



SCOTTISH RACING

AYR HAMILTON PARK KELSO MUSSELBURGH PERTH

Review & Prospectus

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 engaging 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 and develop its success on a global scale.

Our mission is to promote and support the five racecourses in Scotland in the development of a sustainable Scottish horseracing industry.

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Chairman's Introduction



To say that the pandemic was a challenging time for Scottish horseracing would be an understatement! As such, this is an ideal opportunity to highlight the efforts given of over 3,000 members of racing and racecourse personnel during the very dynamic and changing circumstances during 2020/21. Thank

you to everyone; racecourse staff, work riders, jockeys, trainers, yard managers, racehorse owners, security teams, broadcasters, catering teams, operations teams, marketing & sales staff, and many more, who have all continually strived for excellence and helped ensure we had a healthy Scottish horseracing industry to come back to. The commitment, dedication and passion of all staff has been outstanding and I offer my sincere appreciation for all that everyone has done.

It is often said that to know your future, you must also know your past. Whilst we are very much looking forward to safer times, this report looks back at the impact of Covid-19 and suggests how we might now make the most of our recovery, by acknowledging the change in consumer trends which might offer significant advantages to both Scottish Racing (the five racecourses) and the wider horseracing industry in Scotland, in terms of revenues, reducing carbon footprint and building on community engagement.

Like so many industries across the world, horseracing in Scotland was hit very hard by the pandemic because of its reliance on live attendances, with nearly 300,000 people attending racing fixtures in Scotland in a normal year. However, with significant financial assistance from the Scottish government, racing survived Covid-19 in good health, in part by adapting its business model.

Perhaps now more than ever, it is important for us all to remember the benefits that getting out to a racecourse for a day's racing can have on people's mental and physical wellbeing. Horseracing is a strong leisure industry with deep roots in Scottish society and, as the country's second biggest spectator sport, attracts people from all walks of life, whilst offering an entertaining and wholesome day out at all times of year in its five locations across the country. Additionally, with an average day's admission to a racecourse at £20 and under 18s being given free entrance, it is not just a convenient and sociable option for an outdoor, live experience, but also an affordable one.

From a broader perspective of well-being, Scotland's five racecourses also play an active role in their local communities, promoting charitable activity, supporting local businesses and helping other related sports. By engaging with local communities and providing an important source of local employment and economic activity, racing is rooted in wider society, providing an important source of entertainment as part of the leisure sector.

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

Sir Ian Good
Chairman

Chief Executive's Foreward



Since the last Scottish Racing Review was published in 2019, the pandemic has obviously dominated every part of our industry and, indeed, the world. Whilst our focus on the safety of our participants and spectators never wavered, we all looked forward to a time when we could once again welcome full crowds

back to all our race meetings. Fortunately, we are now at that stage, but not without the hard work and resilience of colleagues from many different arenas, and I echo the words of our Chairman by thanking everyone for their support, encouragement and flexibility during such unprecedented times.

I should also mention our gratitude to the Scottish Government. Throughout the pandemic, Scottish Racing regularly briefed the Scottish Government with regard to the financial challenges facing the industry, and that by Spring 2021, Scottish racecourses had collectively lost £12.23m, 55% of their income, from the moratorium on ticket sales, which led to a consequential reduction in returns to the sport's participants. Following these discussions, £2million was made available to the Scottish racecourses, enabling the venues to recover more quickly and thereby aiding the economic recovery of suppliers and participants. As a group, we are all extremely grateful to the Government Ministers and officials we have worked with for their support for horseracing in Scotland and we will continue to work closely with them.

In order to maximise expedient recovery from Covid-19, Scottish Racing commissioned management consultants, 4-Consulting, to carry out a current economic study into horseracing in Scotland, and its role in the leisure sector of Scotland. The results of this study are reflected in this Review and for the first time, we are now able to set out the carbon impact of Scotland's racecourses with benchmarks of both economic and carbon impacts compared to other industry sectors. Although full industry data is unlikely to be available for some time, we have used data from before and during recovery from the pandemic to project a picture of what the industry is likely to achieve by 2025, alongside a more ambitious scenario. This highlights how the sport, with strong potential, offers an important prospect for sustainable economic development in Scotland and how, with a sound public policy framework, the sport can bring major benefits to Scottish society.

Scottish Racing accounts for around 5% of both attendances and prize money in Great Britain. The economic impacts set out in this Review draw heavily on racing activities across Great Britain, with 65% of the overall economic impact (£336 million) generated in

Scotland, dependent on attendances and income drawn from other parts of Great Britain, in addition to gambling and media coverage on racing outside of Scotland.

Reflecting back further from the past two years, Scottish Racing has expanded significantly over the last twenty years, with the number of attendances increasing by nearly one quarter (23%), and an increase in prize money by 70% over the last decade, ahead of racing in the rest of Great Britain. Looking forward, the racecourses are set to rebuild attendances lost through the pandemic with an achievable target of attracting nearly 300,000 racegoers in 2025; a return to pre-pandemic levels. It is already well documented that racing attracts a diverse section of society, and this is now confirmed with 89% of our audience comprising of both middle and lower socio-economic groups. It is also important to note that females account for more than half of all racegoers in Scotland, compared to just 8% in Scottish football.

By 2025, the impact of Scottish horseracing is projected to rise from just over £300m in 2016 to over half a billion pounds of revenue for Scotland's economy (£513.6m) with £50m in tax revenues each year, most of which goes to the Scottish Government. However, following the pandemic, there is an increased appetite for outdoors and active tourism and an opportunity to develop the UK's domestic tourism market. This will require a range of organisations and destinations to co-ordinate their offer to replace overseas trips with domestic tourism options. As is suggested in the Review, by further strengthening other local cultural and tourism assets, there is potential for the racecourses to raise the economic impact of Scottish horseracing to nearly £540m million and sustain nearly 3,900 jobs.

The industry also fits well with society aspirations to become more sustainable and the benefits from a more ambitious, and joined-up, approach would continue to grow and help on Scotland's journey to net zero. Currently, Scotland's racecourses produce just over 130 tonnes of carbon per million pounds of output (direct and indirect), and this is lower than the rest of Scotland's sports and recreation sector. This suggests an opportunity for Scottish Racing to play a significant role in reducing the carbon footprint of Scotland's tourism industry, in addition to spreading the benefits of tourism beyond Scotland's larger cities. Furthermore, a more ambitious scenario for Scottish Racing could include reduced carbon emissions, realised through a package of regional tourism offers driven by Scottish Racing.

Delly Innes
Chief Executive

Horseracing in Scotland

Overall economic impact of Scottish horseracing

Horseracing in Scotland makes up a significant part of Scotland’s leisure sector. In all, it is projected that the economic impact of horseracing in Scotland in 2025 will account for 3,720 Scottish jobs, £513.6m of turnover and generates £50m of tax revenues. Since 2016, the value of the economic impact of Scottish horseracing has risen by £207.3m, from £306.3m.



Projected economic impact of the racing industry in Scotland by 2025:

	TURNOVER			JOBS		
	DIRECT	SECONDARY	TOTAL	DIRECT	SECONDARY	TOTAL
RACECOURSES	£48.6m	£44.2m	£92.8m	190	190	380
OFF COURSE	£24.7m	£18.4m	£43.1m	240	180	420
DEVELOPMENT	£26.7m	£20.5m	£47.2m	300	110	410
GAMBLING	£229.2m	£74.0m	£303.2m	1,600	680	2,280
MEDIA	£15.6m	£11.7m	£27.3m	160	70	230
TOTAL	£344.8m	£168.8m	£513.6m	2,490	1,230	3,720

Source: 4-Consulting

The industry consists of five complementary but distinct areas of economic activity:

- The racecourses themselves, which generate revenues primarily from spectators, hospitality, entry fees from horse owners, fees from on-course retailers (including bookmakers) media rights, the Horserace Betting Levy and sponsorship;
- Off-course expenditure, which consists of the economic activity generated by people outside the course, in hotels, catering and other tourism activities;
- The development of racehorses, including their ownership, breeding and training, which generates revenue from prize money awarded by the racecourses and investment both from within the sport and from outside;
- The betting industry, largely off-course through high street or internet bookmakers. The betting industry pays tax, which is partly recycled via the Horserace Betting Levy, recognising the betting industry’s common interest in a sustainably funded sport. This is collected by the Horserace Betting Levy Board and paid to the horseracing industry;
- Media coverage of the sport including the production and distribution of broadcast, press and internet material.



► Contribution to taxes

The economic impact of the racing industry in Scotland makes a contribution of £50m to government revenues, generated by Scottish horseracing's direct and secondary impacts from suppliers and employee spending.

The tax revenues modelled include corporation tax, income taxes, national insurance, VAT and other taxes on products and production. Just over half of these revenues are collected in Scotland or directly assigned to the Scottish Government, with the remainder going to the UK Treasury.

► Benchmarking Scottish Horseracing

Based on the latest Scottish Government growth sector statistics, Scottish horseracing is performing well against other industries. Productivity is high compared to the operation of other sports facilities across Scotland. For example, the direct (on-course) activities of Scottish racecourses accounted for nearly 20% of the turnover of the operation of Scottish sports facilities, but with only 2% of the employment.

GROWTH SECTOR	TURNOVER	EMPLOYMENT
OIL REFINING & PETROLEUM PRODUCTS	£956.1	1,250
IMPACT OF SCOTTISH RACING	£513.6	3,720
BIOTECHNOLOGY RESEARCH	£430.0	1,500
RADIO & TELEVISION	£394.8	4,020
OPERATION OF SPORTS FACILITIES	£281.4	11,000
FASHION & TEXTILES	£238.8	2,335
COMPUTER GAMES	£121.2	1,785
MUSIC	£26.7	475

Source: Scottish Government growth sector statistics database

The economic impact of Scottish horseracing is larger than the Scottish radio and television industry (£394.8m) and more than four times that of Scotland's computer games industry (£121.2m). The number of jobs sustained by the economic impact of Scottish horseracing is three times the number of jobs in Scotland's oil refining and petroleum products industry.



Scottish Racing

Economic Impact of Racecourses

The combined turnover of Scotland's five racecourses is projected to be £48.6m in 2025. Revenues came from a mix of sources, with media rights, the betting levy and ticket sales providing the main sources of income. Scotland's five racecourses are projected to employ the equivalent of 190 full time employees in 2025.

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. These impacts are called 'secondary' impacts to distinguish them from the direct economic activity of the industry.

Using a model of the Scottish economy published by the Scottish Government, these revenue flows can be measured to show how the various types of spending in racing link together with other parts of the economy to estimate the sector's overall impact. For example, using the Scottish Government model, the secondary impacts from racecourses generated nearly £6m 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.

	TURNOVER			JOBS		
	DIRECT	SECONDARY	TOTAL	DIRECT	SECONDARY	TOTAL
SCOTLAND'S RACECOURSES	£48.6m	£44.2m	£92.8m	190	190	380

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

Attendances, Runners and Fixtures

Racing remains the second most popular spectator sport in Scotland after football and ahead of ice hockey, rugby and golf. Before the Covid-19 pandemic, Scotland's racecourses enjoyed nearly 280,000 attendances in 2019 with an average of 2,800 people attending each race.

Over the last twenty years, Scottish Racing attendances have risen by nearly one quarter (23%), with the number of fixtures expanding by almost a third (43%), whilst the number of runners was unchanged.

The increase in attendances has been driven by a long-term programme of capital investment across Scotland's racecourses.



	1999	2017	2018	2019	2020	2021
ATTENDANCES	226,600	271,300	276,300	279,400	27,000	108,700
RUNNERS	5,400	5,900	6,300	5,400	5,700	5,700
FIXTURES	69	102	115	99	64	96
ABANDONMENTS	6	9	10	13	95	5

Source: Horseracing Betting Levy Board

Over the last twenty years, the number of attendances in Scotland has grown more than twice as quickly compared to Great Britain as a whole. Attendances in Britain have increased by 9%, but in Scotland attendances have risen by 23%.

Attendances, Runners and Fixtures continued

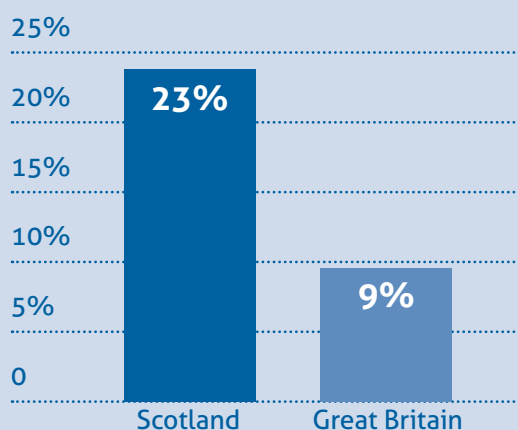
Racing attendances Scotland and Great Britain (1999-2021)

	1999	2017	2018	2019	2020	2021
SCOTLAND	226,600	271,300	276,300	279,400	27,000	108,700
GREAT BRITAIN	5,177,100	5,953,700	5,772,800	5,625,000	574,100	2,627,600

Source: Horseracing Betting Levy Board



Change in racing attendances 1999-2019



Source: Horseracing Betting Levy Board



As the table below shows, racing is the second most popularly attended sport in Scotland, after football. Attendances at Scottish Racing were more than 100,000 higher than both ice hockey and rugby. The attendance figures were taken from the most recent pre-pandemic seasons. Attendances from football (2019-20), ice-hockey (2018-19) and rugby (2018-19) are taken from the attendances of Scottish teams in their respective premier leagues (Scottish Premiership, EHL and Guinness Pro 14).

Some 2019-20 Scottish Premiership fixtures towards the end of the season were affected by public health restrictions. Attendances for football in Scotland are therefore lower than in previous seasons.

Attendances at major sports (pre-pandemic)

SPORT	SCOTTISH ATTENDANCE
FOOTBALL	2,700,000
RACING	276,000
ICE HOCKEY	167,000
RUGBY	161,000

Source: Various sources



Demographic of Racegoers

As well as engaging with local communities and providing an important source of local employment and economic activity, racing is rooted in wider society, providing an important source of entertainment as part of the leisure sector.

People from all walks of life enjoy the racing experience. It is sociable, affordable, convenient and visitors to racecourses enjoy the fact that it is a wholesome, outdoor, live experience.

Attendance by socio-economic groups

	SCOTLAND	GREAT BRITAIN
FEMALE	52%	46%
MALE	48%	54%
TOTAL	100%	100%

Socio-economic groups

	SCOTLAND	GREAT BRITAIN
HIGHER	6%	11%
MIDDLE	42%	43%
LOWER	52%	46%
TOTAL	100%	100%

Source: Racecourse Association (RCA) and 4-consulting

Racing in Scotland is largely enjoyed by local people, with some visitors from further afield. Before the pandemic, a 2019 survey of ticket sales for Musselburgh Racecourse showed two thirds of racegoers lived within twenty miles of the racecourse and nearly two thirds were under 55 years of age.

High socio-economic groups defined by occupation (managers, directors and senior officials) currently account for 9% of people in Scotland, middle and lower socio-economic groups account for 39% and 52% of people respectively.

Socio-economic groups in Scotland (by occupation)

GROUP	NUMBER	(%)
MANAGERS, DIRECTORS & SENIOR OFFICIALS	227,000	9%
PROFESSIONAL, ASSOCIATE PROFESSIONAL & TECHNICAL WORKERS	1,020,000	39%
OTHER GROUPS	1,341,000	52%
TOTAL	2,588,000	100%

Source: Annual Population Survey (Office for National Statistics)

Ticket Prices

An average day's admission to racing in Scotland is around £20, slightly lower than ice-hockey (£21) and cheaper than football (£26) or rugby (£27), making racing the most cost-effective major sport to attend in Scotland.

SPORT	COST OF DAY'S ADMISSION
RUGBY	£27
FOOTBALL	£26
ICE HOCKEY	£21
RACING	£20

Source: Various sources (2022)

www.scottishracing.co.uk

Impact on Tourism and Off-course expenditure

All five racecourses express willingness to work with other local tourism businesses and the sector more broadly. Three racecourses (Ayr, Perth and Hamilton) operate their own hotels, and courses typically collaborate with local hotels, golf courses and other complementary businesses. They also sit on local tourism boards to promote the area to visitors. Engagement with the sector depends to an extent on co-ordinating bodies, particularly VisitScotland.

Racing in Scotland is a sustainable and important part of Scotland's tourism offering. The industry fits well with existing trends towards more locally based tourism and is to an extent 'counter-cyclical'. It therefore contributes towards Scotland's efforts to make the industry more sustainable economically and environmentally.

There are three main elements to this:

- Racing provides an exciting leisure activity on the doorstep of most people in Scotland, encouraging the tourism pound to be spent at home.
- The economic benefits of racing are spread across Scotland and are largely outside of the main tourism areas. They therefore encourage activity in areas which may otherwise struggle to attract large numbers of tourists.
- The benefits of racing are also spread throughout the year. Racing fixtures take place in all seasons, encouraging tourism away from the most congested summary months of July and August. May, June and September host the largest number of racing fixtures, with several important events taking place during low season (November, December, January and February).



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 £43.1m of turnover in Scotland and sustained 420 FTE jobs.

	TURNOVER			JOBS		
	DIRECT	SECONDARY	TOTAL	DIRECT	SECONDARY	TOTAL
OFF-COURSE ACTIVITY	£24.7m	£18.4m	£43.1m	240	180	420

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



Clusters of culture and tourism related activities have developed around Scotland's racecourses.

These clusters appear to have developed around shared tourism, cultural and natural assets. These include castles, whisky distilleries, country parks, museums, golf courses, rivers and lochs.

- **Ayr Racecourse** has several nearby museums including the Robert Burns Birthplace Museum.
- **Hamilton Park Racecourse** is close to both Bothwell Castle and Strathclyde Country Park.
- **Kelso Racecourse** lies next to the River Tweed and is close to Floors Castle and Harestanes Countryside Visitor Centre.
- **Musselburgh Links** golf course runs through Musselburgh Racecourse next to the beach and near to the Newhailes Estate (National Trust for Scotland).
- **Perth Racecourse** lies next to the River Tay, Scone Palace and a range of attractions in and around Perth.

The tourism 'halo effect' means that in the broader areas surrounding the racecourses host areas, more than one sixth local jobs (17.6%) are in sustainable tourism. This is more than double the share for the

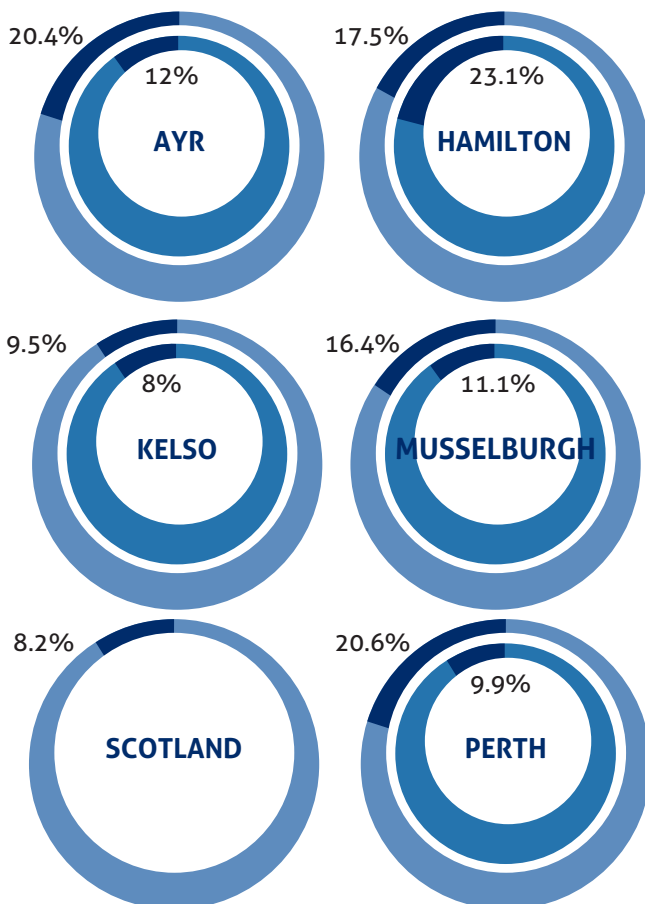
whole of Scotland's economy. Nearly three thousand tourism jobs were clustered in the communities around Scotland's racecourses, (excluding those directly in the racecourse host area).

This 'halo effect' was strongest in the broader areas around Perth (20.6%) and Ayr (20.4%) Racecourses, where tourism accounted for one in six local jobs. This partly reflects the blend of natural assets and urban centres available to Ayr and Perth Racecourses.

The tourism impact of racecourses within the host community and the halo effect for adjoining communities is stronger in Scotland than elsewhere in the UK. This suggests a stronger alignment between Scotland's racecourses and other local tourism assets, particularly outdoors tourism and tourism associated with Scotland's culture and heritage.

It is not known from the above figures, whether Scottish Racing drives tourism or tourism drives Scottish Racing. What is shown, however, is that there exists a strong and valuable relationship between the two. Tourists who enjoy a day at the races as part of their visit to Scotland are just as likely to encourage more spending in the local area as well as encouraging friends and family to visit in future years.

Tourism employment share in racecourse communities



Prize Money

Before the pandemic, Scottish Racing's prize money reached a record £9.1m in 2018. The value of Scottish Racing's prize money rose by nearly 10% each year since 2012, significantly ahead of the growth in prize money across Great Britain.

The value of prize money fell in 2020, reflecting the limited number of fixtures due to the pandemic. However, the value of prize money in Scotland over the last decade has risen by 70%, compared to an increase of 52% across Great Britain.

Prize money (£million) 2012-2021

	2012	2017	2018	2019	2020	2021	CHANGE 2012-21
SCOTLAND	£4.6m	£6.9m	£9.1m	£8.4	£4.4	£7.7	70%
GREAT BRITAIN	£97.8m	£142.6m	£166.2m	£160.7	£94.2	£148.3	52%

Source: British Horseracing Association

The table below shows the prize money in Scottish Racing compared to other major sporting events in Scotland. Racing in Scotland brought in £7.7m in prize money throughout the 2021 fixtures.

The Scottish Open (2022) held at The Renaissance Club, North Berwick, paid out around £6.8m in prize money to the whole tournament in 2022. The prize money for Scottish Racing in 2021 was nearly £1m more than the total prize money for the Scottish Open and 50% higher than the amount paid to the Scottish Premiership 2021-22 champions.

SPORT	PRIZE MONEY
SCOTTISH RACING	£7.7m
SCOTTISH OPEN	£6.8m
PREMIERSHIP CHAMPIONS	£5.0m

Source: British Horseracing Association, sports, events and organising bodies



Sustainability & Environmental Impact

As the racing industry recovers from the pandemic, reducing its environmental impact will be a priority. Several initiatives have already been taken by racecourses, including:

- Recycling food and drink containers
- Moving away from single use plastics
- Installing Electric Vehicle chargers
- Installing renewable energy generators, including solar panels and wind turbines.

Both Ayr Racecourse and Hamilton Park Racecourse used their respective hotels as a venue hosting delegates at the COP26 environment summit. Additionally, Hamilton Park Racecourse also offered

their racecourse facilities and stabling for the Mounted Branch. To qualify as hosting venue, both racecourse hotels needed to subscribe to strict environmental standards regarding the equipment used. This allowed the racecourses to test the supply chain and source new products with less of a carbon footprint.

All five racecourses plan to further develop their processes to measure and reduce their carbon footprint. There are clear challenges that need to be met, some of which have been enhanced by the pandemic. These include moving away from single-use containers for food and drink (partly for reasons of hygiene), limits to the recycling capability of local authorities and difficulties in connecting to the local public transport network.

Carbon Impact

The Scottish Government’s macroeconomic impact model has an environmental extension that makes it possible to estimate greenhouse gas emission effects.

This model was used to extend the economic impacts of the racecourses to show the total carbon emissions attributed to the impacts in terms of tonnes carbon dioxide equivalent (tCO₂e) following the same methodology as the Scottish Government’s high level carbon assessment.

The table below summaries the carbon impacts of Scotland’s racecourses. Additional activities including racehorse development, racing media, and gambling are not included in the carbon assessment.



Carbon impacts of Scotland’s Racecourses

CARBON EMISSIONS	TONNES OF CARBON DIOXIDE EQUIVALENT
Scope 1 Racecourse emissions (<i>direct</i>)	1,600
Scope 2 Racecourse supply chain emissions (<i>indirect and imported</i>)	4,800
Scope 3 Additional off-course expenditure	4,900
Total (racecourses scope 1 & 2)	6,400
Total (including off-course expenditure)	11,300

Source: 4-consulting and Scottish Government Carbon Budget model (2021)

The total carbon impact of Scotland’s racecourses amounted to 6,400 tCO₂e and 11,300 tCO₂e including off-course expenditure. The carbon impacts illustrated above clearly show the majority (86%) of Scottish racing’s carbon footprint lies with the racecourses supply chains and off-course spending by racegoers.

Racecourses’ supply chains include purchases of gas and electricity (26%), travel including fuel (23%) and food and drink supplies (22%). Other significant sources of carbon emissions from supply chain impacts included water, waste services and building and landscaping services (16%).

Benchmarking carbon impacts:

The Scottish Government’s environmental model shows the carbon impacts for nearly one hundred different industrial sectors including the direct (scope 1) and indirect (scope 2) impacts. These are summarised in the table below, showing the equivalent tonnes of carbon dioxide produced for each million pounds of output.

Air travel is Scotland’s most carbon intensive activity, producing 2,140 tonnes of carbon (tCO₂e) for every million pounds of output. Indirect impacts raise the overall figure to 2,140 tCO₂e per million pounds. Agricultural is Scotland’s second most carbon intensive sector producing just over 2,000 tonnes of carbon per million pounds of output.

Other carbon intensive activities include energy production, manufacturing of chemicals, food manufacturing and waste treatment. Nearly all of Scotland’s carbon intensive activities produce most of their carbon through their direct operations.

Some activities produce most of their carbon through supply chains. For example, the indirect impacts of Scotch Whisky (see table below) arise from the consumption of energy, agriculture, water and waste treatment.



Tonnes of carbon per £m of turnover

INDUSTRY	SCOPE 1 <i>direct</i>	SCOPE 2 <i>Indirect</i>	TOTAL <i>Scope 1+2</i>
Air Travel	1,590	550	2,140
Agriculture	1,510	550	2,070
Oil Refining	620	180	800
Scotch Whisky & Other Spirits	120	290	410
Sports & Recreation	30	120	150
Scottish Racing	30	120	150
Film, Video & Broadcasting	<10	70	70
Gambling	10	60	70
Scottish Industry Average	170	240	410

Source: Scottish Government Carbon Budget model (2021) and 4-consulting



Around 80% of the Scottish sports & recreation sector's carbon footprint arises through supply chain effects rather than direct operations. This sector includes the operation of sports and leisure facilities which produce indirect carbon through significant consumption of energy. This may reflect higher energy consumption from gyms, swimming pools and larger sports stadia in regular throughout the year.

Most of the carbon associated with the racecourse's impact arose from travel by road, rather than by air. Energy also accounted for a smaller share of operating costs for racecourses compared to the wider sports and recreation sector. This has the effect of further lowering the indirect carbon impacts of Scottish Racing.

The above factors reduced the carbon intensity of the racecourses' supply chains compared to other sports activities in Scotland. However, overall operating costs accounted for a higher share of the racecourses' turnover, compared to other sports which raises the amount of carbon produced relative to turnover.

Taking all these factors into account, the indirect carbon impact of the Scottish racecourses was 17% lower than the sports and recreation sector. The direct carbon impact of Scotland's racecourses was similar to other sports and recreation activities in Scotland.

The journey to net zero

Following the pandemic, there is an increased appetite for outdoors and active tourism and an opportunity to develop the domestic tourism market. This will require a range of organisations and destinations to co-ordinate their offer to UK residents to replace overseas trips with domestic tourism options.

The Scottish Government's macroeconomic impact model includes a detailed analysis of Scottish residents spending patterns in the rest of the UK and the rest of the world. The most recent data from the model shows travel related expenditure accounted for around 1.2% of all spending by Scottish residents in other parts of the UK. Travel related expenditure accounted for 5.2% of all spending by Scottish residents outside of the UK (this share has been rising over the last ten years).

Much of the difference in spending on travel, between domestic and international tourism, is accounted for by air travel. Air travel accounted for a more significantly higher share of spending by Scottish residents outside of the UK.

This suggests an opportunity for Scottish Racing to play a significant role in reducing the carbon footprint of Scotland's tourism industry in addition to spreading the benefits of tourism beyond Scotland's bigger cities.

Community, Industry and Public Affairs Engagement

Charity and community engagement

Scottish racecourses play an important role in their respective local communities, sponsoring charities, hosting local events and engaging with the voluntary sector in their local areas.

Racecourses typically host a charity raceday and work with strategic charitable partners over the medium term. Staff are encouraged to take part in local voluntary activity.

- Ayr Racecourse has nominated a main charitable partner, Ayrshire Cancer Support, and works closely with local societies, schools and other charities.
- Hamilton Park works with Saints and Sinners charity, Maggie's Cancer Care and Les Hoey MBE DreamMaker Foundation. It provides tickets for troops and blue light workers and donates surplus food to foodbanks.
- As a non-profit organisation, Kelso has a strong emphasis on local engagement. It increased maintenance spending during lockdown to help local tradesmen and businesses. It hosts charity events at the racecourse and encourages charity collections on racedays.
- Musselburgh holds a community raceday, hosts the local fireworks event and is a member of the Musselburgh community liaison forum.
- Perth Racecourse dedicates its Ladies' Day to Breast Cancer charities
- Scottish Racing and the Scottish Racing Academy arranged for the collection and donation of second-hand riding clothes and equipment to be donated to charitable riding schools across Scotland, to be handed on to people who are wanting to participate in horse-based leisure activities, but are being hampered from doing so due to the cost of suitable clothing and equipment, particularly during the cost of living crisis.

Industry engagement

The five Scottish racecourses play an important role in supporting the wider equine industry even when not directly connected to their own commercial activities.

For example,

- Helping local point-to-points by providing them with equipment, marketing and other support.
- Supporting pony clubs by providing facilities and racedays.

Scottish Racing Academy

Scottish Racing received funding from the Racing Foundation in 2019 for the development and delivery of a strategic, ambitious, innovative, joined-up and sustainable model of education and training provision

for young people entering the racing industry, existing racing and racecourse staff and their employees.

The Scottish Racing Academy gained charitable status in September 2019 and a board of Trustees were appointed with Dr. Eleanor Boden leading the development of the Academy, having produced the validated qualifications in consultation with racehorse industry employers. There has been significant growth and success across the provision including the appointment of 10 additional members of the team.

The proposal was based on an evidenced need to address the well-documented challenges in recruiting and retaining high quality, skilled racing and racecourse staff that currently affects the industry across the whole of the UK.

The Scottish Racing Academy (SRA) is committed to addressing the gap in horseracing education and training provision available in Scotland and the north of England.

It has been estimated that there are more than 50 different career paths in the horse racing industry and we want to attract individuals from all walks of life to fulfil those roles.

The SRA has written a suite of qualifications which meet the rules of racing and which can be delivered to a range of people including:

- Schools Academy (*14-16 year olds*)
- Full-Time School Leavers (*15+ years old*)
- Existing Stable Staff
- Career Changers

The selection process and employment of SRA staff have ensured that skills and experience have remained (or returned) in the horseracing industry which may otherwise have been lost. The Racing Specific qualifications have been written and validated by the Scottish Qualifications Authority (SQA) at Level 5 and Level 6. The entire SRA model is based on collaboration with established facilities and training providers. The Schools Academy programme has been significantly popular which is demonstrated by the 25 partner schools.

Horseracing is an accepted part of the national Curriculum for Excellence. Stable Staff can complete, fully funded, accredited training in the workplace. 87% of work-based full-time students have now gained employment in the workplace. 100% of work-based full-time students have been given a positive destination. The SRA has joined up on industry-wide initiatives such as the Jockey Coaching Programme and the Regional Staff Development Programme (work rider coaching) and sourced additional funding to support the potential long-term delivery.

Schools Academy Courses	Full-Time Courses	Industry Initiatives and Stable Staff Courses
The school's link offer is particularly unique due to the wider school model that enables horse care and horseracing to be incorporated for all, not just those who are disengaged from mainstream education.	The SRA has multiple teaching and learning options depending on the way candidates like to learn (college and work-based). This attitude has produced impressive results to date and they both meet the rules of racing.	The SRA recognises the importance of upskilling the stable staff workforce and therefore offer flexible, accredited learning options to those who would like to learn on a part-time basis in a yard environment.
In practice, this means that each school academy student has timetabled sessions within their school week to allow in two sessions (a theory and practical) for the duration of the academic year.	The full-time work-based delivery model although - the course follows an academic calendar (September- June).	A joint-initiative driven by the Scottish Racing Academy (SRA) and the Jockey Coaching Programme.
These courses have been a particular success with more than double our projected uptake across the level 4 and 5 options	The college course is particularly unique because it is currently, the only full-time racehorse care option available at a land-based college in Britain and is delivered in an academic year (September – June).	The SRA and Horse Scotland also piloted a Level 1 Assistant Coaching course in December 2021, where we saw 7 coaches complete the course.

Results

Activity	Result/Outcome 2021	Quote
School Academy	We qualified 90 young people from 25 different schools across Scotland, which is a significant uplift from 12 in 2020.	<i>"I would recommend the SRA because it brings you pure joy when you see the horses you look after at the races."</i> Rhys, a Schools Academy student who has now progressed on to the Full-Time course.
Full-time College	15 full-time learners, of which 10 went into full-time employment following the completion of their course.	<i>"As a student of the SRA I have really enjoyed my time learning about the racing industry and getting to try lots of new things such as riding in racing tack and visits to racing yards. At the end of my course as the prize winner of "Student of the Year", I decided to work at a race yard and I am currently working full-time at Keith Dagleish's yard and hoping to become a work rider. I would highly recommend the SRA to get to have the opportunity to have this amazing experience as I couldn't have done it without them and my tutor, Jamie Turnbull."</i> Lara
Full-time Work-based	100% (8) continued into full time employment with their placement provider.	<i>"I enjoyed the course because I got more in depth within the racing industry and can see how all the different yards work. The part I enjoyed most was the riding and hanging out with the horses. The course helped me understand that I need to keep my fitness up and keep focussing on what I am doing".</i> Mario
Jockey Coaching Programme	The programme was attended by over 100 people. They participated in an interactive fitness session with jockey coach Russ Kennemore and Dr Heather Cameron-Whytock, a senior lecturer at Nottingham Trent University, to understand the impact of physiological exercise on heart rate variability and what this means for performance.	<i>"The wellbeing evening was a fantastic insight into the SRA's support for the young workforce. The psychology discussion explored the support and life beyond racing to ensure nothing becomes too cumbersome. The fitness session highlighted the physical requirements which can be incorporated into training sessions at home. I left the evening feeling very motivated to look at ways to offer a similar session to our Performance Programme athletes."</i> Fiona Rawson
Work Rider Coaching	The SRA and Horse Scotland also piloted a Level 1 Assistant Coaching course in December 2021, where we saw 7 coaches complete the course.	<i>"I thoroughly enjoyed the practical sessions and I think I gained a lot of confidence from the support I got from the mentors."</i> Ali
Stable Staff Training	19 Stable Staff learners completing various NPAs across Level 4, Level 5 and Level 6.	<i>"The best part of the course is being able to do the course in the workplace and not have to go to college. I would recommend the Scottish Racing Academy, again it's good to do a course in the workplace and working in racing is very rewarding when the horses you look after win."</i> Robyn, a Level 5 stable staff learner who completed her course with Ewan Whillans Racing.

Public Affairs Engagement

Despite distractions on both sides of the Border, with the publication of a referendum bill for a vote in October 2023, or a de facto referendum during the next General Election, and a UK Government focused on leadership issues, we have continued to update and inform both Westminster and Holyrood on the wide range of industry issues from equine welfare to gambling policy. 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.

Gambling Review

The UK Government Review of gambling is underway and is due to result in a White Paper due to be published in 2022 for consultation. Gambling regulation is an issue of concern for Scottish Racing because of the revenue streams that come into the industry from bets placed on races.

Scottish racecourses take the issue of problem gambling seriously and recognise the social responsibility to ensure the sport is a healthy and entertaining pursuit with no adverse social effects. While betting on horseracing does not result in problem gambling to the same extent as other forms of betting, it is a problem for the welfare of some individuals.

The racing industry supports betting as an important part of the enjoyment of the sport but does not wish to see individuals' welfare undermined by problem gambling. The issue then is one of balancing regulation to tackle problem gambling and the choices of racing enthusiasts to place bets.

Government must be careful not to trigger unintended consequences by restricting leisure gambling or driving it offshore to that it cannot be regulated and generates no revenue for government and industry. The Government has indicated that it has no willingness to implement measure that damage the industry which is enormously welcome.

Animal Welfare

Scottish racing as a whole and the individual racecourses are focused on ensuring high standards of animal welfare in the sport. It supports the UK wide review on the use of the whip in the sport and engages constructively with DEFRA, the Scottish Government and other bodies to promote animal welfare.



Racing Media

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 62 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 in Scotland is a popular sport that attracts considerable media coverage on television, radio, in the press and on the internet. The production and 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 previous industry review. Media activity impacts were based on the previous estimates and adjusted to 2022 prices with employment outcomes were assumed to have remained similar.

The economic impact of the racing media in Scotland

	TURNOVER			JOBS		
	DIRECT	SECONDARY	TOTAL	DIRECT	SECONDARY	TOTAL
MEDIA	£15.6m	£11.7m	£27.3m	160	70	230

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

► The Bookmaking Sector

Sports gambling 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. Off-course gambling over the counter on horseracing was over £4 billion before the pandemic.

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 Scottish Annual Business Statistics (SABS), published by the Scottish Government, provides an estimate of turnover and Gross Value Added (GVA) for the gambling and betting industry in Scotland.

Turnover in the gambling industry is high relative to GVA when compared to other industries. Economic impact studies often adjust gambling industry turnover to better reflect betting margins or industry profits.

GVA is therefore used here as a conservative measure of adjusted turnover. The latest SABS data shows gambling and betting activities in Scotland accounted for 8,000 jobs in 2019, before the pandemic.

The overall industry figures are adjusted, based on Gambling Commission data, to remove employment and turnover associated with casinos, bingo halls, gaming centres and on course betting. Gambling Commission data shows that horseracing accounted for 50% of the value of over the counter betting, which in turn accounts for under a half of betting shop revenues.

The below figures suggest that horseracing accounts for around one quarter of activity in off-course betting shops in Scotland. A conservative estimate is therefore made here that around a fifth of the overall value of turnover and employment in the gambling sector can be assumed to be associated with horseracing.

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
OFF COURSE TURNOVER	£4.8m	£4.5m	£4.4m	£4.2m	£4.0m	£1.6m

Source: Gambling Commission industry statistics (revised July 2022)

A summary of the of the economic impact is shown below:

	TURNOVER			JOBS		
	DIRECT	SECONDARY	TOTAL	DIRECT	SECONDARY	TOTAL
GAMBLING ON HORSERACING	£229.2m	£74.0m	£303.2m	1,600	680	2,280

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

William Hill Partnership

Scottish Racing continues to enjoy a strong partnership with William Hill, with their betting facilities on all the racecourses in Scotland. By partnering with William Hill, one of Scotland's largest high-street bookmakers, 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.



Post-pandemic Recovery

The impact of the pandemic

The Covid-19 pandemic significantly affected spectator sports across the world. Public health restrictions in Scotland started in March 2020, closing Scotland’s racecourses. Scotland’s lockdown eased later in 2020, but some restrictions remained in place for outdoor events.

Guidelines changed throughout the pandemic, often at short-notice. In December 2021, attendances were limited to 500 people for all outdoor events, this restriction was eased the following month.

In addition to evolving restrictions, the Scottish Government introduced ‘local lockdowns’. This posed significant challenges for Scottish Racing, where

racedays usually involve months of planning and training.

95 abandoned fixtures in 2020

Scotland’s racecourses were forced to abandon a record 95 fixtures in 2020. The number of abandoned fixtures was nearly the same as the number of fixtures held the previous year (99).

The table below shows Scottish Racing attendances grew each year before the pandemic, compared to a slight decline across Great Britain. When the lockdown took hold, attendances fell to just one tenth (10%) of the crowds seen in 2017 for both Scotland and Great Britain.

	2017	2018	2019	2020	2021
SCOTLAND	100%	102%	103%	10%	40%
GREAT BRITAIN	100%	97%	94%	10%	44%

Source: Horseracing Betting Levy Board

Post pandemic recovery by 2025 – a likely scenario

The industry was hit very hard by the pandemic because of its reliance on live attendances with nearly 300,000 people attending racing fixtures in Scotland in a normal year. But, with significant government help, racing survived the pandemic in good health in part by adapting its business model.

Racing stands prepared to make the most of the post-Covid recovery and changed consumer trends that offer significant advantages to horseracing, in terms of revenues, reducing its carbon footprint and building on its community engagement.

By building back attendances lost during the pandemic, with racecourses returning to longer term trend of growing the number of racegoers in Scotland, it can be projected that, by 2025, the impact of horseracing in Scotland can account for 3,720 Scottish jobs, £513.6m of turnover and generate £50m of tax revenues.



Post pandemic recovery by 2025 – a more ambitious scenario

Following the pandemic there is an increased appetite for outdoors and active tourism and an opportunity to develop the UK’s domestic tourism market. This will require a range of organisations and destinations to co-ordinate their offer to replace overseas trips with domestic tourism options.

If the racecourses were able to further complement and strengthen other local cultural and tourism assets, such as castles, whisky distilleries, country parks, museums, golf courses, rivers and lochs, it is likely racing’s core activity (excluding media and gambling) would rise further still by 2025, by just over 10%. This would raise the economic impact of Scottish horseracing to nearly £540 million, generating an additional £30 million, compared to the likely 2025 scenario.

This scenario would also sustain nearly 3,900 jobs, generating an additional 200 jobs compared to the likely 2025 scenario. The benefits from a more ambitious, and joined-up, approach would continue to grow and help on Scotland’s journey to net zero.





Racehorse Development

Economic Impact of Racehorse Development

The impact of racehorse development and maintenance generates £47.2m of turnover in Scotland and supports 410 jobs. This includes ownership, breeding and training.

	TURNOVER			JOBS		
	DIRECT	SECONDARY	TOTAL	DIRECT	SECONDARY	TOTAL
DEVELOPING & MAINTAINING RACEHORSES	£26.7m	£20.5m	£47.2m	300	110	410

Source: British Horseracing Association, Scottish Government Input-Output model and 4-consulting

Ownership

There are 739 owners based in Scotland (at March 2019), shown by type of ownership in the table below.

AREA	SCOTLAND	GB	% OF GB
Individual	426	7,587	56%
Company Ownership	18	604	3%
Joint Ownership	131	2,943	4.5%
Syndicate Ownership	151	2,943	5.1%
Racing Club Ownership	739	14,216	5.2%

Source: British Horseracing Association (at March 2019)

Jockeys, Trainers and Racing Staff

There are currently 25 jockeys based in Scotland, out of around 660 across Great Britain, and there are currently 24 trainers in Scotland, out of around 570 across Great Britain.

The number of Trainers has remained unchanged over the last three years although, over the same period, the number of licensed jockeys based in Scotland has expanded from 16 to 25 (56%).

There are around 250 racing staff in Scotland.

	SCOTTISH RACING	GB
JOCKEYS	25	660
TRAINERS	24	570

British Horseracing Association (March 2022)

Employment in Racehorse Development

Horseracing in Scotland employs 24 jockeys, 25 trainers and 250 other racing staff, whilst also sustaining a further 110 FTE jobs through secondary economic activity.

The table below shows employment related to horse ownership by local area across Great Britain. There are nearly 170 NUTS 3 areas in Great Britain, the NUTS 3 areas are comprised of counties and local authority areas, including groups of smaller local authority areas.

The Scottish Borders has 15 jobs per 100,000 people compared to an average of around one job per 100,000 people for the whole of Scotland. The next highest local authority in Scotland is West Lothian with 5 jobs per 100,000 people. This signifies that the Scottish Borders has the fifth highest number of jobs relating to horse ownership per head in Britain.

Jobs related to horse ownership per 100,000 people

TOP 10 NUTS 3 AREAS	JOBS
North Northamptonshire	117
Isle of Anglesey	26
Suffolk	25
Cambridgeshire	19
Scottish Borders	15
Herefordshire	12
Wiltshire	10
North and North East Lincolnshire	8
East Cumbria	8
West Sussex	8

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

Data Map

Key statistics for racing in Scotland

ECONOMIC IMPACT

£336m

65% generated in Scotland

35% generated from other parts of Great Britain

52% of all racegoers in Scotland are female

94% of racegoers in Scotland are from middle and lower socio-economic groups

Scottish racecourses account for nearly 20% of turnover of Scottish sports facilities

739 owners based in Scotland

Horseracing generates **£50m** to government revenues

Attendances have risen 23% over the last twenty years (9% in Britain).

Racehorse development generates

£47.2m

410 racing staff in Scotland

£43.1m

generated by off-course activity and sustains 420 FTE jobs

24 trainers based in Scotland

Betting on horseracing generates

£303.2m

and supports 2,280 FTE jobs

Racing media generates **£27.3m** and provides 230 jobs

Horseracing generates

£50m

of tax revenues

No. of fixtures has risen by

43% over the last twenty years

25 jockeys based in Scotland

PRIZE MONEY

£7.7m

an increase of 70% over the last ten years

Scotland's racecourses produce just over **11,300** tonnes of CO2e

An average day's admission to racing in Scotland is **£20**

• Perth Racecourse

• Musselburgh Racecourse

• Hamilton Park Racecourse

• Ayr Racecourse

• Kelso Racecourse

Racehorse development provides **410** jobs

Off-course turnover = **£43.1m**
and supports FTE jobs = 420

Projected figures for Horseracing in Scotland by 2025.

- To contribute £50m to government revenues
- To generate £513.6m
- To support 3,720 jobs
- To attract 300,000 racegoers
- Scottish racecourses to generate a turnover of £92.8m with 380 FTE jobs.

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Board & Executives

The Board

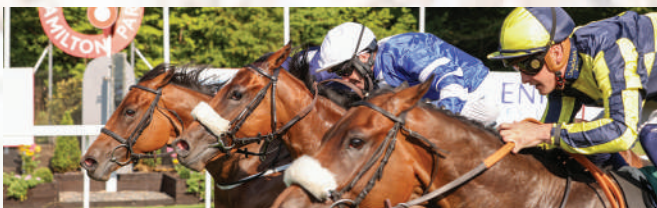
- Sir Ian Good *Chairman*
- John Gellatly *Director*
- Mark Hunter *Director*
- Alan Macdonald *Director*
- John Prideaux *Director*

Scottish Racing

- Delly Innes *Chief Executive*
- Katie Anderson *Marketing Executive*
- Gordon Brown *Race Reporter*

Racecourses

- Ayr - David Brown *Chief Executive*
- Hamilton Park - Ashley Moon *Managing Director*
- Kelso - Jonathan Garratt *Managing Director*
- Musselburgh - Bill Farnsworth *General Manager*
- Perth - Hazel Peplinski *Chief Executive*



Executives

David Brown:

David became Finance Director for Ayr Racecourse in July 2007, and was then appointed Managing Director in 2012.

Ashley Moon:

Ashley was appointed Managing Director of Hamilton Park Racecourse in January 2022, having joined the team in 2008 where he held a number of senior roles. He has also been an active member of several racing industry groups including the Racecourse Association's Raceday Experience Group, Marketing Services Group and Betting Advisory Group.

Jonathan Garratt:

Jonathan joined Kelso Racecourse as Managing Director in 2018, having been Managing Director of Cartmel Racecourse since 2010. Jonathan represents small independent racecourses as a director of RMG, and also serves on the RCA Specialist Groups Committee for race planning and betting.

Bill Farnsworth:

Bill has been General Manager at Musselburgh Racecourse for over 20 years. He has served on the board of UK racing's governing body, the British Horseracing Authority, as well as the Racecourse Association (RCA) and the Racecourse Media Group – an acknowledgement of the work carried out by Bill and the team in transforming Musselburgh into one of the country's leading race tracks.

Hazel Peplinski:

Hazel has held many significant positions within Scottish racing, including 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. Hazel has been a trustee of the Injured Jockeys Fund since 2013 and she became a Director of the RCA in 2020 where she represents small independent racecourses.

Delly Innes:

Delly took on her role in Scottish Racing in 2016. She is also Chair of the Scottish Racing Academy and sits on the British Horseracing Authority's Public Affairs Steering Group which develops and implements agreed racing industry strategy on political engagement in both Westminster and Holyrood. Delly is also a member of the Scottish Government's Equine Stakeholder Group.



SCOTTISH RACING

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