

REVIEW & PROSPECTUS 2025



ABOUT SCOTTISH RACING

Scottish Racing was established in 2000 to promote and support 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 seasoned racegoers on all racing news, and campaigning to attract new audiences to racing. Scottish Racing also provides big screen hire to enhance the raceday experience for racecourse visitors.

BOARD OF DIRECTORS

David Brown, *Ayr Racecourse*

Ashley Moon, *Hamilton Park Racecourse*

Jonathan Garratt, *Kelso Racecourse*

Bill Farnsworth, *Musselburgh Racecourse*

Matthew Taylor, *Perth Racecourse*

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CHIEF EXECUTIVE'S SUMMARY

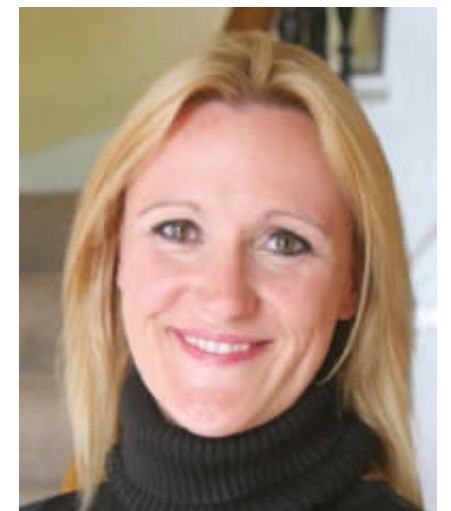
Scottish horseracing today stands at a pivotal moment, balancing a proud heritage with the demands of a rapidly evolving sporting, economic and regulatory landscape. This review has assessed the health and sustainability of the sector across racecourses, ownership, training and fan engagement, particularly when the long-term economic aftermath of the pandemic continues to impact businesses, with around a quarter of UK business leaders predicting a full financial recovery will not occur until 2027 or later.

I am pleased to say the findings show a resilient industry with strong cultural significance and regional economic impact, contributing meaningfully to rural communities and tourism. Scotland's racecourses continue to attract dedicated audiences and flagship events remain key fixtures in the national sporting calendar. However, underlying structural challenges persist and, in some areas, are intensifying.

Attendance and wagering revenues have shown mixed performance, reflecting broader shifts in consumer behaviour, competition from other entertainment formats and tighter household spending. At the same time, high standards of equine welfare remain central to the sport's integrity, requiring continued investment and transparent communication to maintain public trust.

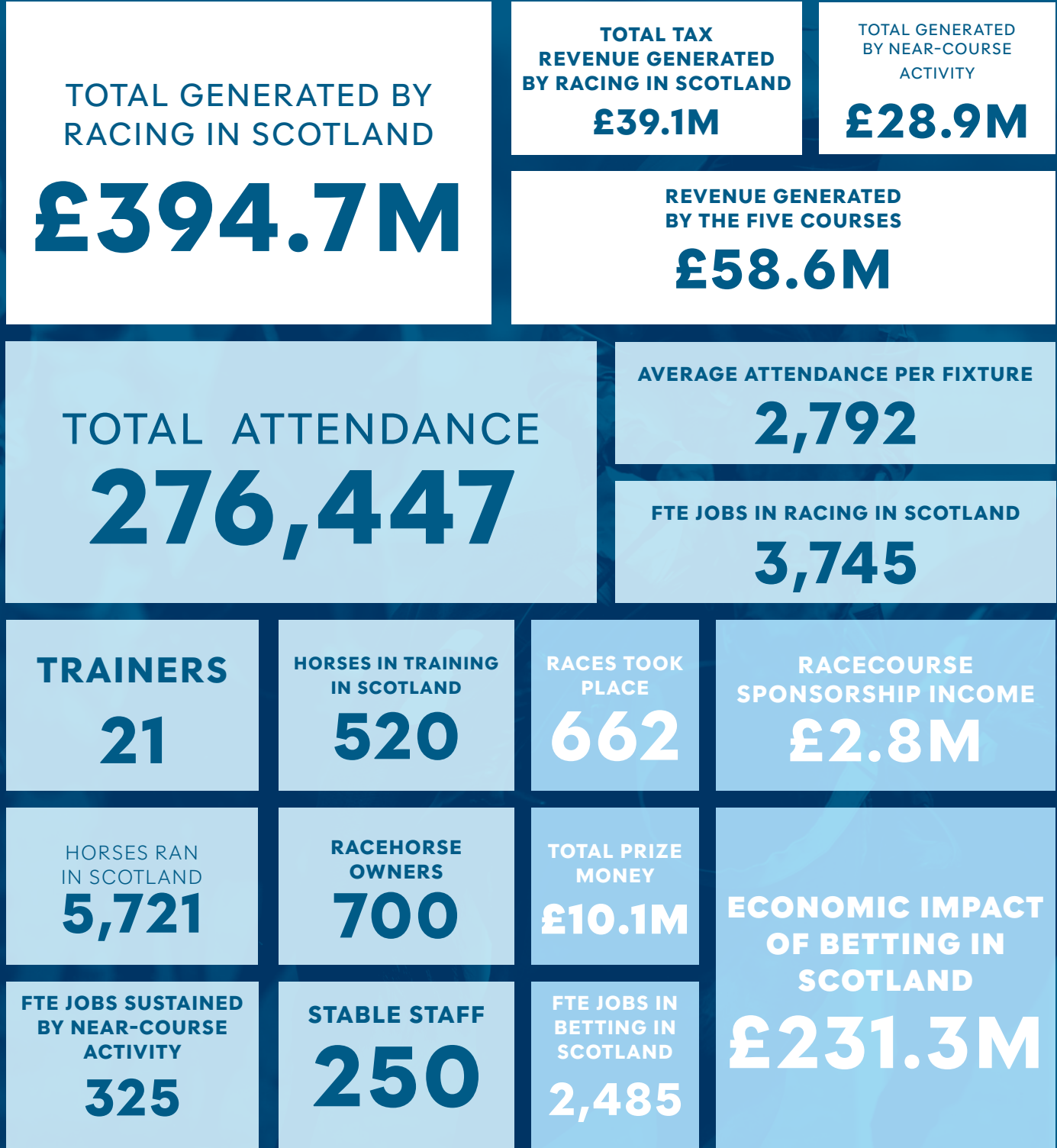
Looking ahead, we hope this review highlights opportunities to unlock potential for growth within the sport as a whole in Scotland. Greater collaboration with new sponsorship partners, targeted investment in facilities and strengthening pathways for ownership participation will be critical to broadening appeal. Additionally, aligning with evolving regulatory frameworks and public expectations around animal welfare and environmental sustainability will be essential for long-term viability.

In conclusion, Scottish horseracing retains strong foundations and has the ability to secure its future and its position as a valued part of Scotland's sporting and cultural identity, while delivering sustainable economic benefit in the years ahead.



Delly Innes
Chief Executive

KEY FIGURES FOR RACING IN SCOTLAND IN 2025



REVIEW OF THE RACING INDUSTRY IN SCOTLAND

Racing in Scotland is a dynamic spectator sport and industry. It is rooted in tradition, with a bright future and sound opportunities for growth and investment. Regulated by the British Horseracing Authority (the BHA), alongside the sport in England and Wales, it makes an important and growing contribution to Scotland’s leisure economy and society with 276,447 attendances at 99 fixtures in 2025. The economic impact of horseracing in Scotland accounted for 3,745 Scottish jobs and £394.7m of turnover, which has seen a significant increase since its turnover of £301.2m in 2016.

Centred around the five racecourses of Ayr, Hamilton Park (near Glasgow), Kelso (in the Scottish Borders), Musselburgh (near Edinburgh) and Perth, it offers spectacular year-round entertainment enjoyed by a wide segment of the population.

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

RACECOURSES
The five racecourses in Scotland 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
Visitors to the racecourses also generate economic activity outside the courses via hotels, catering and other tourism activities.

RACEHORSE DEVELOPMENT
The ownership, breeding and training of racehorses generates revenue from prize money awarded by the racecourses and investment from within and outwith the sport.

THE BETTING INDUSTRY
Bets placed, largely off-course through high street or internet bookmakers, pay tax which is then 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 back into the horseracing industry.

MEDIA COVERAGE
The production and distribution of broadcast, press and internet material.



THE ECONOMIC IMPACT OF THE RACING INDUSTRY IN SCOTLAND

	Turnover			Jobs		
	Direct	Secondary	Total	Direct	Secondary	Total
Racecourses	£32.5m	£26.1m	£58.6m	165	145	310
Off course	£16.6m	£12.3m	£28.9m	270	55	325
Development	£27.6m	£21.0m	£48.6m	290	105	395
Gambling	£154.2m	£77.1m	£231.3m	1,380	1,105	2,485
Media	£15.6m	£11.7m	£27.3m	160	70	230
TOTAL	£246.5m	£148.2m	£394.7m	2,265	1,480	3,745

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 turnover per job for the direct (on course) activities of Scottish racecourses is nearly double that of the operation of Scottish sports facilities.



PERFORMANCE OF BENCHMARKED SCOTTISH GROWTH SECTORS

Growth sector	Turnover	Employment
Biotechnology research	£510.5m	1,500
Impact of Scottish racing	£394.7m	3,745
Radio & television	£339.8m	4,585
Operation of sports facilities	£347.2m	13,000
Fashion and textiles	£277.9m	£2,450
Computer games	£391.4m	2,325
Music	£27.4m	365

Source: Scottish Government growth sector statistics database

The economic impact of Scottish racing is larger than the Scottish radio and television industry and is marginally bigger than Scotland's computer games industry (£391.4m).

The operation of sports facilities includes sports football, rugby and cricket stadiums, ice-hockey arenas, boxing arenas, swimming pools, golf courses and other sports venues.

The number of jobs sustained by the economic impact of Scottish racing is more than ten times the number of jobs in Scotland's music industry and more than double the number of jobs in biotechnology research across Scotland.



SCOTLAND'S FIVE RACECOURSES

ATTENDANCES AND FIXTURES

Scottish racing has delivered a steady and resilient recovery from the disruption of the pandemic and Scotland's public health restrictions. During the height of the pandemic, sporting events and large public gatherings faced severe restrictions.

At different stages, spectators were unable to attend fixtures at all, while strict capacity limits and social distancing rules significantly reduced crowd numbers when racing resumed.

These measures, combined with phased reopening frameworks and changing local protection levels, meant that racecourses operated under sustained uncertainty for much of 2020 and 2021.

When spectators returned, attendance levels were understandably subdued. However, racing was quick to re-establish its audience base. Attendances climbed consistently as public confidence returned.

Racegoers came back in increasing numbers, major race days regained their scale and average attendance per fixture strengthened. Importantly, this was a broad recovery across Scotland's racecourses.

- **Average attendance has risen every year over the last five years** (since 2020) with around 2,800 people at each race day across Scotland in 2025.
- **Average race day attendance has returned to pre-pandemic levels.**
- **Scottish Racing continues to attract large single-day attendances**, with peak race day crowds over 17,000 being achieved following the pandemic.
- **The number of racegoers increased by 22,000 (nearly 9%)** making it one of Scotland's fastest growing spectator sports.
- **Ayr** continues to deliver Scotland's biggest racing days; attendances have now returned to pre-pandemic levels (80,400 race goers last year).
- **Hamilton** grew race day crowds to 50,900 last year, improving on pre-pandemic attendances.
- **Kelso** grew attendances to 33,300 last year, improving on pre-pandemic levels and secured its largest race day crowd of 5,157; the largest race day crowd in over a decade.
- **Musselburgh** drew 64,000 race goers last year, building crowds beyond those seen before the pandemic. Average attendances grew to 2,700, the highest in over a decade.
- **Perth** grew attendances to a post-pandemic high of 47,900 race goers and with the highest average attendance in Scotland with an average of 3,700 race goers at each fixture.



SCOTTISH RACING, ATTENDANCES & FIXTURES

Year	Attendances	Fixtures	Highest attendance
2018	276,000	105	18,015
2019	279,000	99	18,539
2020	27,000	39	6,173
2021	109,000	82	11,267
2022	235,000	105	14,409
2023	266,000	105	17,172
2024	254,000	96	15,183
2025	276,447	99	15,746

Source: Horserace Betting Levy Board (HBLB)



ECONOMIC IMPACT OF RACECOURSES

The combined turnover of Scotland's five racecourses was £32.5m 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 racecourses employed the equivalent of 165 full time employees. 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.

The economic impact of the racing industry in Scotland makes a contribution of £39.1m to government revenues, generated by direct impacts, 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.

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. The table below shows the combined economic impact for the five racecourses.

	Turnover			Jobs		
	Direct	Secondary	Total	Direct	Secondary	Total
Scotland's Racecourses	£32.5m	£26.1m	£58.6m	165	145	310

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

Using the Scottish Government model, the secondary impacts from racecourses generated nearly £4m 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.

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. Previous measures have consistently shown off course spending at just over 50% of racecourse activity. The most recent measure shows overall, off course economic activity generated £28.9m of turnover in Scotland and sustained 325 FTE jobs.

ECONOMIC IMPACT OF OFF-COURSE ACTIVITY IN SCOTLAND

	Turnover			Jobs		
	Direct	Secondary	Total	Direct	Secondary	Total
Off course activity	£16.6m	£12.3m	£28.9m	270	55	325

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



RACEHORSE DEVELOPMENT

There are over 700 owners and 21 registered trainers based in Scotland. There is a seasonal element to the employment of stable staff, therefore the average number of FTE stable staff is approximately 250.

The impact of racehorse development and maintenance generated £48.6m of turnover in Scotland in 2025. This included ownership, breeding and training. The racing industry in Scotland employed a total of 290 jockeys, trainers and other stable staff, and sustained a further 105 FTE jobs through secondary economic activity.

In total, the business of developing and maintaining racehorses generated economic activity and employment in Scotland is shown in the table below.

	Turnover			Jobs		
	Direct	Secondary	Total	Direct	Secondary	Total
Developing & maintaining racehorses	£27.6m	£21.0m	£48.6m	290	105	395

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



EQUINE WELFARE

Responsibility for the care of our animals, rests with everyone in the sport. From the people who independently govern and regulate racing, through to racecourses, the sport's participants and the 8,000 stable staff whose role it is to care for the 20,000+ horses who race over the course of a year, British horseracing is run by people with a deep love of horses.

British Racing leads the way in setting welfare standards, both on and off the racecourse, and we are incredibly proud of our work in this area.

We constantly strive to enhance safety for our participants on and off the racecourse combining world-leading expertise, cutting edge technology, data and epidemiology underpinned by cross industry collaboration.

For example, British racing has launched a partnership with experts from the Royal Veterinary College analysing more than 400,000 individual rides going back to 2010, analysing risk factors to identify improvements that can be made for the safety of our horses.

British Racing's welfare strategy is overseen by the independently chaired, cross-industry Horse Welfare Board (HWB), whose five-year strategy, 'A Life Well Lived' has seen 26 projects delivered, focused on the areas of safety, data and traceability, and aftercare.

The HWB are currently working towards the second iteration of the strategy, due to launch in late 2026.

The Racing Foundation and HBLB are the core funders of the HWB's work and this funding supports ongoing work across multiple projects, including more than £63 million invested in welfare since the year 2000. This investment in research, veterinary science, and education benefits all breeds of horses, and makes British racing by far the biggest single investor in equine welfare and science in the country.

The sport's HorsePWR welfare campaign places honesty, openness and trust at its heart. The campaign website presents the data and facts about racing and this is supported by a campaign which proudly speaks about the sport's welfare record. The "PWR" of HorsePWR stands for purpose, welfare and responsibility, which we believe are the values underpinning British Racing's collective approach to welfare.

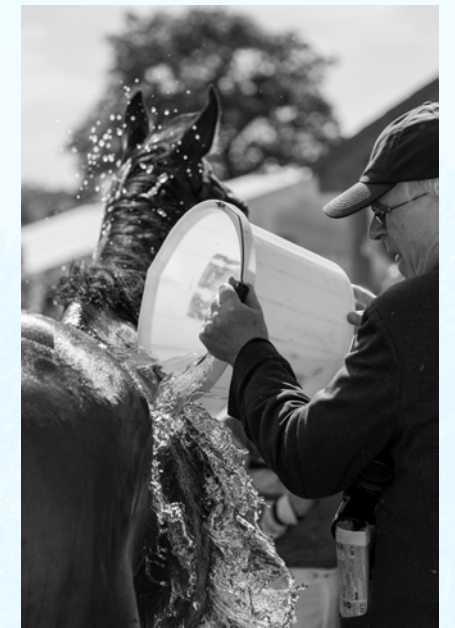


British racing's flagship welfare experiential event, National Racehorse Week, continues to run on an annual basis. National Racehorse Week is a nationwide, cross-industry initiative that opens the doors of training yards, studs and retraining centres, giving the public free, behind-the-scenes insight into the care and lives of Thoroughbreds. Since 2021, the event has delivered around 65,000 free visitor places and 190 community events, reaching an additional 10,000 people. Participant feedback indicates that 80% leave with an improved view of racehorse care and 95% with a positive impression of racing.

HORSE CARE POLICY

Three specially qualified equine vets are in attendance at every race meeting to ensure the welfare of all horses. During a race two vets follow the action from a vehicle in the centre of the course and can attend a casualty in the same response time as the Medical Teams responsible for the welfare of the jockeys. The third vet is based at the stable yard where a close check is kept on all horses, especially those returning after a race.

It is now standard practice for screens to be erected around any horse receiving veterinary attention on the ground. This does not reflect on the severity of an injury but allows the vet some privacy and the horse a calmer environment in which to make a recovery. The same procedure is applied to a jockey receiving medical attention on the ground by paramedics/racecourse doctor.



RAISING WELFARE STANDARDS



£6.4m secured to fund welfare since **2021**



Euthanasia code published



Code of Conduct/ Code of Ethics in development



18 changes made to improve stalls and starting procedures to start races more safely



Partnerships established and collaboration with independent experts



Welfare Data Unit established providing dashboards with clean, verified data to the facts we need to know



11 State of the art mannequins purchased to support the welfare of horses through enhanced training of 500+ racecourse vets and medical personnel



10 new welfare training modules developed and made freely available to industry in 2025



MINIMISING RISK, IMPROVING SAFETY



384,408
race records

analysed by the Race Risk Models, the sport's first safety-focused risk modelling tool



Every racecourse fatality holistically reviewed by a dedicated panel following successful

Fatality Review pilot



Wearable Technology

trial and tendon boots research underway



12 schooling trial days to build race experience in 2025/26



75-125mm the standard length for a blade of grass on a flat course in the new Performance Quality Standard to enhance management of ground



2,500 obstacle markers turned white to improve clarity for horses



4,500 horses trotted up using new **Sleip AI** technology



38 racecourse visits made with **64,000+** data collection points to review consistency of going



Padded-style hurdles at all British racecourses by **October 2026** confirmed



New Standard technical specification for hurdles



38 jump racecourses walked by safety advisor



526 falls at obstacles reviewed as part of **Fallers Project**



MediRecords pilot completed and adopted by BHA for major jump festivals

CROSS-INDUSTRY PARTNERSHIP



- Working with councils, government agencies, stakeholders and equestrian bodies to close identified gaps in traceability established to obtain traceability data from other equine disciplines
 - Annual foal crop analysis to inform pathways taken by British-bred Thoroughbreds
 - Broodmare analysis to assess their whereabouts over the past 10 years
- Working with councils, government agencies, stakeholders and equestrian bodies to close identified gaps in traceability
 - Established the first **step out of racing** as a strategic priority
 - Partnered with Weatherbys on **six-month passport amnesty** to drive compliance
 - New intelligence on **5,566 Thoroughbreds** gathered through the 2023 Census

THE BETTING INDUSTRY

Sports betting is a major leisure pastime in Scotland, with betting 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, digital betting and the suppliers to these businesses and their associated expenditure and employment. Off-course bets placed over the counter on horseracing was nearly £3 billion in the year to March 2025 (Source: Gambling Commission Industry Statistics).

The turnover of betting operations can overstate the value of these activities. Other reports on the sector industry draw on measures of net income 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 for the betting industry in Scotland. The latest SABS data shows gambling and betting activities in Scotland accounted for 6,900 jobs in 2023 and £721.0 million in Gross Value Added (GVA). GVA is a net measure based on the difference between the total output of Scotland's betting sector (£1,980 million in 2023) and operating costs (nearly £1.3 billion in 2023).

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 nearly half of the value of off-course betting, with betting shops accounting for 52% of non-remote betting revenue. A conservative estimate is therefore made here that a fifth of the overall value of turnover and employment in the gambling sector can be assumed to be associated with horseracing. A summary of the economic impact (adjusted to 2025 prices) is shown below.



ECONOMIC IMPACT OF BETTING ON HORSERACING IN SCOTLAND

	Turnover			Jobs		
	Direct	Secondary	Total	Direct	Secondary	Total
Gambling	£154.2m	£77.1m	£231.3m	1,380	1,105	2,485

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

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 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.

The extensive media coverage of racing, including the production and editing of radio, TV programmes and print media, accounts for a further £27.3m of revenue and 230 jobs. Media activity impacts were based on the previous estimates and adjusted to 2025 prices, while employment outcomes 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

BROADCASTING AND MEDIA RIGHTS

Racecourse Media Group (RMG) delivered payments of £118.4m to its 35 shareholder racecourses in Britain (including the five Scottish racecourses) and 26 Irish racecourses. These were generated from the performance of their media and data rights in 2025. The result was achieved despite betting turnover pressures, regulatory intervention and wider macroeconomic challenges.

Those licence fees supported £107m in prize money on offer at RMG racecourses last year. Founded and owned by racecourses, RMG returns 100% of profits back to the racing industry.

RMG is also scaling a digital presence to reach new and younger audiences, with social platforms, including YouTube, central to future growth. RMG's social media platforms have recently exceeded 2m followers, while the RMG-owned Raceday TV (available on Facebook, Instagram, TikTok) is on course to surpass 1bn views for 2026 alone.



RACECOURSES IN THE COMMUNITY

Horseracing has long been an important part of Scotland's sporting, cultural, and economic landscape. Beyond their role as venues for competitive racing and entertainment, Scottish racecourses increasingly contribute to the social wellbeing of the communities in which they operate. Through educational programmes, charitable partnerships, volunteering initiatives and community events, racecourses have expanded their function from sporting venues to community assets that support local engagement and development.

Community engagement has become a key priority within the Scottish horseracing industry, as we are committed to making a positive impact on our local areas. All five Scottish racecourses participate in a range of activities designed to increase public access to racing, support local charities, promote equine welfare and provide educational and employment opportunities. These initiatives help foster positive perceptions of the sport, while demonstrating its value beyond economic contribution alone.

In 2025 the sport published a first social impact strategy setting ambitious goals across four pillars of activity, which can be found here: https://www.britishhorseracing.com/press_releases/powering-positive-change-british-horseracings-social-impact-strategy/

Scottish Racing and the five racecourses in Scotland are proud to support the following initiatives within both the horseracing, national and regional communities:

RACING TOGETHER

Racing Together's vision is for British racing to be known as a 'force for good' by helping the communities in which the sport operates. Racing Together sponsors the annual Racecourse Association Community Award which was won by Ayr racecourse in 2023/4 for their outstanding partnership with Ayrshire Cancer Support.

Every year, staff from all the racecourses in Scotland participate in Racing Together's Community Week. A dedicated week when companies across the racing industry spend time helping their community. Staff across the Scottish racecourses volunteered over 500 hours of their time and experience. Activity in this area, on an annual basis, includes:

- Helping volunteers within local Community Gardens to develop and maintain garden areas, weeding and planting;
- Racecourse staff completing litter picking projects in areas surrounding the racecourses;
- Volunteering at local food banks to help sort and weigh donations, and label parcels for clients;



RETRAINING OF RACEHORSES (ROR)

Scottish racecourses support RoR through funding, fundraising, awareness campaigns, racecourse events, volunteer opportunities, and promotion of lifelong welfare support and rehoming assistance for the more than 2,000 racehorses which retire from racing in Britain each year.

RACING TO SCHOOL AND PONY RACING

In 2025, 11 school groups attended inspiring, educational, free trips to Scottish racecourses. The charity Racing to School, has a network of schools, colleges and Pony Clubs who work closely with the sport. Each of the racecourses are delighted to work with the charity to connect young people with their local racecourse to apply their curriculum learning in racing's fast-moving classroom. Additionally, working closely with the Scottish Racing Academy, Kelso Racecourse hosts an annual pony racing event for young riders, behind-the-scenes open days on racedays, and family events.

Racing Welfare Stable staff week: Racing Welfare is a UK charity that supports the needs of racing stable and stud staff. As part of their official week of activities the racecourses provide a free meal to all stable staff, special gifts for all stable staff visiting that racecourse, as well as increased Best Turned Out prizes.

Educational outreach: Each of the racecourses in Scotland offer work experience opportunities across different areas of their businesses, helping nurture the next generation of industry professionals. Additionally, Musselburgh Racecourse works with Musselburgh Grammar to stage employability workshops, providing an insight into Hospitality, Events and Groundcare. The pupils are then able to learn how the racecourse prepares for hospitality events and set a table for formal service.

Supporting local events: Each of the racecourses stage a variety of community events such as kiltwalks, munro challenges, bucket collections and annual balls throughout the year to help with their fundraising initiatives, along with a significant number of tickets being donated to charities and local community groups.

LOCAL COMMUNITY

The five racecourses enjoy a close and active relationship with their local community and work hard to ensure that people are proud of "their" racecourse with its high-quality facilities and broad range of events hosted. Every fixture is accessible to families and young people, with free admission offered to children 17 years and under (accompanied by an adult) and our popular Family Days include a host of free entertainment such as fairground rides, pony rides and live music. Free tickets to homeowners in local areas is a popular activation carried out by a number of racecourses, along with other initiatives such as racecard art competitions delivered to all local primary schools for racecourse family days. Concession tickets are also available for all racedays (excluding sell-out days). Senior citizens are regular racegoers and a significant part of our local communities. Each racecourse also offers hundreds of tickets to Tickets for Troops and Blue Light each year.

CHARITY AFFILIATIONS

Between all the racecourses, charities from a number of areas have been supported including equestrian, cancer support, military, education, youth and elderly charities, community upkeep, collections and volunteering for food banks and other health and wellbeing charities in the past year. Charitable donations have totalled over £25.5k in 2025, and over £20k in-kind, by supporting over 15 local charities.

RESPONSIBLE DRINKING

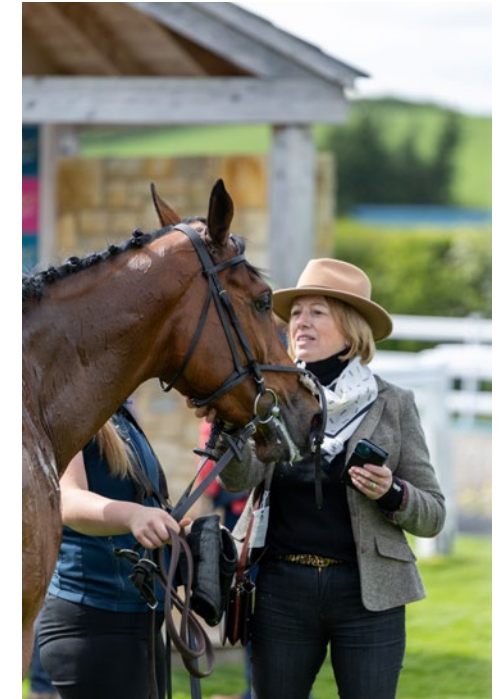
All racecourses promote responsible drinking through the Challenge 25 policy and by supporting the Racecourse Association's 'Pace Yourself' campaign, encouraging moderation. We also offer free water at all fixtures, ensuring racegoers stay hydrated while enjoying a safe and responsible drinking environment

ENVIRONMENTAL IMPACT

We are all aware of the importance of looking after our natural environment and the Scottish racecourses have initiated a number of green practices. Racecourses work with local suppliers across a wide variety of industries including food & beverage, cleaning, portable toilets, tradesmen, security and marquee suppliers to keep our carbon footprint to a minimum. Our food suppliers source the majority of ingredients from the local area and all within Scotland, which has significantly reduced food miles.

We are committed to the importance of looking after our environment and make tremendous efforts in the recycling of glass bottles, paper, cardboard, race programmes and green waste such as organic garden matter and grass cuttings. We use recycled paper for all communications and literature and have introduced biodegradable plastic cups for outdoor use. In addition to this, Hamilton Park has installed bee hives to boost local pollination and produce their own honey, which can be used in hospitality menus.

Racing relies on water to maintain safe ground conditions and ensure the well-being of horses and people. As a shared resource, we have a responsibility to protect local, regional, and national water supplies, using water sustainably and efficiently while preventing harm to water sources. Water quality and its impact on natural habitats, and water stress, vary by location, requiring tailored approaches across the Scottish tracks. Detailed water impact assessments guide targeted actions to ensure responsible local water management and to improve water resilience. One such action earned Kelso Racecourse widespread praise for balancing wet weather conditions with eco-friendly course operations, by creating a dedicated drainwater and rainwater harvesting pond.



SCOTTISH RACING ACADEMY

The Scottish Racing Academy (SRA) was created to fill a long standing gap in racing education across Scotland and the North of England, and today it stands as a critical pillar of the industry's workforce strategy. The SRA's mission remains clear: to deliver flexible, accessible and industry led training that strengthens recruitment, progression and retention across the racing workforce.

The qualifications framework now spans the full breadth of the industry's needs — from Entry Level and Schools Academy programmes, through Stable Staff Levels 4–6, Full Time work-based Level 5, Racing and Horse Care Apprenticeships, and into advanced pathways including rider coaching, coaching qualifications and equine transport qualifications. This comprehensive offer ensures that individuals can enter the industry at any stage and progress with confidence.

The delivery model is intentionally local, blended and employer driven. Through strong partnerships with Borders College, Skills Development Scotland, Myerscough College, 1st4Sport and Qualifications Scotland, the SRA can maximise access to government funding while ensuring that training remains rooted in industry expectations. In 2025 alone, the SRA expanded their in yard coaching provision to over 120 stable staff and this will continue to be built upon through the new Rider Development Pathway as a partner with the British Racing School.

The SRA is equally committed to widening participation. Community Days, Discovery Days and school engagement continue to introduce new audiences to racing, while tailored skills scans and career mapping support long term progression. SRA programmes consistently attract learners from rural, island and deprived communities, and outcomes reflect the strength of this approach: completion rates of up to 98%, retention into employment or further training above 90%, and strong progression into senior roles across Scottish yards.

The social impact of the SRA is clear. Learners report increased confidence, wellbeing and aspiration, and employers consistently recognise the professionalism and readiness of SRA graduates.

As the racing industry continues to evolve, the SRA will remain focused on delivering high quality, future ready training that supports the sport's long term sustainability. Priorities for the year ahead include expanding access to qualifications, strengthening employer engagement, enhancing coaching and transport pathways, and deepening contribution to talent attraction across Scotland and the North of England.

The Scottish Racing Academy is rightly proud of the progress made over the past five years and remains committed to innovation, collaboration and sector leadership — ensuring that racing in Scotland has the skilled, motivated and resilient workforce it needs for the future.

"I am enjoying the course very much, I have learnt all sorts of things about horse care and enjoyed learning the basics about horse anatomy and saddle structure most, I think. All of it has been a completely different learning experience to my past experiences of learning and I am enjoying embracing a new challenge, learning once a week has been a really good way to access the learning and it fits well into my current routine. Thank you for the opportunity." **Ellen, Level 4**

"I started my course in 2025 and was slightly hesitant to do so as I did not enjoy being in education when I was younger. I found the way the SRA delivered the course very easy to manage and deal with due to the flexibility they showed around the course. My job as head traveller can make having spare time difficult. However, having the sessions online made it much easier for me to still participate when I was away from home. It has made me much more open to doing further courses through the SRA." **Jenny, Level 6**



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