

SIZE AND SCOPE OF GREYHOUND RACING IN AUSTRALASIA

AN ECONOMIC AND SOCIAL IMPACT ASSESSMENT

PREPARED BY IER | NOVEMBER 2024



FOCUSED EVENT THINKING





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KEY FINDINGS

ECONOMIC IMPACTS



AUD\$2.60 BIL

GROSS VALUE ADDED¹
GENERATED BY
GREYHOUND RACING

DIRECT AND FIRST
ROUND IMPACT

AUD\$0.94 BIL

INDUCED IMPACT

AUD\$1.66 BIL



15,748

FTE JOBS SUSTAINED
BY GREYHOUND RACING
ACTIVITY

DIRECT AND FIRST
ROUND IMPACT

6,507 FTE

INDUCED IMPACT

9,240 FTE



AUD\$1.41 BIL

HOUSEHOLD INCOME²
GENERATED BY GREYHOUND
RACING ACTIVITY

DIRECT AND FIRST
ROUND IMPACT

AUD\$0.60 BIL

INDUCED IMPACT

AUD\$0.82 BIL

“ *IN 2022/23, GREYHOUND RACING IN AUSTRALASIA CONTRIBUTED AUD\$2.60 BILLION IN ECONOMIC IMPACT - SUSTAINING CLOSE TO 15,800 FTE JOBS IN THE REGION* ”



PRIZEMONEY



AUD\$223.2 MIL

PRIZEMONEY
ON OFFER

SOURCES OF EXPENDITURE



AUD\$0.07 BIL

BREEDING - PRODUCTION OF
LITTERS AND PUPS



AUD\$0.17 BIL

TRAINING - PREPARATION OF
GREYHOUNDS



AUD\$1.68 BIL

RACING AND WAGERING
ACTIVITIES

TOTAL DIRECT SPENDING³
GENERATED

AUD\$1.92 BIL

1. Value added contribution is defined as the value of sales less the value of inputs used in production, i.e. it is equal to the income (wages, salaries and profits) generated in production.

2. Household income is defined as being wages and salaries (before tax) earned from employment generated by the greyhound racing industry.

3. Direct expenditure is defined as expenditure associated with producing foals and pups (breeding & rearing), preparing racing greyhounds (training), racing customer expenditure and expenditure by CB's and racing clubs on operating the industry. Direct expenditure is counted at the point at which it leaves the racing industry and reaches the broader economy.

GREYHOUNDS



10,483

PUPS WHELPED AND REGISTERED



1,534

BREEDING FEMALES COVERED



24,982

GREYHOUNDS IN TRAINING

“ *IN 2022/23, GREYHOUND RACING CLUBS WERE RESPONSIBLE FOR SUPPORTING FINANCIALLY OR IN-KIND NEARLY 200 COMMUNITY OR CHARITABLE ORGANISATIONS IN AUSTRALASIA* ”

GREYHOUND RACING



62

RACING CLUBS



65

RACE TRACKS



4,649

RACE MEETINGS



52,490

RACES



619,127

ATTENDANCES



12,108

MEMBERS

ROLES OCCUPIED IN GREYHOUND RACING



3,238

BREEDERS AND BREEDERS STAFF



2,156

KENNEL ATTENDANTS



3,319

RACING CLUB AND CONTROLLING BODY EMPLOYEES



4,196

TRAINERS



16,394

OWNERS



4,896

VOLUNTEERS

TOTAL ROLES OCCUPIED IN GREYHOUND RACING

34,198

Note: There is some level of duplication in some of the participation categories as a participant in Greyhound Racing can occupy numerous roles in the industry. For example a breeder can also be a trainer and an owner.

INTRODUCTION

Greyhounds Australasia (GA) comprises representatives from jurisdictional controlling bodies in Australian states and territories, and New Zealand. Established in 1937 its aim is to bring together the various controlling bodies in Australia and New Zealand to consider national issues and at the same time established an Australian Register of Greyhound Names, produce an Annual Studbook and develop National Racing Rules.

By reason of the state/federal political system, each controlling body administers greyhound racing within its own jurisdiction, with GA being the support arm to create consistency and uniformity where that outcome is in the best interests of its members. It is important to note that any reference to the 'national' greyhound racing industry includes the jurisdictions of Australia and New Zealand.

PURPOSE OF THE STUDY

GA engaged IER to conduct this study which aims to quantify the economic and social contribution that the greyhound racing industry generates in Australia and New Zealand. This study is based on the 2022/23 financial year and is presented as a representation of the impacts generated in this specific time period.

The key focus of the study is to investigate the following outcomes attributable to the greyhound racing industry in each state/territory and nationally:

- + The employment generated by greyhound racing industry activities
- + The number of participants (i.e. trainers, breeders, owners etc.) in the industry
- + The total direct expenditure contribution that the industry makes, in its current form, to the economy
- + The extent to which the greyhound racing industry contributes to the combined Gross State/Domestic Product of these jurisdictions
- + The social and community impact of greyhound racing

STUDY METHODOLOGY

In assessing the size and scope of the greyhound racing industry, the study takes into account a number of the traditional measures adopted by the racing industry (such as breeding and training activities, racing club activities and wagering) as well as calculating a number of economic measures.

For the purpose of this study, the racing industry is defined as covering the full spectrum of activities associated with the conduct of greyhound racing across the region.

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

- + OzChase
- + Direct data requests to each of the controlling bodies (CB's) in each jurisdiction
- + Greyhounds Australasia
- + Direct requests to racing clubs in each jurisdiction
- + Prior research undertaken by IER in some jurisdictions
- + Secondary research

Throughout the report, data has been presented at an Australasian, National and State/Territory level. For the Australian jurisdictions, data is further illustrated by metro and non-metro regions.

The determination of metro and non-metro regions is based in the ABS SA4 geographic framework. Under this framework, metropolitan areas are generally based on the

capital city and immediate surrounds.

ECONOMIC METHODOLOGY

The development of an economic model of the greyhound racing industry requires a strong understanding of the internal and external flows of money. The greyhound racing industry is built on a series of inter-related sectors which sees funds flowing back and forth, with one sector's expenditure often representing another sector's revenue. For instance, punters bet on greyhound racing (expenditure) which sees funds flow through to controlling bodies (revenues). Some of these funds then flow to racing clubs (funding operational expenditure) and participants (prizemoney). IER has taken care, throughout the model to ensure that duplicate expenditures have been identified and excluded from the total expenditure calculations. In this regard, the key is to identify the final expenditures - ensuring not to count the same expenditures as they flow between internal racing industry transactions.

The final expenditure profile of the greyhound racing industry is based on the following key inputs: -

- + Production (breeding related activities) of greyhounds – the expenditure generated by the breeding sector in maintaining sires and breeding females and producing litters
- + Preparation (training related activities) of greyhounds for racing – the expenditure by owners and trainers on training services as well as other non-training related expenses such as major veterinary, transport etc.
- + Net wagering revenues – otherwise known as revenues generated from punter losses. Whilst it varies across the jurisdictions, these revenues flow through to the economy via Government taxes, wagering operator revenues and racing industry funding (which is used to fund operational costs and prizemoney)
- + Controlling body and operator expenditure – on maintaining facilities, running race meetings, marketing and administration
- + Racing customer expenditure – expenditure made by attendees. This includes spending at the races as well as spending in the community linked to their attendance at the races (mainly for major events)

It is important to note that racing and wagering are assessed as a complete unit because they are so completely entwined. In many jurisdictions, controlling bodies generate a significant portion of their income from wagering revenues. These wagering revenues are used to fund prizemoney, infrastructure projects and operations of racing clubs. Racing clubs then run race meetings where punters wager on the racing product and the cycle continues.

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

1. Gathering Industry Expenditure

This involves the collection and collation of expenditure data from all available sources within the industry

2. Categorisation of industry expenditure into industry classifications

The 'greyhound racing industry' as an entire entity does not exist within the Australian and New Zealand Standard Industry Classification (ANZSIC) structure. For modelling purposes, it is necessary to allocate direct expenditures to the appropriate industry sectors

The majority of expenditures are classified within their relevant ANZSIC codes.

A number of greyhound racing activities are contained within ANZSIC classification R – Arts and Recreation Services, specifically within the following sectors:

- a. R9121 – Horse and Dog Racing Activities,
- b. R9129 – Training and Racing Activities,
- c. R9209 – Other Gambling (Racing).

3. Economic modelling

IER has utilised an input/output methodology for the calculation of economic impacts associated with the greyhound racing industry. Models relevant to each jurisdiction have been developed and used to determine these impacts.

The report illustrates impacts in Australian Dollars (AUD\$). Please note that in the case of New Zealand, conversions from local currencies were based on exchange rates as at June 30, 2023.

Disclaimer

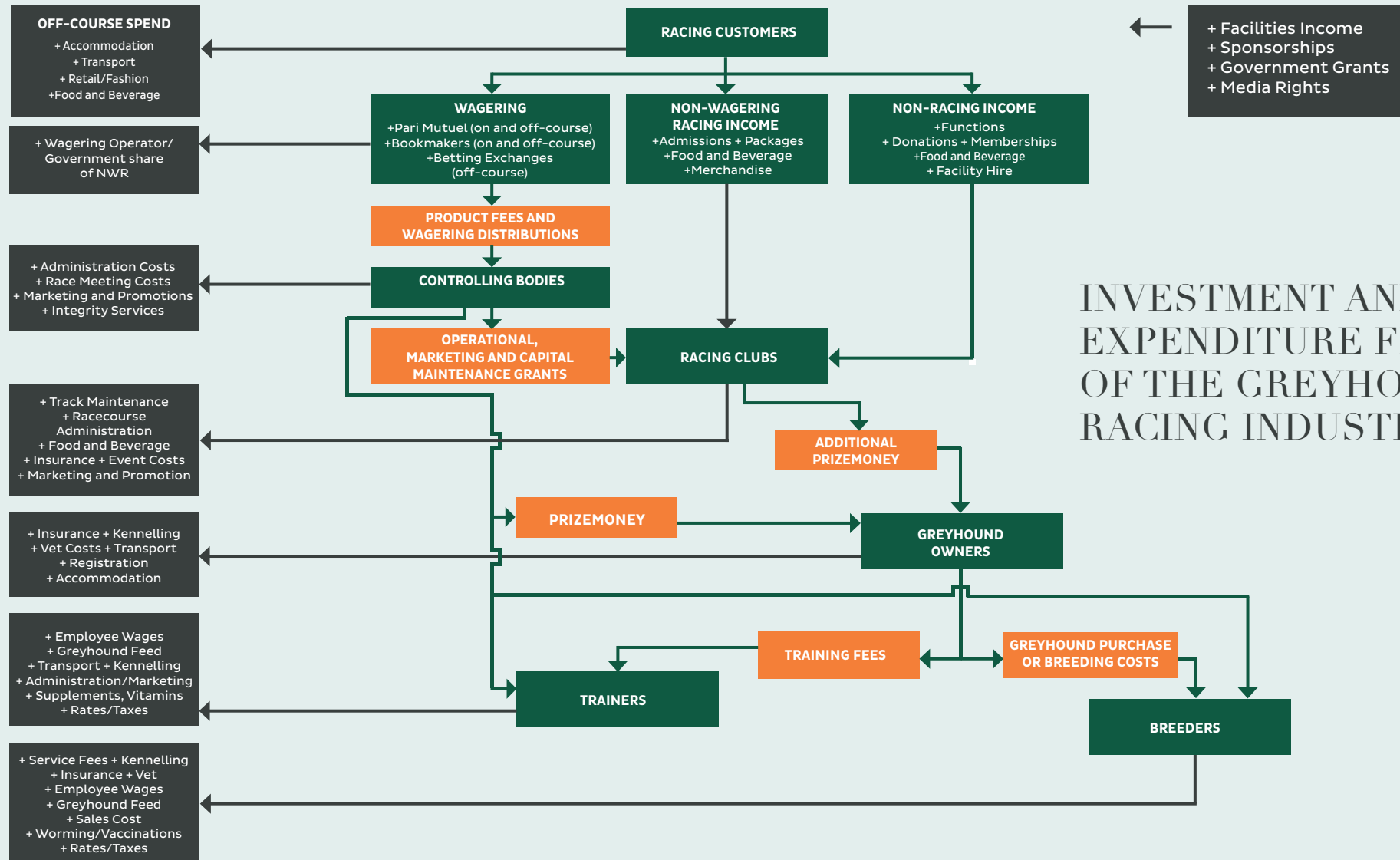
This report illustrates the impacts generated by greyhound racing in the Australasian region. It is important to note that it constitutes an analysis based on a mixture of actual data (provided by controlling bodies and clubs) and estimates.

Some data, such as the inputs into the cost of breeding and training greyhounds, have been estimated based on prior assessments undertaken for numerous jurisdictions.

All modelling has been undertaken to deliver the best possible approximation of the size and scope of the greyhound racing industry in Australasia.

EXTERNAL EXPENDITURE ←

← **INTERNAL INVESTMENTS**



INVESTMENT AND EXPENDITURE FLOW OF THE GREYHOUND RACING INDUSTRY



GREYHOUND RACING IN THE AUSTRALASIAN REGION

Greyhound Racing in Australia and New Zealand is significant in size and scale. Controlling bodies, within each country, state and region are generally charged with the responsibility of running their industry whilst racing clubs manage the day to day operation of the racing activities. There are 62 greyhound racing clubs across the region.

In 2022/23, there were 4,649 race meetings held across Australasia, hosting more than 52,400 races. On average there are approximately 13 race meetings held through the region on any given day. The racing program, in 2022/23, provided

an opportunity for greyhounds to compete for approximately AUD\$223.1 million in prizemoney.

Greyhound racing jurisdictions and racing clubs are charged with the responsibility of promoting greyhound racing. Some of these initiatives include the promotion of greyhounds as pets, marketing feature racing events and celebrating participants through a range of awards ceremonies.

KEY RACING STATISTICS



RACING CLUBS

62



RACES

52,490



RACE MEETINGS

4,649



ATTENDANCES

619,127





KEY RACING STATISTICS



**VALUE ADDED
CONTRIBUTION TO THE
ECONOMY**

**AUD
\$2.60
BILLION**



**FTE JOBS SUPPORTED
BY RACING INDUSTRY
ACTIVITY**

15,748



**HOUSEHOLD
INCOME GENERATED**

**AUD \$1.41
BILLION**

Greyhound racing generates significant economic and social impacts. From a social perspective, greyhound racing plays an important role in community building and inclusiveness, particularly in terms of participants in the industry. In many places, greyhound racing is one of the oldest leisure pursuits whilst in regional areas, club infrastructure is often an important community asset for more than just the racing industry. Additionally, controlling bodies and racing clubs actively contribute to specific causes through their community and philanthropic initiatives.

Economically, greyhound racing is a significant contributor to the economy (both in terms of contribution to GDP and also generation of employment opportunities).

Greyhound Racing in Australasia is responsible for generating close to AUD\$2.60 billion in value added contribution to the economy. In all jurisdictions, this economic impact is most heavily driven by wagering revenues. However, the investment by the breeding and training sector is also a driver of direct and indirect impacts.

This economic activity is responsible for

supporting 15,748 jobs across region. The actual number of jobs would be higher than this given the high ratio of part-time and casual roles that are supported. A sizeable part of this impact occurs in areas where individuals with particular skills are employed to pursue their interests in greyhound racing animal welfare through the various greyhound adoption programs supported by the industry - skills unique to the industry.

The employment supported by the greyhound racing industry is responsible for generating nearly AUD\$1.41 billion in household income.

ECONOMIC CONTRIBUTION BY JURISDICTION (\$AUD)



DIRECT SPENDING BY THE GREYHOUND RACING INDUSTRY AUSTRALASIA

In 2022/23, greyhound racing throughout the Australasian region generated AUD\$1,921.9 million in direct expenditure. Spending generated by racing participants, businesses and customers as a result of the racing industry included¹:

- + Spending by owners and trainers on the preparation of greyhounds for racing
- + Spending by breeders on the production of pups, maintenance of sires and breeding females
- + Revenues generated by controlling bodies, (primarily from wagering) and other business activities including media, publications and retail
- + Revenue generated by racing clubs (excluding any distributions received from controlling bodies). Some racing clubs also have additional non-racing revenue streams such as hospitality and gaming
- + Revenues generated for wagering service providers and for the Government as a result of betting on greyhound racing
- + Spending by racegoers, off-course, as a result of their engagement with racing (i.e. tourism related expenditure including travel and accommodation)

The breeding sector, through its activities in producing pups for racing, is directly responsible for creating an expenditure impact of more than AUD\$70.3 million.

The training sector, through its activities in preparing greyhounds for racing, is responsible for creating an expenditure impact of AUD\$173.1 million. The calculation of expenditure on the preparation of greyhounds takes into account the various training and non-training related expenditures incurred by owners and trainers.

Racing and wagering activities generate more than AUD\$1,680.3 million in expenditure. Overall, net wagering revenues (including product fee payments to the industry) make up the largest proportion of this spending whilst also being the largest funding source for the industry. The operations of wagering service providers, to the extent that they are funded by revenues generated through greyhound racing, are also significant contributors to the economic impact generated.

Racing and wagering are closely entwined as funding sources and beneficiaries of the racing product. Without greyhound racing, the wagering industry would be much smaller in size. However, without wagering providing an important source of funding, the racing industry would contract significantly.

SOURCES OF FINAL EXPENDITURE



BREEDING - PRODUCTION OF PUPS FOR RACING

AUD\$0.07 BILLION



TRAINING - PREPARATION OF GREYHOUNDS FOR RACING

AUD\$0.17 BILLION

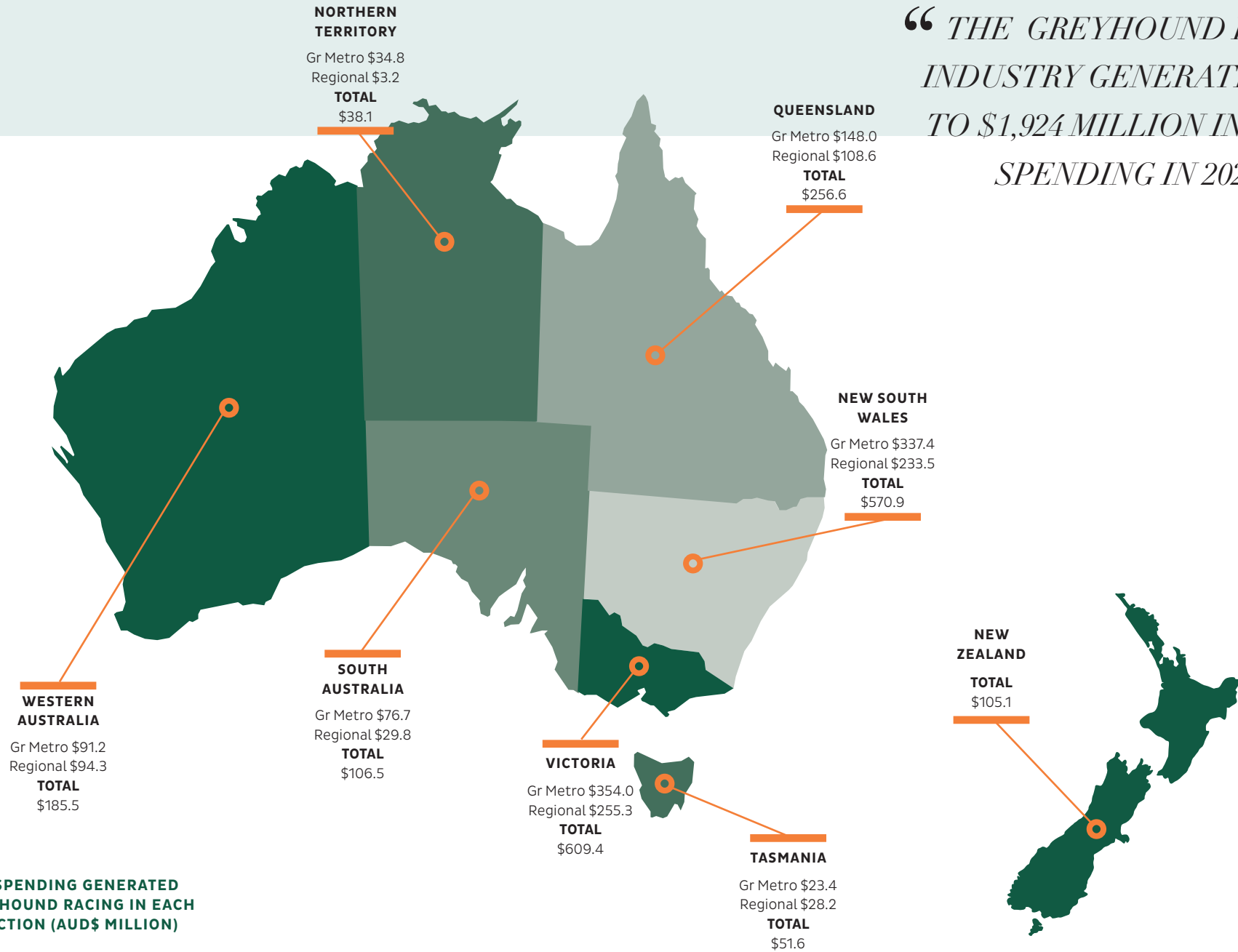


RACING AND WAGERING ACTIVITIES

AUD\$1.68 BILLION

¹ Direct expenditure is defined as expenditure associated with producing foals and pups (breeding & rearing), preparing racing greyhounds (training), racing customer expenditure and expenditure by CBs and racing clubs on operating the industry. Direct expenditure is counted at the point at which it leaves the racing industry and reaches the broader economy.

“ *THE GREYHOUND RACING INDUSTRY GENERATED NEAR TO \$1,924 MILLION IN DIRECT SPENDING IN 2022/23* ”



DIRECT SPENDING GENERATED BY GREYHOUND RACING IN EACH JURISDICTION (AUD\$ MILLION)

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

ECONOMIC CONTRIBUTION OF THE GREYHOUND RACING INDUSTRY

The expenditure generated by the greyhound racing industry leads to economic impacts which benefit the broader economy.

The greyhound racing industry is responsible for generating a direct and first round value added impact of AUD\$938.8 million. This comprises expenditures by the racing industry as well as the wages, salaries and gross operating surplus of the businesses that supply goods and services directly to the racing industry.

In addition, there are induced value added impacts derived as a result of the racing industry activity. These induced value added impacts include production based impacts (i.e. the chain of activities when retailers transact with wholesalers, who in turn transact with manufacturers and raw material providers) and consumption impacts (e.g. when workers spend their wages and salaries earned as a result of racing industry activity).

When the flow-on (induced value-added) impacts of this created demand are also considered, the total value added impact rises to AUD\$2,598.2 million¹.

Generally, the level of economic activity will not always proportionally follow the origin of expenditures. Regions will have differing capacities of meeting the created demand, meaning that some will have higher import penetrations than others.

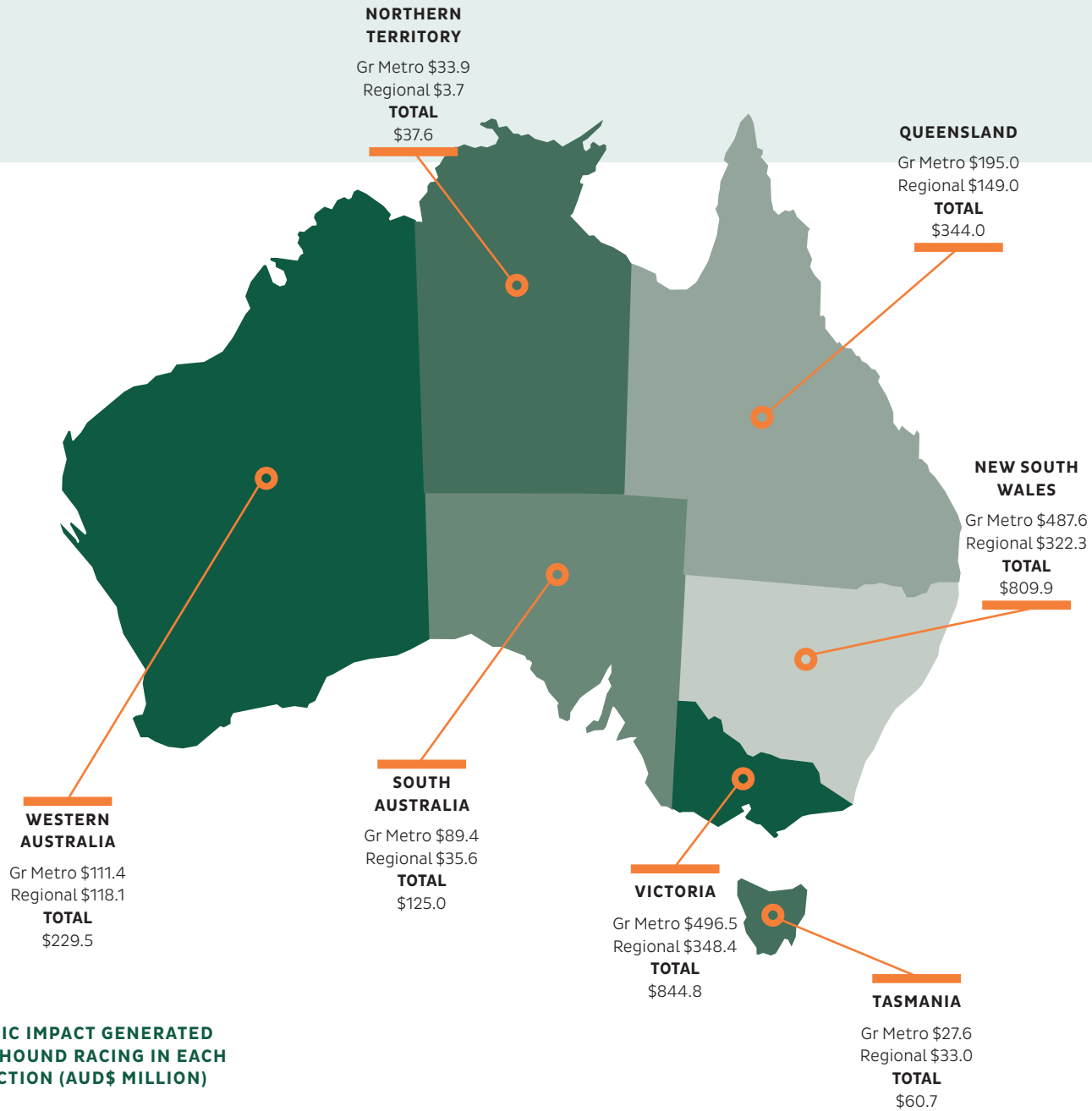
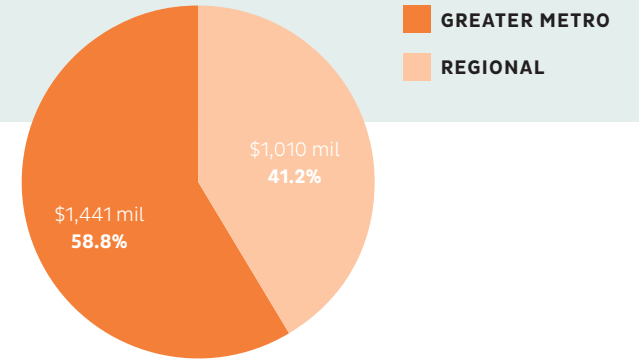
ECONOMIC IMPACTS GENERATED



“ IN 2022/23, THE GREYHOUND RACING INDUSTRY IN AUSTRALASIA CONTRIBUTED AUD\$2.60 BILLION TO THE ECONOMIES IN AUSTRALASIA ”

¹ Value added contribution is defined as the value of sales less the value of inputs used in production, i.e. it is equal to the income (wages, salaries and profits) generated in production

ECONOMIC CONTRIBUTION BY REGION IN AUSTRALIA (\$AUD)



ECONOMIC IMPACT GENERATED BY GREYHOUND RACING IN EACH JURISDICTION (AUD\$ MILLION)

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

GAP SA CELEBRATES ITS 25TH BIRTHDAY WITH ADOPTION DAY

Greyhounds as Pets (GAP SA) commemorated its 25th Birthday with an adoption day. The event led to 24 greyhounds being adopted and finding new homes. The occasion was made even more special by a generous donation from Greyhound Racing SA (GRSA) of \$69,130 to the Little Heroes Foundation. This contribution directly supports initiatives to ensure the physical and mental well-being of children in South Australia and ensure they have access to the best care possible.

The team at GRSA expressed immense satisfaction with the event's outcome, emphasizing the organization's unwavering dedication to enhancing children's health.

The longstanding partnership between GRSA and Little Heroes Foundation has been instrumental in providing crucial funding for youth mental health programs and aiding in the recruitment of a cancer research nurse at the Australian Bragg Centre for Proton Therapy and Research.

Chris McDermott, the Chief Executive of Little Heroes Foundation, extended deep appreciation for the ongoing partnership between Greyhounds as Pets and Greyhound Racing South Australia, recognising the profound impact of their contributions on the lives of children and families in need.

The 25th Birthday Adoption Day festivities also included a fancy dress competition for greyhounds, with numerous families dressing up their beloved pets and making use of the photo booth. Eventgoers also made the most of pop-ups from Pups Kitchen and Greyhound Blankets by Becc, taking home yummy treats and cozy presents for their furry friends. The event's success not only marked a milestone for GAP SA but also underscored the positive influence of collaborative efforts in supporting both animal welfare and charitable causes.



ROLES OCCUPIED IN GREYHOUND RACING

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

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

For many of those involved in greyhound racing, the industry provides an opportunity to seek gainful employment of their specific skillset where they may find it difficult otherwise. This is especially true in relation to the trainers, breeders, attendants and particularly for supply businesses for whom greyhound racing provides the market for which to sell their goods or services.

Overall, there are close to 34,200 roles occupied by licensed participants, employees and volunteers who are directly involved in the greyhound racing industry in Australasia. The key participants in the racing industry are outlined opposite:

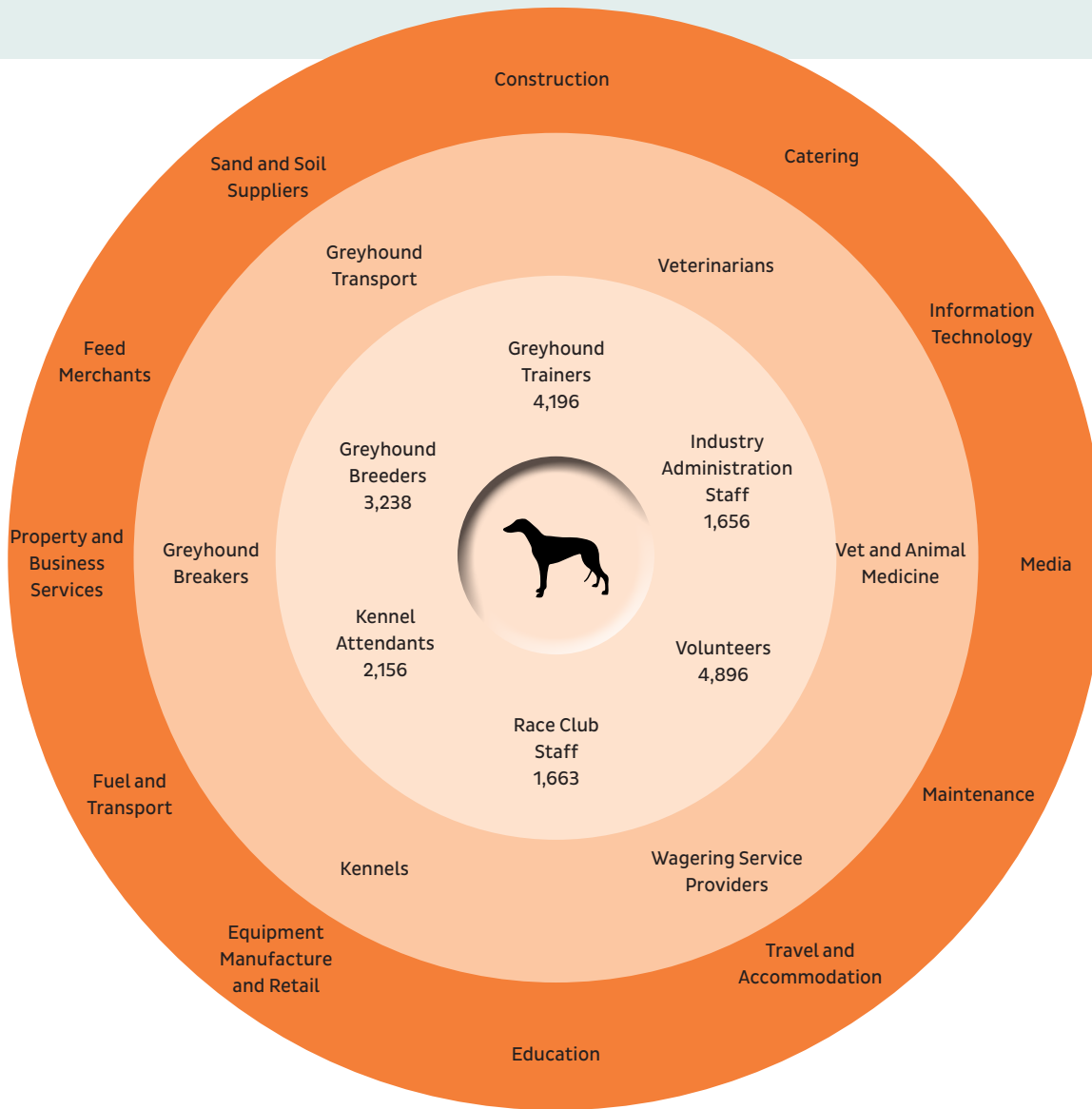
“ *IN 2022/23, THERE WERE CLOSE TO 34,200 ROLES OCCUPIED IN THE GREYHOUND RACING INDUSTRY - MORE THAN 50% OF WHOM WERE IN REGIONAL AREAS* ”

PARTICIPANT	ROLES	NUMBER
Breeders & Breeder Staff	+ Own and maintain sires and/or breeding females + Responsible for producing the litters that provide the population of racing greyhounds	3,238
Trainers	+ Tasked with preparing greyhounds so that they are ready for racing	4,196
Owners	+ Purchase greyhounds (from breeders, trainers and/or other owners) for racing + Engage trainers to prepare their greyhounds for racing	16,394
Kennel Attendants	+ Licensed support staff who provide care of greyhounds during race meetings	2,156
Race Club Staff	+ Full time, part time and casual employees of racing clubs + Includes raceday and non-raceday employees	1,663
Industry & Controlling Bodies	+ Employees of controlling bodies + Includes wagering staff in jurisdictions where wagering is administered by the controlling body	1,656
Volunteers	+ Racing club and raceday volunteers who assist with the delivery of race meetings + Volunteers who assist trainers or breeders with their operations	4,896
TOTAL		34,198

Note: There is some level of duplication in some of the participation categories as a participant in Greyhound Racing can occupy numerous roles in the industry. For example a breeder can also be a trainer and an owner.

*Some totals may not add due to rounding

**RACING INDUSTRY
SUPPLIER NETWORK**



EMPLOYMENT GENERATED BY THE GREYHOUND RACING INDUSTRY

JOBS SUPPORTED

In 2022/23, the demand generated by the greyhound racing industry in Australasia was responsible for sustaining 15,748 full time equivalent (FTE) jobs. The impact of this created demand generates both direct and induced employment impacts as outlined below: -

The demand generated by the greyhound racing industry is responsible for directly supporting more than 6,507 FTE jobs. This

employment impact is tied to a functioning and active racing industry – with growth or decline in racing activity likely to have a direct impact on employment levels amongst this population.

When the flow-on (induced) impacts of this created demand are also considered, total employment rises to 15,748. Employment in this sector includes both production induced effects (i.e. employment opportunities in the supply chain of production) as well as the

jobs linked to consumption induced effects (when workers spend their wages and salaries – earned as a result of racing industry activity – back into the economy).

HOUSEHOLD INCOME

Greyhound racing generates extensive employment and therefore significant household income. The jobs that are directly sustained by greyhound racing created demand resulting in more than AUD\$598.2 million in wages and salaries. This represents

the household incomes for those employed directly by the greyhound racing industry, or by those businesses who supply goods and services directly to the industry. Additionally, those employed as a result of the induced demand created are beneficiaries of more than AUD\$815.8 million in household income.

Therefore, the total household income generated, as a result of greyhound racing industry created demand, amounts to \$1,414.0 million.¹

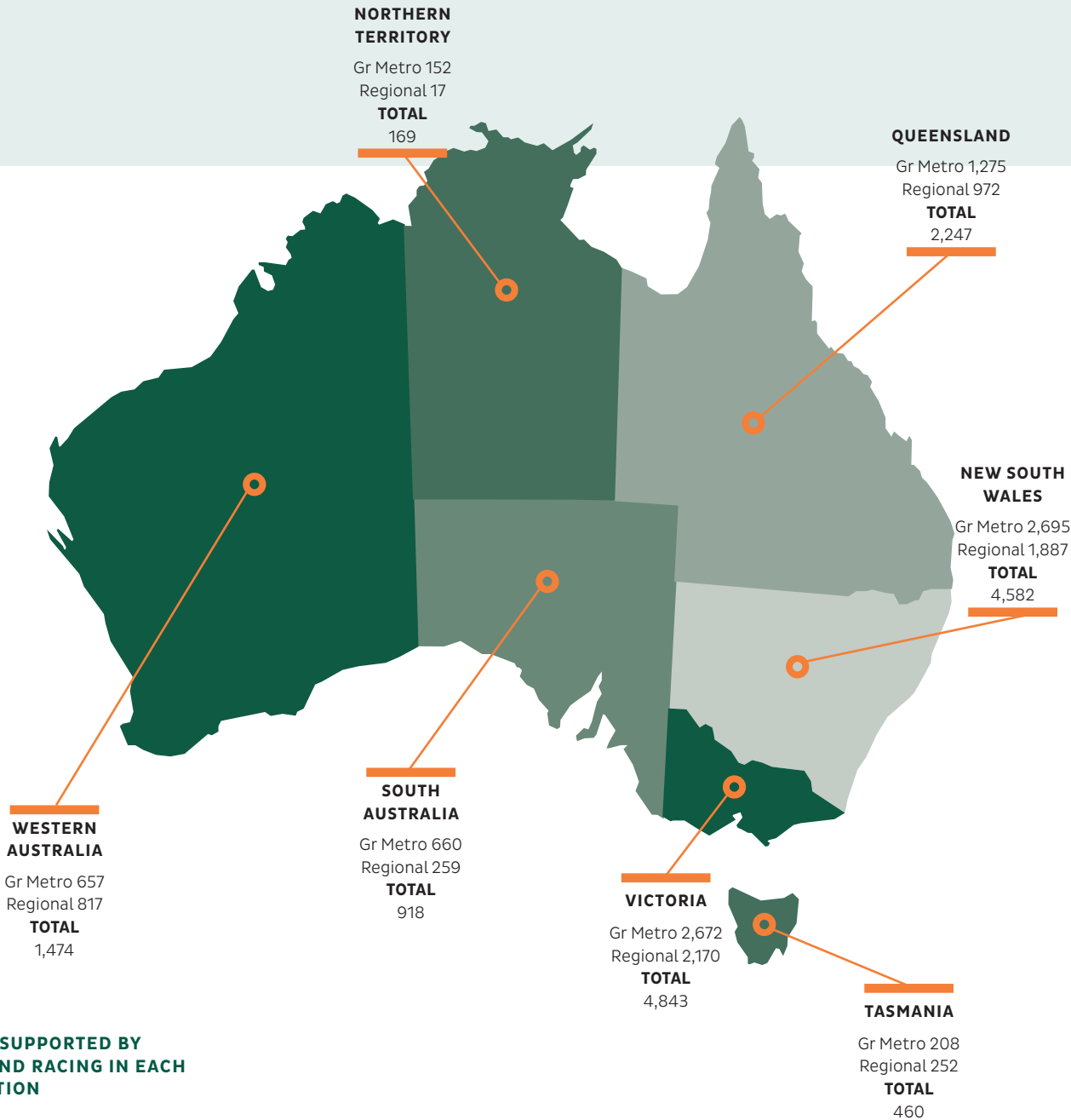
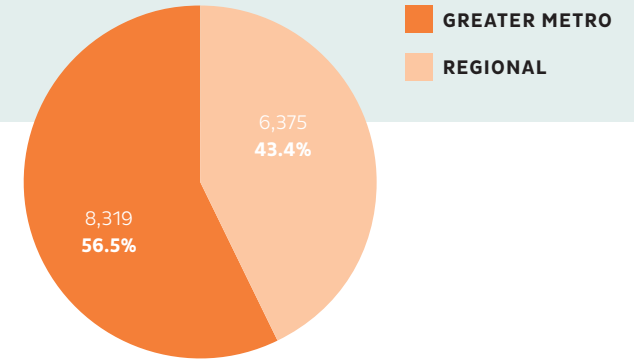
FTE EMPLOYMENT SUSTAINED BY RACING



“ *IN 2022/23, GREYHOUND RACING WAS RESPONSIBLE FOR SUPPORTING CLOSE TO 15,800 JOBS - 6,500 OF WHICH WERE DIRECTLY INVOLVED IN THE RACING INDUSTRY* ”

¹ Household Income is defined as being wages and salaries (before tax) earned from employment generated by the greyhound racing industry

TOTAL FULL TIME JOBS SUPPORTED BY THE GREYHOUND RACING INDUSTRY IN AUSTRALIA



FTE JOBS SUPPORTED BY GREYHOUND RACING IN EACH JURISDICTION

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

RETIRED GREYHOUNDS, RETIRED POLICE SUPPORTING EACH OTHER

Policing is a highly demanding job both physically and mentally so when the Police Association of NSW (PANSW) was considering welfare initiatives to support its members it was not a difficult decision to partner with the Greyhounds As Pets program conducted by Greyhounds NSW.

Former police officer, Megan Parker, was an early recipient of the initiative when she was paired with the lovable Frankie. Megan had retired from the police force due to injury and suffered post traumatic stress disorder (PTSD) for over a decade struggling to find treatment that suited her but the arrival of Frankie has lifted the spirits and energy of her entire family with his love, affection, companionship and ability to make everyone laugh.

The program is open to both current and retired police and within 24 hours of announcing the partnership in December 2022 more than a dozen applications had been received. PANSW members receive priority access to the adoption program which includes personalized matching service to ensure suitable Greyhounds for members and their families, support for pre adoption vet services such as vaccinations, six months of costs for pet insurance and food and ongoing support and advice.

Greyhounds As Pets found new homes for over 2,000 retired racing dogs in 2022 and with the success of the partnership with PANSW will aim to extend it to other first responder including paramedics and fire fighters.



REGISTERED BREEDERS

	GREATER METRO	REGIONAL	TOTAL
New South Wales	304	610	914
Northern Territory	-	-	-
Queensland	120	62	182
South Australia	64	54	118
Tasmania	32	58	90
Victoria	122	218	340
Western Australia	46	7	53
AUSTRALIA	648	1,009	1,697
New Zealand			37
TOTAL			1,734

FEMALES COVERED

	GREATER METRO	REGIONAL	TOTAL
New South Wales	174	367	540
Northern Territory	-	-	-
Queensland	116	52	168
South Australia	28	40	68
Tasmania	10	24	34
Victoria	207	372	579
Western Australia	62	10	72
AUSTRALIA	598	863	1,461
New Zealand			73
TOTAL			1,534

BREEDERS SUPPORT STAFF (INCL. VOLUNTEERS)

	GREATER METRO	REGIONAL	TOTAL
New South Wales	459	921	1,380
Northern Territory	-	-	-
Queensland	374	192	567
South Australia	96	82	178
Tasmania	48	86	134
Victoria	177	316	493
Western Australia	73	12	85
AUSTRALIA	1,227	1,609	2,836
New Zealand			59
TOTAL			2,895

PUPS WHELPED AND REGISTERED

	GREATER METRO	REGIONAL	TOTAL
New South Wales	1,159	2,514	3,673
Northern Territory	-	-	-
Queensland	796	392	1,188
South Australia	199	277	476
Tasmania	63	142	205
Victoria	924	3,023	3,947
Western Australia	470	53	523
AUSTRALIA	3,611	6,401	10,012
New Zealand			471
TOTAL			10,483

*Some totals may not add due to rounding

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

BREEDING ACTIVITY

The breeding sector provides the vitally important replenishment of racing animals to the racing industry.

Across the region, there are more than 1,700 registered breeders who are involved in this process. Breeders are supported by more than 1,500 employees (of a full-time, part-time or casual nature) and further supported by almost 1,400 individuals who volunteer their time and efforts to assist greyhound breeders.

In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of females, sires and pups in the following areas:

- + feed
- + veterinarian, worming and flea treatment
- + breeding costs (i.e. artificial insemination)
- + travel and transport
- + infrastructure and maintenance
- + bedding
- + cleaning
- + rearing
- + pre-education
- + breaking-in

In some instances, breeders incur all of these expenses themselves, whilst in other situations, breeders may send their greyhounds to professional service providers (such as those who provide whelping or breaking-in services).

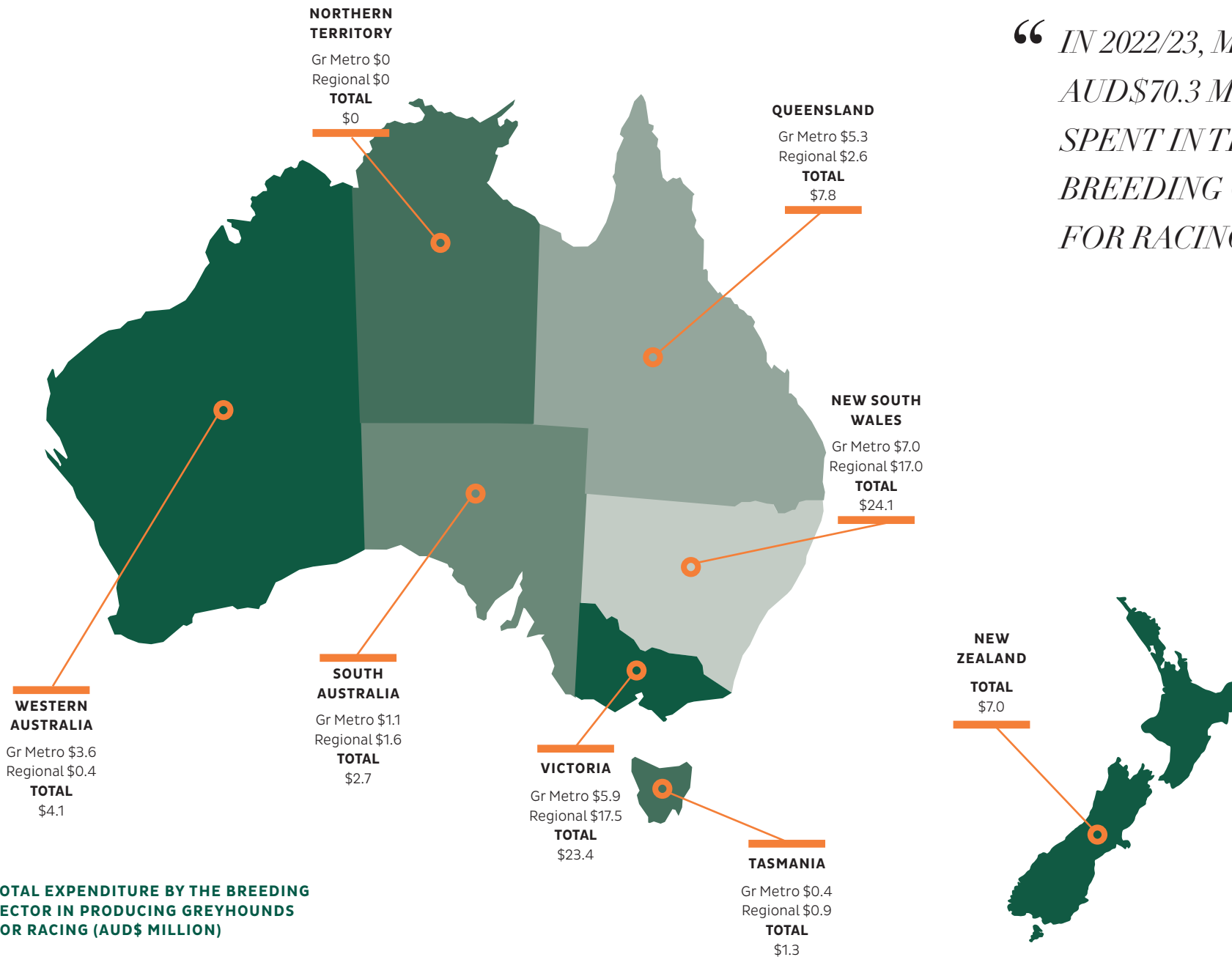
In total, breeders in the greyhound racing industry spent more than AUD\$70.3 million on the process of producing pups and caring for females in 2022/23. The expenditure figures outlined in this section have been derived from a combination of industry level consultation, and primary research amongst greyhound breeders in a number of racing jurisdictions across the region. From an industry perspective, it is important to acknowledge that breeders may not breed with their female in a regular and consistent manner. Despite this, there is still the ongoing care and maintenance of the female that requires investment.



KEY BREEDING STATISTICS



“ *IN 2022/23, MORE THAN AUD\$70.3 MILLION WAS SPENT IN THE PROCESS OF BREEDING GREYHOUNDS FOR RACING* ”



TOTAL EXPENDITURE BY THE BREEDING SECTOR IN PRODUCING GREYHOUNDS FOR RACING (AUD\$ MILLION)

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.





GREYHOUND CLUBS SUPPORTING THEIR COMMUNITY

Greyhound racing clubs play an important role in their communities. The extent of their positive impacts is particularly visible in terms of supporting charitable organisations, engaging volunteers and building community partnerships.

A survey of greyhound racing clubs (completed by 45 of the 62 clubs) highlighted the following positive outcomes demonstrated by clubs:

- + more than 200 community organisations or charities are assisted and supported by racing clubs
- + more than 100 community organisations share racing club facilities and resources
- + Greyhound Racing clubs engage close to 200 volunteers and are home to more than 8,800 members

When asked about the community impact of their clubs, the top three attributes Greyhound clubs stated was to firstly bring together family and friends for a social experience, secondly support businesses in the local economy and thirdly connect people with both similar and diverse backgrounds.

Greyhound racing is often a family affair with feature events often having face painting, family friendly events as well as jumping castles and other amusements on hand to ensure there's something for everyone at the track.

Education and training are important to many clubs in Australasia with 80 staff currently participating in further education, career development or training programs. More than one third of clubs offering places for work experience students and 16% having current partnerships with primary, secondary, trade or tertiary institutions in their region.

There are a wide number of initiatives to improve the raceday experience for attendees, participants, staff, partners and the broader community which includes:

- + the provision of healthy choice options for both racing participants and customers
- + Customers are not able to bring alcohol on course when attending the races
- + All clubs have policies and practices in place to encourage the responsible consumption of alcohol
- + Clubs have trained on-site medical staff available to assist participants, volunteers, staff and customers if required

Further there are a number of programs in place to save and re-use water and minimise energy usage through solar panels and LED lighting throughout the venues.

More than two thirds of Greyhound clubs in the region are actively promoting the history and heritage of their clubs through memorabilia displays in venue, stories in local media or detailed histories on club websites and features on social media. Many clubs honor their history through feature race days or races on their annual calendar of events.

REGISTERED OWNERS (INCL. SYNDICATE MEMBERS)

	GREATER METRO	REGIONAL	TOTAL
New South Wales	1,456	2,286	3,742
Northern Territory	47	2	49
Queensland	3,042	2,244	5,286
South Australia	699	353	1,052
Tasmania	126	136	262
Victoria	2,531	2,077	4,608
Western Australia	544	113	657
AUSTRALIA	8,446	7,189	15,656
New Zealand			738
TOTAL			16,394

REGISTERED TRAINERS

	GREATER METRO	REGIONAL	TOTAL
New South Wales	517	1,162	1,679
Northern Territory	15	0	15
Queensland	398	250	648
South Australia	124	96	220
Tasmania	63	95	158
Victoria	416	812	1,228
Western Australia	100	17	117
AUSTRALIA	1,633	2,430	4,064
New Zealand			131
TOTAL			4,195

REGISTERED KENNEL ATTENDANTS

	GREATER METRO	REGIONAL	TOTAL
New South Wales	283	474	757
Northern Territory	39	3	42
Queensland	224	157	381
South Australia	71	55	126
Tasmania	43	65	107
Victoria	187	365	553
Western Australia	102	9	111
AUSTRALIA	949	1,128	2,077
New Zealand			79
TOTAL			2,156

GREYHOUNDS IN TRAINING

	GREATER METRO	REGIONAL	TOTAL
New South Wales	2,147	5,211	7,358
Northern Territory	209	1	210
Queensland	2,444	1,691	4,134
South Australia	991	941	1,932
Tasmania	323	536	859
Victoria	1,914	4,974	6,889
Western Australia	1,729	222	1,951
AUSTRALIA	9,757	13,576	23,334
New Zealand			1,648
TOTAL			24,982

*Some totals may not add due to rounding

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

OWNERSHIP AND TRAINING

In greyhound racing, more than in any other code of racing, the separation of roles between a greyhound trainer and owner is less defined. Whilst the owner engages the trainer to provide their skills in preparing the greyhound for racing, in most cases, trainers choose to forgo a traditional training fee in exchange for the retention of a percentage of any prizemoney that is won.

There are more than 16,000 individuals with an ownership interest in the greyhound racing industry. Some of these individuals own greyhounds in their own right, whilst others own greyhounds as part of a syndicate.

During the 2022/23 racing season, greyhound racing in Australasia, provided owners and trainers with the opportunity to compete for more than AUD\$223.1 million of available prizemoney.

Previous research in a number of jurisdictions has shown that most greyhound owners do not enter the sport with a vision of returning, or profiting, on their investment. In racing circles, this is often referred to as the 'acceptable loss'. The fact that an 'acceptable loss' concept exists within the industry, is mostly a recognition that ownership is often driven by a combination of business and leisure motivations. This is not to devalue the importance of ensuring that participants have the chance to operate profitably, however it is a reflection of the role that passion and love for the sport play in the decision to be involved as a participant.

Trainers play an integral role in the racing 'service' industry. Training services generally incorporate pre and race training, trialling and raceday management of greyhounds.

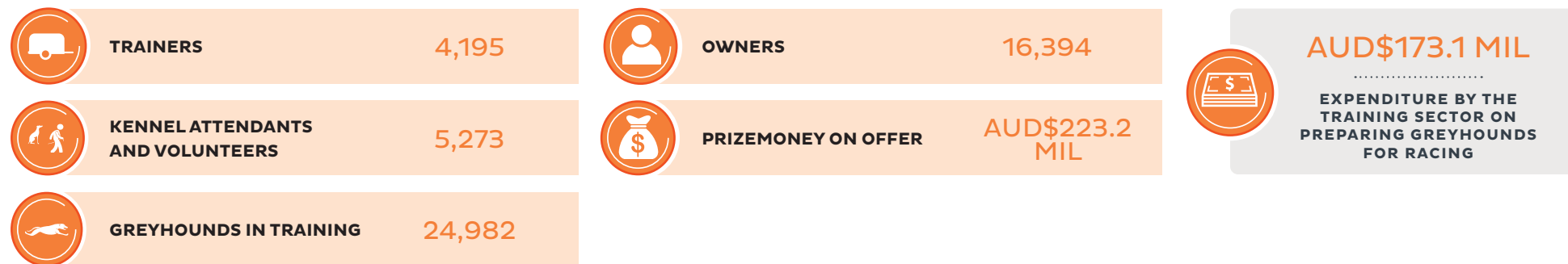
During the 2022/23 racing season, there were nearly 4,200 greyhound trainers who prepared greyhounds to race. These trainers also employed the assistance of nearly 2,200 kennel employees and a further 3,100 individuals who volunteered their time and efforts to assist. For many of these people, the employment/involvement opportunities offered by trainers utilise skills that are not easily transferrable to other employment sectors.

In 2022/23, greyhound owners and trainers spent nearly \$173.1 million on the preparation of their greyhounds for racing. The calculation of expenditure on the preparation of greyhounds takes into account the various training and non-training related expenditures incurred by owners and trainers.

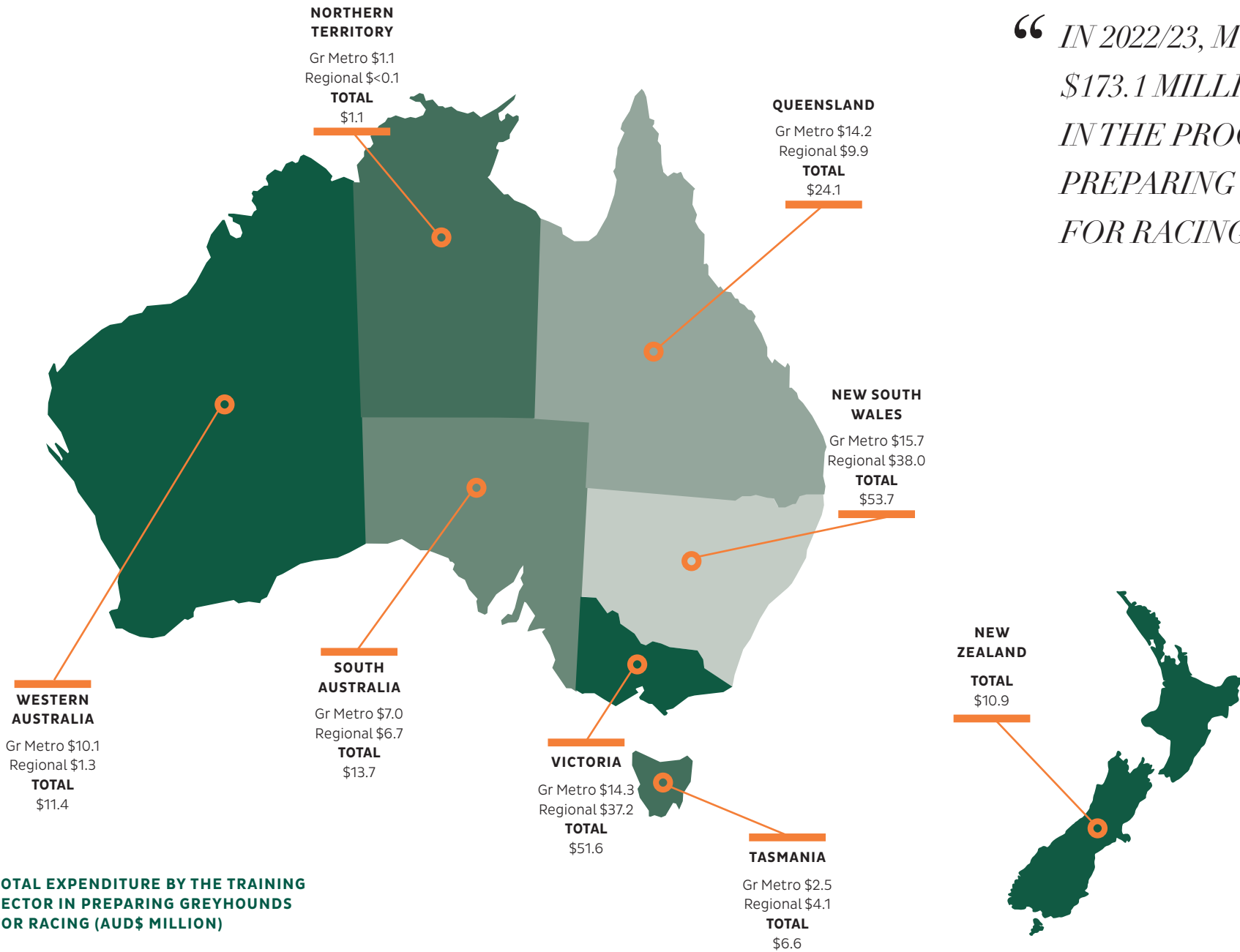
The development of expenditure profiles within each region is based primarily upon the number of greyhounds in training. It also takes into consideration the differing training costs at various stages of the lifecycle of the greyhound. For instance, expenditure in the pre-training stage of the greyhound is different to expenditure on an established racing greyhound.

The expenditure figures outlined in this section have been derived from a combination of industry level consultation and surveying of a sample of owners and trainers in various jurisdictions over the last three years. The analysis of the expenditure incurred in the preparation of greyhounds includes items such as training fees, insurance, vitamins and supplements, veterinarian fees, gear hire/ purchase and racing/ trialling fees, amongst others.

KEY TRAINING STATISTICS



“ *IN 2022/23, MORE THAN \$173.1 MILLION WAS SPENT IN THE PROCESS OF PREPARING GREYHOUNDS FOR RACING* ”



TOTAL EXPENDITURE BY THE TRAINING SECTOR IN PREPARING GREYHOUNDS FOR RACING (AUD\$ MILLION)

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.



RILEY EVANS EXPERIENCES RACING IN AUSTRALIA

Riley Evans is a greyhound trainer out of Canterbury and was recognised by Greyhound Racing New Zealand (GRNS) in their monthly awards. He was quoted saying how he constantly challenges himself to further upskill his knowledge of the greyhound industry, a statement which was on display during a recent trip to Australia.

Riley was taken under the tutelage of Australian Robert Britton, a Greyhound trainer from Victoria and with whom he spent a week learning from earlier this year. Following his trip to Australia, Riley stated that “It was a life-changing experience in terms of greyhound systems. It was really good meeting a number of top trainers,” and that “To learn from someone of Robbie’s experience and knowledge is irreplaceable.”

Evans had used the \$5,000 grant given to him for winning the GRNZ Board Award to fund his trip to Australia and was grateful for the assistance of the GRNZ board, notably Liz Whelan and Michael Guerin for arranging his trip and sponsorship for the award.

The highlight of Riley’s trip to Australia was the opportunity to box away Britton’s son Tim’s greyhound Wheel And Go during race 1 at the Premier Australian Cup at The Meadows. A race in which Wheel And Go would end up winning following a poor start. “It was an amazing experience on such a big night of racing. I wouldn’t mind taking one over there if I had the right dog,” stated Evans.

Back home in New Zealand, Evans has his own winner in Goldstar Bennett, who broke the maiden 295m track record at Addington and Goldstar Carlito the winner of the Group 1 Duke of Edinburgh Silver Collar early this year at the Manukau Stadium.

The Goldstar team which consists of Riley’s parents, Dad Steve and Mother Bonnie, have pups in various stages of development and is hoping to make a major impact on the Canterbury racing scene for years to come.



RACING CLUBS

	GREATER METRO	REGIONAL	TOTAL
New South Wales	4	23	27
Northern Territory	1	-	1
Queensland	3	3	6
South Australia	3	2	5
Tasmania	1	2	3
Victoria	4	9	13
Western Australia	1	-	1
AUSTRALIA	17	39	56
New Zealand			6
TOTAL			62

RACETRACKS

	GREATER METRO	REGIONAL	TOTAL
New South Wales	5	23	28
Northern Territory	1	-	1
Queensland	3	3	6
South Australia	3	2	5
Tasmania	1	2	3
Victoria	4	9	13
Western Australia	2	1	3
AUSTRALIA	19	40	59
New Zealand			6
TOTAL			65

RACE MEETINGS

	GREATER METRO	REGIONAL	TOTAL
New South Wales	373	881	1,254
Northern Territory	77	-	77
Queensland	481	180	661
South Australia	234	202	436
Tasmania	80	80	160
Victoria	319	964	1,283
Western Australia	310	47	357
AUSTRALIA	1,874	2,354	4,228
New Zealand			421
TOTAL			4,649

RACES

	GREATER METRO	REGIONAL	TOTAL
New South Wales	4,093	9,557	13,650
Northern Territory	664	-	664
Queensland	5,451	1,991	7,442
South Australia	2,686	2,324	5,010
Tasmania	806	804	1,610
Victoria	3,727	11,340	15,067
Western Australia	3,584	543	4,127
AUSTRALIA	21,011	26,559	47,570
New Zealand			4,920
TOTAL			52,490

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

RACING AND WAGERING

There are 62 greyhound racing clubs currently operating throughout the Australasian region. The majority of these clubs all race at their own tracks although some are tenants (at another club's track) and a couple operate in a shared facility under either a dual-code or tri-code arrangement.

In 2022/23, these racing clubs were responsible for hosting 4,649 race meetings. In addition to hosting race meetings, a number of racing clubs also hold trials for the purposes of providing opportunities for greyhounds to prepare under race-like conditions.

Overall, greyhound racing clubs conduct 52,490 races across the racing season – or 143 races at approximately 13 race meetings per day. Race meetings not only provide the opportunity for participants to race their greyhounds, they also provide an important social destination for racing enthusiasts and

in many regions, are an important part of the social fabric of the community. It is estimated that greyhound race meetings in 2022/23 attracted more than 619,000 attendances (including participants).

The clubs generally provide a bar service, catering and betting facilities for these on-track patrons. Some tracks also provide additional entertainment elements such as raffles, betting information and themed entertainment nights.

There are about 12,000 individuals who hold memberships with their greyhound racing club and many more who attend weekly as part of their social calendar.

In 2022/23, racing and wagering activities were responsible for the generation of more than \$1,680.3 million in expenditure.

This expenditure is made up of the following elements:

- + racing customer spending on raceday and non-raceday racing club products
- + product fee payments made by wagering service providers to controlling bodies in each jurisdictions
- + wagering taxes paid by wagering service providers as a result of point-of-consumption turnover on greyhound racing
- + operational expenditure incurred by wagering service providers proportional to their fielding of greyhound racing wagers
- + racing customer spending off-track related to their attendance at the races
- + other non-wagering related revenues generated by controlling bodies and racing clubs.

Note: the inclusion of wagering service provider expenditure impacts is based on the operational expenditure that is funded out of wagering activity, on greyhound racing, in each State or Territory and is based on data provided by Totalisator Agency Boards (TAB'S) and select corporate bookmaker organisations in Australia.

KEY RACING STATISTICS



RACING CLUBS

62



RACE MEETINGS

4,649



RACECLUB MEMBERS

12,108



RACETRACKS

65



RACES

52,490



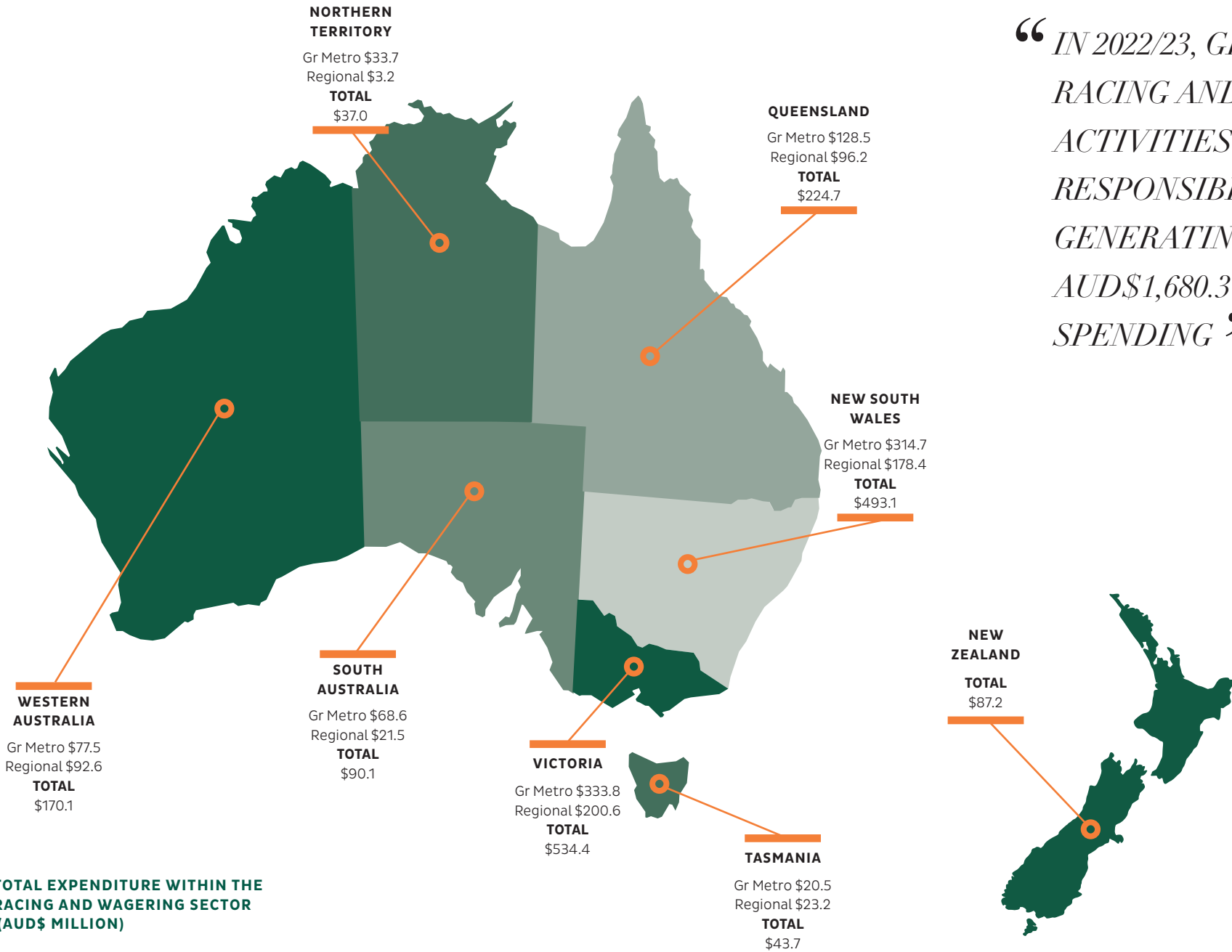
ATTENDANCES

619,127



AUD\$1.68 BIL

EXPENDITURE GENERATED BY GREYHOUND RACING AND WAGERING ACTIVITIES



“ IN 2022/23, GREYHOUND RACING AND WAGERING ACTIVITIES WERE RESPONSIBLE FOR GENERATING MORE THAN AUD\$1,680.3 MILLION IN SPENDING ”

TOTAL EXPENDITURE WITHIN THE RACING AND WAGERING SECTOR (AUD\$ MILLION)

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

MEMBERS

	GREATER METRO	REGIONAL	TOTAL
New South Wales	2,764	6,133	8,897
Northern Territory	60	-	60
Queensland	407	210	617
South Australia	296	257	553
Tasmania	90	270	360
Victoria	510	768	1,278
Western Australia	10	-	10
AUSTRALIA	4,137	7,638	11,775
New Zealand			333
TOTAL			12,108

ATTENDANCES

	GREATER METRO	REGIONAL	TOTAL
New South Wales	78,700	89,976	168,676
Northern Territory	6,100	-	6,100
Queensland	47,175	13,121	60,296
South Australia	31,917	34,323	66,240
Tasmania	15,000	13,180	28,180
Victoria	62,080	158,327	220,407
Western Australia	53,428	8,100	61,528
AUSTRALIA	294,400	317,027	611,427
New Zealand			7,700
TOTAL			619,127

Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.



SALE GREYHOUND CLUB, A CORNERSTONE OF THE COMMUNITY

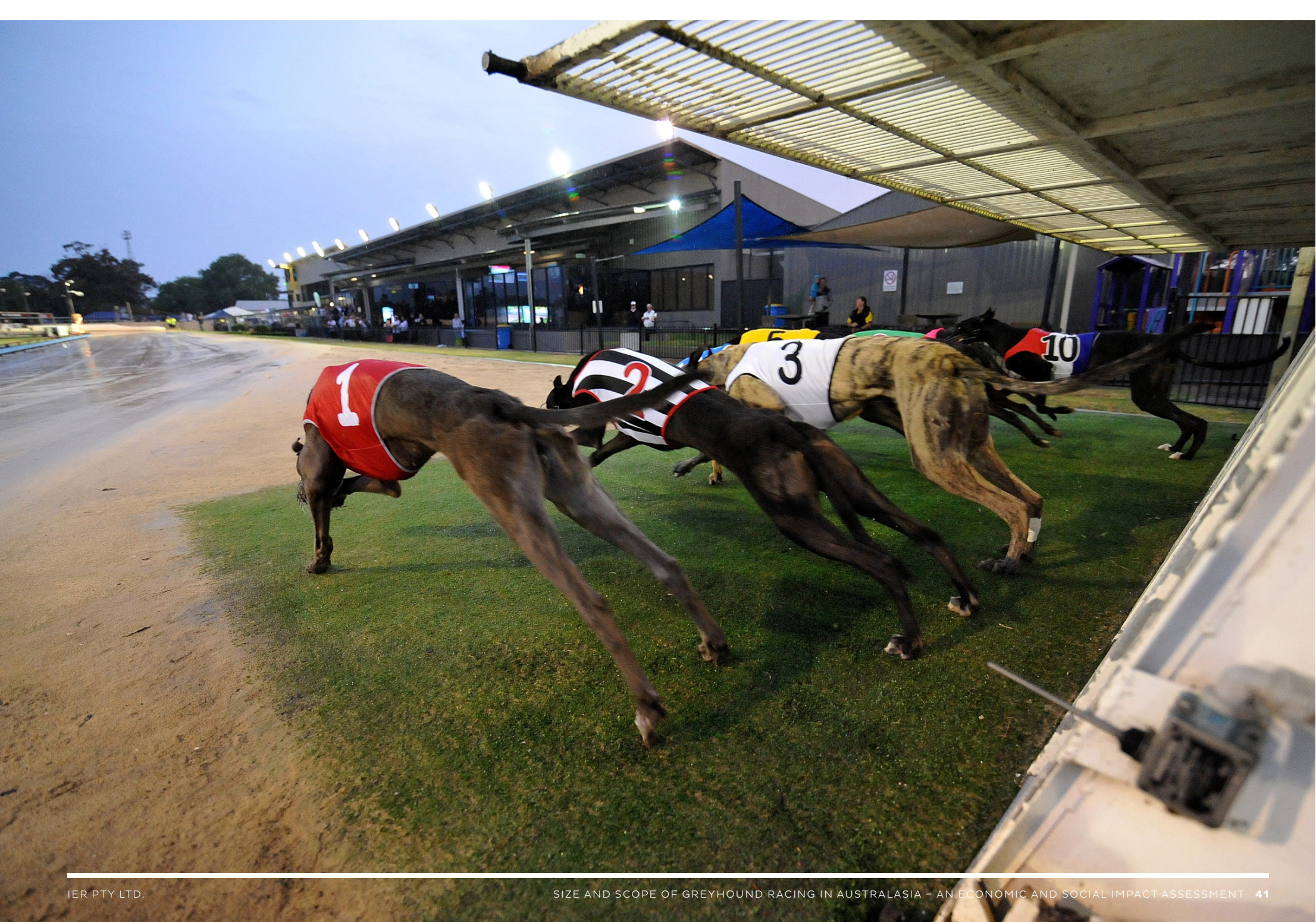
Like many racing clubs across the country, the Sale Greyhound Racing Club is a key part of the local community. With origins back to coursing club formed in 1876, the club formed as it currently stands in 1935 with the first meeting held at the Sale Showgrounds in February 1936.

There are a total of 70 full-time, part-time and casual employees at the club which, through wages alone, injects more than \$3.5 million into the local economy and is the major sponsor of several sporting clubs from the Latrobe Valley through to East Gippsland with strong relationships with local charity and not-for-profits such as Heartbeat, Rotary & Pony Clubs.

The club solely engages local vendors, suppliers and businesses across all facets of the club including the supply of food and beverage, security and even professional services such as accountants to operate the venue seven days a week which includes a bistro and function rooms.

Beyond this, the recent \$4 million upgrade to the club's racetrack was one of the first in the state of Victoria aimed at providing the highest quality racing environments possible for greyhounds, participants and patrons. Some of the elements of the racetrack that were redeveloped include a two-meter increase in track width, new transitions to all four corners, a new racing surface and upgrades to lighting, rails, fencing and irrigation.

The development was funded by the State government, Greyhound Racing Victoria and the club itself and, in keeping with the club philosophy, was completed using solely local contractors.





AUSTRALASIA

KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$2,598.2 MILLION



FTE EMPLOYMENT SUSTAINED
15,748 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$1,414.0 MILLION



ROLES OCCUPIED IN RACING
34,198 ROLES



VOLUNTEERS
4,896 INDIVIDUALS

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	62
Race Meetings	4,649
Races	52,490
Attendances	619,127
Prizemoney	AUD\$223.2 MIL

TRAINING

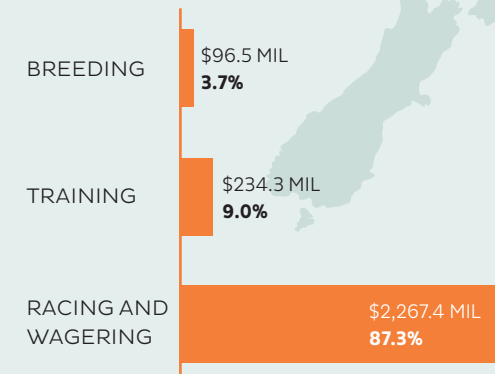
INDICATOR	VALUE
Trainers	4,196
Kennel Staff	2,156
Greyhounds in Training	24,982
Owners and Syndicate Members	16,394

BREEDING

INDICATOR	VALUE
Breeders	1,734
Breeders Staff	1,504
Females Covered	1,534
Pups Born and Whelped	10,483

“*GREYHOUND RACING IN AUSTRALASIA IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$2,598.2 MILLION*”

CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



AUSTRALIA



KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$2,451.5 MILLION



FTE EMPLOYMENT SUSTAINED
14,694 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$1,348.2 MILLION



ROLES OCCUPIED IN RACING
32,816 ROLES



VOLUNTEERS
4,657 INDIVIDUALS

“ GREYHOUND RACING IN AUSTRALIA IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$2,451.5 MILLION - 41% OF WHICH IS IN REGIONAL AREAS ”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	56
Race Meetings	4,228
Races	47,570
Attendances	611,427
Prizemoney	AUD\$208.7MIL

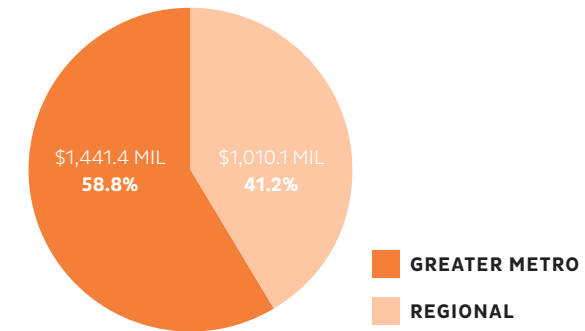
TRAINING

INDICATOR	VALUE
Trainers	4,065
Kennel Staff	2,077
Greyhounds in Training	23,334
Owners and Syndicate Members	15,656

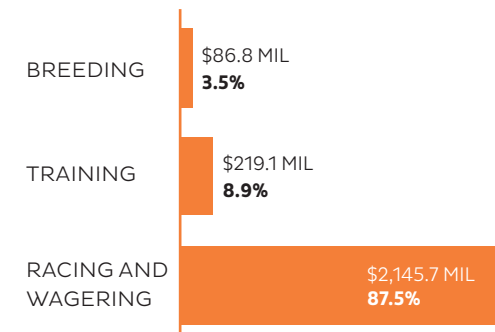
BREEDING

INDICATOR	VALUE
Breeders	1,697
Breeders Staff	1,492
Females Covered	1,461
Pups Born and Whelped	10,012

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



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NEW ZEALAND



KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$146.7 MILLION



FTE EMPLOYMENT SUSTAINED
1,054 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$65.8 MILLION



ROLES OCCUPIED IN RACING
1,382 ROLES



VOLUNTEERS
238 INDIVIDUALS

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	6
Race Meetings	421
Races	4,920
Attendances	7,700
Prizemoney	AUD\$14.5 MIL

TRAINING

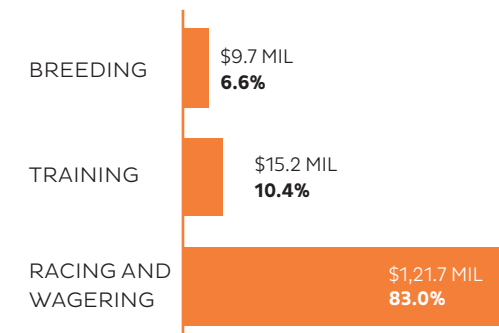
INDICATOR	VALUE
Trainers	131
Kennel Staff	79
Greyhounds in Training	1,648
Owners and Syndicate Members	738

BREEDING

INDICATOR	VALUE
Breeders	37
Breeders Staff	11
Females Covered	73
Pups Born and Whelped	471

“*GREYHOUND RACING IN NEW ZEALAND IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$146.7 MILLION*”

CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



NEW SOUTH WALES

KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$809.9 MILLION



FTE EMPLOYMENT SUSTAINED
4,582 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$434.8 MILLION



ROLES OCCUPIED IN RACING
10,848 ROLES



VOLUNTEERS
1,752 INDIVIDUALS

“GREYHOUND RACING IN NEW SOUTH WALES IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$809.9 MILLION - 40% OF WHICH IS IN REGIONAL AREAS”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	27
Race Meetings	1,254
Races	13,650
Attendances	168,676
Prizemoney	AUD\$52.6 MIL

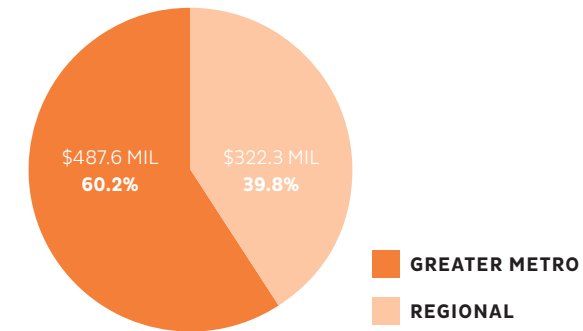
TRAINING

INDICATOR	VALUE
Trainers	1,679
Kennel Staff	757
Greyhounds in Training	7,358
Owners and Syndicate Members	3,742

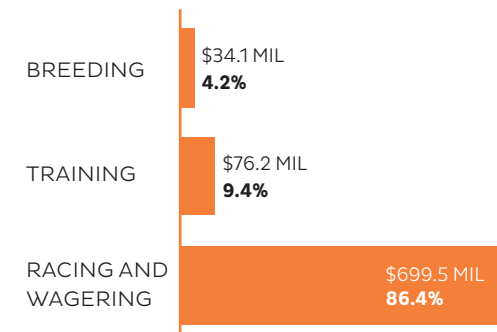
BREEDING

INDICATOR	VALUE
Breeders	914
Breeders Staff	832
Females Covered	540
Pups Born and Whelped	3,673

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



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NORTHERN TERRITORY

KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$37.6 MILLION



FTE EMPLOYMENT SUSTAINED
169 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$17.3 MILLION



ROLES OCCUPIED IN RACING
169 ROLES



VOLUNTEERS
27 INDIVIDUALS

“ *GREYHOUND RACING IN THE NORTHERN TERRITORY IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$37.6 MILLION - 90% OF WHICH IS IN DARWIN* ”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	1
Race Meetings	77
Races	664
Attendances	6,100
Prizemoney	AUD\$1.3 MIL

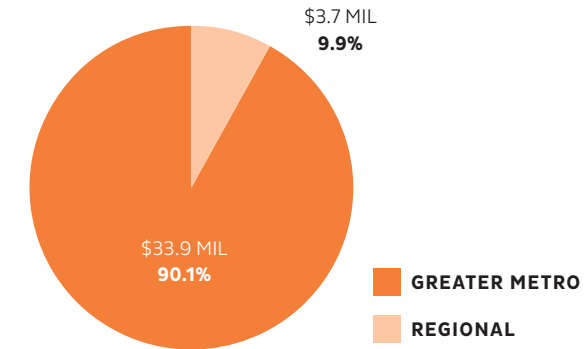
TRAINING

INDICATOR	VALUE
Trainers	15
Kennel Staff	42
Greyhounds in Training	210
Owners and Syndicate Members	49

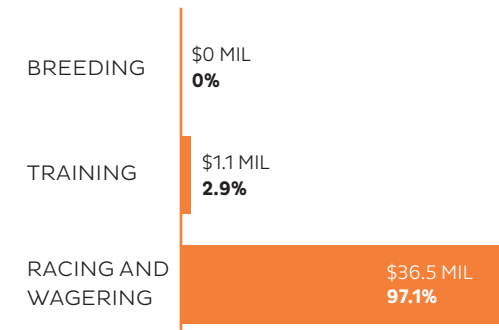
BREEDING

INDICATOR	VALUE
Breeders	-
Breeders Staff	-
Females Covered	-
Pups Born and Whelped	-

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

QUEENSLAND



KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$344.0 MILLION



FTE EMPLOYMENT SUSTAINED
2,247 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$204.3 MILLION



ROLES OCCUPIED IN RACING
8,263 ROLES



VOLUNTEERS
1,058 INDIVIDUALS

“ GREYHOUND RACING IN QUEENSLAND IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$344.0 MILLION - 57% OF WHICH IS IN METROPOLITAN AREAS ”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	6
Race Meetings	661
Races	7,442
Attendances	60,296
Prizemoney	AUD\$39.5 MIL

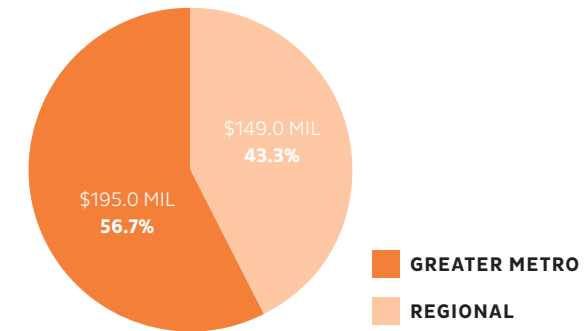
TRAINING

INDICATOR	VALUE
Trainers	648
Kennel Staff	381
Greyhounds in Training	4,134
Owners and Syndicate Members	5,286

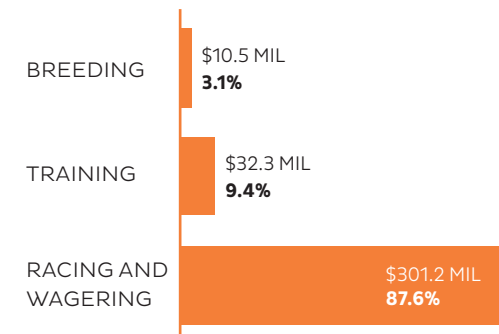
BREEDING

INDICATOR	VALUE
Breeders	182
Breeders Staff	271
Females Covered	168
Pups Born and Whelped	1,188

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

SOUTH AUSTRALIA

KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$125.0 MILLION



FTE EMPLOYMENT SUSTAINED
918 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$73.0 MILLION



ROLES OCCUPIED IN RACING
2,029 ROLES



VOLUNTEERS
240 INDIVIDUALS

“ GREYHOUND RACING IN SOUTH AUSTRALIA IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$125.0 MILLION - 72% OF WHICH IS IN METROPOLITAN AREAS ”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	5
Race Meetings	436
Races	5,010
Attendances	66,240
Prizemoney	AUD\$13.0 MIL

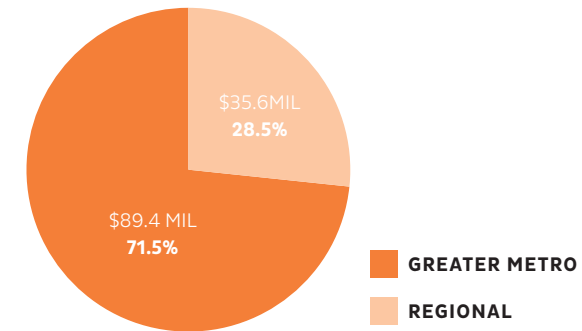
TRAINING

INDICATOR	VALUE
Trainers	220
Kennel Staff	126
Greyhounds in Training	1,932
Owners and Syndicate Members	1,052

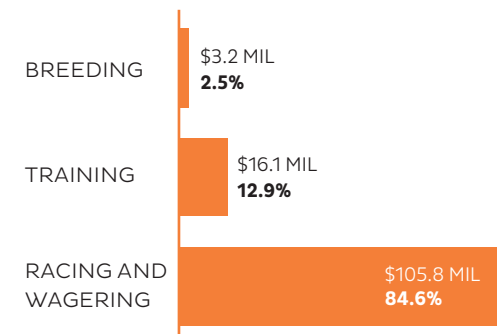
BREEDING

INDICATOR	VALUE
Breeders	118
Breeders Staff	84
Females Covered	68
Pups Born and Whelped	476

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

TASMANIA

KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$60.7 MILLION



FTE EMPLOYMENT SUSTAINED
460 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$34.0 MILLION



ROLES OCCUPIED IN RACING
1,258 ROLES



VOLUNTEERS
301 INDIVIDUALS

“ GREYHOUND RACING IN TASMANIA IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$60.7 MILLION - 54% OF WHICH IS IN REGIONAL AREAS ”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	3
Race Meetings	160
Races	1,610
Attendances	28,180
Prizemoney	AUD\$6.6 MIL

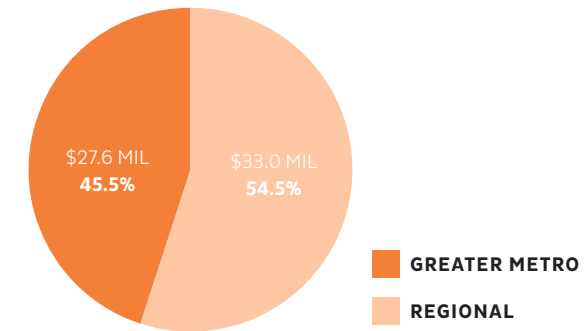
TRAINING

INDICATOR	VALUE
Trainers	158
Kennel Staff	107
Greyhounds in Training	859
Owners and Syndicate Members	262

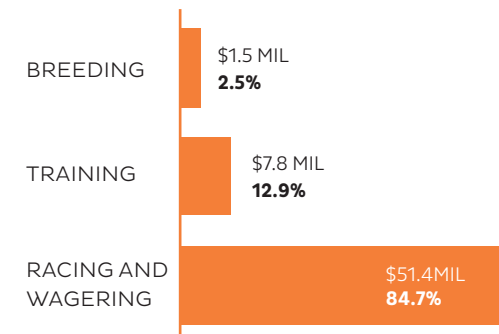
BREEDING

INDICATOR	VALUE
Breeders	90
Breeders Staff	73
Females Covered	34
Pups Born and Whelped	205

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

VICTORIA



KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$844.8 MILLION



FTE EMPLOYMENT SUSTAINED
4,843 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$450.3 MILLION



ROLES OCCUPIED IN RACING
8,886 ROLES



VOLUNTEERS
1,157 INDIVIDUALS

“GREYHOUND RACING IN VICTORIA IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF AUD\$844.8 MILLION - 41% OF WHICH IS IN REGIONAL AREAS”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	13
Race Meetings	1,283
Races	15,067
Attendances	220,407
Prizemoney	AUD\$73.9 MIL

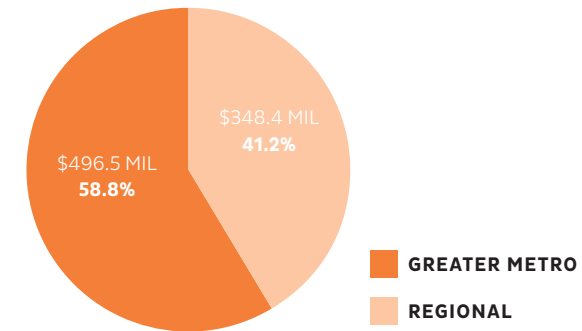
TRAINING

INDICATOR	VALUE
Trainers	1,228
Kennel Staff	553
Greyhounds in Training	6,889
Owners and Syndicate Members	4,608

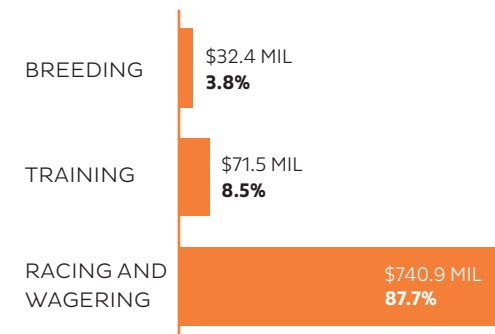
BREEDING

INDICATOR	VALUE
Breeders	340
Breeders Staff	190
Females Covered	579
Pups Born and Whelped	3,947

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.

WESTERN AUSTRALIA

KEY IMPACTS



VALUE ADDED ECONOMIC IMPACT
AUD\$229.5 MILLION



FTE EMPLOYMENT SUSTAINED
1,474 JOBS



HOUSEHOLD INCOME GENERATED
AUD\$134.6 MILLION



ROLES OCCUPIED IN RACING
1,364 ROLES



VOLUNTEERS
124 INDIVIDUALS

“GREYHOUND RACING IN WESTERN AUSTRALIA IS RESPONSIBLE FOR GENERATING AN ECONOMIC CONTRIBUTION OF \$229.5 MILLION - 49% OF WHICH IS IN METROPOLITAN AREAS”

RACING AND WAGERING

INDICATOR	VALUE
Racing Clubs	1
Race Meetings	357
Races	4,127
Attendances	61,528
Prizemoney	AUD\$21.8 MIL

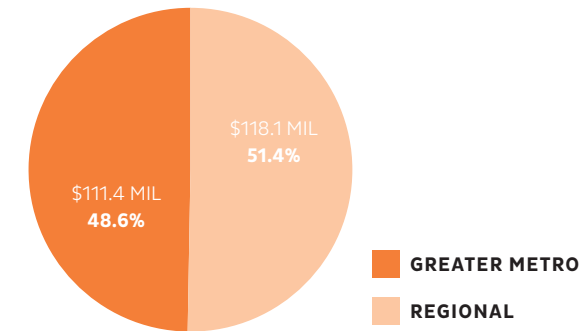
TRAINING

INDICATOR	VALUE
Trainers	117
Kennel Staff	111
Greyhounds in Training	1,951
Owners and Syndicate Members	657

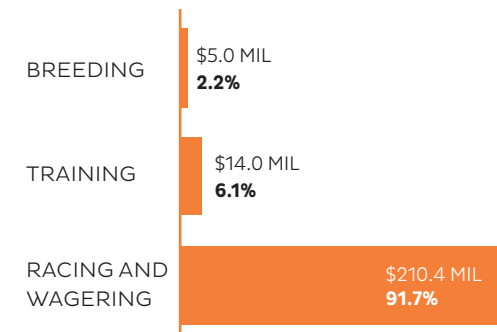
BREEDING

INDICATOR	VALUE
Breeders	53
Breeders Staff	42
Females Covered	72
Pups Born and Whelped	523

DISTRIBUTION OF VALUE ADDED ECONOMIC IMPACTS (\$AUD)



CONTRIBUTION TO VALUE ADDED ECONOMIC IMPACT (\$AUD)



Note: Metro regions have been defined by the Australian Bureau of Statistics SA4 regional framework which makes up the Greater Capital City Statistical Area (GCCSA). This means some traditional non-metropolitan greyhound racing tracks are considered as being in metro regions.



APPENDIX

About IER

IER is a leading strategic consulting business specialising in the sports, racing and entertainment industries. For over 30 years, IER has provided economic impact evaluations for both private and Government clients.

In particular, IER has specialised in consulting on a variety of projects related to the racing industries in Australia, New Zealand and Asia over this time. This study constitutes an economic and social impact evaluation of the greyhound racing industry in Australasia.

It has been developed utilising the following source data:

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

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

- + Asian Racing Federation

- + Australian Football League
- + Australian thoroughbred racing industry
- + New South Wales greyhound racing industry
- + New South Wales harness racing industry
- + New Zealand racing industry (3 codes)
- + Northern Territory thoroughbred racing industry
- + Queensland racing industry (3 Codes)
- + South Australian racing industry
- + Tasmanian racing industry (3 codes)
- + Victorian racing industry (3 Codes)
- + Western Australian racing industry (3 Codes)

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

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

Barry provides the advisory services to IER and has undertaken the economic modelling for all IER's size and scope studies over the past 10 years including:

- + Size and scope of the New Zealand racing industry (2024)
- + Size and scope of the Queensland racing industry (2023)
- + Size and scope study of the Tasmanian racing industry (2021)
- + Size and scope of the Tasmanian racing industry (2023)
- + Size and scope of the New South Wales harness racing industry (2023)
- + Size and scope of the Australian Football League (2022)
- + Size and scope of Thoroughbred racing industry in the Northern Territory (2022)
- + Size and scope of the Victorian racing industry (2022)
- + Size and scope of the Western Australian racing industry (2021)
- + Size and scope of the Asian Racing Federation (2020)
- + Size and scope of the South Australian racing industry (2019)
- + Economic and social impact study of harness racing in Australia (2012)

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

Economic Methodology

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

BASIS OF EVALUATION

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

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

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

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

In terms of determining average costs of producing a greyhound (breeding) and preparing

a greyhound (training) for racing, IER consults with Greyhound breeders and trainers. The focus is to determine an average cost of breeding and training at the different lifecycle stages. Data collected in similar jurisdictions is sometimes used to make comparisons and determine per greyhound expenditures.

This study also provides an estimate of the number of people involved in racing as a licensed participant volunteer or in jobs created with direct suppliers of services to the racing industry, economic activity produces a broader effect throughout the community, due to supply chain linkages and the impact of the spend of wage - extending the spend effect and the impact through various layers of the economy. This is known as the flow on or induced impact.

The result of an unconstrained whole of economy or general equilibrium model underpinned by input output tables is a prominent process for translating direct created expenditure (a final demand stimulus) of industries or projects into jobs and incomes, and for establishing the extent of the flow on impact. There is some level of academic argument about appropriate models for converting increases in external expenditure (final demand) into regional economic impacts. The critics of using unconstrained models such as input output tables often argue that they overstate the value of an industry - and reference that "multiplier" impacts are taken as method of ratcheting up the stated value (noting that this study uses an impact assessment rather than multipliers per se). This criticism would be valid when analysts applied turnover multipliers but is not the case with the more appropriate use of value added multipliers - which translate the expenditure estimates to national accounting framework measure with a whole of economy context.

Indeed, value added multipliers (the value added impact (direct and induced) relative to a dollar of created expenditure) at the regional level are often less than 1. It is further noted that the constraints that are applied in more complex economic models do not tend to be substantial at the state and regional level in a longer term context (labour flows from state to state and region to region and capital can also flow freely). Further this is a study of the current economic footprint of the industry. It is not a study of the change in economic activity associated with a change in the level of direct activity in the greyhound industry and as such average (rather than marginal) relationships are appropriate.

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

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

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

Further on the use of average multipliers it should be emphasised that this methodology includes the identification and inclusion of local expenditure associated with racing. The economic impacts determined by this approach do not represent the value that would be lost to the region if the industry did not exist. Generally, when considering expenditure by locals it is often held that substitution is a significant factor in whether that spending would be lost to the economy. Taking the racing industry as an example, it is likely (under a scenario where it no longer existed) that much of the local resident

spend would substitute to other activities. Depending on where this spending occurs the overall economic impact of that spending could be higher or lower than what it was when spent on racing.

What this study calculates is the level of direct and induced employment and income that is linked to people choosing to spend their entertainment dollar on greyhound racing (after allowing for imports which are used in the production process). This could be considered the gross economic impact of the sector and is therefore a measure of its significance generally. If a similar gross impact was calculated for every other sector of the economy, then the sum of the impacts would be considerably greater than the size of the economy in total. An alternative methodology would be to measure the net economic impact. Such a study would represent the extent to which this industry expenditure is supported by revenues that can be considered new to the state or region. This would include the supply of services by the local industry to racing activities interstate. It would also include the spending made by tourists or visitors to the region whose main reason for visiting is to attend/participate in the races and wagering by out-of-region residents on local racing product. Finally, it would include industry revenues that locals spend where they would not spend it in the region but for their involvement in the activities of racing. It would also reasonably be expected that some race attendees would attend events in other regions if they were not available in their local region, and that some operators would base their operations in other regions if this was the case. The information required for this assessment is not available, and as such is out of the scope of this analysis.

ESTIMATES OF EXPENDITURE BY THE INDUSTRY

This study of the industry is undertaken by firstly identifying the expenditures generated by the industry and then applying this expenditure to state input output model. The input output model has been prepared using the latest ABS national input output table (2020-21) as a base and has been created using the location quotient method and using state labour force and national accounts data and updated to the relevant year for inflation. The model condenses the industry structure of the national input output table to a 26 industry sector level focusing on industries more directly impacted by production activity in the racing industry. The approach identifies the structural context of expenditure and then applies this to industry sectors from which point it is assumed that the general industry production function can be applied.

The estimated racing industry expenditure is determined at two levels. Firstly, the industry expenditure generated within greyhound racing is identified, as well as the region in which this spend occurs. Secondly, final expenditures are allocated to the model's industry sectors. Expenditure on labour in the racing sector itself is allocated to the sport and recreation sector. By allocating these expenditures in this way, the imports required to support racing industry activity can be estimated for the production function of respective industry sectors and excluded as they represent a leakage from the state economy.

From an industry classification perspective, whilst "sport and recreation" is the dominant sector, there are significant purchases made from other sectors such as agriculture, business services, property services etc., while racing events include spend on food and beverage services and other general consumer spend.

ADJUSTMENT OF EXPENDITURES

The expenditure data is converted from purchasers' prices to basic prices, as the final expenditure data includes margins, taxes and subsidies and all monetary values in the input output model are expressed as basic values. The prime differences between purchaser prices and basic prices are that:

- ✦ Basic values exclude the cost of transport and wholesale and retail trade embedded in the purchase price (and allocate these to the transport and trade sectors).
- ✦ GST will be allocated to Gross Operating Surplus. In the modelling herein this is then considered to support Government expenditure (an implied revenue neutral situation).

The core assumptions to make the adjustments from purchaser price distributions to basic values are:

- ✦ The average value added in each of the industry sectors is extracted and then the GST component (at 10% in Australia and 15% in New Zealand- which is only paid on the value added) is deducted and separately identified. It is assumed that the value added coefficient for the arts and recreation sector understates that of the spend for the racing industry as the cultural industry will be dominated by public sector institutions and not for profits - whereas the recreation sector is more commercial.
- ✦ The purchaser price is adjusted for the average margin for wholesale, retail and transport sectors, as identified in the national input output tables.

DISTRIBUTION TO REGIONS

The final expenditures outlined within this study has been allocated to regions. The level of economic activity will not proportionally follow the expenditure, as regional areas generally have higher import penetrations than metropolitan areas (i.e. regional areas have a higher likelihood of needing to import products and services from the metropolitan area).

The Australian study develops a regional input output model for each of the metro and regional assessments. These regional models are created from the underlying state table and again using the location quotient method based on metro and regional employment estimates for each region from the latest data available through the ABS Census. Outcomes for the regions are adjusted for feedback impacts to be consistent with the state level modelling results, with the feedback proportions based on the proportion of regional outcomes before feedback.

To estimate the impact in New Zealand by region, expenditures are distributed to the regions based on the type and industry within which the spending occurs, with adjustments to basic values as applied for total expenditures. This is then converted to the estimated impact by region using a tops down approach - where the flow on multipliers are adjusted for each region based on population size, population density and whether a region includes a major metropolitan centre (it is noted that smaller regions generally have higher import percentages, and as such lower induced multipliers - which is allowed for in a tops down approach).

ACKNOWLEDGEMENTS

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

- + Greyhounds Australasia
- + Controlling bodies in each jurisdiction
- + Racing Clubs
- + Various greyhound integrity commissions (e.g QRIC, GWIC, etc)
- + Responsible Wagering Australia
- + OzChase
- + Tabcorp
- + Participants who provided their financial data on breeding and training greyhounds

Definitions

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

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

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

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

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

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

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

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

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



FOCUSED THINKING

