Scotland are maintained, however they do not have a responsibility for oversight of racehorse welfare in Scotland".
Mairi Gougeon MSP, Minister for Rural Affairs and the Natural Environment, March 2019

"The British Horseracing Authority (BHA) is responsible for the safety of jockeys and horses at races in this country. The BHA work with animal welfare organisations like the RSPCA and World Horse Welfare to keep racecourses as safe as possible for horses."

Defra, 2018

■ EQUINE WELFARE

As a consequence of British racing's investment in safety, welfare and health, the number of horses that have suffered fatal injuries on racecourses has decreased by 1/3 in the last 20 years, to 0.2% of runners. The five-year fatality rate is also at its lowest on record.

Faller rates during jump races have decreased to an all-time low of just 2.53%, a reduction of 30% in the last 20 years as a result of initiatives to make racecourses and jump racing safer.

Sport horses are at risk whatever activity they are engaged in, whether in competition or when turned out in the field – a recent study by Liverpool University found that 62% of traumatic injuries in sport horses occurred in the field, compared to 13% while in ridden exercise.



Since the year 2000, British racing has invested £35 million in veterinary research and education which benefits all breeds of horses, not just thoroughbreds, including for example during the recent outbreak of Equine Influenza.

Scottish courses are spending c. £650,000/annum on the maintenance of their tracks. Turf management has progressed hugely in recent years, moving away from use of agricultural practices to amenity management, using products designed for the likes of golf courses and football pitches.

Soil analysis is carried out by European Turfgrass Labs in Alloa, who inform the courses what nutrients may be lacking and advise on soil structure and drainage quality.

Groundstaff teams in Scotland have been recognised by the Racecourse Association, with the following awards:

- Kelso Racecourse – Jumps Racecourse Groundstaff Team of the Year, 2016
- Hamilton Park Racecourse – Flat Racecourse Groundstaff Team of the Year, 2014
- Musselburgh Racecourse – Dual Code Groundstaff Team of the Year, 2011 and 2012
- Ayr Racecourse – Dual Code Groundstaff Team of the Year, 2010.

Investment and innovation is a priority at all Scottish tracks. Kelso and Hamilton Park have recently bought verti-draining machines at £40k/unit, for de-compaction. Perth has created a purpose-built exercise track and grazing area, given that 40% of their runners travel over-night.

Using GPS mapping, Hamilton Park has created a consistent radius on the bend that allows horses to travel in a more balanced, and safer, way. Musselburgh has introduced a fibresand bend, the first course in the UK to do so, at cost of £100k and other courses in Britain have followed Musselburgh's lead.

Kelso Racecourse is one of the first racecourses in Britain to trial the use of padded hurdles. To date, results show a reduction in fallers of c0.5% on installation of one-fit padded hurdles, however the benefits of padded hurdles continue to be assessed in relation to their benefit as a whole to racehorse welfare.

■ EQUINE WELFARE

The irrigation of tracks is crucial for producing safe, consistent turf during dry weather. In 2017 Perth invested £250k in a new irrigation system for 2017. The Scottish tracks take water from local water sources, which is then put onto the ground, and either evaporates or is fed back into the local water source, so no water is wasted.

Trainers, Jockeys & Racecourses

No trainers or jockeys are licensed by the BHA unless they are proven to be suitable persons to look after or ride racehorses and they are subject to strict welfare standards, which are continuously monitored through the annual licence renewal process.

Additionally, the BHA's inspecting officers carry out around 600 stable inspections each year to ensure standards are being maintained.

Every racecourse is inspected by a BHA inspector prior to the start of the season, and twice during the course of a season. The Professional Jockeys' Association employ current jockeys as safety officers, to voice any concern that jockeys may have regarding safety.

No racecourse is licensed, and no racing can take place unless the premises, facilities, and the way the course is operated meet strict BHA

equine welfare criteria, which far exceed those demanded by animal welfare legislation.

These standards are enforced by the BHA's team of racecourse inspectors who visit courses frequently on and before racedays to ensure that courses are safe.

The requirements include the provision of experienced veterinary surgeons and state-of-the-art veterinary facilities on course – such as horse ambulances – to ensure the very best treatment of any injury.

The BHA also works with racecourses to ensure the continual improvement of welfare standards, and constantly monitor injury rates to identify where improvements can be made. Improvements range from minor alterations to racecourse facilities, through to significant reviews and changes to racecourse layout.

Each of the five courses in Scotland has invested in secure stable yards, which are regularly disinfected with dust-free bedding, good wash-down areas and a veterinary treatment area. The racecourses also provide a sampling area for post-race sampling, carried out by the BHA. Jockeys are also tested for drugs and alcohol.

Perth, Musselburgh and Hamilton Park have all built new stable yards in the last ten years. Musselburgh now has a secure walkway directly from the stables to the course, with ample horse box parking, and a level unloading ramp.

Welfare on the Raceday

All of the BHA officials who operate on a raceday are there to ensure the health and welfare of our participants, including stewards, equine welfare integrity officers and BHA vets.

One Veterinary Officer and three Veterinary Surgeons are required on a racecourse as a minimum requirement for the 1,500 race meetings that take place in Britain each year.

In the event of an incident on a racecourse:

- Any horse affected will receive immediate attention from the racecourse veterinary team
- If further assessment is required horses can be transported in specially designed horse ambulances to the first-class veterinary facilities at each racecourse
- If necessary, horses can be transported from the course to receive further treatment at the nearest equine hospital

■ EQUINE WELFARE

Safety During a Race

The waving of a yellow flag informs jockeys that the race is to be stopped immediately, along with a loud whistle, so there is an aural and visual cue for the jockeys. If part of the track is blocked by an injured horse/jockey, a chequered flag is waved, and by-pass arrows can be used at Hurdles/Fences, to advertise to the jockeys that part of the track is blocked by an injured horse/jockey. The Bypass Boards positioned above hurdles/fences will also stop a loose horse from jumping a fence with a casualty on the hidden side. This also serves to protect those treating the casualty. Doctors, Vets and Clerks of the Course are all provided with two-way radios for communication during a race. Treatment screens are used for privacy for veterinary treatment on the track.

Post-Race Recovery

Wash-down areas are provided near the unsaddling areas, with copious amounts of water and buckets located around the course, and on the back of vehicles.

Personnel

There are at least two vets at every Flat meeting, and 3 vets at every Jump meeting, with more vets in place for the larger meetings, such as the Scottish Grand National. Scotland has two excellent veterinary hospitals in Glasgow and

Edinburgh, meaning that no track is far from a centre of equine veterinary excellence.

The Whip

In British racing the use of a foam padded, air cushioned whip is permitted, with strict controls on its use. Existing evidence shows that, with the appropriate design and these strict controls in place, it does not compromise the welfare of horses during a race.

The current foam padded design of the whip was developed with input from the RSPCA.

Whips are carried first and foremost as an essential aid to horsemanship and safety. This is consistent across all equine activities which involve exertion on the part of the horse.

The use of the whip in British racing is restricted to safety, correction and encouragement. By “encouragement” we mean using the whip as an aid to activate and focus the horse.

Following a detailed 2011 Review of the use of the whip in horseracing, the rules regarding the use of the whip in British racing were revised and breaches of the whip rules now occur in less than 0.6% of rides.

Because of the low thresholds for use and the foam padded design of the whip, even a serious breach of the whip rules would be unlikely to

impact negatively on a horse's welfare.

“The BHA policy on the whip was drawn up in consultation with animal welfare groups, such as the RSPCA and World Horse Welfare. The rules include a threshold on the number of times the whip is used before racing stewards can consider an enquiry. If the rules are broken, the jockey may be banned from racing for a certain number of days depending on the seriousness of the offence. Defra is satisfied that the rules in place are sufficient to restrict and limit the use of the whip in horseracing.” - Defra, 2019

Whole-life Care

We take steps to look after horses at all stages of their lives, from the mandatory microchipping and registration of a foal within 30 days of its birth, through to the sport's own charity – Retraining of Racehorses (ROR) – which rehomes and retrains horses who leave the sport. Tens of thousands of former racehorses go on to second careers after racing.

Thoroughbred foals must be registered and micro-chipped within 30 days of birth, meaning that racehorses can be tracked and identified throughout their life. The industry is continuing to implement a strategy to focus more on horses once they leave racing, to protect and promote their continuing welfare.



■ SCOTTISH RACING PEOPLE

Education & Training Project

The difficulties in recruiting and retaining high-quality, skilled racing staff that currently affects the industry across Britain, are well-documented. In order to address this problem in Scotland, Scottish Racing were successful in their application for funding from the Racing Foundation for the development and delivery of a sustainable model of education and training provision in Scotland.

The main objective of this exciting project is to create a charitable organisation, separate from Scottish Racing Ltd, to provide an education and training pathway which will be of benefit to all those who operate within the racing industry in Scotland.

The proposal represents a phased approach to achieve this vision. The first phase will focus on the following activities:

- Research to better understand the issues affecting the industry in Scotland, determine the requisite skill needs for stable staff, to map existing training provision and to draft a fit for purpose education and training model accordingly.
- Develop high quality industry qualifications and training provision to meet needs, which are recognised in Scotland by the Scottish

Qualifications Authority (SQA), allowing Scottish based racing staff and trainers to access funding from the Scottish Government.

- Establish a network of equestrian colleges and facilities, including Dumfries House (Ayrshire) and Borders College, to provide young and disadvantaged people new to the industry with access to high quality and local entry-level training and qualifications, and to also offer existing racing staff further continual professional development opportunities locally.
- Deliver work-based education and training opportunities directly to racing staff based in yards in Scotland and the north of England. This will build on the mobile training provision from the British Racing School and Northern Racing College, ensuring that in-yard training is increased across all yards. We aim to deliver the mobile training vehicle and staff from the aforementioned racing schools initially and, if successful, funding will be sought in future years to invest in a dedicated mobile training facility, with staffing, for Scotland.
- The ultimate aim is to create a world class, local and bespoke education and training provision that has a positive impact on the recruitment, skills, career development/ progression and retention of racing staff in Scotland, creating a lasting legacy for the

wider racing industry and its participants. Our aim does not intend to replicate existing provision, but instead to complement, utilise and improve upon it, and we look forward to making progress on this project which has the potential to have a hugely positive impact for the industry as a whole in Scotland.



Community Engagement

Scottish Racing recognises the huge opportunities for diverse groups to benefit from the exceptional infrastructure that racing can provide to the wider community and is the only racecourse group in Britain to appoint a dedicated Community Engagement Manager to drive forward socially responsible activity. This is a vital role to carry out projects which include young people, the elderly and encourage environmental sustainability at the racecourses.

Members of the Scottish racing industry came together in May 2019 to participate in the third annual Racing Together Community Day-British Racing's national day of volunteering.



Racecourse staff in Scotland pledged their time and people power to volunteer for their local communities working on a range of projects from litter-picking to helping out in a charity tea room.

The Racing Together Community Day provides racecourses and all racing stakeholders with an opportunity and focus to engage with their local area and build lasting relationships with those that share the communities in which they operate.

The five racecourses in Scotland are in a unique position to make a genuine difference to local communities by offering our time, and the teams themselves always comment on how much they enjoy giving something back.

Alzheimer Scotland Partnership

With over 90,000 people living with dementia in Scotland, and the disease now established as the second leading cause of death in Scotland, Scottish Racing is proud to partner with Alzheimer Scotland.

Scottish Racing has committed to stage “Dementia Friends” information sessions at all its courses. The sessions are interactive and will enable racecourse staff to increase their

understanding of dementia. Dementia Friends outlines the small ways in which everyone can help support those living with the illness and their families.

This is an exciting development in the partnership between Scottish Racing and Alzheimer Scotland. Further activities include the attendance of the Alzheimer Scotland Memory Bus at racecourses, which offer attendees the chance to reconnect those living with dementia of past events. All the racecourses are committed to making the small but vital changes that help people with dementia to feel understood and valued in our communities. The sessions are interactive and will enable racecourse staff to increase their understanding of dementia and support those living with the illness or caring for those who are living with dementia.



■ SCOTTISH RACING PUBLIC AFFAIRS & COMMUNICATION

Recent political activity has been delivered against a background of political uncertainty and a UK Parliament focused on Brexit rather than domestic issues.

Despite this significant distraction, we have continued to see racing supporters in both Westminster and Holyrood speak in support of the industry on issues ranging from equine welfare to gambling policy, while praising the industry's response to the equine influenza outbreak. The BHA's Public Affairs Group, which includes representation from Scottish Racing, looks to widen the base of support amongst MPs and MSPs, on topics such as engagement with Members of Parliament, Ministerial engagement, hospitality, equine welfare, levy reform, and engagement with the All Party Racing and Bloodstock Industries Group in Westminster and the Cross-Party Group on Horseracing and Bloodstock Industries in Scotland. All topics feed into the overarching message of demonstrating the economic impact that horseracing has on the Scottish and UK economies.

Racecourse Visits

Political attendees to Scottish racecourses include: Joe FitzPatrick MSP (Minister for Public Health & Sport (2018 -)); John Lamont MP; Angela Crawley MP; Maurice Golden MSP; Finlay Carson MSP; Richard Lyle MSP; Martin Whitfield MP.

Ministerial and Departmental Engagement

Meetings have been held with; Minister for Public Health & Sport, Aileen Campbell (2016-2018) and Joe FitzPatrick MSP (2018-); Miles Briggs MSP, Shadow Cabinet Secretary for Health & Sport; Colin Beattie MSP; John Lamont MP.

MP Communications

Briefings were sent to all racecourse MPs ahead of a House of Commons debate on the Impact of Sport, which resulted in 4 mentions of horseracing, 2 of which were mentions of Scottish horseracing. Briefings on the use of the whip were sent to all MPs in February following a letter-writing campaign backed by Animal Aid calling for it to be reviewed. The Public Affairs Group developed a British Racing factsheet which was sent to all MPs ahead of the Cheltenham Festival – with a note covering Brexit, equine influenza and equine welfare. Cross Party Group meetings have been held on a number of issues such as: equine welfare, community engagement, racecourse media, gambling legislation reform and FOBTs.

Consultations

Scottish Racing responded to the Scottish Government's consultation on the Animal Health & Welfare Act Amendment Consultation 2019.

Parliamentary Mentions

There have been 14 mentions of horseracing in the UK Parliament and 5 mentions of horseracing in the Scottish Parliament.

Key Mentions of Horseracing

Mims Davies MP (Sports Minister): *"Horseracing is a significant contributor to Britain's economic and sporting success... and that is why the Government is committed to supporting our world leading racing industry and make sure it can continue to prosper."*

David Rutley MP (Animal Welfare Minister): *"The British Horseracing Authority (BHA) work in collaboration with the RSPCA and World Horse Welfare to make racetracks as safe as possible. It is good to see that the number of racehorse fatalities at racetracks has been falling steadily since 2012. I am in active discussions with the BHA about how to make horseracing safer and I am not currently seeking to establish a different regulatory body."*

Joe Fitzpatrick MSP (Minister for Public Health, Sport and Wellbeing): *"The Scottish Government recognises the importance of horse racing to rural economies and communities and has a good relationship and holds regular meetings with Scottish Racing to examine ways to expand its reach and impact."*



■ RACING IN SCOTLAND INDUSTRY OVERVIEW

The economic impact of horseracing in Scotland accounted for 3,400 Scottish jobs and £306.3m of turnover in 2018, a rise from £301.2m since 2016. This includes a significant rise (35%) in the value of the economic impact from the racecourses themselves, this was partly offset by a fall in the economic impact associated with gambling (-10%). The number of jobs supported by horseracing in Scotland has remained broadly stable at 3,400 FTE jobs compared to 3,430 FTE jobs in 2016.

Based on the latest Scottish Government growth sector statistics, Scottish horseracing is performing well against other industries, and

productivity is high compared to the operation of other sports facilities across Scotland. For example, the on-course activities of Scottish racecourses accounted for around 10% of the turnover of the operation of Scottish sports facilities, but only around 1% of the employment.

The economic impact of Scottish racing is larger than the Scottish radio and television industry and nearly three times that of Scotland's computer games industry (£114.4m). The number of jobs sustained by the economic impact of Scottish racing is nearly double the number of jobs in Scotland's oil refining and petroleum products industry.

Impact of horseracing in Scotland

	TURNOVER			JOBS		
	Direct	Secondary	Total	Direct	Secondary	Total
RACECOURSES	£23.9m	£27.2m	£51.1m	180	220	400
OFF COURSE	£19.1m	£14.2m	£33.3m	220	170	390
DEVELOPMENT	£24.2m	£18.5m	£42.7m	290	110	400
GAMBLING	£116.8m	£37.7m	£154.5m	1,390	590	1,980
MEDIA	£14.1m	£10.6m	£24.7m	160	70	230
TOTAL	£198.10m	£108.20m	£306.30m	2,240	1,160	3,400

Source: Horseracing Betting Levy Board (2018)

Performance of Scottish growth sectors

GROWTH SECTOR	TURNOVER	JOBS
Oil Refining & Petroleum Products	£755.1	1,750
Impact of Scottish Racing	£306.3	3,400
Radio & Television	£249.2	4,735
Operation of Sports Facilities	£235.5	15,000
Computer Games	£114.4	1,285
Museum Activities	£82.7	4,500
Music	£19.1	505

Source: Scottish Government growth sector statistics

Notes: The latest growth sector statistics cover turnover (2016) and employment (2017)

DATA MAP

Key Figures for racing in Scotland in 2018

£306m
generated by racing in Scotland

£42.7m
GENERATED BY TRAINING
RACEHORSES

50% of clerks of the
course in Scotland are female

£51.1m
economic impact of
Scottish racecourses

16 jockeys
based in Scotland

£30m in tax
revenue generated by racing

280,000 attendances in total,
an average of 2,600 per race meeting

£23.9m
generated by the
five racecourses

£33.3m generated
by near-course activity

£16 average day's admission
to a race meeting

115 FIXTURES

290 stable
staff employed
in Scotland

50% of senior management
positions in Scottish Racing
held by women

390 jobs sustained
by near-course
activity

£9.1m
total prize money;
an average prize per
fixture of £79,000

24
trainers
based in
Scotland

3,400 FTE jobs
sustained by
racing in Scotland

739
owners based
in Scotland

6,300
horses ran in Scotland

£155m
revenue generated
through betting on
horses

•Perth
Racecourse

•Musselburgh
Racecourse

•Hamilton Park
Racecourse

•Ayr
Racecourse

•Kelso
Racecourse

■ RACING IN SCOTLAND OWNERSHIP

Owners

In 2018, there were 739 registered owners based in Scotland. This is broken down by the type of ownership in the table below. The table shows whether horses are owned jointly, individually or through a company or racing partnership. The majority of owners based in Scotland are the sole owners of horses, with individual owners accounting for 58% of Scottish ownership.

Income to owners comes primarily from prize money or the sale of bloodstock to other owners. This does not cover the full cost of producing racehorses, with the balance derived from owners' other sources of funds.

Ayr, Hamilton Park, Musselburgh and Perth Racecourses have been awarded Gold Standard status for 2018 from the ROA.

Just 15 racecourses – out of 60 in Britain – are awarded the Gold Standard by the ROA, and the Scottish venues are going the extra mile to offer the best possible service for all owners.

To attract the best horses regularly from the major training centres south of the border, Scottish tracks offer proportionately higher prize-money and invest consistently in their hospitality.

• **Ayr Racecourse** is renowned for the hospitality it provides to owners and trainers, striving to provide the best possible race-day experience. Each owner with a runner receives four complimentary two-course buffet lunches, with wine. In 2012, Ayr won an award for their implementation of high-quality Owners' hospitality and welcoming approach at The Racecourse Association (RCA) Showcase Awards.

• **Hamilton Park Racecourse** prides itself on providing a high quality and exclusive raceday experience to all Owners who visit the track. Each Owner with a runner is entitled to two complimentary meals with afternoon tea in the dedicated Sprinters Restaurant as well as access for them and their guests into the Owners' & Trainers' Bar overlooking the Parade Ring. Hamilton Park has held the ROA Gold Standard consistently since 2008 and were awarded for their commitment and investment in owners' facilities at the Racecourse Association (RCA) Showcase Awards in 2017. Hamilton Park is only one of a handful of courses in the whole country to offer two complimentary admission tickets to all ROA Members without a runner at all fixtures.

Ownership in Scotland (2018)

AREA	SCOTLAND	GREAT BRITAIN	% OF GB
INDIVIDUAL	426	7,587	5.6%
COMPANY OWNERSHIP	18	604	3.0%
JOINT OWNERSHIP	131	2,943	4.5%
SYNDICATE OWNERSHIP	151	2,943	5.1%
RACING CLUB OWNERSHIP	13	139	9.4%
TOTAL	739	14,216	5.2%

Source: British Horseracing Association (at March 2019)



- **Kelso Racecourse** stages Scotland's highest quality programme of jump racing, based on the average class of races programmed throughout the year. Located in the Scottish Borders, the heartland of equestrianism in Scotland, the track supports the grassroots of the sport through a valuable programme of novice hurdle races and steeplechases, the most valuable Hunterchase programme in the North of Britain, plus additional opportunities for Amateur and Conditional jockeys. In the top quartile of British jumps tracks in terms of prize money, Kelso offers six admission badges to each Owner and hospitality in the Berry Moss Marquee.

- **Musselburgh Racecourse** provides six badges for owners with generous and flexible options for syndicates. A spacious hospitality pavilion for owners and trainers, with views of the Parade Ring and the Wining Post serves complimentary tea, coffee, and cakes throughout the day. Four lunch vouchers per runner are available to use in the dedicated Owners and Trainers restaurant followed by their new "Wee Tea" experience. ROA badge scheme members receive 2 badges, giving access to all Owners facilities. Musselburgh Racecourse has proudly held the ROA Gold Standard Award since 2011 due to

their continuous innovation and dedication to the Owner and Trainer experience.

- **Perth Racecourse** increased its prize-money for 2018 by a huge 30% and has seen a 3% growth in total runners as a result. A novel poster version of Perth's summer jump programme was circulated at the start of the year allowing owners to visualise potential campaigns for each class of Hurdler or Chaser, and over whichever distance. A massive investment in a modern irrigation system has been a godsend in a very dry year which owners have appreciated as it has continued the recent trend for reduced frustrating non-runners due to "unsuitable going". The Horsemen's dedicated bar and restaurant enjoys a wonderful ambience overlooking the parade ring.



RACING IN SCOTLAND RACEHORSE DEVELOPMENT

Jockeys and Trainers and Racing Staff

The table below shows the number of jockeys and trainers working in Scotland and Great Britain in 2019. There are currently sixteen jockeys in Scotland out of around 450 across Great Britain as a whole. There are currently 24 trainers in Scotland, around 4% of the total across Great Britain.

Jockeys & Trainers (2019)		
	SCOTTISH RACING	GB
JOCKEYS	16	450
TRAINERS	24	600

Source: British Horseracing Association (at March 2019)



The impact of racehorse development and maintenance generated £42.7m of turnover in Scotland. This includes ownership, breeding and training. Racing in Scotland also employs 250 other stable staff, and sustains a further 110 FTE jobs through secondary economic activity.

Employment in Racehorse Development

CATEGORY	JOB
STABLE STAFF	250
JOCKEYS	16
TRAINERS	24

Source: British Horseracing Association and 4-consulting estimates

In total, the business of developing and maintaining racehorses generated economic activity and employment in Scotland as shown below:

Economic Impact of developing & maintaining racehorses

	TURNOVER			JOBS		
	Direct	Secondary	Total	Direct	Secondary	Total
DEVELOPING & MAINTAINING	£24.2m	£18.5m	£42.7m	290	110	400

Source: BHA, Scottish Government Input-Output model and 4-consulting calculations

The table on the next page shows employment related to horse ownership by local area across the UK, over three years 2015-17 relative to the resident population data for 2017.

The Scottish Borders has the fifth highest number of jobs relating to horse ownership per head in Britain. The Scottish Borders has 17 jobs per 100,000 people compared to an average of one job per 100,000 people for the whole of Scotland. The next highest local authority in Scotland is Perth and Kinross with 6 jobs per 100,000 people.

There are more registered trainers in the Scottish Borders than any other part Scotland, and this area accounts for one in three trainers in Scotland.

Jobs related to horse ownership per 100,000 people

TOP 10 NUTS 3 AREAS	JOB
NORTH NORTHAMPTONSHIRE	52
ISLE OF ANGLESEY	33
SUFFOLK	23
CAMBRIDGESHIRE	20
SCOTTISH BORDERS	17
HEREFORDSHIRE	15
NORTH AND NORTH EAST LINCOLNSHIRE	11
WILTSHIRE	9
WEST SUSSEX (SOUTH WEST)	8
CHESHIRE WEST AND CHESTER	7

Source: Business Register and Employment Survey (BRES) & Eurostat



Location of trainers in Scotland (2018)

AREA	TRAINERS
SCOTTISH BORDERS	8
LANARKSHIRE	5
DUMFRIES AND GALLOWAY	3
AYRSHIRE	3
PERTH AND KINROSS	3
REST OF SCOTLAND	2
TOTAL	24

Source: British Horseracing Association



CONTACT DETAILS



AYR RACECOURSE

2-6 Whitletts Road, Ayr, Ayrshire KA8 0JE
Tel: 01292 264179

www.ayr-racecourse.co.uk

@ayrracecourse

Email: info@ayr-racecourse.co.uk

HAMILTON PARK RACECOURSE

Bothwell Road, Hamilton ML3 0DW
Tel: 01698 283806

www.hamilton-park.co.uk

@HamiltonParkRC

Email: enquiries@hamilton-park.co.uk

KELSO RACECOURSE

Racecourse House, Kelso, Roxburghshire TD5 7SX
Tel: 01573 225842

www.kelso-races.co.uk

@KelsoRacecourse

Email: info@kelso-races.co.uk

MUSSELBURGH RACECOURSE

Linkfield Road, Musselburgh, East Lothian EH21 7RG
Tel: 0131 665 2859

www.musselburgh-racecourse.co.uk

@MusselburghRace

Email: mail@musselburgh-racecourse.co.uk

PERTH RACECOURSE

Scone Palace Park, Perth, Perthshire PH2 6BB
Tel: 01738 551 597

www.perth-races.co.uk

@PerthRacecourse

Email: info@perth-races.co.uk



Registered Address: Hamilton Park Racecourse, Bothwell Road, Hamilton ML3 0DW

Telephone: 01835 840315

Mobile: 07970 229507

Email: info@scottishracing.co.uk

www.scottishracing.co.uk

f Find us: **scottishracing**

t Follow us: **@ScottishRacing**

