

Size and Scope of the

NSW

GREYHOUND RACING INDUSTRY

PREPARED BY IER | MARCH 2023



FOCUSED THINKING





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KEY FINDINGS

The NSW Greyhound racing industry was responsible for **generating more than \$655 million in value-added contribution** to the NSW economy in the 2021-22 financial year

DIRECT SPENDING IMPACTS

	Total
Total Direct Expenditure	\$505.1m

In 2021-22, the NSW greyhound racing industry generated total direct spending of \$505.1 million. This expenditure was responsible for creating a direct value-added impact (in terms of wages, salaries and profits) of \$225.0 million. However, the flow-on effects linked to the direct value-added, increases the size of the industry's total value-added contribution to \$655.1 million.

ECONOMIC IMPACTS

	Total
Total Value-Added	\$655.1m
Total Household Income	\$371.9m
Total FTE Employment	4,344

Overall 52% of the total value-added impact occurred in regional parts of the state, whilst 48% occurred in the metropolitan area of NSW.

The economic output generated by the NSW greyhound racing industry was directly responsible for sustaining 2,031 full time equivalent (FTE) jobs across the state. When

flow-on employment impacts are considered, the total FTE impact generated by the NSW greyhound racing industry rises to 4,344 jobs. This total represents the employment sustained within the industry, as well as the employment that is sustained in supply industries which meet the demand created by greyhound racing industry activity.

¹ Direct expenditure is defined as expenditure associated with preparing racing greyhounds (training), racing customer expenditure and expenditure by Greyhound Racing NSW 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.

² 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

³ Household Income is defined as being wages and salaries (before tax) earned from employment generated by the greyhound racing industry





Of the **4,344 FTE jobs sustained** by the NSW greyhound racing industry around **47% are the direct result of the racing industry activity** whilst the remainder support down-the-line industries that **produce and supply goods and services** for greyhound racing in NSW

AT A GLANCE

RACING ACTIVITY

28 Racing Clubs

1,211 Race Meetings

12,990 Races

134,269 Attendances

11,229 Greyhounds in Training

There are **1,211** greyhound race meetings held in the NSW each year providing entertainment to more than **134,000** attendees

THE ROLES

950 Breeders

5,268 Owners & Syndicate Members

1,377 Active Trainers

1,128 Racing Club & Industry Staff

2,042 Staff employed by participants

1,570 Volunteers



In 2021-22, more than 134,000 attendances were recorded at greyhound race meetings in NSW. Close to 37% of these attendances were made at racecourses in the metropolitan area, with the remaining 63% occurring in regional parts of the state.

Participants are the lifeblood of the greyhound racing industry. They provide the investment, time, skills and passion that underpins greyhound racing in NSW. In total, there are more than 12,300 participant roles occupied in the NSW greyhound racing industry. Many of these people enjoy gainful employment of their specific skillset where they may find limited opportunities otherwise - particularly in the training and racing related disciplines. Furthermore, many participants hold more than one role within 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, racing authorities and racing clubs actively contribute to society through various community and philanthropic initiatives.

The industry is supported by close to 1,600 roles in which people volunteer their time and resources supporting racing clubs, breeders and trainers. For many of these people, local racing clubs are an important part of their community and provide valuable opportunities to stay active and engage with people from all walks of life.



There are **more than 12,300 roles occupied** involved in the NSW greyhound racing industry as an **employee, participant or volunteer**

INTRODUCTION

In August 2022, Greyhound Racing NSW (GRNSW) commissioned a study into the size and scope of greyhound racing in NSW. This study is based on an assessment of the impacts generated in the 2021-22 financial year. The last size and scope study was undertaken as part of the Greyhounds Australasia study for the 2018-19 financial year.

PURPOSE OF THE STUDY

This study aims to quantify the economic, employment and social contribution that the greyhound racing industry generates within NSW. The report focuses on the whole of state impacts as well as looking at outcomes by metropolitan and regional geographic areas. The key focus of the study is to investigate the following outcomes attributable to the greyhound racing industry:

- + The full-time equivalent employment generated by the greyhound racing industry activities in NSW
- + The number of participants (i.e. trainers, breeders etc.) in the industry
- + The total direct expenditure contribution that the industry makes, in its current form, to the NSW economy
- + The value-added contribution that the industry generates within the NSW economy
- + The social and community importance of greyhound racing - particularly in regional parts of the state



STUDY METHODOLOGY

In assessing the size and scope of the greyhound racing industry, the study will take into account a number of the traditional measures adopted by the greyhound racing industry (such as training activities, attendance and wagering) as well as calculating a number of economic measures. For the purpose of this study, the greyhound racing industry is defined as covering the full spectrum of activities associated with the conduct of greyhound racing in NSW. This includes racing activity at racing clubs and the impacts that flow to NSW as a result of betting activity.

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

- + GRNSW provided financials, wagering data and data related to racing activities
- + Racing clubs provided financial data as well as data relating to their club and raceday/night operations
- + Wagering data was provided by Tabcorp and Responsible Wagering Australia (on behalf of the corporate bookmakers)
- + GRNSW and OzChase provided greyhound racing and participant data
- + IER also interviewed a number of trainers and breeders in order to build a profile of the cost of producing and preparing

Throughout the report, data has been presented at the state and regional level. The regional level analysis has based on the allocation of certain Local Government Areas identified as being metropolitan and regional. It should be noted that not all geographic frameworks are able to perfectly overlap. IER has used its best endeavours to ensure the most accurate alignment of LGA's with the metropolitan and regional constructs.

This study also provides an estimate of the number of people involved in greyhound racing as a licensed participant, volunteer or employee. There is some level of duplication within the participation categories resulting from an inability to de-duplicate individual databases. Surveys from participants and race clubs have been used to determine the number of non-licensed roles occupied as these cannot be tracked from registrations. In addition, it is widely acknowledged that there is a significant cohort of individuals involved in racing, who are not accounted for in any official database (i.e. members of micro syndicates, members of companies or trusts which have ownership in greyhounds). As such, when the report presents a sub-total of the roles occupied in racing, these factors above should be considered.

ECONOMIC METHODOLOGY

This study constitutes an economic assessment of the 2021-22 financial year.

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

In order to determine the economic impacts generated, it is first necessary to develop an assessment of the total expenditure generated. The final expenditure profile of the greyhound racing industry is based on the following key inputs:

- + Breeding of greyhounds for racing - the expenditure on breeding dams and pups related to the care and production of greyhounds for racing.
- + 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. This is only taken into account for greyhounds which are domiciled in NSW.
- + Racing club and industry expenditure - the expenditure generated by racing clubs and GRNSW on running their operations, businesses and events
- + Wagering related impacts - the benefits that flow to NSW from product fees, taxes and operational expenditure by wagering operators
- + Racing customer off-track expenditure - expenditure made by racegoers, off-track, as part of their attendance at greyhound races.

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

1 Gathering Industry Expenditure This has been explained in more detail previously; however, this is the most important step as a failure to accurately generate the expenditure profile of the industry only leads to a multiplication of this error throughout the latter parts of the economic methodology.

2 Categorisation of industry expenditure into ANZSIC classifications The 'greyhound racing industry' does not exist within the Australian and New Zealand Standard Industry Classification (ANZSIC) structure. For modelling

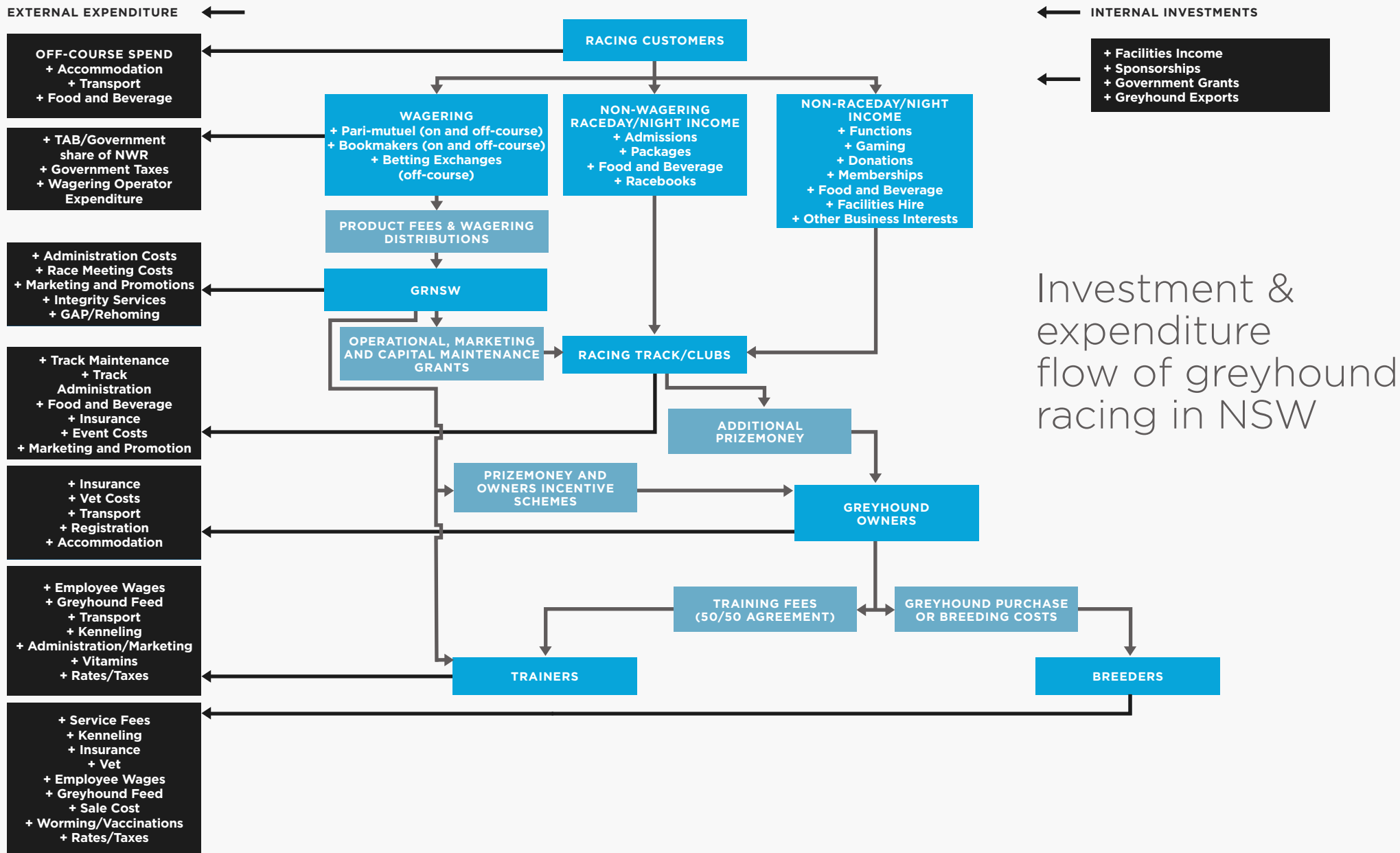
purposes, it is necessary to allocate direct expenditures to the appropriate industry sectors. The majority of expenditures are classified within their relevant ANZSIC codes. A number of greyhound racing activities are contained within ANZSIC classification R - Arts and Recreation Services, specifically within the following sectors:

- R9114 - Sport and Physical Recreation Administration,
- R9121 - Greyhound and Dog Racing Activities,
- R9129 - Training and Racing Activities,
- 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 in NSW. The input-output model provides direct and indirect impacts in relation to value-added, income and employment.

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

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





TRACK RECORD

280m	LAURENCE	15.72
520m	SHANE	29.07
720m	MARS	41.38

ECONOMIC IMPACTS

The NSW greyhound racing industry is responsible for **generating more than \$505 million in direct expenditure** in NSW

Direct spending by the NSW greyhound racing industry

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

In 2021-22, the NSW greyhound racing industry generated more than \$505 million in direct expenditure. The calculation of direct expenditure is based on the final expenditures of the

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





Each of the key areas of the greyhound racing industry expenditure assessed within this study are defined as follows:

+ Breeding greyhounds

includes all expenditure on the production of pups, the maintenance of sires and breeding dams

+ Preparing greyhounds

includes all expenditure on breaking-in, training and maintaining the greyhound in training

+ Wagering related customer expenditure

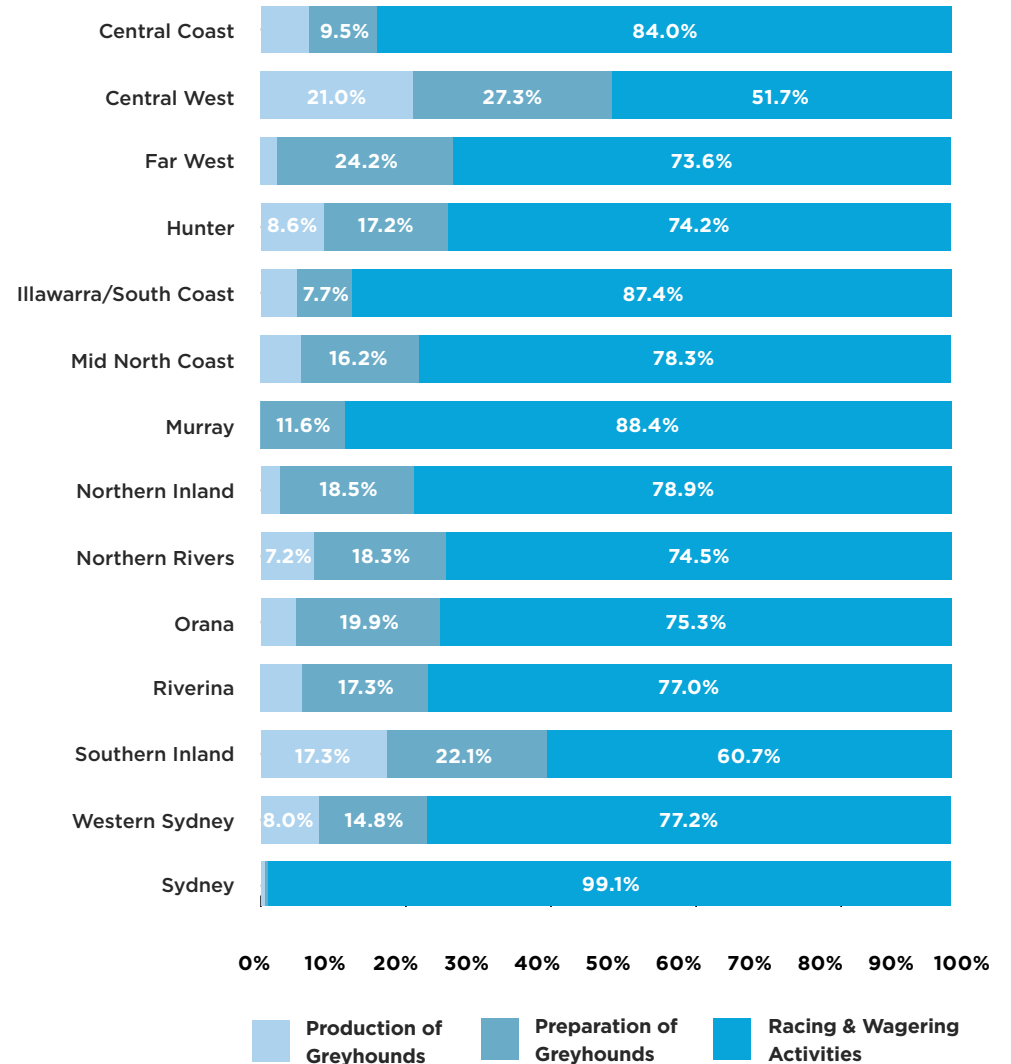
includes product fee payments, taxes generated from wagering and wagering service provider operating expenditure in NSW

+ Raceday/night customer expenditure

includes all expenditure generated from on-course activities (raceday/night) such as sponsorship, catering, admission and raceday/night functions. It also includes all expenditure generated outside the race track as part of attending the races (such as transport, accommodation, retail etc.). Finally, it includes all spending on non-raceday/night functions, facility hire, and membership. It does not however, include wagering as this is covered in the wagering related customer expenditure section

Racing and wagering related expenditure makes up the largest proportion of the industry's expenditure profile (83.5%), whilst close to 11% is generated by the training sector and the remaining 5.7% in breeding.

PROPORTION OF DIRECT SPENDING BY REGION

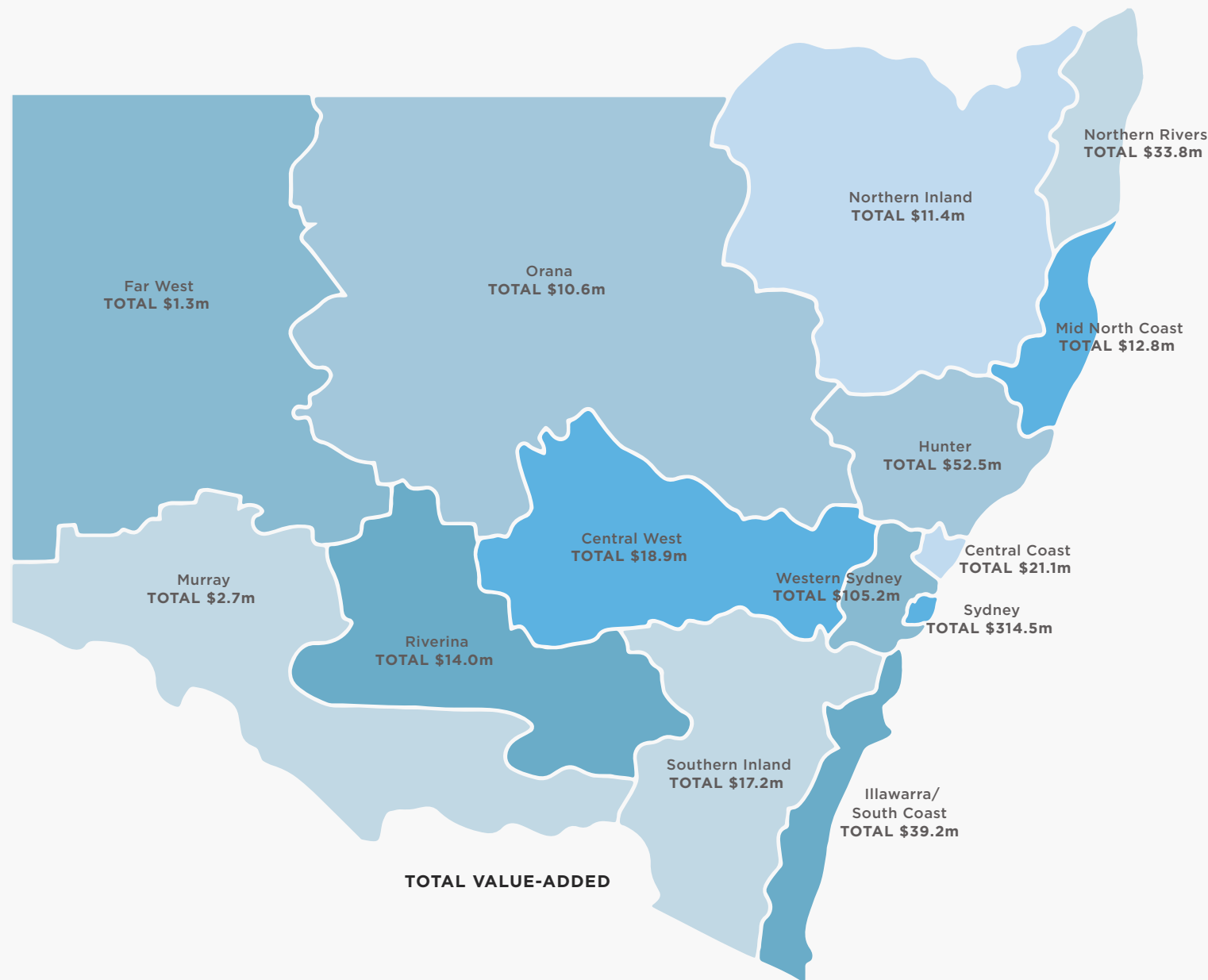


Economic Contribution of the Industry

In 2021-22 the NSW Greyhound racing industry was responsible for generating a real gross value-added contribution of \$655.1 million for the NSW economy. Real gross value-added is the generally accepted measure of the value of production from economic activity. It is the sum of value-added by all industries in a region (in this case, all regions of NSW). In any period of time, the value-added contribution in an industry equates to the value of sales less the value of inputs used in production. This means value-added is equal to the income (wages, salaries and profits) generated in the course of production.

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

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





TOTAL VALUE-ADDED BY REGION

Racing Region (\$mil)	Direct Value-Added	Flow-on	Total Value-Added
Central Coast	\$8.6	\$12.4	\$21.1
Central West	\$9.4	\$9.5	\$18.9
Far West	\$0.7	\$0.6	\$1.3
Hunter	\$23.3	\$29.3	\$52.5
Illawarra/South Coast	\$17.1	\$22.1	\$39.2
Mid North Coast	\$6.1	\$6.7	\$12.8
Murray	\$1.3	\$1.4	\$2.7
Northern Inland	\$5.7	\$5.7	\$11.4
Northern Rivers	\$15.5	\$18.3	\$33.8
Orana	\$5.5	\$5.1	\$10.6
Riverina	\$7.0	\$7.0	\$14.0
Southern Inland	\$8.6	\$8.6	\$17.2
Western Sydney	\$40.6	\$64.5	\$105.2
Non-Metro Total	\$149.4	\$191.2	\$340.6
Sydney Metro	\$75.6	\$238.9	\$314.5
Total	\$225.0	\$430.1	\$655.1

When considering the value-added contribution of \$655.1 million generated by the NSW Greyhound racing industry, it is important to note that it is made up of:

- + Direct value-added (\$225.0 million) - this represents the amount of income included in direct industry expenditure. It is the amount of gross wages and salaries in the greyhound racing industry and in those businesses providing goods services to the racing industry, plus the gross operating surplus (profits, interest payment and direct taxes) directly created in supplying these services and product. This is also equal to the direct expenditure less the purchases that the provider of the goods and services makes in providing the goods and services (both supplied from within the region, as well as externally (i.e. imported)).
- + Indirect (Induced) value-added (\$430.1 million) - represents the value-added activity (wages, salaries and gross operating surplus) generated to support the

purchases made in providing the inputs to the providers of the direct services, along with the value-added impact in providing households with goods and services as they spend their wages, and the trickle down effect of this.

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

Participation in the NSW greyhound racing industry

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

Participants are the lifeblood of racing. For the majority of participants, involvement is part business and part hobby. Passion drives many to

pursue the challenges and opportunities available in the greyhound racing industry. 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 and those skilled in preparing or caring for racing greyhounds.

Additionally, there are many supply businesses for whom the greyhound racing industry provides the market for which to sell their goods or services.

Close to 7,600 owners & syndicate members, breeders and trainers roles provide the capital and the skills to breed and prepare greyhounds for racing. These participants drive a chain of activity which leads to the racing product that is consumed by audiences on almost every day of the year.

There are 1,570 roles occupied that volunteer their time and skills in a variety of roles within the industry. In the participant space, this often includes family members - for many of whom the family connection goes back many generations.

In total, there are 12,335 roles occupied in the NSW greyhound racing industry as a participant, employee or volunteer.

TOTAL ROLES OCCUPIED IN RACING

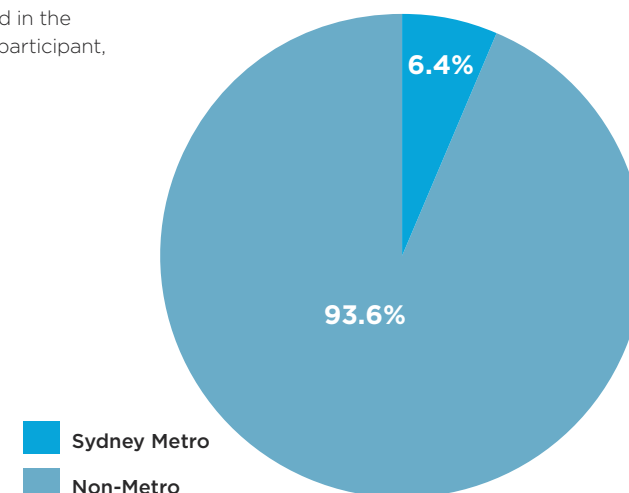
	Non-Metro	Sydney Metro	Total
Breeders	927	23	950
Owners/Syndicate members	4,744	524	5,268
Trainers	1,360	17	1,377
Racing Club Staff (FT,PT,Casual)	410	36	446
Race track attendants	186	0	186
Industry employees (GRNSW and Stewards)	114	67	181
Wagering staff	270	46	315
Breeders staff	843	21	865
Trainers staff	1,163	15	1,177
Racing Club Volunteers	154	20	174
Volunteers assisting Breeders	556	14	570
Volunteers assisting Trainers	816	10	826
Total	11,542	793	12,335

Note 1: Volunteer numbers sourced from club and participant surveys. Not all clubs provided data.

Note 2: There is some level of duplication in these participation categories resulting from an inability to de-duplicate individual databases

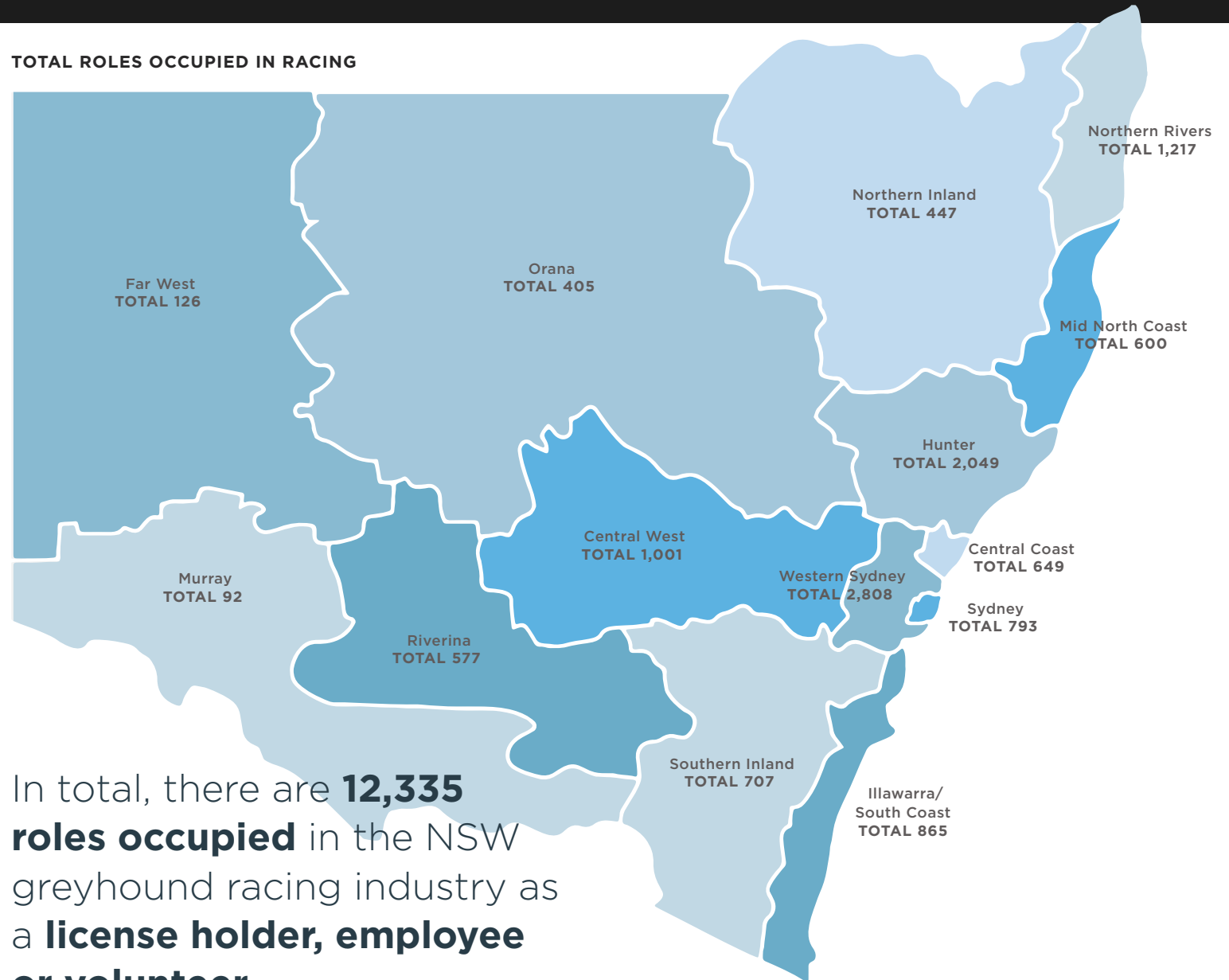
Note 3: Number of syndicate members were unavailable and thus not included in the number of owners and syndicate members reported in the Greyhounds Australasia study published in 2020.

TOTAL ROLES OCCUPIED IN RACING BY REGION





TOTAL ROLES OCCUPIED IN RACING



In total, there are **12,335 roles occupied** in the NSW greyhound racing industry as a **license holder, employee or volunteer**



RACE 9 THE MILLION DOLLAR CHASE CONSOLATOR

6	2	9	3
TIME	29.52		
DATE	5.37		
200x110 MLCR			
IN	4.9		
OUT	2.8	1.8	1.9
TRAP	17.8		
TRIP	38.8		
TRK	12.8		
TRK	1.6		

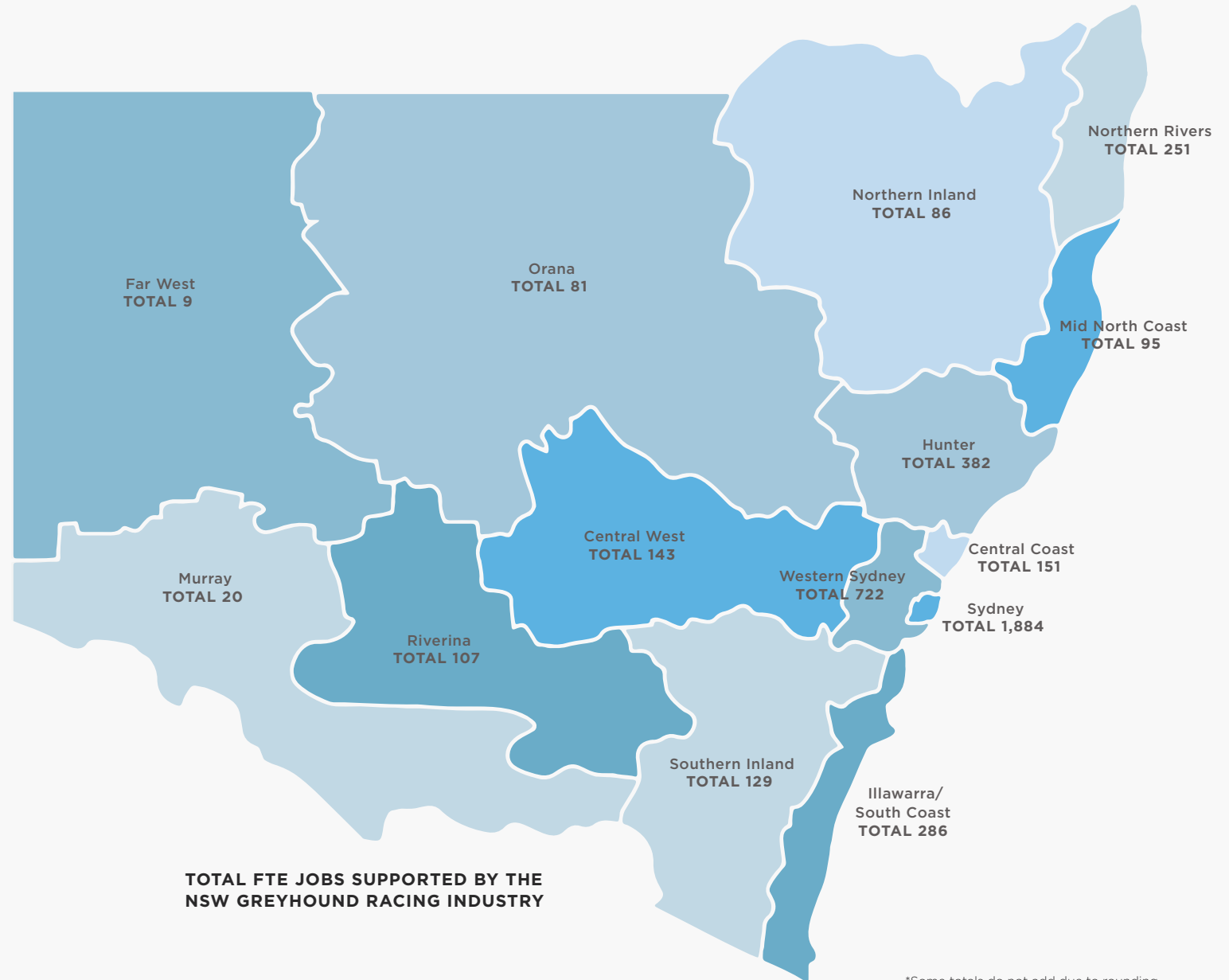
Employment generated by greyhound racing in NSW

There are 12,335 roles involved in the NSW greyhound racing industry. As outlined earlier, this is a statistical construct that takes into consideration participants, volunteers and employees (full time, part time, casual and contractor).

The NSW greyhound racing industry, like racing industries all over Australia, relies on a large number of part-time and casual roles. As such, the level of FTE employment is significantly lower than any headcount.

In 2021-22, the economic activity generated by the NSW greyhound racing industry directly sustained 2,031 full-time equivalent positions in NSW. In addition to the direct employment impact, the activities of the greyhound racing industry also help to sustain a further 2,312 FTE jobs in support industries. Therefore, the total direct and indirect employment impact generated by the NSW greyhound racing industry was 4,344 FTE jobs.

The FTE positions sustained by the NSW greyhound racing industry will result in close to \$371.9 million in wages and salaries for the people employed directly within the industry as well as those employed in down the line industries that receive increased demand as a result of racing activity. Some examples of the other industries that are stimulated by racing include; veterinary, feed, retail, tourism, accommodation, transport, manufacturing and construction.



The Supplier Network

The NSW greyhound racing industry is supported by a large supplier network in a mutually beneficial way. For many suppliers of goods and services, a strong greyhound racing industry forms an important part of the critical mass of their client base. Many offer specific skills, and customised products that are relevant only to this industry. The supplier network broadly contains those providing a direct service or product to the industry as well as those down-the-line businesses who provide the raw materials and manufacturing that drive the products on offer.

The direct suppliers to the greyhound racing industry provide goods and services that are specifically developed for the sport. A functioning and thriving racing industry provides those suppliers with the opportunity to also thrive. Additionally, there are a large number of companies and individuals who supply greyhound racing (among other industries). For these suppliers, diversification means that their success or failure is not completely tied to the fortunes of greyhound racing. However, for many of these businesses, greyhound racing helps provide the critical mass of opportunity that provides them with scope to prosper.

The NSW greyhound racing industry generates some of its most significant impacts in the following industry sectors:

Industry	Economic Impacts	Sources of Impact
Other Gambling services	+ Direct value-added - \$67.0m + Direct FTE jobs - 642	+ Bookmaker operation + Wagering activity
Health care and social assistance	+ Direct value-added - \$25.1m + Direct FTE jobs - 256	+ Medical and Other Health Care Services
Professional, scientific & technical	+ Direct value-added - \$23.6m + Direct FTE jobs - 152	+ Veterinary + Breeding Activity + Integrity









Case study

YOUNG AND UPCOMING TRAINER JACK STRUTT ON THE RISE

Jack Strutt has been involved greyhounds since he was 12 years of age when his dad, Paul, started as a trainer. Whilst he would assist his dad with the dogs at their home in Wagga he had his eyes firmly set on forging a different career as he headed to Wollongong University in 2017 to commence a six-year degree in law, finance and economics.

Then in early 2020 COVID-19 struck and Jack was forced to head back to Wagga. Once back with the greyhounds, and with more time on his hands, Jack's interest peaked again and he started training 16 month old Stagger Out Lee.

It was a true partnership between Jack and Stagger Out Lee as he could see the potential but needed to build up her confidence slowly with runs at Wentworth Park. When she broke the 760 metre track record at home in Wagga, Jack knew Stagger Out Lee was ready.

Being ready meant some long drives for Jack and Stagger Out Lee into Victoria to compete at elite level Group 1 race meetings. They took along a companion Tiggerlong Ginga, one of Jack's first greyhounds for the long drives. Over the next four months, Stagger Out Lee won two significant Group 1 races - firstly, at Sandown Park in November 2022 in the Bold Trease and secondly, as an extreme outsider, in the Zoom Top at The Meadows in February 2023.

Jack, at 24 years of age, is one of the youngest greyhound trainers in NSW and as he nears graduation from the University of Wollongong he is quietly confident he will still find the opportunity to continue his success with Stagger Out Lee.

Case study

RETIRED GREYHOUNDS, RETIRED POLICE SUPPORTING EACH OTHER

Policing is a highly demanding job both physically and mentally, and consideration of welfare initiatives to support its members is an integral factor for successful operation. So in 2022 it was a not a difficult decision for the Police Association of NSW (PANSW) to partner with the Greyhounds As Pets program - a partnership that helps both organisations.

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 had been suffering post traumatic stress disorder (PTSD) for over a decade. Struggling to find a treatment regimen that suited her, the arrival of Frankie helped to lift 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 a personalised matching service to ensure suitable greyhounds for members and their families. In addition to this they receive support for pre-adoption vet services such as vaccinations, six months of costs for pet insurance, food and ongoing support and advice.

In 2022, GRNSW assisted over 2,000 greyhounds to pet life through Greyhounds As Pets NSW (GAPNSW) and the Homing Assistance Scheme.

THE BREEDING INDUSTRY

The Breeding Industry

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

Across the state, there are 950 registered breeders who are involved in this process. Breeders are supported by more than 860 employees (of a full-time, part-time or casual nature) and further supported by 570 roles 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 and/or breaking-in services).

PARTICIPANTS IN THE BREEDING INDUSTRY

	Breeders	Staff employed by breeders	Volunteers assisting breeders
Central Coast	45	41	27
Central West	102	92	61
Far West	5	5	3
Hunter	164	149	98
Illawarra/South Coast	58	53	35
Mid North Coast	45	41	27
Murray	7	6	4
Northern Inland	21	19	13
Northern Rivers	116	105	69
Orana	29	27	17
Riverina	36	33	22
Southern Inland	60	55	36
Western Sydney	238	217	143
Non-Metro Total	927	843	556
Sydney Metro	23	21	14
Total	950	865	570

There are **950 individuals** who either breed, or have an ownership interest in a breeding dam or sire. They are supported by **865 employees and 570 volunteers** – meaning that the industry is supported by **2,385 roles directly involved in breeding activities** across the industry



Economic Contribution of the Breeding Industry

GREYHOUNDS IN THE BREEDING INDUSTRY

	Sires	Dams	Pups Produced
Central Coast	14	27	208
Central West	9	98	759
Far West	0	0	6
Hunter	4	95	804
Illawarra/South Coast	4	28	213
Mid North Coast	2	17	129
Murray	0	2	0
Northern Inland	0	7	60
Northern Rivers	3	60	441
Orana	1	18	103
Riverina	1	16	158
Southern Inland	4	47	355
Western Sydney	9	153	1,266
Non-Metro Total	51	567	4,502
Sydney Metro	4	28	156
Total	55	595	4,658

Note 1: The pup number represents the number of pups reported as of December 2022, this differs to the GWIC reported in their annual report figure due to late returns.

Note 2: Sires are defined as sires kennelled or stored in NSW and active in FY2021-22

Note 3: Dams are defined as the active breeding dams in NSW FY2021-22 that produced pups



In 2021/22, breeders in the NSW greyhound racing industry spent close to \$29 million on the breeding process. This includes the breeding of litters and pups as well as providing care for females. In calculating the expenditure incurred by breeders, a number of factors must be considered. Essentially, breeders incur costs on the maintenance of breeding dams and sires as well as in the process of breeding and care for pups.

The expenditure figures outlined in this section have been derived from a combination of

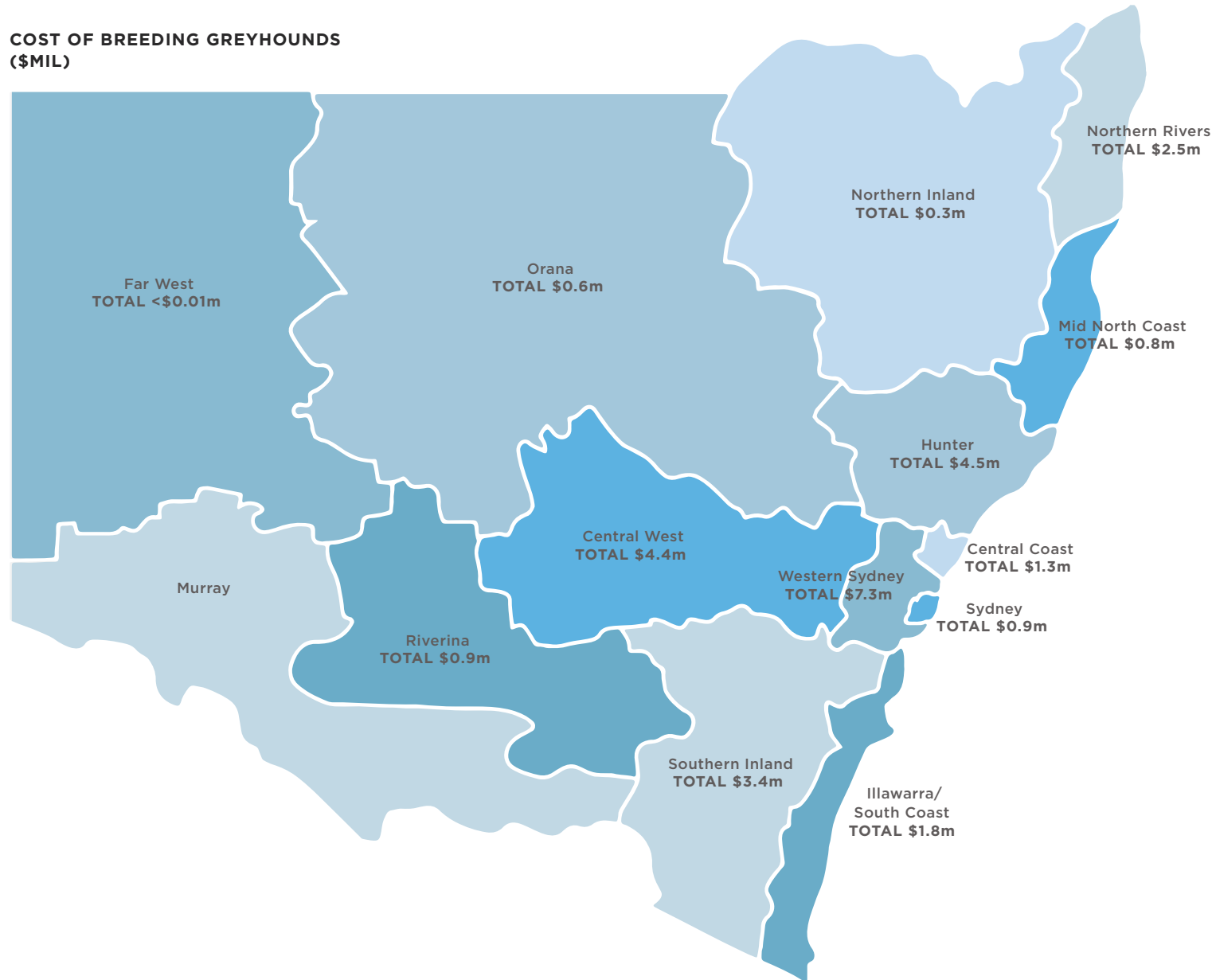
industry level consultation, and primary research amongst greyhound breeders across NSW. From an industry perspective, it is important to acknowledge that breeders may not breed with their female in a regular and consistent manner. Despite this, there is still the ongoing care and maintenance of the female that requires investment.

In some instances, breeders incur all of these expenses themselves, whilst in other situations, breeders may send their pups to professional service providers.

COST OF BREEDING GREYHOUNDS (\$MIL)

Close to 97% of all breeding related expenditure occurs in the regional parts of NSW whilst 3% is in the metro region.

Greyhound breeding activity is responsible for generating close to \$29 million in expenditure impacts in NSW.



Region	Breeding Expenditure
Central Coast	\$1.3m
Central West	\$4.4m
Far West	<math>< \\$0.01m</math>
Hunter	\$4.5m
Illawarra/South Coast	\$1.8m
Mid North Coast	\$0.8m
Murray	-
Northern Inland	\$0.3m
Northern Rivers	\$2.5m
Orana	\$0.6m
Riverina	\$0.9m
Southern Inland	\$3.4m
Western Sydney	\$7.3m
Non-Metro Total	\$27.7m
Sydney Metro	\$0.9m
Total	\$28.6m

OWNERSHIP & 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 50% of any prizemoney that is won.

There are close to 5,300 individuals with an ownership interest in the NSW greyhound racing industry. Some of these individuals own greyhounds in their own right, whilst others own greyhounds as part of a syndicate. During 2021/22, greyhound racing in NSW, provided owners and trainers with the opportunity to compete for more than \$41 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 race training, trialling and raceday/night management of greyhounds.

In 2021/22, there were nearly 1,400 greyhound trainers who prepared greyhounds to race - when considering the total number of licensed trainers this number rises to 2,165. These trainers also employed the assistance of 1,177 kennel employees and a further 826 roles 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 transferable to other employment sectors.

Note 1: The number of trainers reported at a regional level are NSW trainers who had a greyhound in at least one race in the reporting period.

Note 2: The total number of greyhounds in training reported are NSW-kennelled and named or racing greyhounds, and includes those which may also be from outside of NSW. The latter are most commonly from owners who live in border towns.

TRAINING INDUSTRY SUMMARY

	Trainers	Kennel employees	Volunteers assisting trainers	Greyhounds in training
Central Coast	63	54	38	376
Central West	123	105	74	1,175
Far West	19	16	12	75
Hunter	229	196	137	1,823
Illawarra/South Coast	84	72	50	594
Mid North Coast	80	68	48	456
Murray	9	8	5	70
Northern Inland	71	60	42	485
Northern Rivers	152	130	91	1,301
Orana	50	43	30	502
Riverina	70	60	42	556
Southern Inland	87	74	52	880
Western Sydney	323	276	194	2,795
Non-Metro Total	1,360	1,163	816	11,088
Sydney Metro	17	15	10	141
Total	1,377	1,177	826	11,229





NUMBER OF GREYHOUNDS IN TRAINING



There are **1,377 active trainers** which provide the greyhound training services in NSW. Together, they train **more than 11,200 greyhounds**

Economic Contribution of the Training Industry

In 2021/22, greyhound owners and trainers spent more than \$54.7 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.

NSW owners and trainers spent **more than \$54.7 million** on preparing greyhounds for racing

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. The analysis of the expenditure incurred in the preparation of greyhounds includes items such as transport, feed, insurance, vitamins and supplements, veterinarian fees, gear hire/purchase and racing/ trialling fees, amongst others.

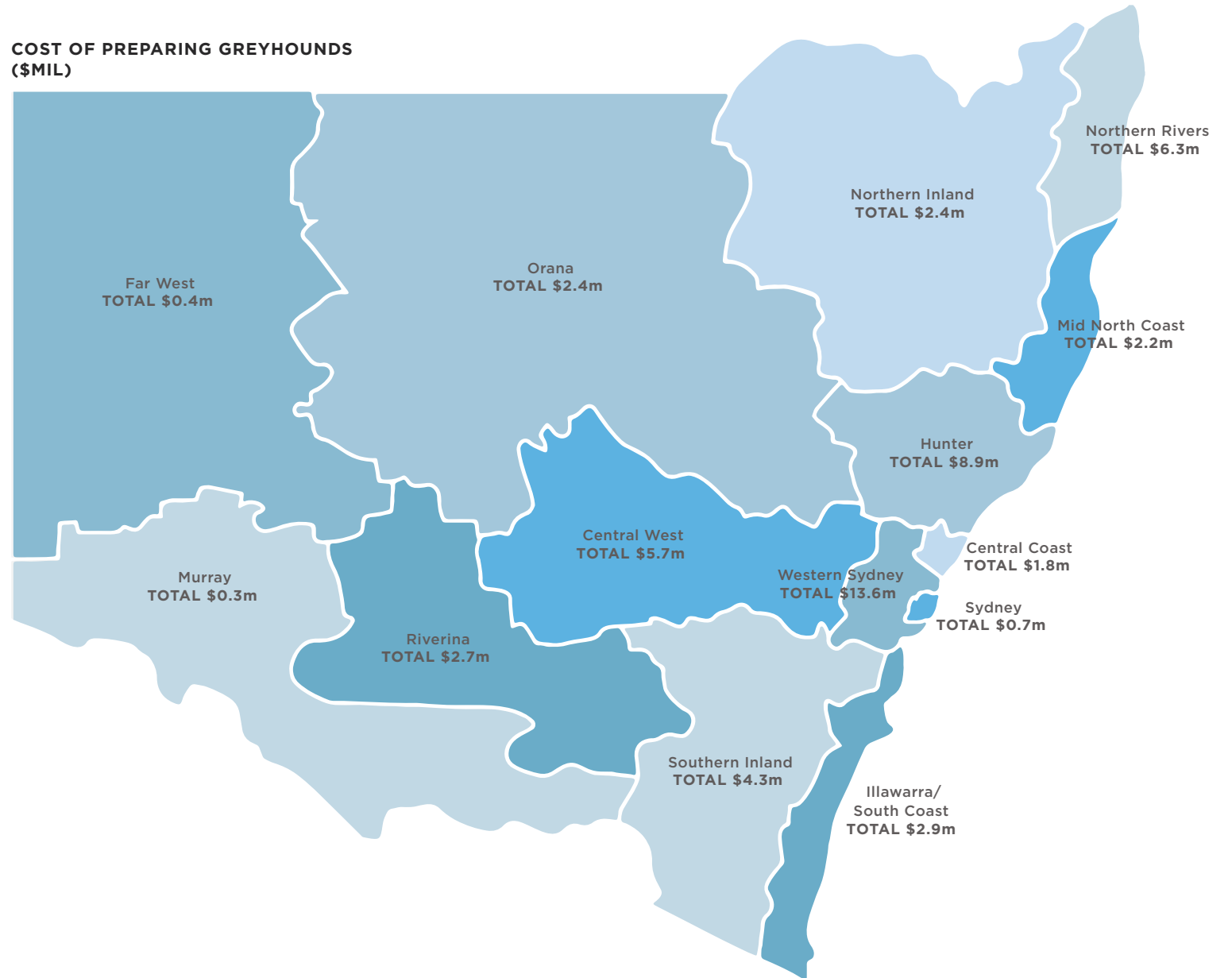




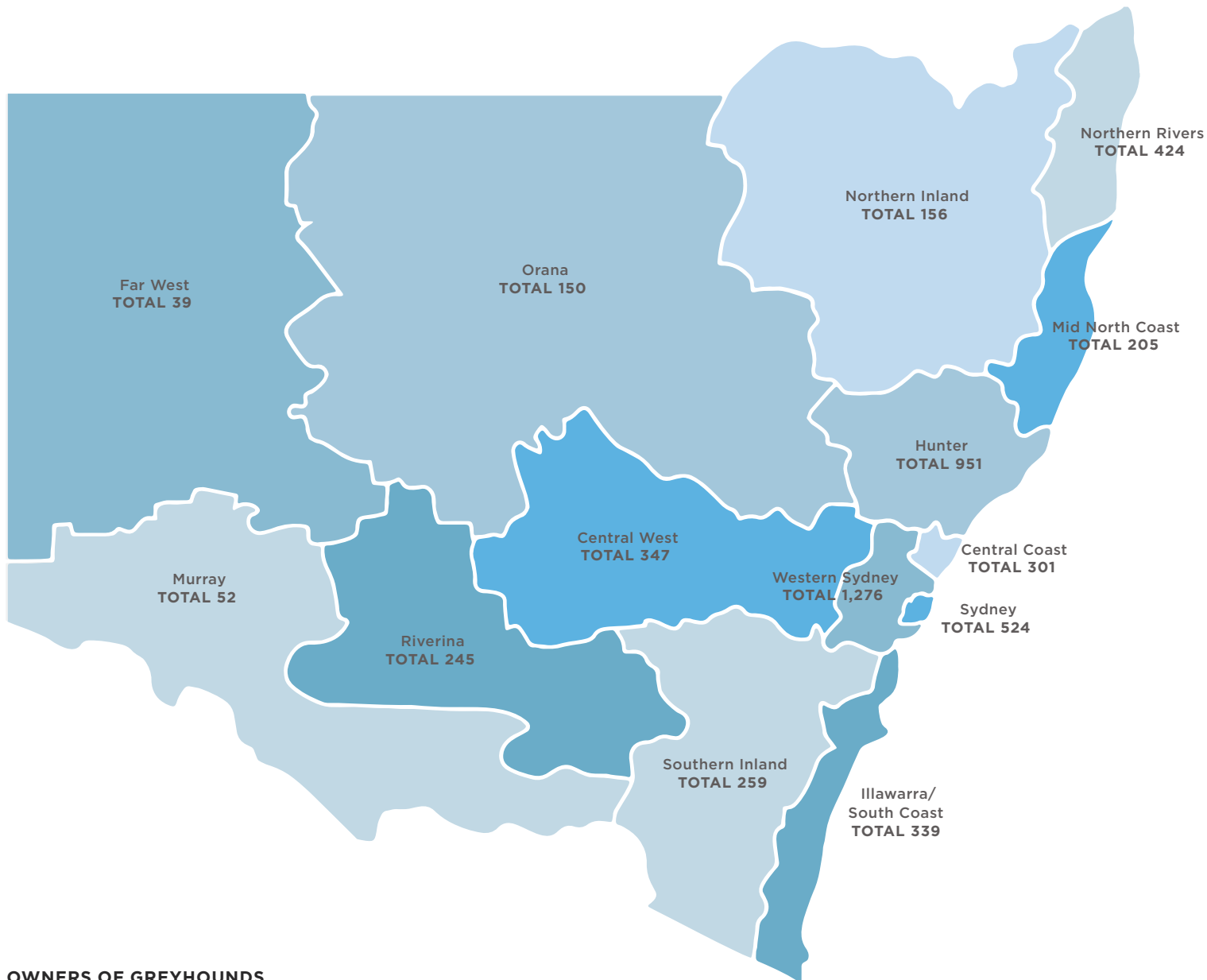
COST OF PREPARING GREYHOUNDS (\$MIL)

Overall, close to 99% of the expenditure on training activities occurs in the regional parts of the state, whilst the metropolitan area accounts for 1%.

Greyhound training activity is responsible for generating more than \$54.7 million in expenditure impacts in NSW.



Region	Training Expenditure
Central Coast	\$1.8m
Central West	\$5.7m
Far West	\$0.4m
Hunter	\$8.9m
Illawarra/South Coast	\$2.9m
Mid North Coast	\$2.2m
Murray	\$0.3m
Northern Inland	\$2.4m
Northern Rivers	\$6.3m
Orana	\$2.4m
Riverina	\$2.7m
Southern Inland	\$4.3m
Western Sydney	\$13.6m
Non-Metro Total	\$54.1m
Sydney Metro	\$0.7m
Total	\$54.7m



OWNERS OF GREYHOUNDS

Owners race for **over \$46 million in prizemoney and returns** that is on offer in NSW

Owners play a significant role in the funding model of the racing industry. They provide much of the capital outlay funding for the purchase and preparation of greyhounds. There are close to 5,300 individuals with an ownership interest in greyhound racing in the NSW. More than 4,700 owners reside in the regional parts of NSW, whilst 524 are from the metropolitan region.

The investment by owners provides a critical funding source for trainers and is critically important to a successful greyhound racing industry. It is important, however, to note that it is often not identified as the most important motivation for participation. Many owners are involved in the racing industry, at least in part, as a hobby or leisure pursuit. However, a strong industry provides owners with the opportunity to realise some returns on their investment through the prizemoney on offer.

GREYHOUND ACTIVITY

	Owners & Syndicate Members of Greyhounds	Number of Race Starts
Central Coast	301	4,670
Central West	347	4,781
Far West	39	890
Hunter	951	13,471
Illawarra/South Coast	339	11,513
Mid North Coast	205	3,614
Murray	52	0
Northern Inland	156	5,000
Northern Rivers	424	12,965
Orana	150	4,510
Riverina	245	6,291
Southern Inland	259	4,811
Western Sydney	1,276	14,920
Non-Metro Total	4,744	87,436
Sydney Metro	524	6,774
Total	5,268	94,210



Case study

GREYHOUNDS AS PETS ADOPTION PROGRAM

The Greyhounds As Pets NSW (GAPNSW) program started in 2008 and promotes the adoption of retired greyhounds into loving homes. The program prides itself on successfully matching greyhounds to pet owners. Currently there are two GAPNSW centres; Wyee, Central Coast and Londonderry in Western Sydney. In addition to this, several GAPNSW regional adoption coordinators also operate throughout NSW, from the Northern Rivers to the Mid North Coast and beyond. The goal for GAPNSW is to find responsible, caring and loving permanent homes for these greyhounds.

GAPNSW delivers a program that aims to offer the following guarantees:

- + All the greyhounds are behaviourally assessed to ensure their suitability as a pet
- + The greyhounds often undergo fostering (either with the potential adopters or a foster carer) where they make the transition to pet life
- + All greyhounds are desexed, have their teeth cleaned, are vaccinated, microchipped and lifetime registered with the companion animals register (NSW)
- + All greyhounds go to their new home with up to date flea, heartworm and intestinal worm treatments
- + All greyhounds go to their new homes with a lead, collar and muzzle

The program is supported by numerous ambassadors who share their own personal stories and love for greyhounds. These include famous names such as:

- + Tim Cahill (Soccer Legend)
- + Ryan Paphenhuizen (Rugby League Superstar)
- + Todd McKenney (TV Personality)

In 2022, GRNSW assisted over 2,000 greyhounds to pet life through GAPNSW and the Homing Assistance Scheme. As part of this study commissioned by GRNSW, IER has worked with both GRNSW and GAPNSW to conduct a survey of over 200 Greyhound adopters through the GAP program. The survey was designed to assess numerous aspects surrounding the adoption of their greyhound - from the impact it has had on their everyday life, to their level of satisfaction and advocacy for the program.

As part of the survey, Greyhound adopters were asked to indicate how their overall experience with their greyhound has compared to what their expectations were prior to adopting. A very high proportion of adopters (82.4%) indicated that their experience had exceeded their expectations, with more than 70.6% saying that their expectations were exceeded by a lot.

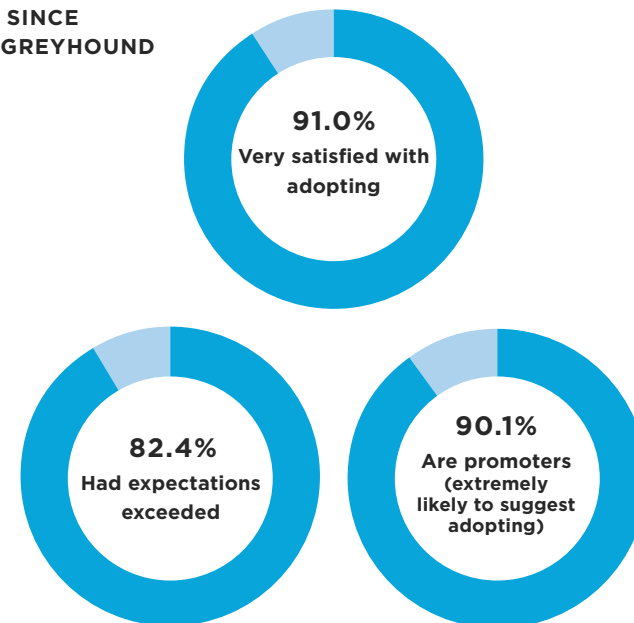
Looking at the physical benefits associated with adopting a greyhound, 58.9% of adopters felt that their fitness level has improved since meeting their dog. GAPNSW suggests that greyhounds require a 15-20 minute walk each day. Taking this additional walking into consideration, respondents indicated on average an increase of 8.7km walked per week following the adoption of their greyhound.

Having a greyhound as a pet is also believed to have mental health benefits. An improvement in mental wellbeing was reported by 93.5% of adopters. When considering the COVID-19 pandemic period specifically, 80% of the respondents indicate that having their greyhound with them during that time benefited them. Adopters reported that companionship was important for their mental health, whilst the increased physical activity (when taking their greyhound out for walks) provided an important avenue for exercise during this difficult time.

Living with the demands of caring for your dog, also appears to lead to better individual planning and a need to be organised as an individual. The survey revealed that 85.6% of adopters felt that they had developed a greater structure and routine to their day. Taking on this responsibility, 65.3% of adopters felt that they had developed a better sense of identity since getting their greyhound. Adopters also reported a strong social aspect associated with adopting, demonstrated by the fact that 73.6% of respondents indicated that they've met new people as a result of having a greyhound as a pet.

When considering the overall experience of the adopters with their greyhound, 98.4% of adopters indicated they have been somewhat or very satisfied with their overall experience since adopting their greyhound, with 91.0% indicating that they were very satisfied. This strong satisfaction level may have contributed to the 90.1% of adopters indicating that they would be extremely likely to recommend adopting a greyhound to a family member, friend or colleague in future.

KEY IMPACTS SINCE ADOPTING A GREYHOUND

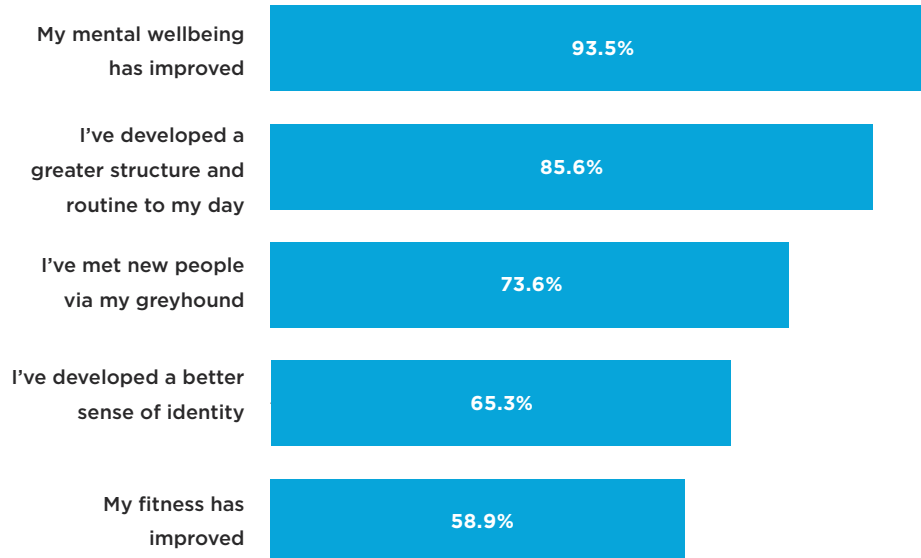


“Both greys are always up for some pats and cuddling. They love being at home, hanging out and watching what we do - the comings and goings in the family. Just being with them is enough and having them as part of the family has been the best.”

“Buddy loves the beach and will happily lay in shallow water for 10-15 minutes followed by some happy zoomies. We’ve been camping together and gone hiking together, he is always by my side and will happily walk as far as I want to, even as he ages.”

“Going out with my greyhound to meet friends, he gets along with everyone and they all love him, after the experience some of them want to adopt a greyhound.”

AGREEMENT STATEMENTS SINCE ADOPTING A GREYHOUND (SOMEWHAT/TO A GREAT EXTENT)



RACING CLUBS AND RACING AUTHORITY

RACING CLUBS AND TRACKS

	Number of Racing Clubs	Number of Tracks
Central Coast	1	1
Central West	2	2
Far West	1	1
Hunter	3	3
Illawarra/South Coast	3	3
Mid North Coast	3	3
Murray	0	0
Northern Inland	3	3
Northern Rivers	3	3
Orana	2	2
Riverina	2	2
Southern Inland	2	2
Western Sydney	2	3
Non-Metro Total	27	28
Sydney Metro	1	1
Total	28	29

Note 1: There are a total number of 28 venues containing the 29 tracks as Richmond is a two-track venue. The Bathurst and Lismore tracks have now closed since time of reporting.





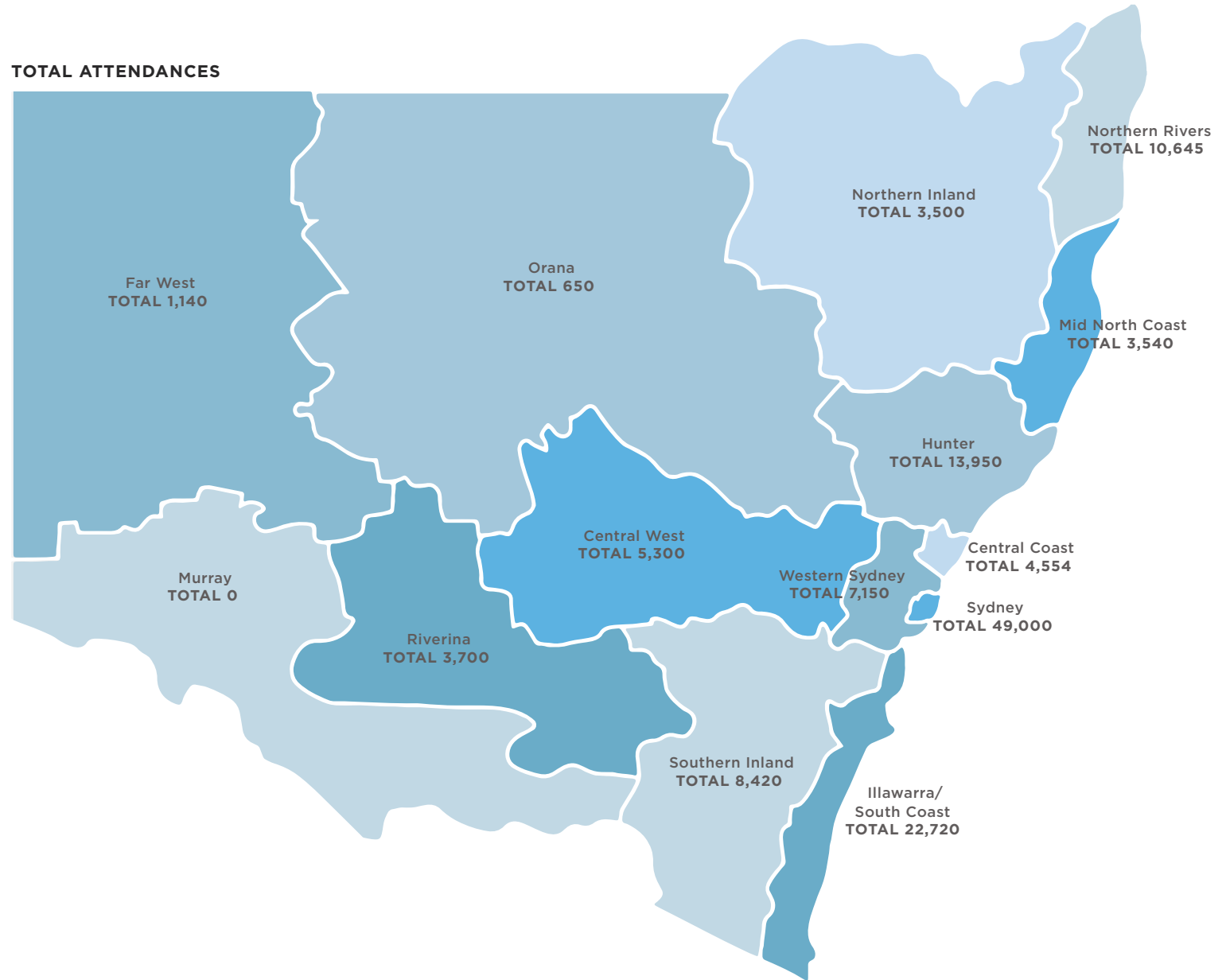
Racing Clubs

There are 28 greyhound racing clubs in NSW, with the majority in regional parts of the State.

Racing clubs not only provide the opportunity for participants and spectators to participate in the sport of greyhound racing, they also provide an important social destination and in many regions, are an important part of the community - not only for greyhound racing activity, but also for the use of their facilities within the community.

There were 1,211 race meetings across NSW. These race meetings attracted attendances approaching 134,300 - almost 64% of which were in regional NSW.

TOTAL ATTENDANCES



RACE CLUB ACTIVITY

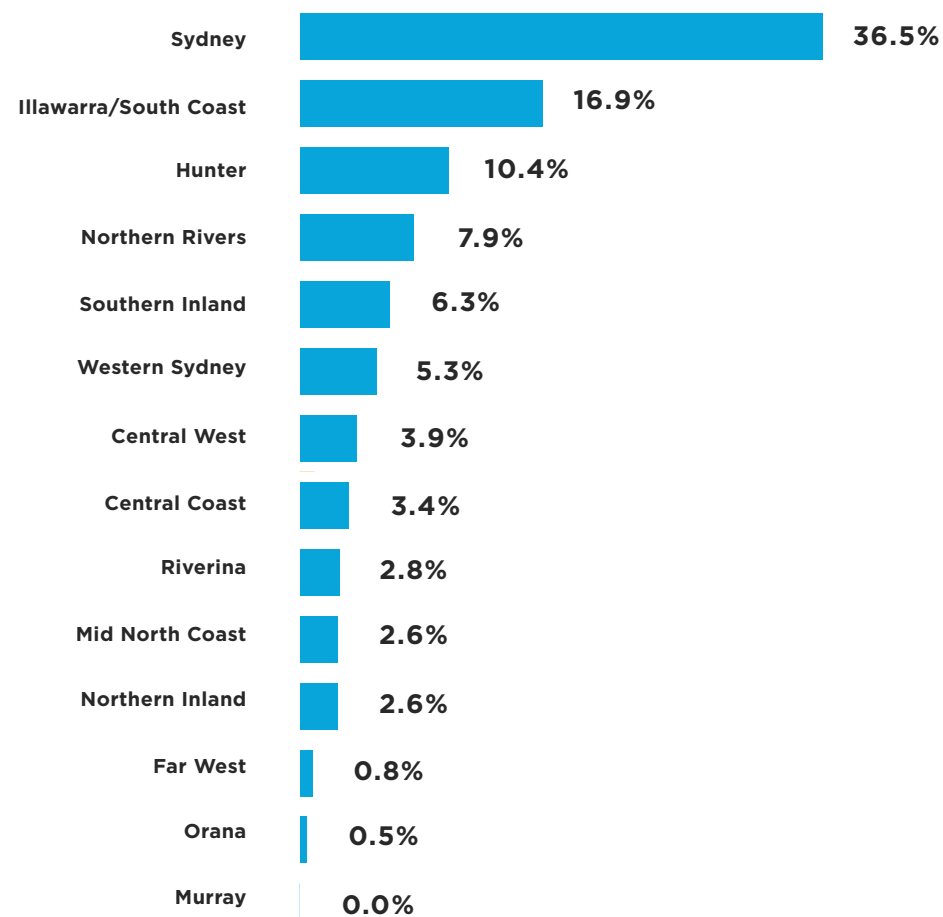
	Number of Racing Club Members	Total Race Meetings	Total Races	Total Attendances
Central Coast	0	61	651	4,554
Central West	100	63	665	5,300
Far West	33	23	154	1,140
Hunter	333	164	1,840	13,950
Illawarra/South Coast	1,050	159	1,649	22,720
Mid North Coast	180	48	493	3,540
Murray	0	0	0	0
Northern Inland	70	63	683	3,500
Northern Rivers	256	163	1,757	10,645
Orana	45	60	644	650
Riverina	130	81	859	3,700
Southern Inland	1,910	61	676	8,420
Western Sydney	2,079	175	1,988	7,150
Non-Metro Total	6,186	1,121	12,059	85,269
Sydney Metro	244	90	931	49,000
Total	6,430	1,211	12,990	134,269

Note 1: Attendances may include participants involved in the industry as well as spectators.

Note 2: The number of race meetings fluctuate year on year.

The chart below illustrates the proportion of attendances at greyhound race meetings in NSW:

ATTENDANCES AT THE NSW GREYHOUND RACE MEETINGS



Customer Expenditure Generated by Racing Clubs and Events

It is estimated that the total expenditure generated by racing customers is \$25.6 million, (excluding wagering on the races). Racing's customers include attendees, sponsors, members, broadcast providers, community groups and participants.

Racing customer expenditure can be broadly segmented into the following categories:

- + On-course raceday/night expenditure by customers (spending on on-course products, as well as yields from membership and sponsorship)
- + Off-course raceday/night expenditure by customers (spending incurred by customers as part of their attendance at the races, such as transport, retail, food etc.)
- + Non-raceday/night related expenditure (spending with racing clubs on non-racedays/nights on items such as bistro dining, hiring arrangements for facility use, fundraising, investments, track fees, etc.)

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

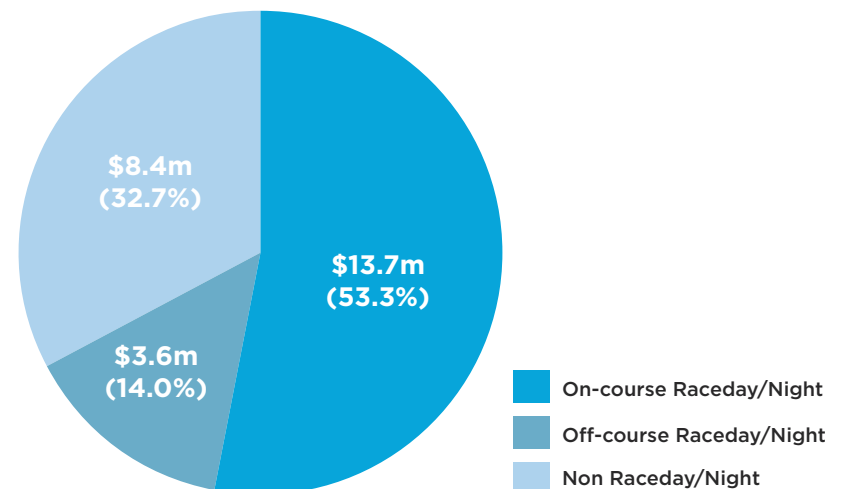
Off-course expenditure is primarily related to feature race meetings where the racing product extends out into the community both prior to and after the racing event. It is important to note that on-course expenditure within this section does not include on-course wagering.

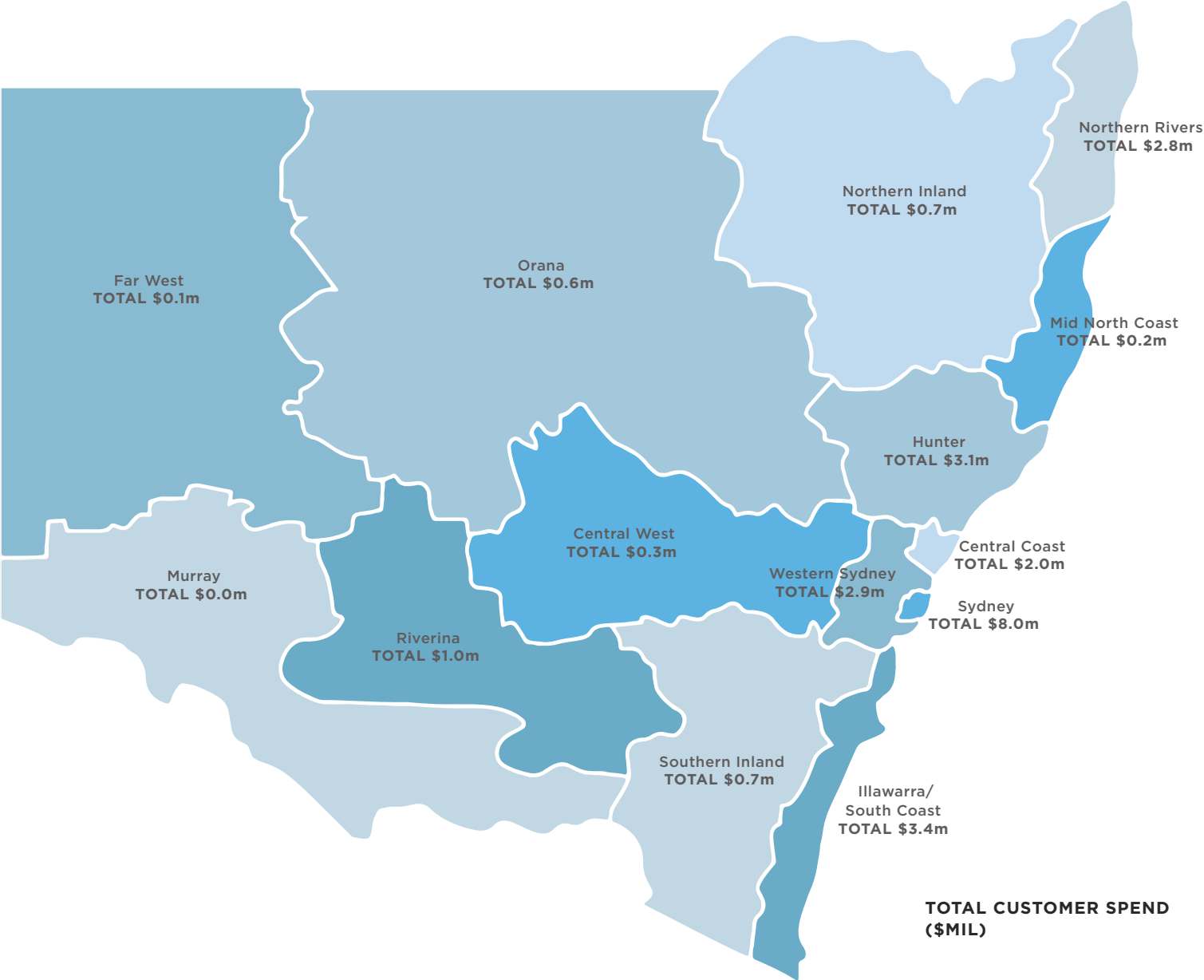
Whilst on-course wagering is the largest component of customer spend, it is analysed in the section relating to wagering.

The following chart illustrates the split of customer expenditure. More than 53% relates to on-course spending by greyhound racing attendees, with a further 32.7% through non-racing related activities such as hiring facilities, fundraising etc.



**BREAKDOWN OF RACING
CUSTOMER SPENDING**





TOTAL CUSTOMER SPEND (\$MIL)



Expenditure by the Principal Racing Authority and Clubs

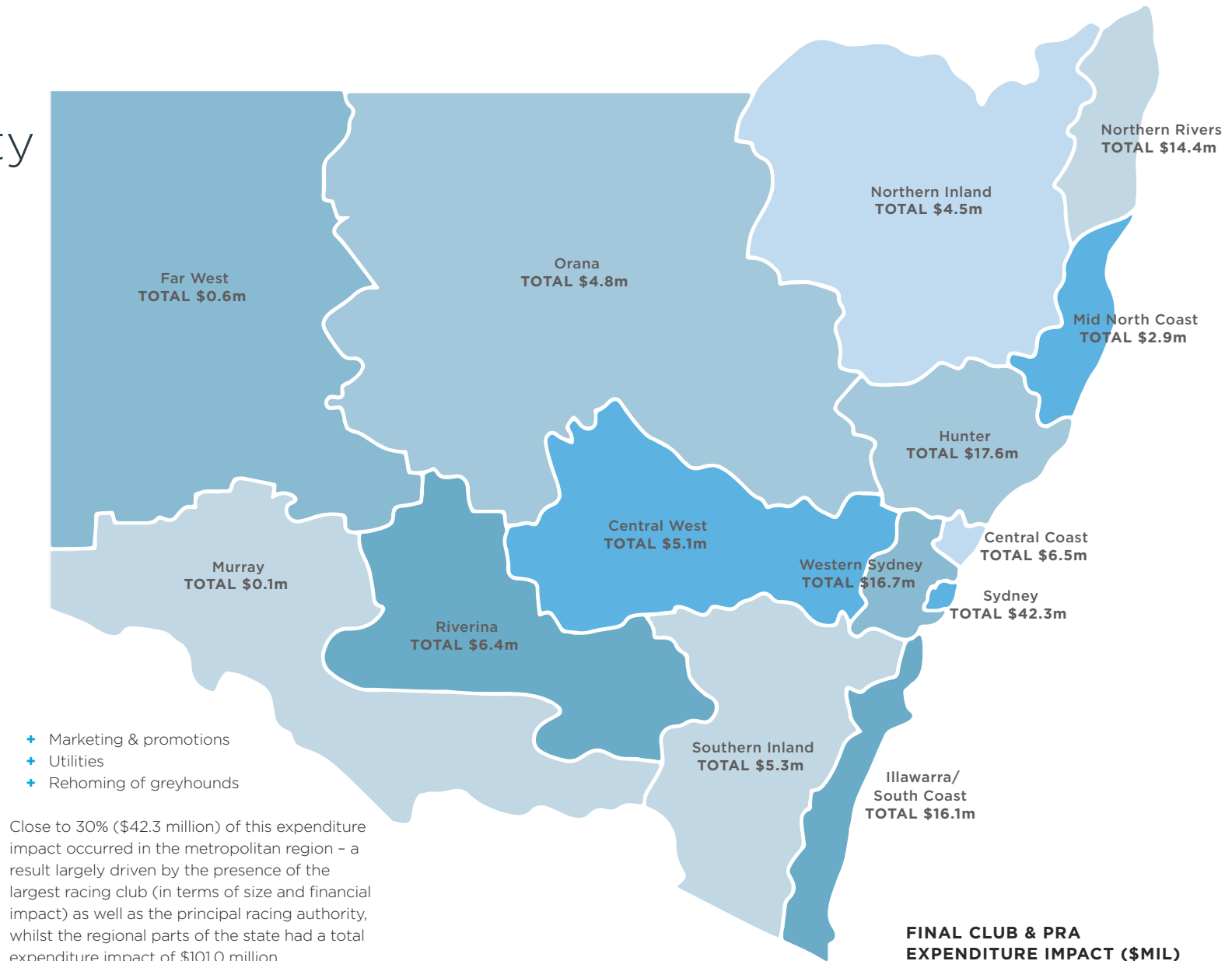
GRNSW and the 28 greyhound clubs combined, generate an expenditure impact of more than \$143.2 million in NSW. This represents the expenditure incurred by these organisations in maintaining tracks, running race meetings, administration, marketing, cost of goods and prizemoney.

The majority of expenditure generated by GRNSW and racing clubs is funded by racing customers. This includes:

- + Spending by customers on-course when attending a racing event
- + Non raceday/night utilisations of racing industry assets
- + Sponsorship and membership associated with racing clubs
- + Racing industry share of off-course and on-course wagering revenue (pari-mutuel, corporate bookmakers & betting exchanges)
- + Government grants which come indirectly from license payments and taxes from wagering operators

The key areas of expenditure, in terms of greyhound racing industry operations, include:

- + Track repairs & facilities maintenance
- + Staff & personnel
- + Cost of goods



Community and Social Benefits

The economic activity generated by the NSW greyhound racing industry complements the social impacts, where racing events and facilities foster social cohesion and provide benefits for a broad range of individuals and community organisations.

Racing and non-racing events attract community members, independent of socio-economic status, age or gender. This is highlighted within the greyhound racing industry throughout NSW, where racing is a profession, sport, hobby and leisure activity.

The development of social initiatives also has a positive impact in terms of family socialisation and volunteerism. With this, greyhound racing also supports health, education, employment and tourism. For example, health benefits through the GAPNSW program has demonstrated physical and mental wellbeing benefits for the greyhound adopters. However, maintaining and building the trust and respect of the communities in which greyhound racing clubs operate is also extremely valuable.

The implementation and communication of social and community initiatives play an important

role in managing community perceptions, and in doing so protect and enhance greyhound racing's image and reputation. This in turn provides the industry with a greater opportunity to foster the support of customers, corporate partners and Government, as well as building pride and increased satisfaction with internal stakeholders.

The sport of greyhound racing also demonstrates a strong historical significance in terms of its history and heritage throughout NSW. The NSW Greyhound Breeders, Owners and Trainers Association was founded in 1939, in which tracks began to operate across the state.

The historical elements of all racetracks throughout the state are an important part of the fabric of many local communities.

The importance of racing clubs and tracks extends beyond simply those with an interest in racing. They are valuable community assets. This greyhound racing industry study incorporated a social impact survey which was completed by all racing clubs. The information gathered from this survey provided valuable insights in determining the extent of the social and community benefits generated by the greyhound racing industry.





The evaluation highlighted the greyhound racing industry's significant role in the critical areas of:

+ Community Building

Building inclusive and welcoming communities featuring powerful and collaborative partnerships and relationships

+ Family

Providing opportunities for family participation in greyhound racing and assisting in the development of stronger family relationships

+ Education and Training

Supporting the education, training and development of participants and greyhound racing club staff and volunteers

+ Health

Commitment to policies that support priority community health objectives and providing engagement and a sense of worth for volunteers within the industry

+ Leisure

Providing enjoyable leisure opportunities for hobby owners, trainers, raceday/night customers and other greyhound racing club event attendees

+ Employment

Creating a major source of employment and a variety of career opportunities for NSW residents

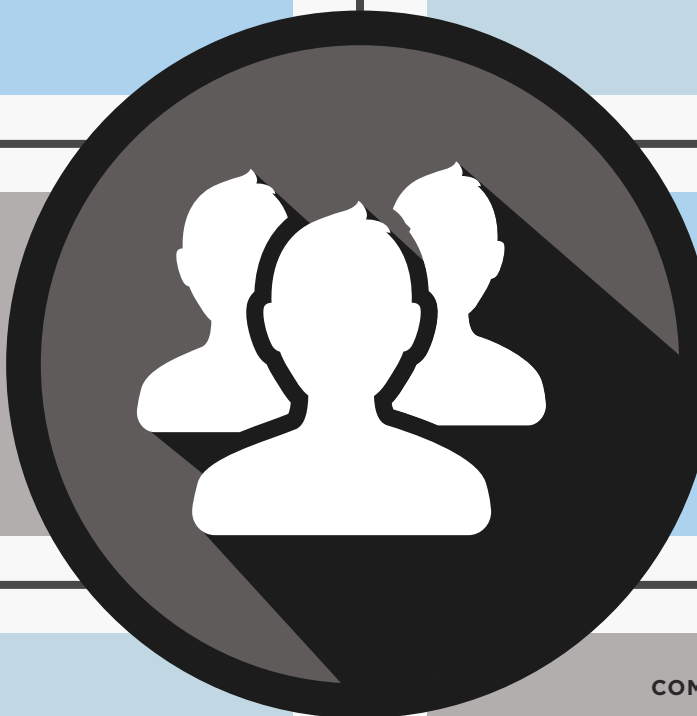


CAPACITY BUILDING

Most racing Clubs hire out on-course facilities for private or social use. The hire of these facilities serve events that support their local communities

CHARITABLE SUPPORT

More than 50 charitable organisations are supported by the greyhound racing industry. These charities receive direct funds, in addition to in-kind support



HISTORY

Greyhound Racing in the NSW has a long and celebrated history dating back to the 1930s

VOLUNTEERISM

Close to 1,600 roles provide their skills, time and support to the greyhound racing industry as a volunteer



FACILITY SHARING

36 community and not-for-profit organisations share racing club facilities in NSW

COMMUNITY

Racing clubs provide an important community for more than 6,400 members who are actively engaged in their club. Close to 134,300 attendances are recorded at NSW greyhound race meetings



COMMUNITY BUILDING

Greyhound racing in NSW has adopted practices that engage with individuals and build strong partnerships with organisations within their communities. This is particularly visible in terms of supporting charitable organisations, engaging volunteers and building community partnerships - as well as key initiatives through GAPNSW.

The survey results highlighted the following positive outcomes demonstrated by clubs:

- + Over 50 community organisations or charities are assisted and supported by racing clubs
- + Close to 40 community organisations share racing club facilities and resources
- + Greyhound racing in NSW currently engages close to 1,600 volunteer roles who assist in various club and participant roles
- + Over 6,400 people hold racing club memberships

Racing plays an important role in fostering a sense of worth and belonging over 1,600 people who provide volunteer time and services to racing clubs and participants. Socially, volunteering is recognised as a means of enhancing the quality of life, particularly among the aged, whilst making an important contribution to the community. Volunteers in racing assume roles in areas such as:

- + Gate supervisor
- + Administration (e.g. committee, board members)
- + Kennel attendants
- + Promotions and fundraising
- + Preparing and maintaining the track and grounds
- + Operating beverage outlets
- + Lure driver

IER found that racing clubs assist and support more than 50 organisations and charities.

Club organised functions raise significant funds for community organisations and charities through activities such as raffles and auctions. Furthermore, many clubs engage local community organisations and charities to undertake activities such as supplying food and beverages, operational duties etc.

Just some of the charitable organisations supported by racing include:

- + General charities (e.g. Local Breast Cancer Awareness, Men of League, Footy Colours Cancer Foundation, Care Flight, Cystic Fibrosis, Men's Mental Health, Mission Australia, Disability Trust, Veolia Trust, Haulin' the Hume (HTH), Mental Health initiatives)
- + Racing based initiatives (e.g. Greyhound Adoption Program)
- + Sporting clubs and organisations (e.g. Londonderry Junior Rugby League, Shoalhaven Junior Cricket Association, Harness Racing clubs, Dressage, Rodeo clubs, Junior Basketball, Indoor Hockey, Netball, Fishing clubs)
- + Community groups and organisations (e.g. Lions clubs, Folk clubs, Fire and Rescue, Poultry Fanciers Association, Retirement Villages, Hot Rod clubs)
- + Agricultural and Horticultural associations
- + Local councils
- + Dog training and Kennel clubs

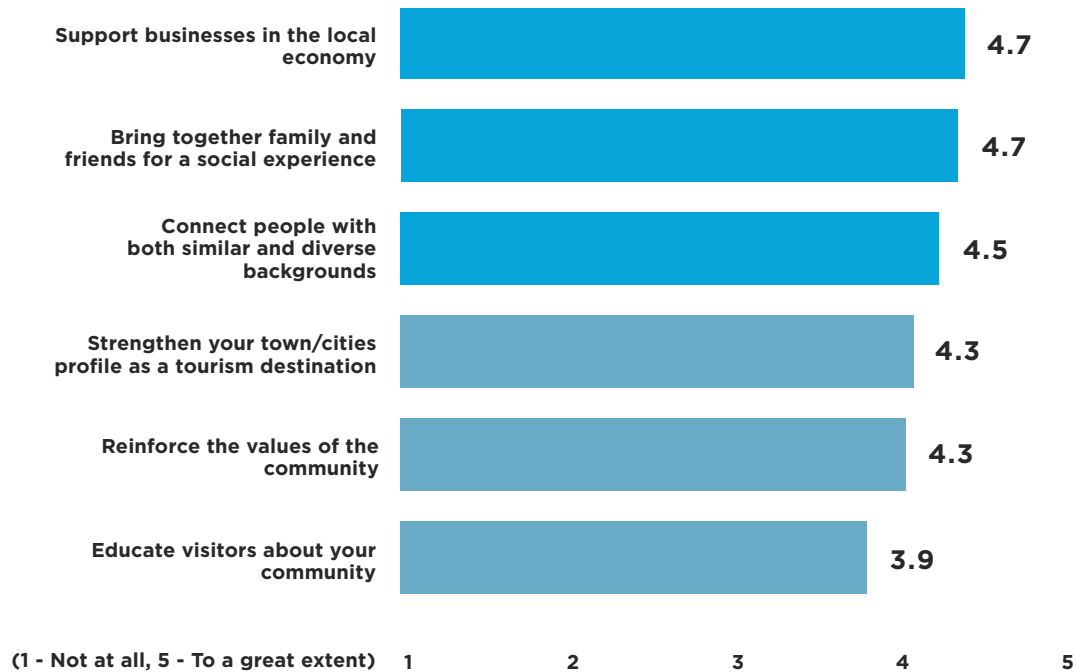


Greyhound racing plays an important role in fostering a sense of worth and belonging to close to 1,600 volunteer roles across club and industry

The economic research in this study clearly demonstrates how greyhound racing supports businesses in the local economy, from the preparation of racing greyhounds through to consumer spending. In addition to this, attendee research conducted at general racing events supports the concept of the racing industry's ability to bring people together for a social experience. The research demonstrates that a key motivation to attending racing events is the chance to socialise with friends and family.

The social impact survey asked clubs how much they believed racing in their town or city has the ability to engage with the community from a social cohesion, tourism and business perspective. As the chart illustrates, all indicators were positive, particularly significant in the areas of racing's ability to 'support businesses in the local economy' (4.7), to 'bring together family and friends for a social experience' (4.7) and to 'connect people with both similar and diverse backgrounds' (4.5). These indicators illustrate the position that greyhound clubs see themselves as integral to the fabric of the local community.

COMMUNITY ENGAGEMENT WITHIN NSW RACING





SUPPORTING FAMILY RELATIONSHIPS

The survey identified that racing clubs have increasingly developed activities and facilities that enable families to enjoy a social day at the races. Many clubs actively promote services and amenities which are conducive to bringing families together to build stronger relationships.

Racing clubs themselves have increasingly developed activities and on-course facilities that enable families to enjoy a social day or night at the races. The survey revealed a number of positive initiatives which have been developed by clubs. All clubs offer attractions or services that support attendance by children and all clubs offer facilities and access for people with a disability (examples include lifts, ramps, reserved seating, toilets etc).

In addition to this, some of the specific raceday/night initiatives undertaken by greyhound racing clubs in NSW include:

- + Jumping castles
- + Food markets
- + School holiday activities
- + Petting zoos
- + Street performers
- + Activities around Easter and Christmas time
- + Kids Fashions on the Field
- + Face painting and live music
- + Carnival rides (e.g. Mini train rides, dodgem cars)
- + Giveaways
- + Kid's zones with games and activities

SHARING FACILITIES WITHIN THE COMMUNITY

Greyhound racing clubs have a limited requirement to use their facilities for racing purposes and therefore look to assist and support the community by providing these facilities and resources for use on a temporary and permanent basis. The majority of greyhound racing clubs engage with community groups including hobby and sporting clubs, Lions clubs and Agricultural and Horticultural associations to share their facilities and resources.

This is particularly evident in regional areas where facilities have been used extensively for community and public use. Some of the 36 organisations which share facilities and resources with clubs include:

- + Hobby clubs (Motorcycle, Fishing)
- + Sports clubs (Rugby League, Football)
- + Music events
- + NSW Rural Fire Service state games
- + Monster Trucks Australia
- + Dog clubs
- + Harness racing clubs
- + Lions and Folk clubs
- + Markets
- + Agricultural and Horticultural associations
- + Regional Councils



EDUCATION AND TRAINING

Education and training are vitally important for the continued growth and success of greyhound racing across NSW. Education and training programs also work to support communities through various avenues.

Larger racing hubs like Sydney as well as regional areas feel the positive impact provided by community partnerships, training programs and welfare initiatives. Participants in the racing industry have a variety of education and training courses to assist and support those within the industry to further their professional or tertiary development, and to engage those looking for opportunities to enter the industry.

Racing clubs and participants directly employ staff on a full-time, part-time and casual basis. Club employees are involved in administration, which includes the conduct of raceday/night and other non-raceday/night tasks.

As part of their commitment to delivering an enjoyable experience for racing participants and customers, racing clubs have adopted a number of initiatives:

- + 42% of clubs have at least one member of their staff currently participating in further education, career development and training programs each year
- + 53% of clubs offer placements for work experience students each year
- + 5% of clubs have partnerships with primary, secondary, trade and tertiary institutions
- + All racing clubs encourage responsible gambling and responsible consumption of alcohol



PROMOTING HEALTHY RACING CLUB ENVIRONMENTS

Greyhound racing clubs in NSW have developed and applied a number of initiatives to improve the raceday/night and non-raceday/night experience for attendees, participants, staff, partners and the broader community. These initiatives have arisen in response to changing consumer needs and community values.

Racing clubs play an active role in providing healthy environments for their customers and racing participants. Some examples include:

- + 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 & practices in place to encourage responsible consumption of alcohol
- + Clubs have trained on-site medical staff available to assist participants, volunteers, staff and customers if required

Racing clubs manage major facilities and events involving large numbers of customers. Many of these events relate to non-raceday/night functions and events run by other community groups or individuals. Community and Government expectations of racing clubs, relating to environmentally friendly practices and policies, have led to the adoption of a number of important initiatives that have a positive impact on the NSW environment.

Racing clubs are actively implementing policies and practices in key areas that impact on the environment. More than 68% of all clubs have policies in place to save water or to re-use or recycle water. Examples include:

- + Use of bore water and council treatment plants
- + Effluent water usage
- + Timed and low flow irrigation (dripper irrigation)
- + Rain storage tanks, dams and storm water feeds

Furthermore, 79% percent of clubs have programs in place to utilise solar energy or save electricity. Examples include:

- + Installation of panels for solar generation
- + Lighting and power programming to save energy
- + Energy efficient light fittings (low energy lighting)

Meanwhile, 53% of clubs have implemented aspects for energy efficient buildings. Examples include:

- + Insulation and cool room style roofs
- + Planning of buildings to have orientated in directions for energy efficiencies



CLUB HISTORY AND HERITAGE

Greyhound racing in NSW has a long and important history, in which the sport has been officially recorded for more than 80 years. Many clubs actively promote past sporting participants, racing identities and special anniversaries.

It is believed that the first ever sporting use of greyhounds in Australia dates back to the 1860s, despite this, 'tin hare' racing wasn't introduced in NSW until 1927. The inaugural meeting was held at Epping Racecourse, which went on to be known as Harold Park, with the establishment of the Greyhound Coursing Association.

The NSW Greyhound Breeders, Owners and Trainers Association was founded in 1939 and with it, more tracks began to open across the state. In the 1970s, crowd attendance at race meetings had grown to substantial levels, leading to the National Coursing Association constructing a large grandstand to accommodate the expansion of patronage – marking a significant change and movement in a new direction for Wentworth Park. The new grandstand was finished in 1985 which became the headquarters of NSW Greyhound Breeders Owners and Trainers Association two years later following the ceasing of racing at Harold Park.

In 2008, the NSW NCA terminated their agreement with Wentworth Park to take up permanent residence at The Gardens despite having their longstanding partnership with

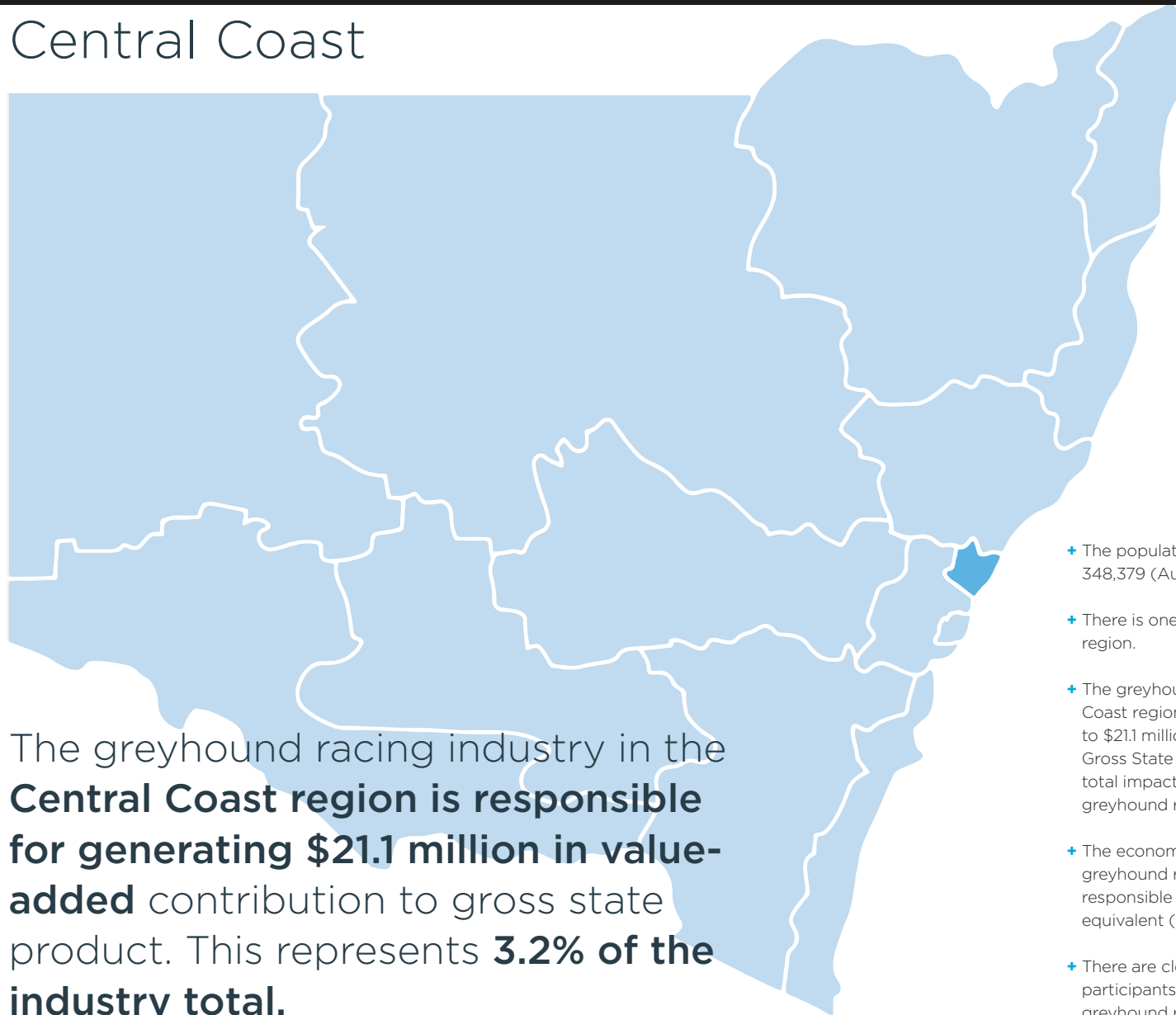
Wentworth Park Trust. NSW NCA then took up permanent residence at The Gardens. Currently, races are held on all-year-round and there are 28 greyhound racing clubs in operation.

A number of examples include:

- + Annual Anniversary Cup race day recognising the origins of the Club and track
- + Promoting club and feature race anniversaries
- + Prints and images on display
- + Promoting club and feature race anniversaries
- + Engaging the media with historical information about clubs
- + Social media articles
- + On-course memorabilia rooms



Central Coast



RACING CLUBS IN THE REGION

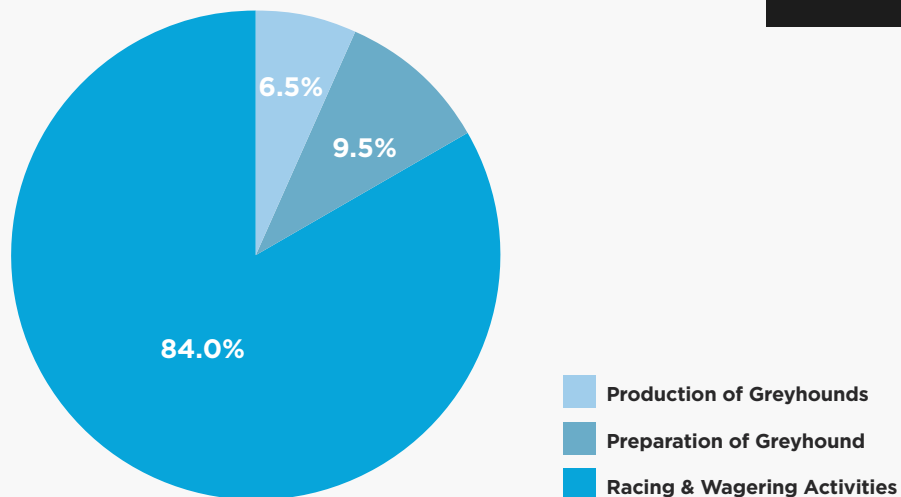
- + Gosford Racing Club

The greyhound racing industry in the **Central Coast region is responsible for generating \$21.1 million in value-added** contribution to gross state product. This represents **3.2% of the industry total.**

- + The population of the Central Coast region is 348,379 (Australian Bureau of Statistics).
- + There is one (1) racing club operating in the region.
- + The greyhound racing industry in the Central Coast region is responsible for generating close to \$21.1 million in value-added contribution to Gross State Product. This equates to 3.2% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 151 full-time equivalent (FTE) jobs in the region.
- + There are close to 650 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Central Coast region.

Race meetings in the **Central Coast region** attracted attendances of **4,554** or **3.4%** of total attendances at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE CENTRAL COAST REGION (%)



AT A GLANCE

1 Racing Club

61 Race Meetings

651 Races

4,554 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$19.3m
Total Value-Added	\$21.1m
Full-time Equivalent Employment	151

ANIMALS

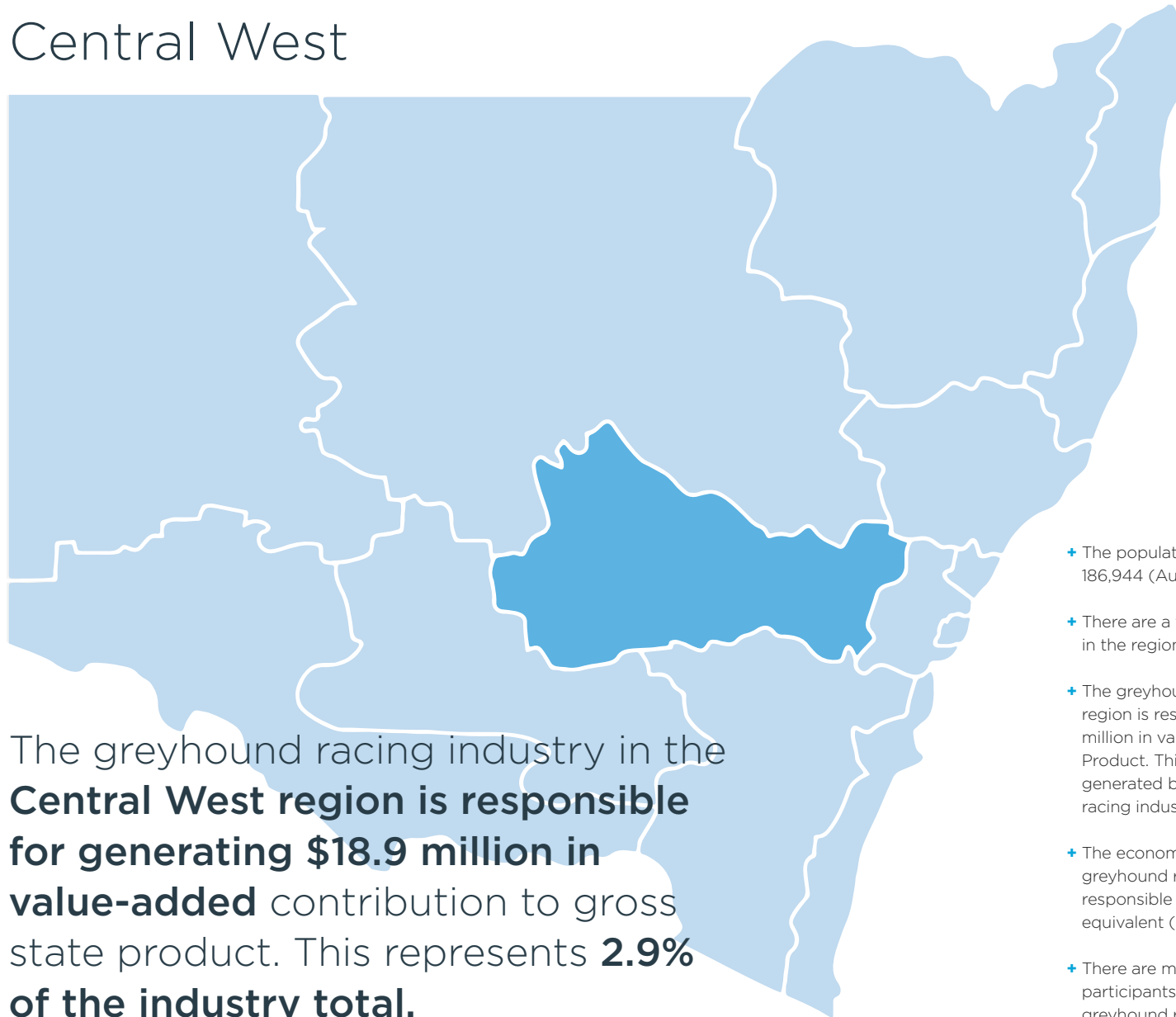
Pups Produced	208
Sires	14
Dams	27
Greyhounds in Training	376

TOTAL ROLES OCCUPIED IN RACING

Breeders	45
Owners/Syndicate Members	301
Trainers	63
Racing Club & Industry Staff	81
Breeders Staff	41
Kennel Employees	54
Racing Club Volunteers	0
Volunteers Assisting Participants	65
Total roles occupied in the Central Coast region	649

*Some totals do not add due to rounding.

Central West



The greyhound racing industry in the **Central West region is responsible for generating \$18.9 million in value-added** contribution to gross state product. This represents **2.9% of the industry total.**

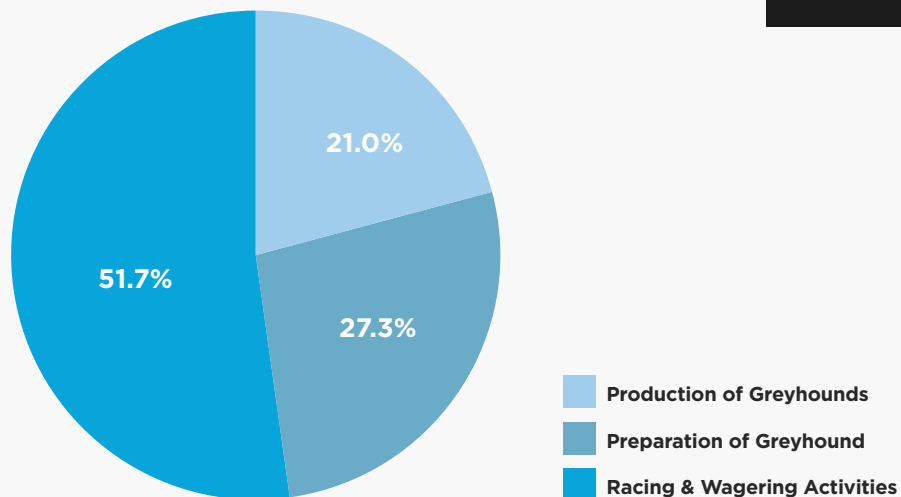
RACING CLUBS IN THE REGION

- + Bathurst Racing Club
- + Lithgow Racing Club

- + The population of the Central West region is 186,944 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region.
- + The greyhound racing industry in the Central West region is responsible for generating close to \$18.9 million in value-added contribution to Gross State Product. This equates to 2.9% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 143 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,000 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Central West region.

Race meetings in the **Central West region** attracted attendances of **5,300** or **3.9%** of total attendances at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE CENTRAL WEST REGION (%)



AT A GLANCE

2 Racing Clubs

63 Race Meetings

665 Races

100 Racing Club Members

5,300 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$21.0m
Total Value-Added	\$18.9m
Full-time Equivalent Employment	143

ANIMALS

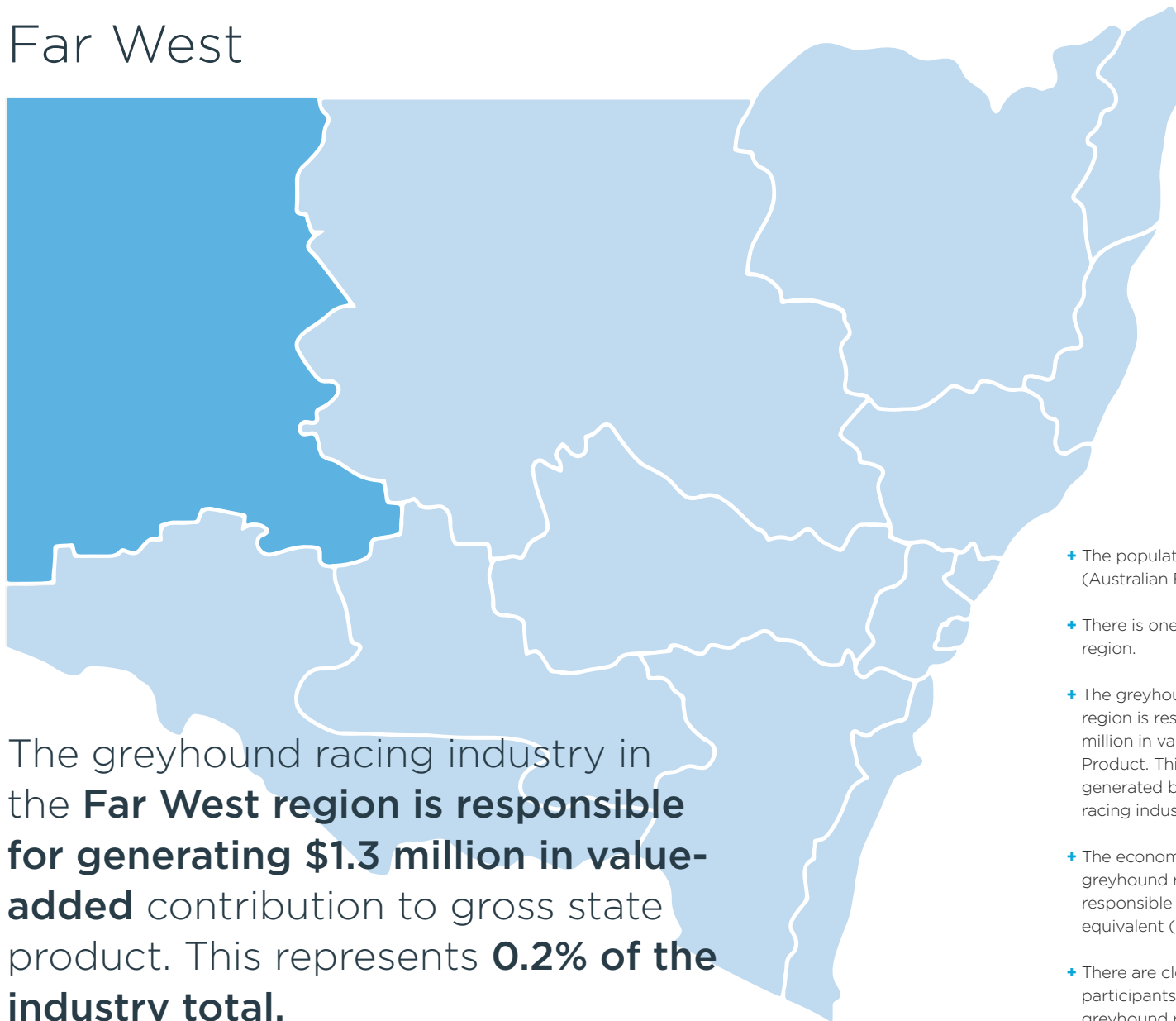
Pups Produced	759
Sires	9
Dams	98
Greyhounds in Training	1,175

TOTAL ROLES OCCUPIED IN RACING

Breeders	102
Owners/Syndicate Members	347
Trainers	123
Racing Club & Industry Staff	88
Breeders Staff	92
Kennel Employees	105
Racing Club Volunteers	9
Volunteers Assisting Participants	135
Total roles occupied in the Central West region	1,001

*Some totals do not add due to rounding.

Far West



The greyhound racing industry in the **Far West region is responsible for generating \$1.3 million in value-added** contribution to gross state product. This represents **0.2% of the industry total.**

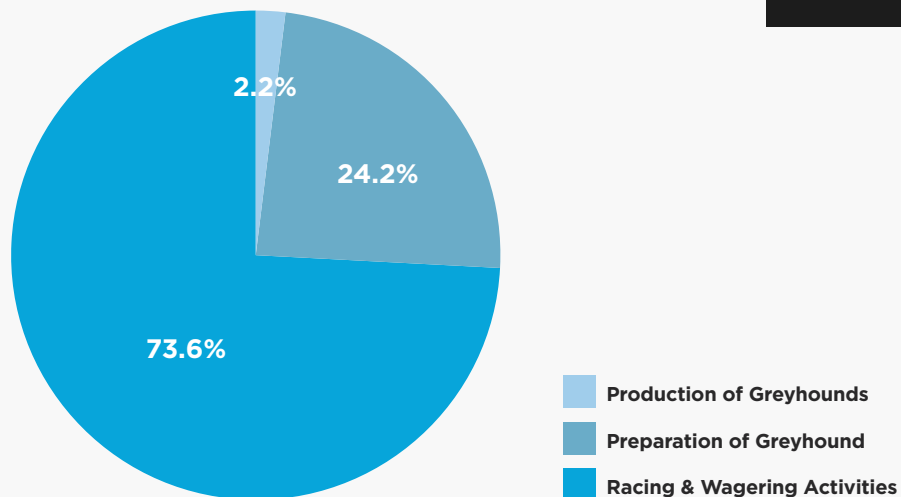
RACING CLUBS IN THE REGION

- + Broken Hill Racing Club

- + The population of the Far West region is 19,421 (Australian Bureau of Statistics).
- + There is one (1) racing club operating in the region.
- + The greyhound racing industry in the Far West region is responsible for generating close to \$1.3 million in value-added contribution to Gross State Product. This equates to 0.2% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 9 full-time equivalent (FTE) jobs in the region.
- + There are close to 130 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Far West region.

Race meetings in the Far West region attracted attendances of **1,140** or **0.8% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE FAR WEST REGION (%)



AT A GLANCE

1 Racing Club

23 Race Meetings

154 Races

33 Racing Club Members

1,140 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$1.5m
Total Value-Added	\$1.3m
Full-time Equivalent Employment	9

ANIMALS

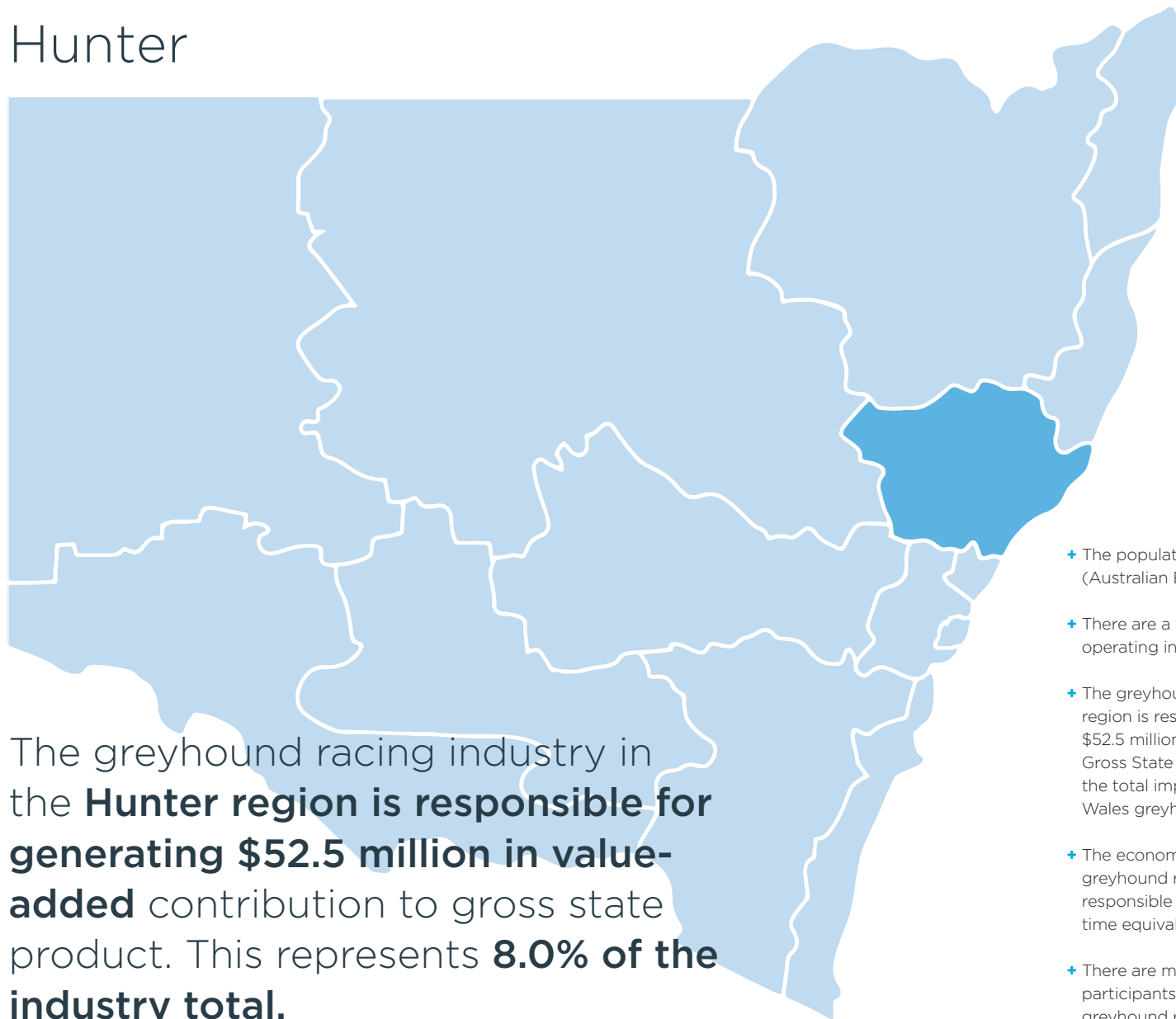
Pups Produced	6
Sires	0
Dams	0
Greyhounds in Training	75

TOTAL ROLES OCCUPIED IN RACING

Breeders	5
Owners/Syndicate Members	39
Trainers	19
Racing Club & Industry Staff	6
Breeders Staff	5
Kennel Employees	16
Racing Club Volunteers	21
Volunteers Assisting Participants	15
Total roles occupied in the Far West region	126

*Some totals do not add due to rounding.

Hunter



The greyhound racing industry in the **Hunter region is responsible for generating \$52.5 million in value-added** contribution to gross state product. This represents **8.0% of the industry total.**

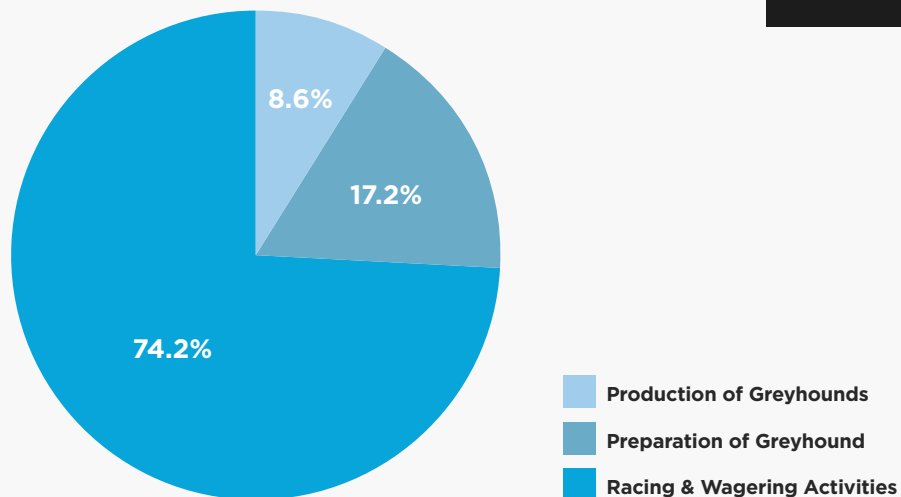
RACING CLUBS IN THE REGION

- + Maitland Racing Club
- + Muswellbrook Racing Club
- + The Gardens Racing Club

- + The population of the Hunter region is 678,162 (Australian Bureau of Statistics).
- + There are a total of three (3) racing clubs operating in the region.
- + The greyhound racing industry in the Hunter region is responsible for generating more than \$52.5 million in value-added contribution to Gross State Product. This equates to 8.0% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 382 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,000 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Hunter region.

Race meetings in the Hunter region attracted attendances of **13,950 or 10.4% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE HUNTER REGION (%)



AT A GLANCE

3 Racing Clubs

164 Race Meetings

1,840 Races

333 Racing Club Members

13,950 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$51.8m
Total Value-Added	\$52.5m
Full-time Equivalent Employment	382

ANIMALS

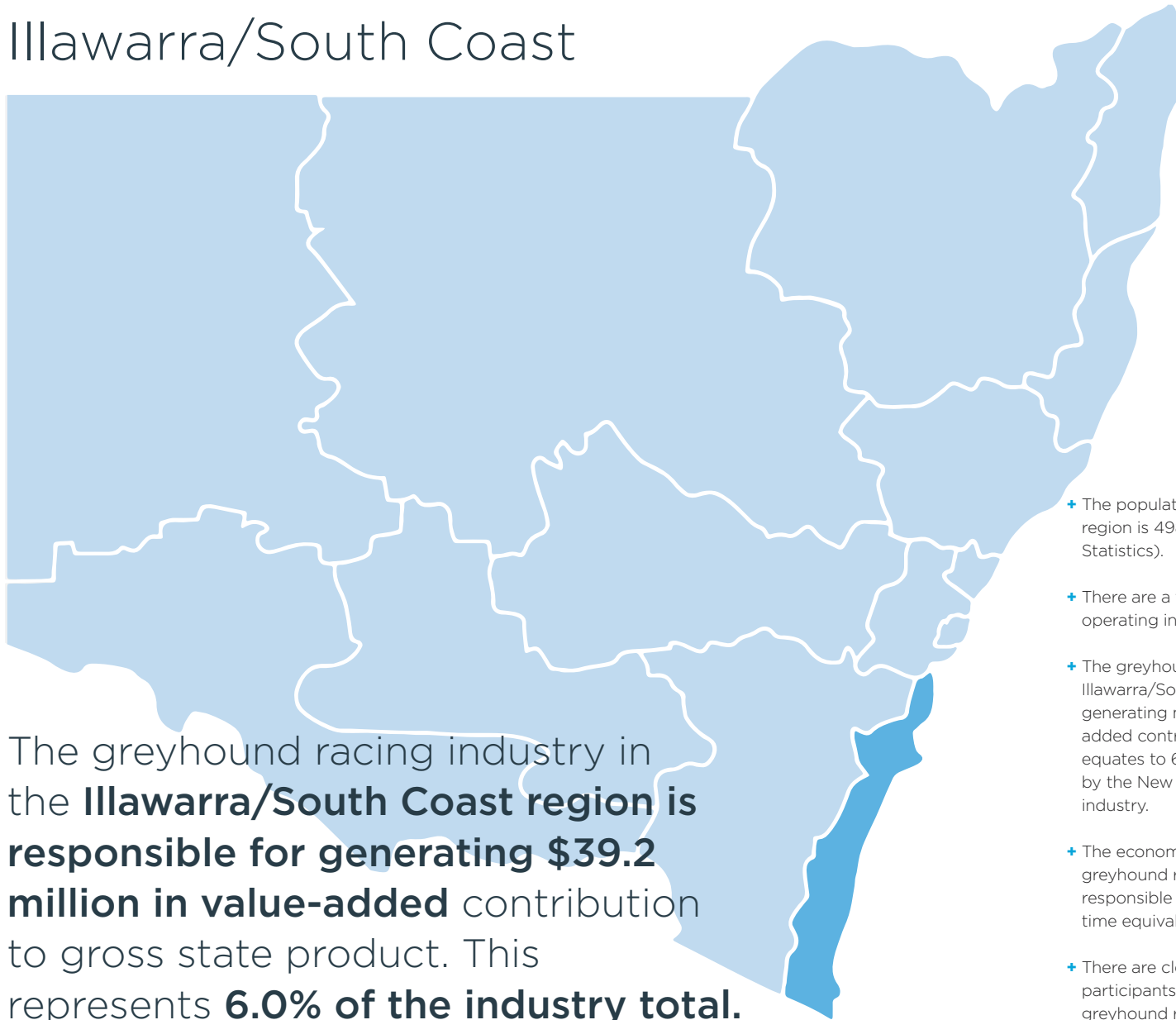
Pups Produced	804
Sires	4
Dams	95
Greyhounds in Training	1,823

TOTAL ROLES OCCUPIED IN RACING

Breeders	164
Owners/Syndicate Members	951
Trainers	229
Racing Club & Industry Staff	113
Breeders Staff	149
Kennel Employees	196
Racing Club Volunteers	11
Volunteers Assisting Participants	236
Total roles occupied in the Hunter region	2,049

*Some totals do not add due to rounding.

Illawarra/South Coast



The greyhound racing industry in the **Illawarra/South Coast region is responsible for generating \$39.2 million in value-added** contribution to gross state product. This represents **6.0% of the industry total.**

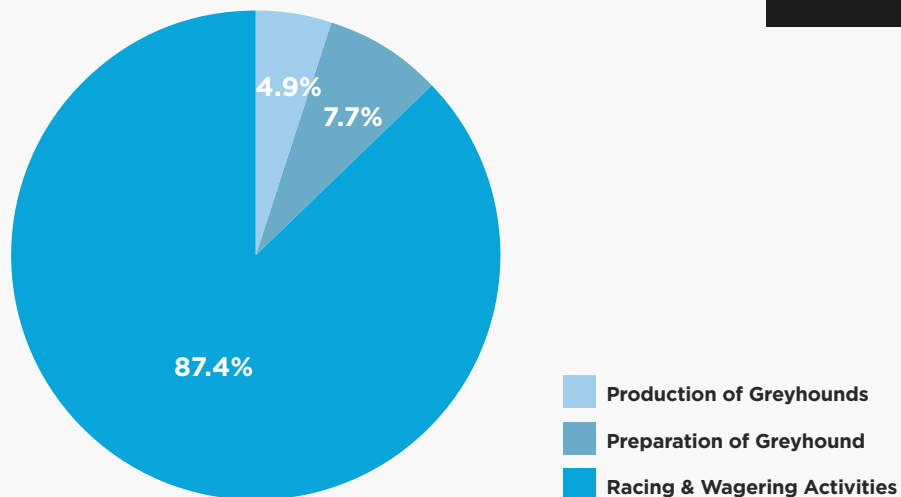
RACING CLUBS IN THE REGION

- + Bulli Racing Club
- + Dapto Racing Club
- + Nowra Racing Club

- + The population of the Illawarra/South Coast region is 498,772 (Australian Bureau of Statistics).
- + There are a total of three (3) racing clubs operating in the region.
- + The greyhound racing industry in the Illawarra/South Coast region is responsible for generating more than \$39.2 million in value-added contribution to Gross State Product. This equates to 6.0% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 286 full-time equivalent (FTE) jobs in the region.
- + There are close to 870 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Illawarra/South Coast region.

Race meetings in the Illawarra/
South Coast region attracted
attendances of **22,720 or 16.9%**
of total attendances at race
meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN
THE ILLAWARRA/SOUTH COAST REGION (%)



AT A GLANCE

3 Racing Clubs

159 Race Meetings

1,649 Races

1,050 Racing Club
Members

22,720 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$37.8m
Total Value-Added	\$39.2m
Full-time Equivalent Employment	286

ANIMALS

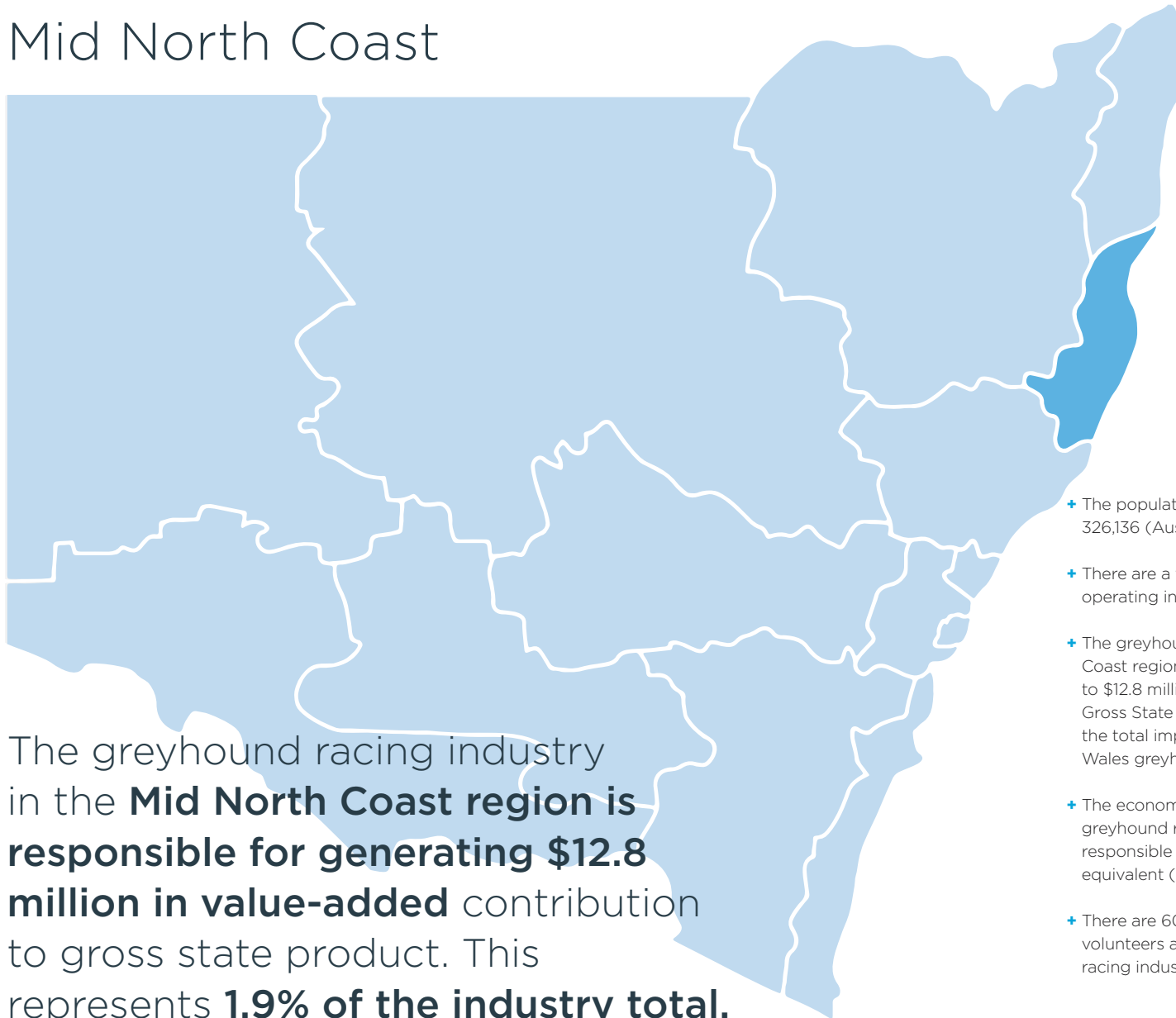
Pups Produced	213
Sires	4
Dams	28
Greyhounds in Training	594

TOTAL ROLES OCCUPIED IN RACING

Breeders	58
Owners/Syndicate Members	339
Trainers	84
Racing Club & Industry Staff	157
Breeders Staff	53
Kennel Employees	72
Racing Club Volunteers	16
Volunteers Assisting Participants	85
Total roles occupied in the Illawarra/South Coast region	865

*Some totals do not add due to rounding.

Mid North Coast



The greyhound racing industry in the **Mid North Coast region is responsible for generating \$12.8 million in value-added** contribution to gross state product. This represents **1.9% of the industry total.**

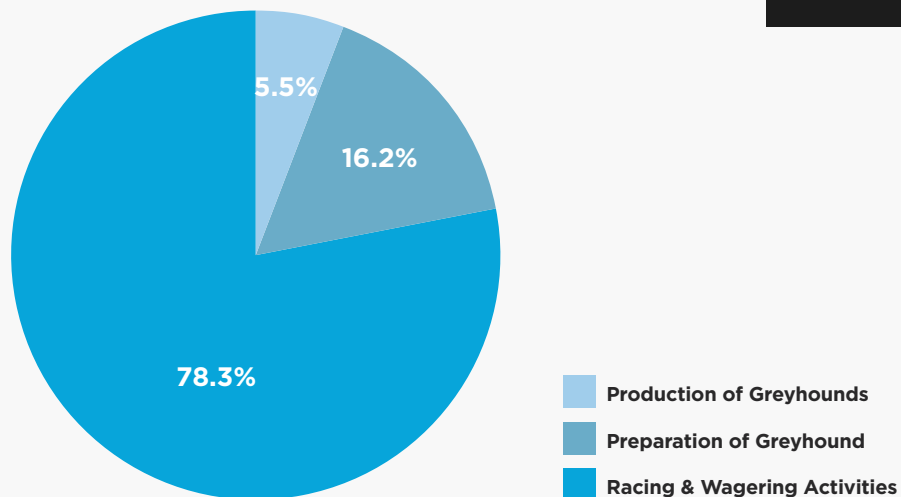
RACING CLUBS IN THE REGION

- + Kempsey Racing Club
- + Taree Racing Club
- + Wauchope Racing Club

- + The population of the Mid North Coast region is 326,136 (Australian Bureau of Statistics).
- + There are a total of three (3) racing clubs operating in the region.
- + The greyhound racing industry in the Mid North Coast region is responsible for generating close to \$12.8 million in value-added contribution to Gross State Product. This equates to 1.9% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 95 full-time equivalent (FTE) jobs in the region.
- + There are 600 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Mid North Coast region.

Race meetings in the Mid North Coast region attracted attendances of **3,540 or 2.6% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE MID NORTH COAST REGION (%)



AT A GLANCE

3 Racing Clubs

48 Race Meetings

493 Races

180 Racing Club Members

3,540 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$13.7m
Total Value-Added	\$12.8m
Full-time Equivalent Employment	95

ANIMALS

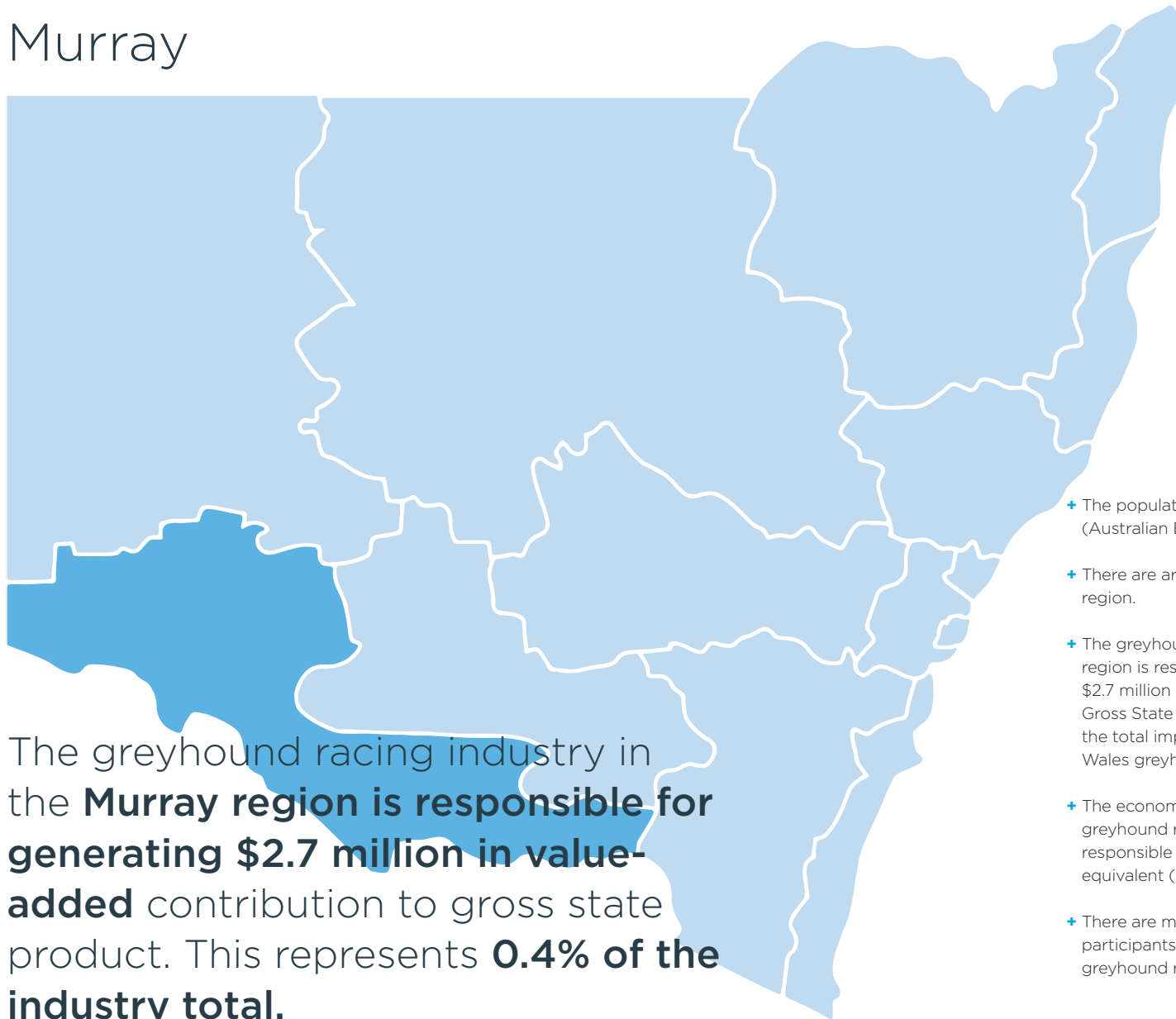
Pups Produced	129
Sires	2
Dams	17
Greyhounds in Training	456

TOTAL ROLES OCCUPIED IN RACING

Breeders	45
Owners/Syndicate Members	205
Trainers	80
Racing Club & Industry Staff	64
Breeders Staff	41
Kennel Employees	68
Racing Club Volunteers	22
Volunteers Assisting Participants	75
Total roles occupied in the Mid North Coast region	600

*Some totals do not add due to rounding.

Murray



The greyhound racing industry in the **Murray region is responsible for generating \$2.7 million in value-added** contribution to gross state product. This represents **0.4% of the industry total.**

- + The population of the Murray region is 119,485 (Australian Bureau of Statistics).
- + There are no racing clubs operating in the region.
- + The greyhound racing industry in the Murray region is responsible for generating close to \$2.7 million in value-added contribution to Gross State Product. This equates to 0.4% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 20 full-time equivalent (FTE) jobs in the region.
- + There are more than 90 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Murray region.

AT A GLANCE

0 Racing Clubs

0 Race Meetings

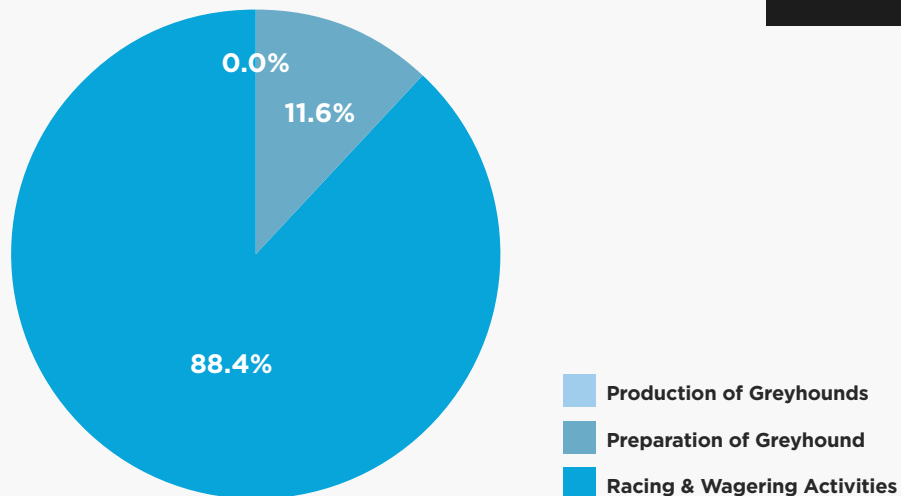
0 Races

0 Racing Club Members

0 Attendances

*Some totals do not add due to rounding

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE MURRAY REGION (%)



ECONOMIC IMPACTS

Total Direct Expenditure	\$2.9m
Total Value-Added	\$2.7m
Full-time Equivalent Employment	20

ANIMALS

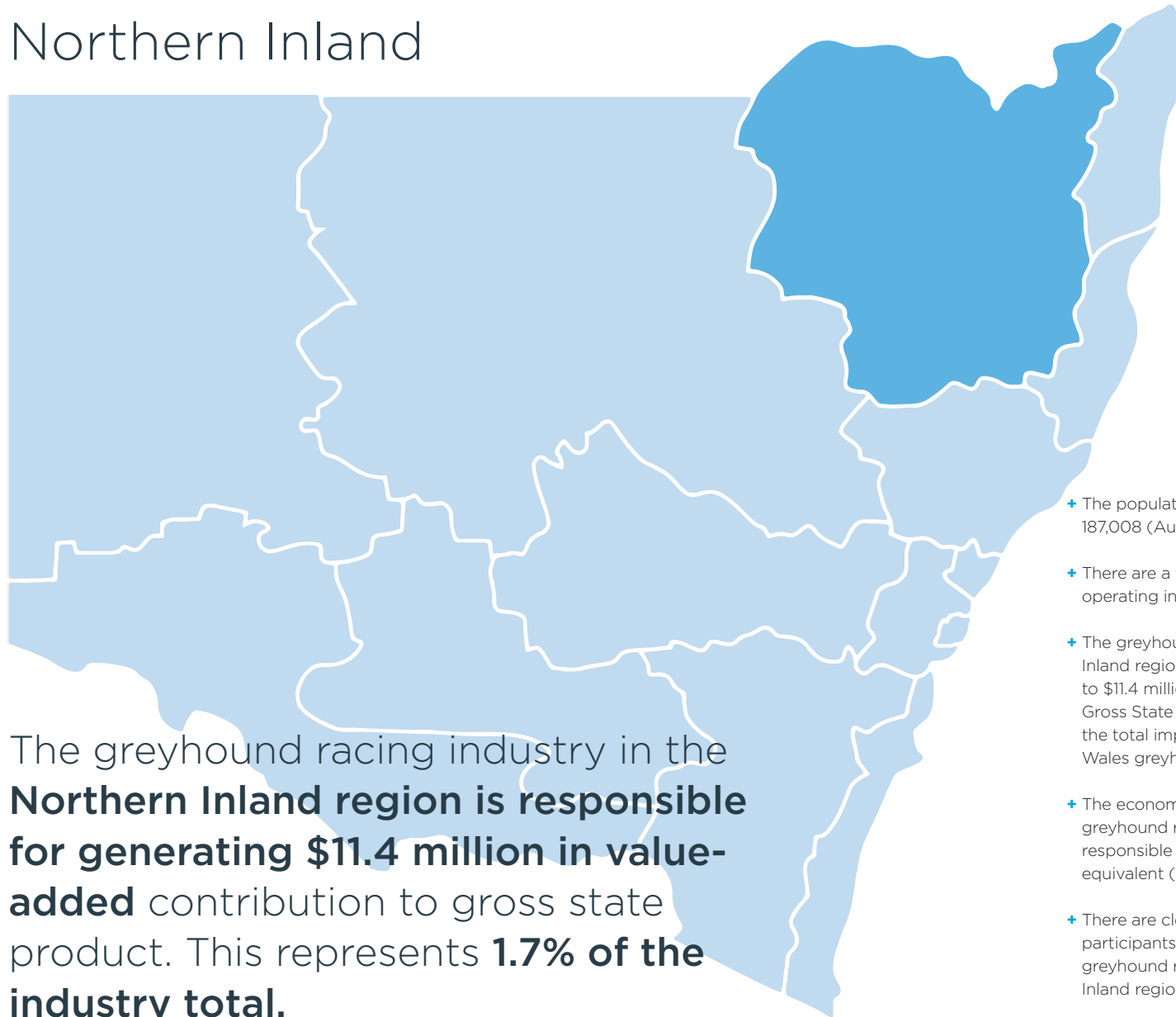
Pups Produced	0
Sires	0
Dams	2
Greyhounds in Training	70

TOTAL ROLES OCCUPIED IN RACING

Breeders	7
Owners/Syndicate Members	52
Trainers	9
Racing Club & Industry Staff	0
Breeders Staff	6
Kennel Employees	8
Racing Club Volunteers	0
Volunteers Assisting Participants	10
Total roles occupied in the Murray region	92

*Some totals do not add due to rounding.

Northern Inland



The greyhound racing industry in the **Northern Inland region is responsible for generating \$11.4 million in value-added** contribution to gross state product. This represents **1.7% of the industry total.**

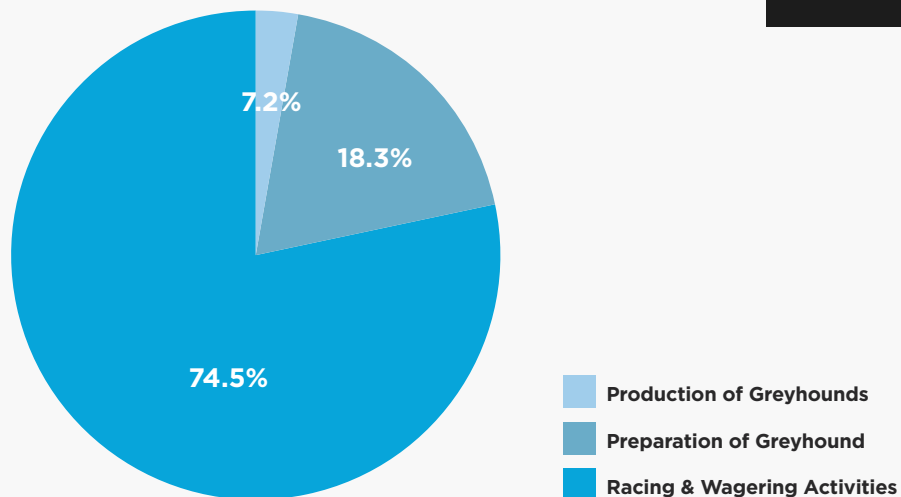
RACING CLUBS IN THE REGION

- + Gunnedah Racing Club
- + Moree Racing Club
- + Tamworth Racing Club

- + The population of the Northern Inland region is 187,008 (Australian Bureau of Statistics).
- + There are a total of three (3) racing clubs operating in the region.
- + The greyhound racing industry in the Northern Inland region is responsible for generating close to \$11.4 million in value-added contribution to Gross State Product. This equates to 1.7% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 86 full-time equivalent (FTE) jobs in the region.
- + There are close to 450 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Northern Inland region.

Race meetings in the Northern Inland region attracted attendances of **3,500 or 2.6% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE NORTHERN INLAND REGION (%)



AT A GLANCE

3 Racing Clubs

63 Race Meetings

683 Races

70 Racing Club Members

3,500 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$12.8m
Total Value-Added	\$11.4m
Full-time Equivalent Employment	86

ANIMALS

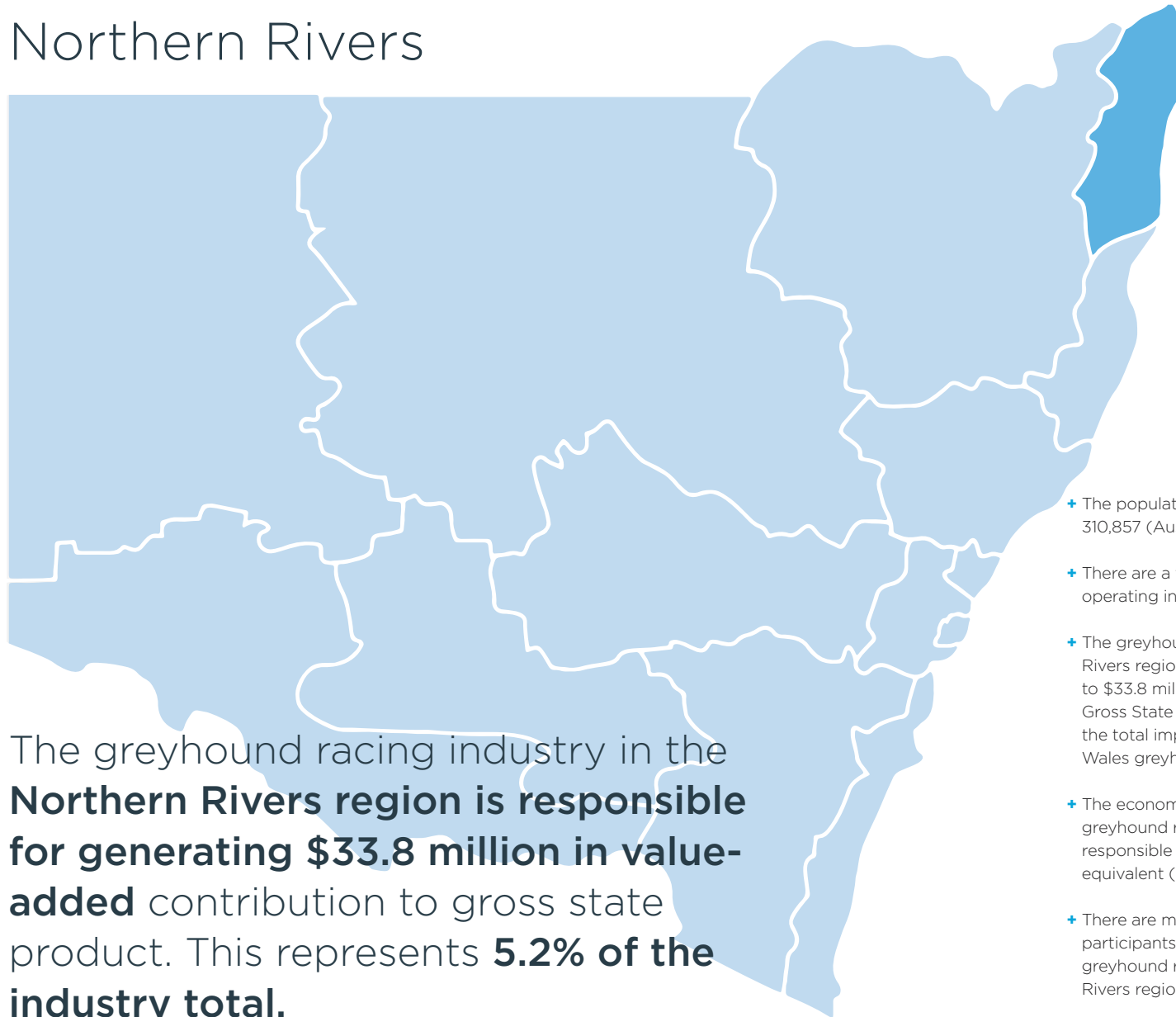
Pups Produced	60
Sires	0
Dams	7
Greyhounds in Training	485

TOTAL ROLES OCCUPIED IN RACING

Breeders	21
Owners/Syndicate Members	156
Trainers	71
Racing Club & Industry Staff	46
Breeders Staff	19
Kennel Employees	60
Racing Club Volunteers	18
Volunteers Assisting Participants	55
Total roles occupied in the Northern Inland region	447

*Some totals do not add due to rounding.

Northern Rivers



The greyhound racing industry in the **Northern Rivers region is responsible for generating \$33.8 million in value-added** contribution to gross state product. This represents **5.2% of the industry total.**

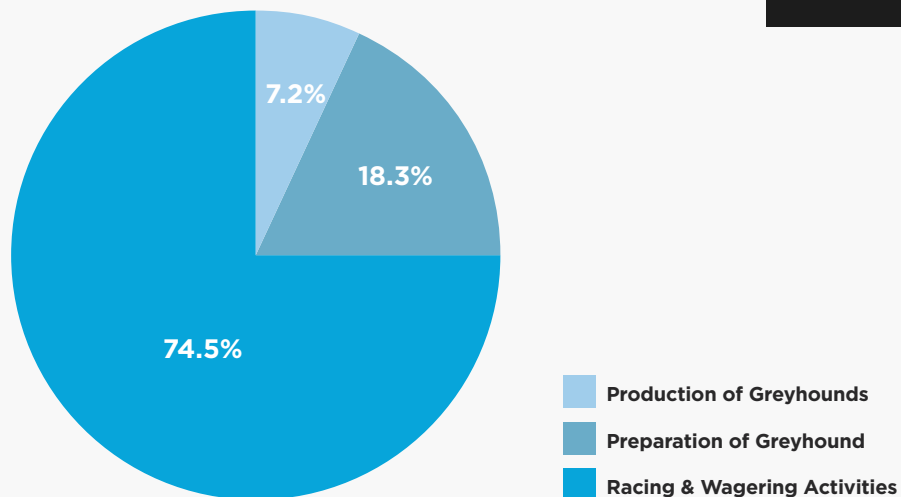
RACING CLUBS IN THE REGION

- + Casino Racing Club
- + Grafton Racing Club
- + Lismore Racing Club

- + The population of the Northern Rivers region is 310,857 (Australian Bureau of Statistics).
- + There are a total of three (3) racing clubs operating in the region.
- + The greyhound racing industry in the Northern Rivers region is responsible for generating close to \$33.8 million in value-added contribution to Gross State Product. This equates to 5.2% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 251 full-time equivalent (FTE) jobs in the region.
- + There are more than 1,200 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Northern Rivers region.

Race meetings in the Northern Rivers region attracted attendances of **10,645 or 7.9% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE NORTHERN RIVERS REGION (%)



AT A GLANCE

3 Racing Clubs

163 Race Meetings

1,757 Races

256 Racing Club Members

10,645 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$34.7m
Total Value-Added	\$33.8m
Full-time Equivalent Employment	251

ANIMALS

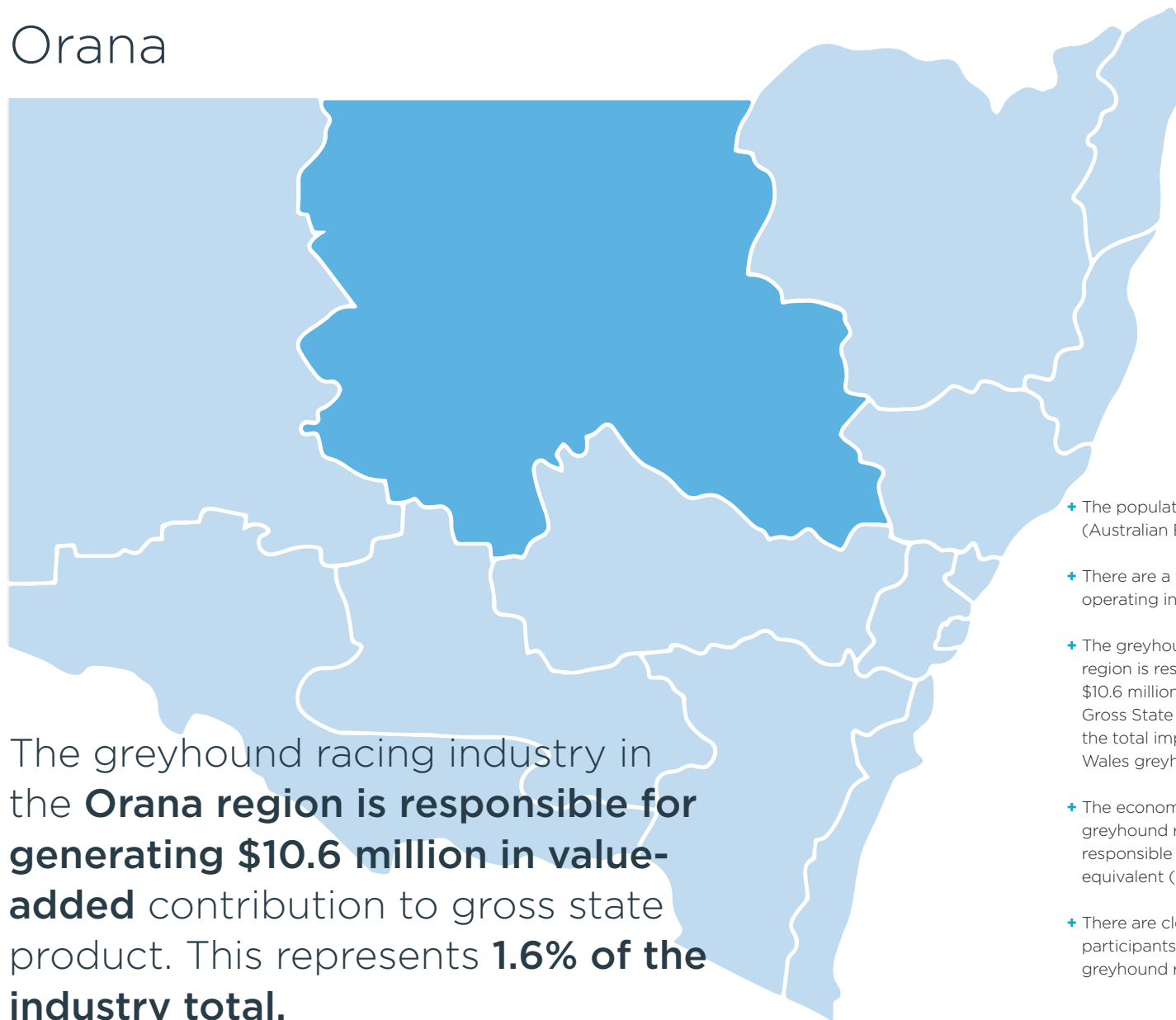
Pups Produced	441
Sires	3
Dams	60
Greyhounds in Training	1,301

TOTAL ROLES OCCUPIED IN RACING

Breeders	116
Owners/Syndicate Members	424
Trainers	152
Racing Club & Industry Staff	109
Breeders Staff	105
Kennel Employees	130
Racing Club Volunteers	20
Volunteers Assisting Participants	161
Total roles occupied in the Northern Rivers region	1,217

*Some totals do not add due to rounding.

Orana



The greyhound racing industry in the **Orana region is responsible for generating \$10.6 million in value-added** contribution to gross state product. This represents **1.6% of the industry total.**

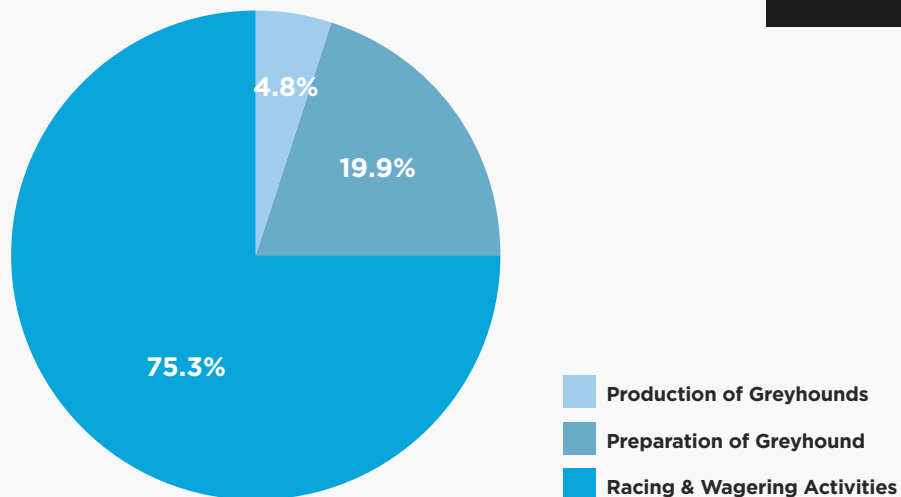
RACING CLUBS IN THE REGION

- + Coonamble Racing Club
- + Dubbo Racing Club

- + The population of the Orana region is 123,737 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region.
- + The greyhound racing industry in the Orana region is responsible for generating close to \$10.6 million in value-added contribution to Gross State Product. This equates to 1.6% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 81 full-time equivalent (FTE) jobs in the region.
- + There are close to 410 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Orana region.

Race meetings in the Orana region attracted attendances of **650 or 0.5% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE ORANA REGION (%)



AT A GLANCE

2 Racing Clubs

60 Race Meetings

644 Races

45 Racing Club Members

650 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$12.3m
Total Value-Added	\$10.6m
Full-time Equivalent Employment	81

ANIMALS

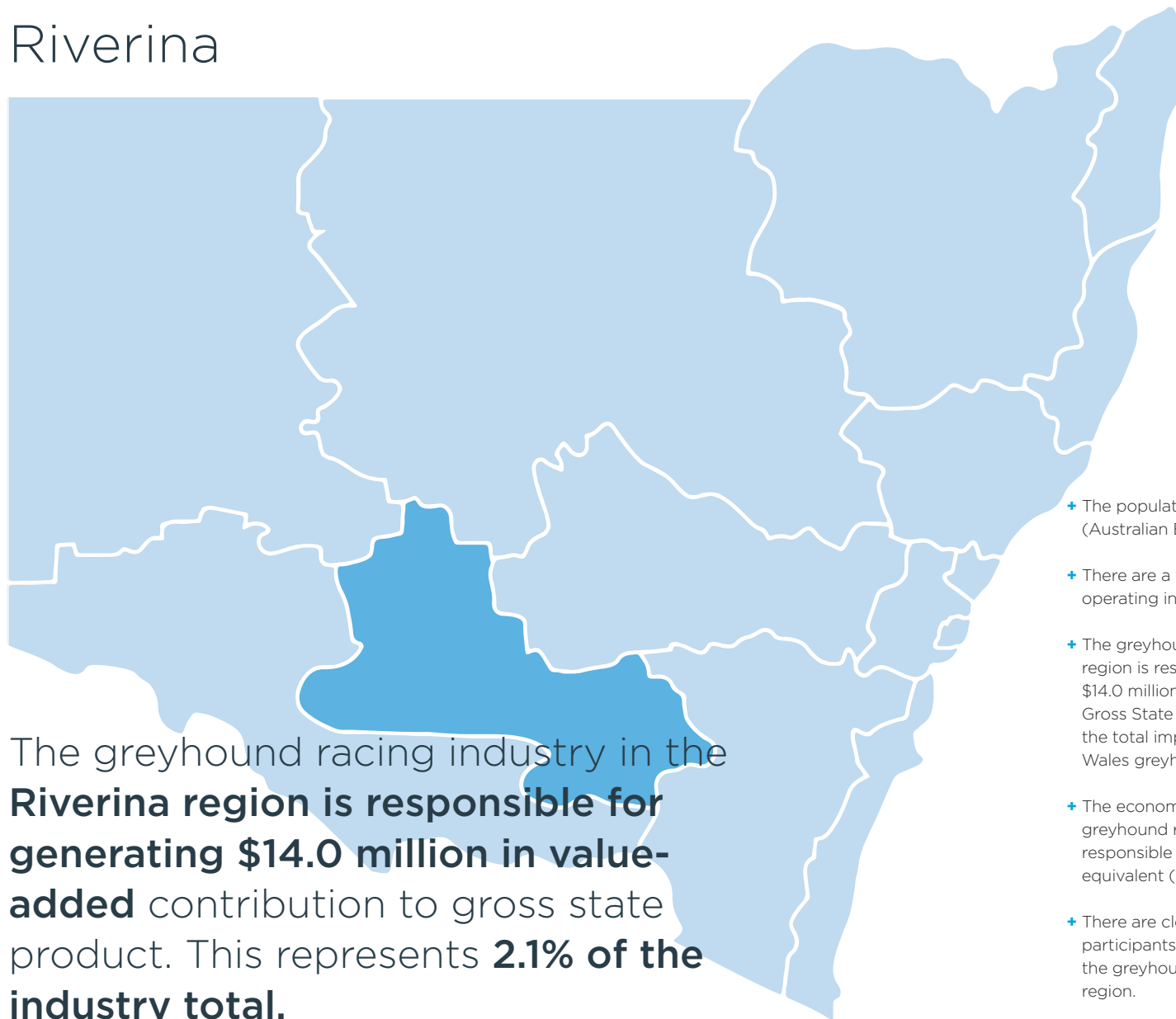
Pups Produced	103
Sires	1
Dams	18
Greyhounds in Training	502

TOTAL ROLES OCCUPIED IN RACING

Breeders	29
Owners/Syndicate Members	150
Trainers	50
Racing Club & Industry Staff	44
Breeders Staff	27
Kennel Employees	43
Racing Club Volunteers	14
Volunteers Assisting Participants	48
Total roles occupied in the Orana region	405

*Some totals do not add due to rounding.

Riverina



The greyhound racing industry in the **Riverina region is responsible for generating \$14.0 million in value-added** contribution to gross state product. This represents **2.1% of the industry total.**

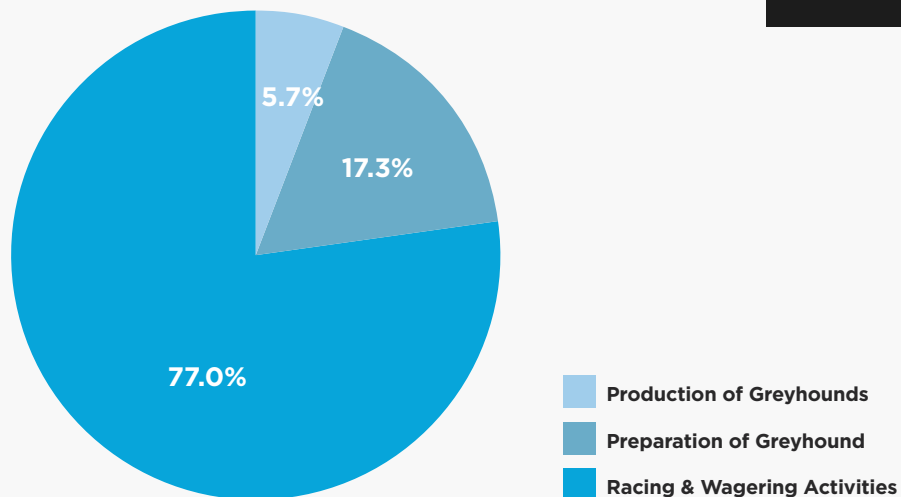
RACING CLUBS IN THE REGION

- + Temora Racing Club
- + Wagga Racing Club

- + The population of the Riverina region is 153,150 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region.
- + The greyhound racing industry in the Riverina region is responsible for generating more than \$14.0 million in value-added contribution to Gross State Product. This equates to 2.1% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 107 full-time equivalent (FTE) jobs in the region.
- + There are close to 580 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Riverina region.

Race meetings in the Riverina region attracted attendances of **3,700** or **2.8% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE RIVERINA REGION (%)



AT A GLANCE

2 Racing Clubs

81 Race Meetings

859 Races

130 Racing Club Members

3,700 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$15.6m
Total Value-Added	\$14.0m
Full-time Equivalent Employment	107

ANIMALS

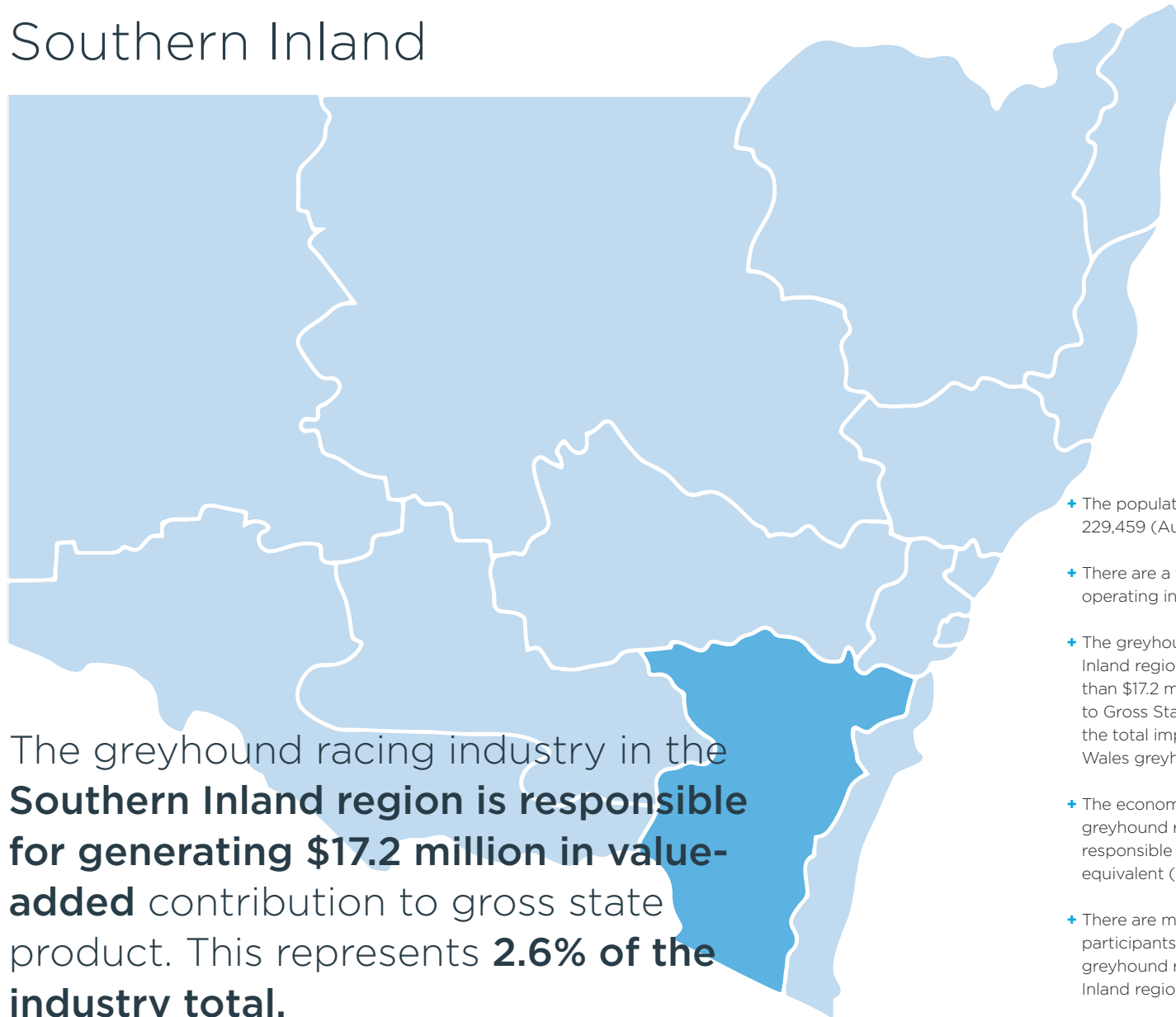
Pups Produced	158
Sires	1
Dams	16
Greyhounds in Training	556

TOTAL ROLES OCCUPIED IN RACING

Breeders	36
Owners/Syndicate Members	245
Trainers	70
Racing Club & Industry Staff	60
Breeders Staff	33
Kennel Employees	60
Racing Club Volunteers	10
Volunteers Assisting Participants	64
Total roles occupied in the Riverina region	577

*Some totals do not add due to rounding.

Southern Inland



The greyhound racing industry in the **Southern Inland region is responsible for generating \$17.2 million in value-added** contribution to gross state product. This represents **2.6% of the industry total.**

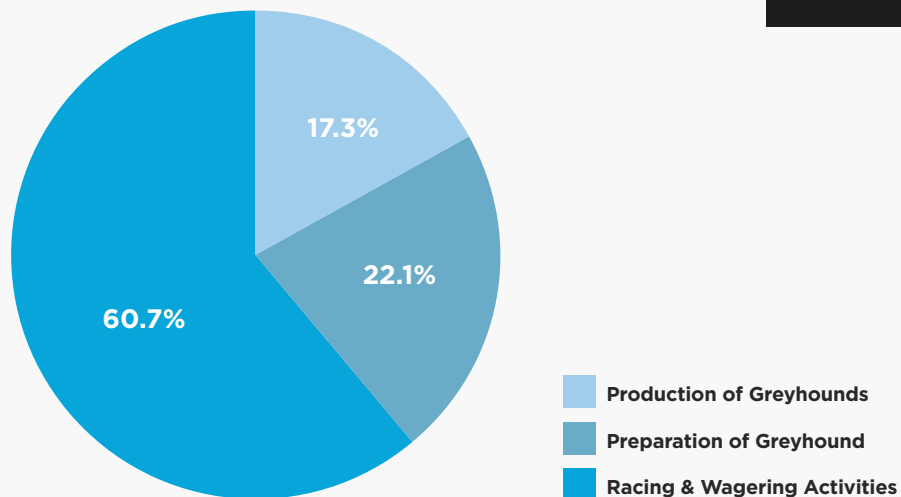
RACING CLUBS IN THE REGION

- + Goulburn Racing Club
- + Young Racing Club

- + The population of the Southern Inland region is 229,459 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region.
- + The greyhound racing industry in the Southern Inland region is responsible for generating more than \$17.2 million in value-added contribution to Gross State Product. This equates to 2.6% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 129 full-time equivalent (FTE) jobs in the region.
- + There are more than 700 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Southern Inland region.

Race meetings in the Southern Inland region attracted attendances of **8,420** or **6.3%** of total attendances at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE SOUTHERN INLAND REGION (%)



AT A GLANCE

2 Racing Clubs

61 Race Meetings

676 Races

1,910 Racing Club Members

8,420 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$19.4m
Total Value-Added	\$17.2m
Full-time Equivalent Employment	129

ANIMALS

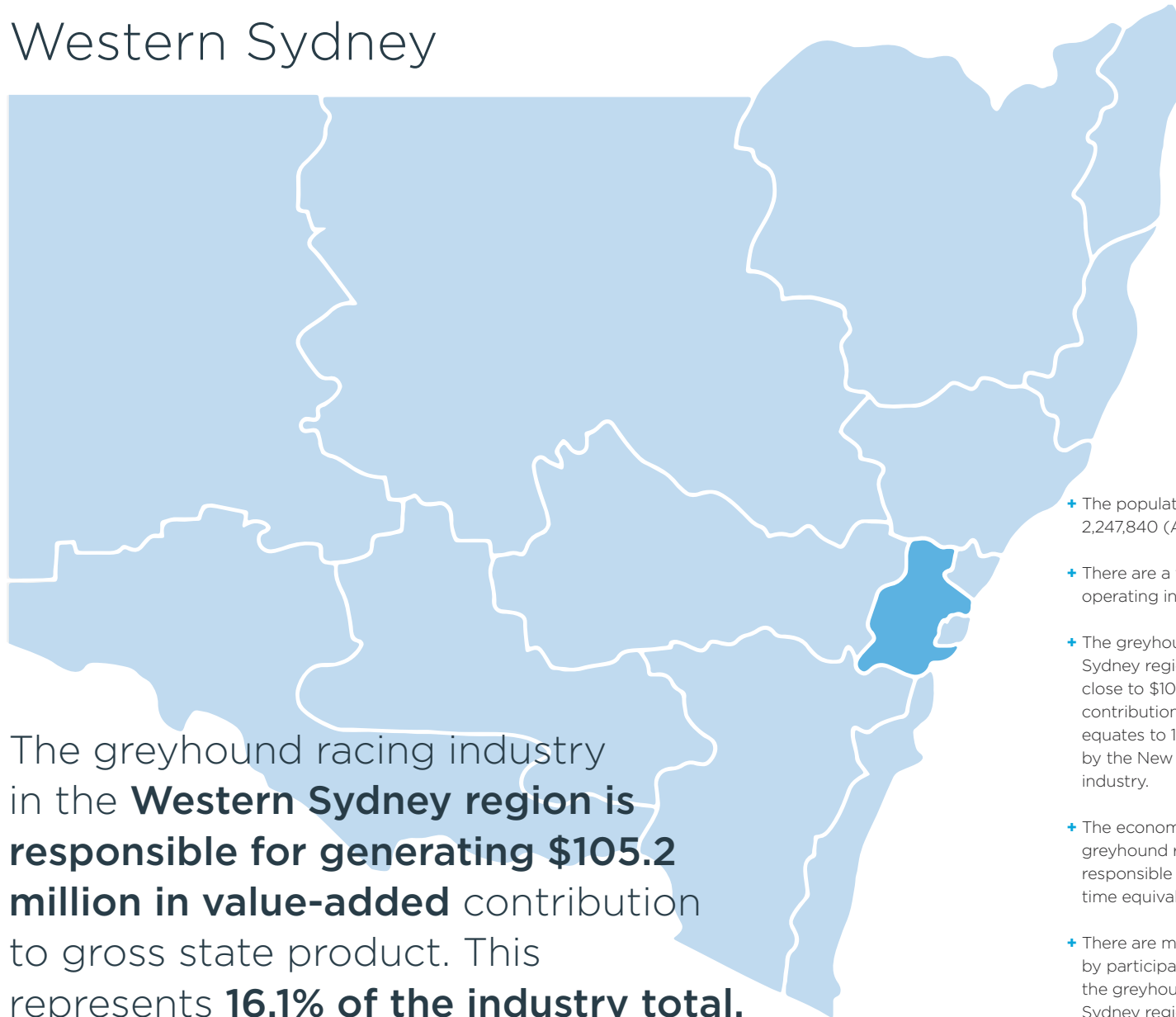
Pups Produced	355
Sires	4
Dams	47
Greyhounds in Training	880

TOTAL ROLES OCCUPIED IN RACING

Breeders	60
Owners/Syndicate Members	259
Trainers	87
Racing Club & Industry Staff	76
Breeders Staff	55
Kennel Employees	74
Racing Club Volunteers	8
Volunteers Assisting Participants	88
Total roles occupied in the Southern Inland region	707

*Some totals do not add due to rounding.

Western Sydney



The greyhound racing industry in the **Western Sydney region is responsible for generating \$105.2 million in value-added** contribution to gross state product. This represents **16.1% of the industry total.**

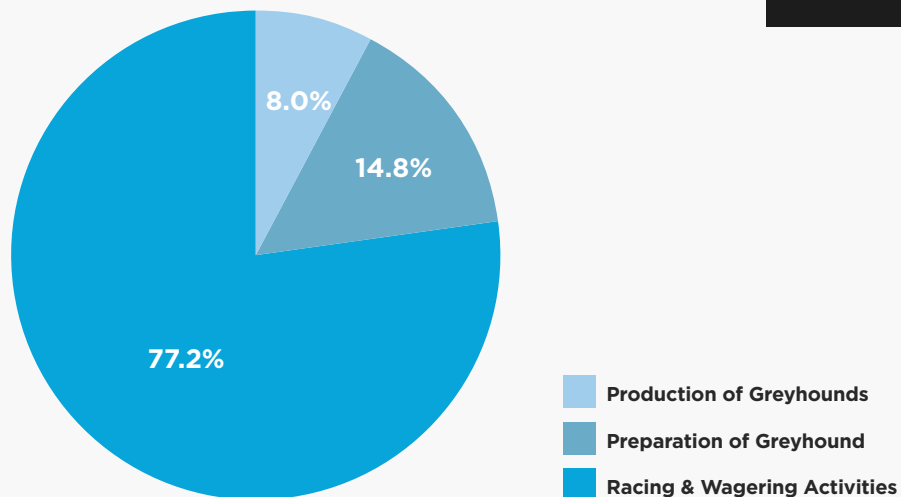
RACING CLUBS IN THE REGION

- + Potts Park Racing Club
- + Richmond & Richmond Straight Racing Club

- + The population of the Western Sydney region is 2,247,840 (Australian Bureau of Statistics).
- + There are a total of two (2) racing clubs operating in the region.
- + The greyhound racing industry in the Western Sydney region is responsible for generating close to \$105.2 million in value-added contribution to Gross State Product. This equates to 16.1% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 722 full-time equivalent (FTE) jobs in the region.
- + There are more than 2,800 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Western Sydney region.

Race meetings in the **Western Sydney region** attracted attendances of **7,150** or **5.3%** of total attendances at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE WESTERN SYDNEY REGION (%)



AT A GLANCE

2 Racing Clubs

175 Race Meetings

1,988 Races

2,079 Racing Club Members

7,150 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$91.8m
Total Value-Added	\$105.2m
Full-time Equivalent Employment	722

ANIMALS

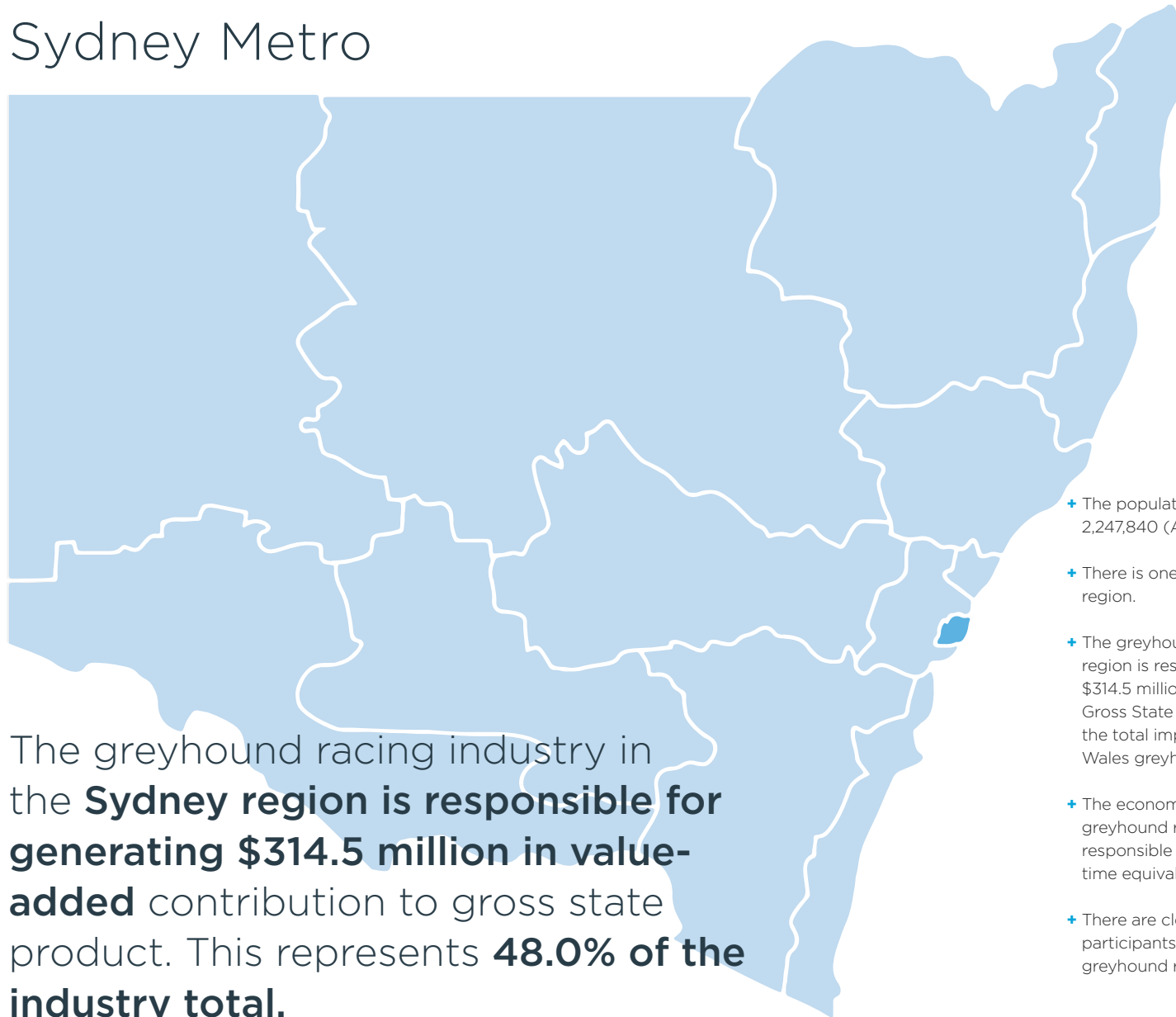
Pups Produced	1,266
Sires	9
Dams	153
Greyhounds in Training	2,795

TOTAL ROLES OCCUPIED IN RACING

Breeders	238
Owners/Syndicate Members	1,276
Trainers	323
Racing Club & Industry Staff	136
Breeders Staff	217
Kennel Employees	276
Racing Club Volunteers	5
Volunteers Assisting Participants	337
Total roles occupied in the Western Sydney region	2,808

*Some totals do not add due to rounding.

Sydney Metro



The greyhound racing industry in the **Sydney region** is responsible for **generating \$314.5 million in value-added** contribution to gross state product. This represents **48.0% of the industry total.**

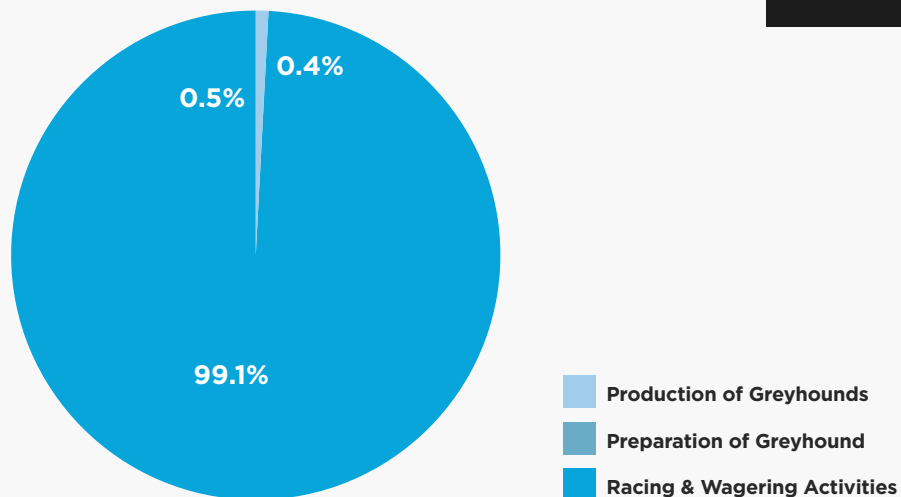
RACING CLUBS IN THE REGION

- + Wentworth Park Racing Club

- + The population of the Sydney region is 2,247,840 (Australian Bureau of Statistics).
- + There is one (1) racing club operating in the region.
- + The greyhound racing industry in the Sydney region is responsible for generating more than \$314.5 million in value-added contribution to Gross State Product. This equates to 48.0% of the total impact generated by the New South Wales greyhound racing industry.
- + The economic impact generated by the greyhound racing industry in this region is responsible for sustaining a total of 1,884 full-time equivalent (FTE) jobs in the region.
- + There are close to 800 roles occupied by participants, volunteers and employees in the greyhound racing industry in the Sydney region.

Race meetings in the Sydney region attracted attendances of **49,000** or **36.5% of total attendances** at race meetings in New South Wales.

VALUE-ADDED ECONOMIC CONTRIBUTION WITHIN THE SYDNEY REGION (%)



AT A GLANCE

1 Racing Club

90 Race Meetings

931 Races

244 Racing Club Members

49,000 Attendances

*Some totals do not add due to rounding

ECONOMIC IMPACTS

Total Direct Expenditure	\$170.4m
Total Value-Added	\$314.5m
Full-time Equivalent Employment	1,884

ANIMALS

Pups Produced	156
Sires	4
Dams	28
Greyhounds in Training	141

TOTAL ROLES OCCUPIED IN RACING

Breeders	23
Owners/Syndicate Members	524
Trainers	17
Racing Club & Industry Staff	149
Breeders Staff	21
Kennel Employees	15
Racing Club Volunteers	20
Volunteers Assisting Participants	24
Total roles occupied in the Sydney region	793

*Some totals do not add due to rounding.

About IER

IER is a leading strategic consulting business specialising in the tourism, events and sporting industries. For over twenty 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 in NSW.

It has been developed utilising the following source data:

- + Registration data relating to participants and greyhounds
- + Breeding and Training expenditure data captured from surveys with greyhound racing participants
- + Expenditure and taxation data provided by wagering operators throughout Australia
- + Data provided by the GRNSW and racing clubs

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

- + Australian Greyhound Racing Industry
- + Australian Thoroughbred Racing Industry
- + NSW Harness Racing Industry

- + New Zealand Racing Industry (3 Codes)
- + Northern Territory Thoroughbred Racing Industry
- + Queensland Racing Industry (3 Codes)
- + Australian Football League
- + Tasmanian Racing Industry (3 Codes)
- + Victorian Racing Industry (3 Codes)
- + 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 has undertaken a significant range of studies on sporting industries, with some specific examples including:

- + Size and Scope of the Queensland Racing Industry (2023)
- + Size and Scope of the NSW Harness Racing Industry (2023)

- + Size and Scope of the Australian Football League (2022)
- + Size and Scope Study of Thoroughbred Racing Industry in the NT (2022)
- + Size and Scope study of the Victorian Racing Industry (2022)
- + Size and Scope study of the Tasmanian Racing Industry (2021)
- + Size and Scope of the Western Australian Racing Industry (2021)
- + Size and Scope of the Asian Racing Federation (2020)
- + Size and Scope of the South Australian Racing Industry (2019)
- + Economic and Social Impact Study of Harness Racing in Australia (2012)

Barry provides the economic modelling and advisory services to IER.

This report (Report) has been produced independently by IER as requested by Greyhound Racing NSW (GRNSW). The report has been prepared to meet the requirements set out by GRNSW 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 greyhound racing to the NSW economy. In this way, it is a generalised measure of the industry's contribution to the State's economy.

BASIS OF EVALUATION

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

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

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

In addition to the jobs created with direct suppliers of services to the greyhound 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) are often less than 1. It is further noted that the constraints that are applied in more complex economic models do not tend to be substantial at the state and regional level in a longer term context (labour flows from state to state and region to region and capital can also flow freely).

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

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

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

It should be emphasised that this methodology includes the identification and inclusion of local (NSW) expenditure associated with greyhound racing. The economic impacts determined by this approach do not represent the value that would be lost to the State if the industry did not exist. Generally, when considering expenditure by locals it is often held that substitution is a significant factor in whether that spending would be lost to the economy. Taking the greyhound 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 greyhound 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 state whose main reason for visiting is to attend/participate in the races and wagering by out-of-state residents on local racing product. Finally, it would include industry revenues that locals spend where they would not spend it in the state but for their involvement in the activities of racing. It would also reasonably be expected that some race attendees would attend events interstate if they were not available in NSW, and that some operators would base their operations interstate 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 NSW greyhound racing industry is undertaken by firstly identifying the expenditures generated by the industry and then applying this expenditure to state input output model. The State input output model has been prepared using the latest ABS national input output table (2019-20) 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 greyhound 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

greyhound racing sector itself is allocated to the sport and recreation sector. By allocating these expenditures in this way, the imports required to support greyhound 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 greyhound 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% - 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.

Input output tables are prepared for the two regions and regional results are adjusted for feedback effects.

DISTRIBUTION TO REGIONS

The final expenditures outlined within this study has been allocated to regions across NSW. 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).

This study develops a regional input output model for each of the nominated regions. These regional models are created from the underlying state table and again using the location quotient method based on 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 much of the feedback being assumed to occur within the metro area.

ACKNOWLEDGEMENTS

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

- + Greyhound Racing NSW
- + Greyhound Welfare and Integrity Commission
- + Greyhounds As Pets NSW
- + Greyhounds Australasia
- + NSW Greyhound Breeders, Owners and Trainers' Association Wentworth Park
- + NSW Greyhound Racing Clubs
- + OzChase
- + Participants who provided detailed financial data on training and breeding greyhounds
- + Responsible Wagering Australia
- + Tabcorp

Definitions

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

+ Direct Expenditure - is defined as expenditure associated with preparing greyhounds (training), racing customer expenditure and expenditure by GRNSW and racing clubs on operating the industry. Direct expenditure is counted at the point at which it leaves the greyhound 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 NSW 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 NSW greyhound racing industry

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

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



GREYHOUND
RACING
NSW



FOCUSED THINKING