



Jim Power
economics

THE ECONOMIC & FINANCIAL
SIGNIFICANCE OF THE IRISH
GREYHOUND INDUSTRY
JULY 2021

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EXECUTIVE SUMMARY

- The greyhound industry is an important part of the social and economic fabric of rural Ireland. It supports considerable employment directly and indirectly down through the supply chain, and it is an important 'way of life' for greyhound owners around the country. For stakeholders in the sector, it is an important economic and social activity.
- The greyhound industry has experienced many challenges in recent years. These challenges include declining attendances, the closure of some tracks for economic reasons, Brexit and adverse publicity in relation to welfare and other practices within the industry.
- COVID-19 has had a significant and damaging impact on the Irish greyhound industry since March 2020. Racing activity ceased from March to June 2020 as a result of the health-related restrictions imposed by Government to counteract the effects of the pandemic. This resulted in a significant reduction in the number of race meetings held during the year. In addition, most of the racing that did take place was behind closed doors.
- The Greyhound Racing Act (2019) was signed into law on 28th May 2019. This Act strengthened the legal basis for regulation of the integrity of the greyhound racing industry. It made provision for the introduction of a greyhound traceability system, to enable greyhounds to be traced throughout their lives. In early 2021, the Rásaíocht Con Éireann Traceability System (RCÉTS) was launched by GRI.
- The Irish horse and greyhound racing industry receives significant funding from the State through the Horse and Greyhound Racing Fund under Section 12 of the Horse and Greyhound Racing Act 2001. The funding is given to the respective sectors through Horse Racing Ireland and Greyhound Racing Ireland. The fund is seen as essential to the survival and continued development of the horse and greyhound racing industries.
- In 2019, 1,606 race meetings were held, equivalent to 16,691 individual races. The average prize money per race from the GRI prize money grant worked out at €473. In 2020, 1,085 race meetings were held, equivalent to 11,651 individual races. The average prize money per race from the GRI prize money grant worked out at €425. The prize money grant per race represents excellent value given the economic contribution of the greyhound sector and the level of economic activity and financial contribution involved in getting six greyhounds born, reared, trained and ready to race.

- The greyhound industry provides and supports considerable employment both directly and indirectly across the Irish economy. It is estimated that in 2019, the industry supported 4,150 full-time and part-time jobs in the economy. In addition, there are 6,211 active greyhound owners. The total number of people deriving economic benefit from the greyhound sector is estimated at 10,361.
- The gross wage bill on the back of this direct and indirect employment is estimated at €103.8 million per annum. PAYE/PRSI paid per annum is estimated at €15.6 million. Net incomes generated in the industry are estimated at €88.2 million. Based on a conservative income multiplier effect of 0.5, this would result in a total economic impact to the economy of €132.3 million per annum in terms of additional spending.
- The economic contribution of the 6,211 owners is not included in the analysis. Owners represent the foundation upon which the rest of the industry is built. The owners are the ones who rear or purchase the greyhounds; who arrange the training of the greyhounds; and who ultimately facilitate everything that occurs in the industry.
- The total cost to greyhound owners each year of keeping the 'greyhound pipeline' in operation is around €117.79 million. This is a significant amount of expenditure, and much of it is injected into local economies and supports thousands of local jobs.
- The greyhound industry is going through a very challenging period, but the economic, financial, and employment contribution is still significant. The ongoing challenge for GRI is to continue the development of a commercial greyhound racing industry built on a consumer-focused, and high-quality entertainment product, which meets the highest possible international regulatory and welfare standards.
- Government support for the sector is very important, and in the absence of such support, there would be considerable implications for rural employment and economic activity.
- COVID-19 has represented a significant challenge for the industry, but as restrictions are eased, activity levels should pick up again. In 2019, 462,709 patrons attended race meetings, and it is difficult to see that total being surpassed in 2022. However, provided the public and private greyhound stadia are put on a sound commercial footing, and there is a continuance of the aggressive approach to regulating the sector, it should be possible to target attendance levels of around 630,000 by 2023, which were last seen in 2015.

INTRODUCTION

A key priority of successive governments in recent years has been the promotion of more balanced regional economic growth and development. The Greyhound Industry must be given recognition for the strong contribution that it makes to rural economic activity and employment.

Its activities are spread across rural areas and support considerable employment throughout the countryside, as well as generating considerable economic activity and employment in urban areas.

The greyhound industry has experienced many challenges in recent years. These challenges include declining attendances, the closure of some tracks for economic reasons, Brexit, and adverse publicity in relation to welfare and other practices within the industry. In addition, COVID-19 has had a very significant impact on the industry in 2020, and this continues to be the case in 2021.

Efforts are being made and progress is being achieved in improving the image and perception of the industry. The Greyhound Racing Act 2019 was signed into law on 28th May 2019. This legislation strengthened the legal basis for strong regulation of the integrity of the greyhound racing industry. It made provision for the introduction of a greyhound traceability system, to enable greyhounds to be traced throughout their lives.

In early 2021, the Rásaíocht Con Éireann Traceability System (RCÉTS) was launched by Greyhound Racing Ireland (GRI). A strong focus being maintained on welfare issues is essential for the sustainable future of the industry. All stakeholders within the industry must make every conceivable effort to address the reputational issues confronting the industry and ensure that the activities of the industry are beyond reproach.

This report examines the broad economic and financial contribution that the greyhound industry makes to the Irish economy, and particularly to rural and regional economies. It is a follow-up to reports published by Power Economics in 2010 and 2017.

As was the case in 2017, the data upon which this report is prepared are provided by Greyhound Racing Ireland (GRI) either directly or from published material on its website, from interviews with various stakeholders in the sector, and data from the Department of Agriculture, Food and the Marine.

- Section 1 explains the history and structure of Greyhound Racing Ireland (GRI).
- Section 2 looks at recent trends in the greyhound industry including the impact of COVID-19, race meetings, and attendances.
- Section 3 looks at trends in the financing of the greyhound industry, including official funding, sponsorship and prize money.
- Section 4 examines the economic contribution of the greyhound industry, including employment, expenditure, ownership, training, and betting activity.

SECTION 1: ABOUT GREYHOUND RACING IRELAND

Greyhound Racing Ireland (GRI) / Rásaíocht Con Éireann (RCÉ), was formerly known as the Irish Greyhound Board (IGB) / Bord na gCon). It is a commercial semi-state body that is responsible for the control and development of the greyhound industry in Ireland.

The governing body for Irish Greyhound Racing (Bord na gCon) was established under special legislation by the Irish government in 1958. The Greyhound Industry Act (1958) gave the organisation wide powers to regulate all aspects of greyhound racing in the Republic of Ireland including the licensing of the different tracks, the issuing of permits to officials, bookmakers and trainers, and the implementation of the rules of racing.

The Greyhound Racing Act (2019) was signed into law on 28th May 2019. This act is intended to strengthen regulatory controls in the industry, update racing sanctions, strengthen the governance platform, and improve the overall integrity of the industry.

The welfare of greyhounds was made one of the statutory functions of GRI, and the Act also included powers to make regulations in relation to anti-doping, administration and traceability for both integrity and welfare purposes. The Act reflects recommendations made in the Indecon Report, the Greyhound report of the Joint Committee on Agriculture, Food and the Marine, and the Morris Review of Anti-Doping and Medication.

In October 2020, the Minister for Agriculture, Food and the Marine announced the commencement of certain other sections of the Greyhound Racing Act (2019). On 1st October 2020, the Irish Greyhound Board (Bord na gCon) was renamed Greyhound Racing Ireland (Rásaíocht Con Éireann).

Greyhound Racing Ireland has licensed a total of 14 tracks in the Republic, of which nine are controlled and managed by the organisation. The remainder are owned and operated by private enterprise. There are also two privately owned stadia in Northern Ireland.

The 14 tracks in the control and management of GRI are:

- Cork (GRI).
- Galway (GRI.)
- Limerick (GRI).
- Mullingar (GRI).
- Newbridge (GRI).
- Shelbourne Park (GRI).
- Tralee (GRI).
- Waterford (GRI).
- Youghal (GRI).
- Clonmel (Private).
- Dundalk (Private).
- Enniscorthy (Private).
- Kilkenny (Private).
- Thurles (Private).

In June 2021, GRI granted a licence to operate commercial greyhound racing at Lifford greyhound track. A private consortium proposes to operate the track on a new and innovative model. Through a partnership with the UK Tote Group, the consortium proposes a self-funded model without recourse to financial support from GRI. This approach underlines the interest in, and extent of support for, greyhound racing in Ireland.

Greyhound Racing Ireland operates Tote betting facilities at all greyhound tracks in the Republic and applies an on-course levy on all bookmaker's betting. These levies, gate receipts, sponsorship, media rights income and Government financial support provide the bulk of the funding for the industry. This funding allows Greyhound Racing Ireland to:

- Supplement prize money at all levels of greyhound racing.
- Maintain an extensive regulatory, integrity and care and welfare regime
- Advertise and market the industry on both a national and international level.
- Develop and improve greyhound stadia nationwide.

The Mission Statement of GRI is *'To deliver a commercial, well-regulated Greyhound Racing and Breeding Industry whilst enabling the delivery of a customer centred, highly exciting and value led entertainment experience'*.

SECTION 2: RECENTS TRENDS IN THE GREYHOUND INDUSTRY

The operating environment for the greyhound racing industry has been challenging in recent years. COVID-19 has had a significant impact on the industry since March 2020, but other issues include the increasingly negative perception of the industry; care and welfare issues; the sale and closure of some racing tracks; Brexit; and the general trend towards reduced attendance at many Irish sporting events.

COVID-19 AND THE GREYHOUND INDUSTRY

COVID-19 has had a significant and damaging impact on the Irish greyhound industry since March 2020. Racing activity ceased from March to June 2020 as a result of the health-related restrictions imposed by Government to counteract the effects of the pandemic. This resulted in a significant reduction in the number of race meetings held during the year. In addition, most of the racing that did take place was behind closed doors.

In 2020:

- 126,396 patrons attended greyhound meetings, which is almost 73 per cent lower than 2019 when 462,709 patrons attended race meetings.
- 1,085 race meetings were held, equivalent to 11,651 individual races, and 68,757 entries. This is down from 1,606 race meetings; 16,691 individual races; and 98,597 entries in 2019.
- The average attendance at race meetings in 2020 was 116, down from 288 in 2019.

Apart from the 13 weeks when racing was suspended, racing took place behind closed doors and prize money continued to be paid.

The focus of GRI during the period of restrictions in 2020 was on maintaining racing activity and ensuring that the care and welfare needs of racing greyhounds could be appropriately addressed. During the period of suspension of racing activity, GRI put in place a COVID-19 Greyhound Care Payment Scheme, whereby a daily payment was made in respect of participating racing greyhounds, to ensure that the care and welfare needs of the animals were met. GRI allocated €998,000 under this scheme.

In order to address the significant financial impact on the sport and industry arising from COVID-19 and to generally support this important industry, the Department of Agriculture, Food and the Marine allocated €16.8 million from the Horse and Greyhound Racing Fund in 2020 and increased the allocation to €19.2 million for 2021.

GREYHOUND RACE MEETINGS

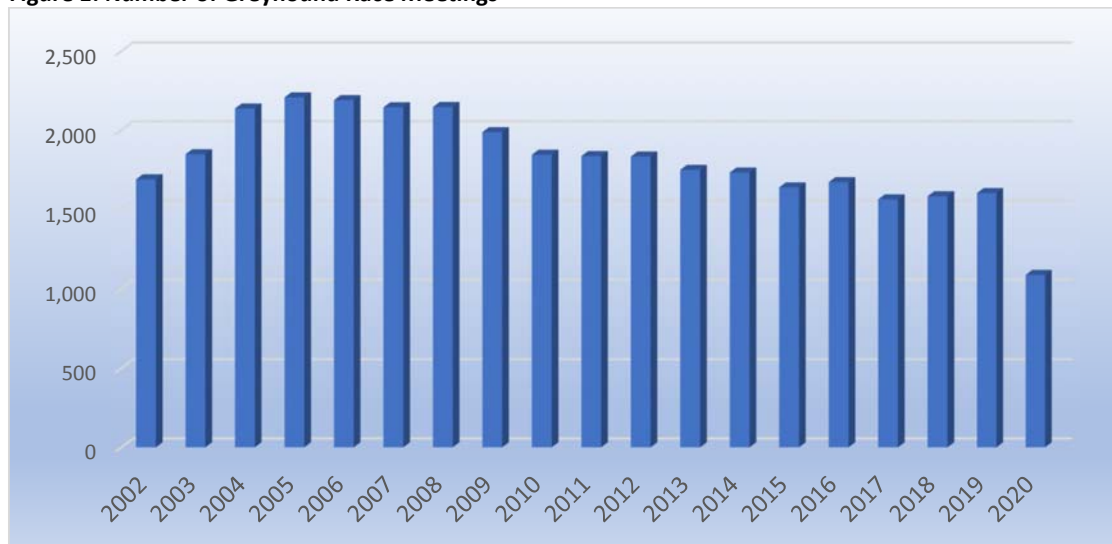
Greyhound race meetings have been declining in recent years. The number of race meetings peaked at 2,208 in 2005, and it then declined to a low of 1,566 in 2017. By 2019, the number of meetings had increased by 2.6 per cent to 1,606 meetings.

The number of meetings held is influenced by events from year to year. For example:

- In 2017, Shelbourne Park, which is the flagship greyhound stadium within the GRI portfolio and a major income generator, was closed for 23 weeks.
- Harold's Cross Stadium held its last race in March 2017 and was subsequently sold.
- In 2020, all racing activity was suspended for a 13-week period due to the COVID-19 pandemic.
- In December 2019, Indecon consultants published a strategic review of Irish greyhound stadia, and a supplementary report was published in April 2020. It suggested that funding should cease for 4 greyhound stadia – Lifford, Longford, Enniscorthy and Youghal. Lifford was closed in 2019 and Longford in 2020. Memorandum of Understandings (MOUs) were entered into with Youghal and Enniscorthy to reduce the costs associated with both tracks. Indecon has recommended a further review of stadia at the end of 2022.
- Two early morning meetings have been introduced in 2 stadia. In December 2018, Kilkenny introduced Wednesday morning race meetings. Waterford introduced early morning race meetings on Thursdays in January 2019. These race meetings are broadcast into betting shops across Ireland and the UK through the SIS (Sport Information Services) broadcasting system and are also available to online operators as part of the SIS streaming portfolio.

Between 2002 and 2020, 34,537 greyhound racing meetings were held throughout the country.

Figure 1: Number of Greyhound Race Meetings



Source: Rásaíocht Con Éireann

The number of individual races declined by 32.9 per cent from 23,255 in 2007 to 15,610 in 2017. Between 2017 and 2019, the number of races increased by 6.9 per cent from 15,610 to 16,691 races. In 2020, due to COVID-19 restrictions, just 1,085 race meetings were held, and 11,651 individual races. In 2019, the 16,691 races featured 98,597 entries. This declined to 68,757 in 2020.

Figure 2: Number of Individual Races



Source: Rásaíocht Con Éireann

In 2019, the 16,691 races featured 98,597 entries. This declined to 68,757 in 2020 (racing suspended for 13 weeks).

ATTENDANCE AT GREYHOUND RACE MEETINGS

Attendance figures at greyhound meetings expanded strongly between 2002 and 2005. Attendance peaked at 1.39 million in 2005 and subsequently declined to 462,709 by 2019. Just 126,376 patrons attended race meetings in 2020 due to COVID-19.

The decline in attendance numbers in recent years reflects a number of factors. These include a difficult economic environment after 2009, which had the effect of breaking the habit of attending greyhound races; the broadcasting of races through SIS; fewer tracks; and the negative perception of the industry caused by adverse media coverage.

Attendance is no longer the key measure of support for greyhound racing. The broadcast of 8 race meetings on a weekly basis through the SIS system does not attract general attendance particularly the early morning meetings. Those enjoying the meetings through the SIS platform are not included in attendance figures.

Similarly, GRI launched an initiative Talking Dogs TV on a trial period in 2021 which allowed viewing of greyhound racing on a pay per view basis. The GRI developed Barking Buzz wagering platform allows races to be viewed live through the Barking Buzz app.

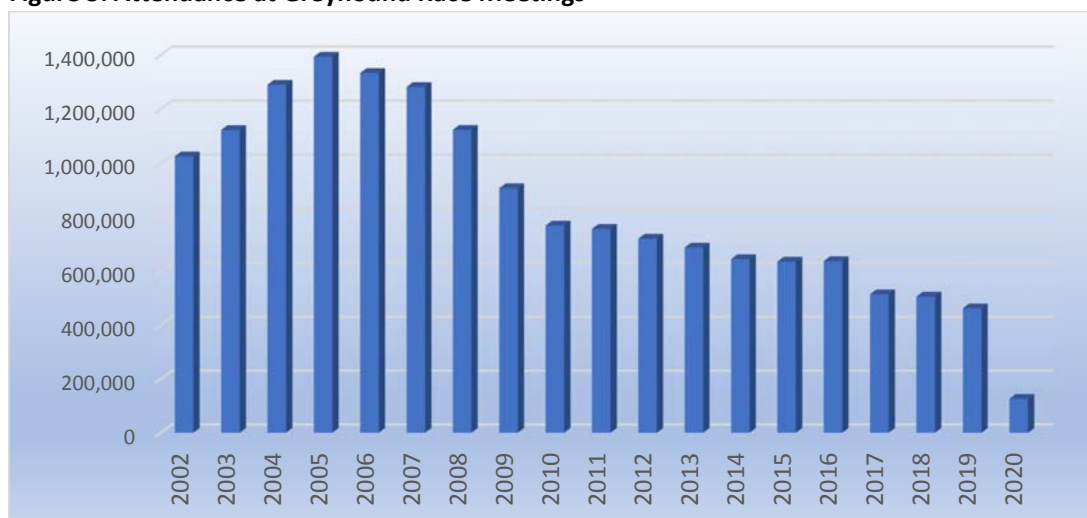
Participation levels in the industry rather than physical attendance are more reflective of activity and are higher than the published attendance figures but are not easily measured.

It is worth noting that the attendance challenges for the greyhound industry are common to many other sports in Ireland. Between 2002 and 2020, 15.9 million patrons attended greyhound racing meetings.

An analysis of customer data from the Barking Buzz database would indicate that there is a strong spread across all age groups and geographical locations. 77% of customers are male with 23 % females.

The geographic spread indicates Munster (44%), Leinster (30%), UK (14%) and Connacht (6%) and Ulster (6%). The data underlines the direct relationship with the location of tracks.

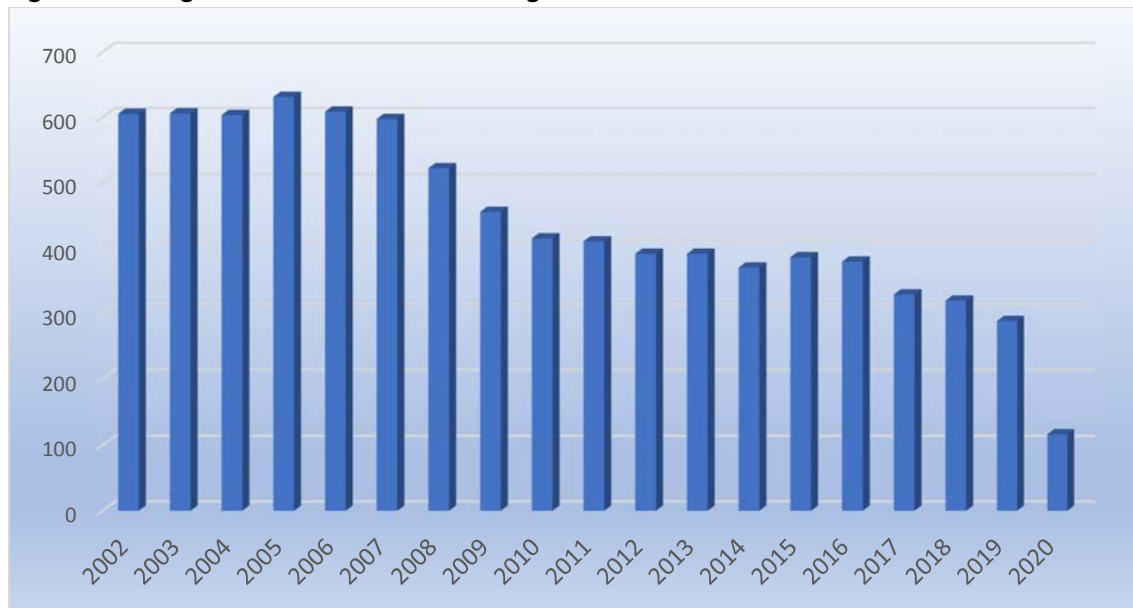
Figure 3: Attendance at Greyhound Race Meetings



Source: Rásaíocht Con Éireann

The average attendance at race meetings has also been on a declining trend. Average attendance peaked at 631 in 2005, and had fallen to 288 by 2019, In 2020, the average attendance was just 116, but this reflects the impact of COVID-19.

Figure 4: Average Attendance at Race Meetings



Source: Rásaíocht Con Éireann

GREYHOUND WELFARE

The Greyhound Racing Act (2019) was signed into law on 28th May 2019.

The 2019 legislation strengthened the legal basis for regulation of the integrity of the greyhound racing industry. It made provision for the introduction of a greyhound traceability system, to enable greyhounds to be traced up to the point of retirement and rehoming. In early 2021, the Rásaíocht Con Éireann Traceability System (RCÉTS) was launched by GRI.

At July 2021, there were 6 Exclusion Orders (which prohibits a party from being at a greyhound track) in effect with investigations pending in 5 other cases. The testing for prohibited substances was also enhanced during 2020, with the introduction of blood sampling as part of the overall sampling regime.

Despite the interruption to racing due to Covid restrictions from late March to early June 2020, a total of 4,251 samples were analysed by the INAB accredited National Greyhound Laboratory in 2020. From the samples analysed, 11 Adverse Analytical Findings (0.26%) were returned.

The certification of an Adverse Analytical Finding is published on the RCÉ website pursuant to the Racing Regulations and all Adverse Analytical Findings are forwarded to the Independent Control Committee for adjudication. Furthermore, all decisions of the Control Committee are additionally published on the RCÉ website pursuant to the regulations.

The significant level of transparency in this area augments the confidence that track patrons and the general public place on the sport.

During 2019/2020, a number of other initiatives were progressed by GRI:

- Introduction of a Care Fund dedicated to funding a variety of initiatives for the care and welfare of the greyhound
- Opening of the first Greyhound Care Centre and extension of the GRI foster care programme.
- Procurement and commissioning of the Rásaíocht Con Éireann Traceability System (RCÉTS).
- Financially supporting and incentivising the rehoming of greyhounds through the Irish Retired Greyhound Trust (IRGT).
- Operation of a Greyhound Injuries Support Scheme.
- Financial incentives for the domestic rehoming of greyhounds.
- Provision of dog utility ambulances at tracks.
- Establishing a confidential phoneline/email for the public to report welfare breaches
- An expanded inspection programme for greyhound establishments
- Updating of the GRI Code of Practice for the Care & Welfare of the Greyhound.

The level of rehoming activity supported by the IRGT has significantly expanded in recent years.

Re-homings Financially Assisted by IRGT	
Year	No Greyhounds
2019	974
2020	1,775
2021 (to 30th June 2021)	1,246

This increasing level of rehoming also contributes to economic activity including veterinary support, foster care and transportation expenditures.

There is clearly a renewed and strong focus on welfare issues within the industry. A strong focus being maintained on welfare issues is essential for the sustainable future of the industry.

SECTION 3: RECENT TRENDS IN THE FINANCES OF THE GREYHOUND INDUSTRY

FUNDING FOR THE GREYHOUND INDUSTRY

The Irish horse and greyhound racing industry receives significant funding from the State through the Horse and Greyhound Racing Fund under Section 12 of the Horse and Greyhound Racing Act 2001. The funding is given to the respective sectors through Horse Racing Ireland and Greyhound Racing Ireland. The fund is seen as essential to the survival and continued development of the horse and greyhound racing industries.

An important part of Government policy is to ensure that the horse and greyhound racing industries achieve their maximum potential and, in so doing, contribute to a balanced economic and social development across a wide geographic swathe of the country.

In 2019 and 2020, the Department of Agriculture, Fund and the Marine paid €16.8 million to the greyhound industry through the Horse and Greyhound Racing Fund, and it increased the allocation to €19.2 million in 2021 to provide general support to the industry and to enable it deal with COVID-19.

Figure 5: Funding from the Horse and Greyhound Racing Fund (€)



Source: Rásaíocht Con Éireann & DAFM

PRIZE MONEY

In 2019, 1,606 race meetings were held, equivalent to 16,691 individual race meetings. The average prize money per race from the GRI prize money grant worked out at €473.

In 2020, 1,085 race meetings were held, equivalent to 11,651 individual races. The average prize money per race from the GRI prize money grant worked out at €425.

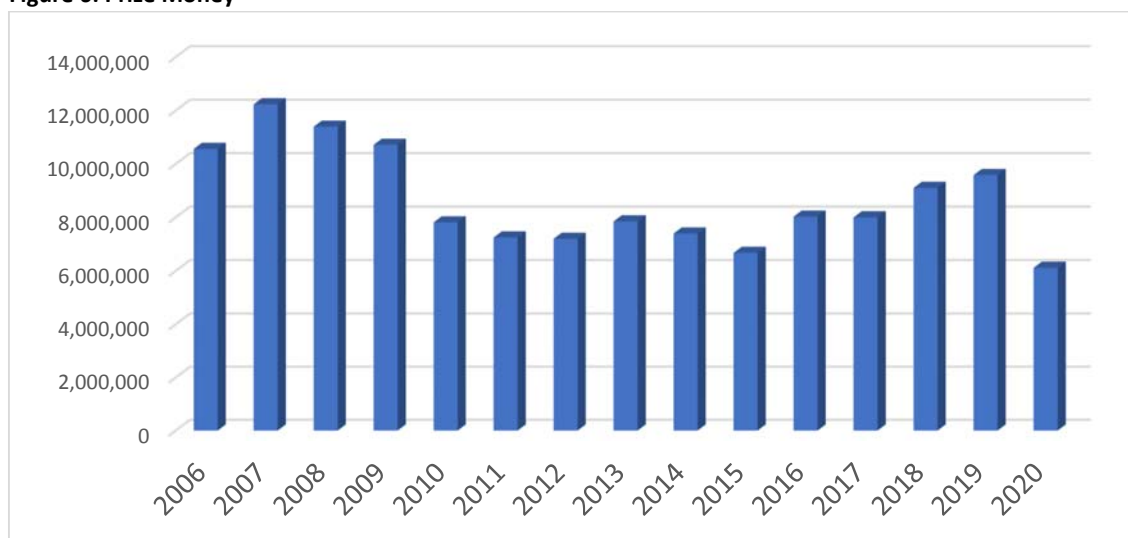
The prize money grant per race represents excellent value given the economic contribution of the greyhound sector and the level of economic activity and financial contribution involved in getting six greyhounds born, reared, trained and ready to race.

In 2019, the total prize money granted was €9.58 million, of which GRI contributed 82.4 per cent, which works out at €7.89 million. The remainder came from race entry fees and sponsorship contributions.

In 2020, the total prize money granted was €6.11 million, of which GRI contributed 81 per cent, which works out at €4.95 million.

Between 2006 and 2020, prize money totalling €129.9 million was paid out, with GRI (previously IGB) contributing 74.4 per cent, which works out at €96.6 million.

Figure 6: Prize Money



Source: Rásaíocht Con Éireann

MEDIA RIGHTS

An area of growth for GRI has been the sale of media rights for its greyhound racing activities. An agreement has been entered into with Sports Information Services (SIS) who transmit Irish greyhound racing to UK bookmaker outlets and international markets. At present 8 greyhound race meetings are transmitted on a weekly basis through the SIS network. This is a reduction on the 9 meetings that were transmitted in 2019/2020. The 8 meetings incorporate 2 early morning meetings (Waterford and Kilkenny) which are aimed towards the international wagering market. Total income from SIS in 2019 was €2.1M.

SECTION 4: ECONOMIC CONTRIBUTION

INTRODUCTION

Given that 2020 was a year of significant dislocation for the greyhound industry as a result of COVID-19, 2019 is the last 'normal' year for the industry, and it is the focus for most of the economic analysis in this section.

There is considerable direct and indirect economic activity associated with the greyhound industry. This includes:

- Breeding and training of greyhounds.
- Veterinary activity.
- Canine supplies.
- Manufacture of feedstuffs.
- Retail and catering activities.
- Transportation
- Regulatory and statutory activities.
- Office supplies.
- Ireland has a very strong reputation for greyhound breeding and as a consequence, there is a considerable export industry.
- Betting activity both on and off the racetrack.
- Many charitable and other organisations use greyhound racing for fund raising activity. It is estimated that €8 million per year was raised at greyhound meetings for worthy causes. In a post-Covid world, greyhound racing will re-establish itself as a significant vehicle for fundraising for sporting organisations such as GAA clubs and charitable causes.

The greyhound industry makes a strong economic contribution from the initial mating to the eventual retirement and rehoming of the greyhound. There are many players and beneficiaries in the greyhound supply chain.

EMPLOYMENT IN THE GREYHOUND INDUSTRY

The greyhound industry provides and supports considerable employment both directly and indirectly across the Irish economy. It is estimated that in 2019, the industry supported 4,150 full-time and part-time jobs in the economy. In addition, there are 6,211 active greyhound owners. The total number of people deriving economic benefit from the greyhound sector is estimated at 10,361.

Table 1 provides a breakdown of where the employment is provided.

Table 1: Direct and Indirect Employment Attributable to Greyhound Industry (2019)

ACTIVITY	EMPLOYMENT
Greyhound Racing Ireland Payroll	800
Private Tracks Payroll	140
Catering Services	280
Irish Coursing Club	160
Facilities Management at Stadia	66
Food & Drink Suppliers to Catering Operators	314
Private & Public Trainers	400
Dog Food Manufacturers – Manufacture/Sales/Distribution	300
Greyhound Ancillary Products – Medicines/Treatments/Walkers/Baths/Veterinary Services/Manufacture/Distribution/Sales	750
Betting & Wagering activities	740
Miscellaneous – Facilities Management, Printers, Outside Contractors etc.	200
Direct & Indirect Employment	4,150
Active Greyhound Owners	6,211
Total Number Deriving Economic Benefit	10,361

Source: Rásaíocht Con Éireann

The employment is provided in activities including: staff employed at tracks owned by the GRI, staff employed at the privately-owned tracks, staff employed in cleaning and security services at all stadia, food and drink suppliers to catering operators, private and public trainers, catering services on track, greyhound food manufacturers and suppliers, ancillary services such as veterinary and medicine, dog owners, and wagering activities.

In relation to greyhound trainers, private trainers are those who train four or less greyhounds, for financial reward, owned by other people. Public trainers have larger numbers of greyhounds, which are trained for financial reward and which are owned by other people.

Employment in the sector is obviously variable over the year, but many of the jobs are full time because greyhounds require looking after 365 days per year, and not only when they are racing. Many of these jobs are rurally based and in some areas the greyhound industry has become one of the few meaningful sources of employment.

Adjusting for full-time and part-time equivalents, it is estimated that the average earnings per employee is around €25,000 per annum. Based on this average salary, the wage contribution to the economy is very significant.

For purposes of estimating the economic benefits of this employment, it is necessary to calculate the gross wage bill that would be paid to workers, and the income tax and PRSI that would be paid to the Exchequer out of this gross income. An average wage of €25,000 is assumed for all employees. An average PAYE/PRSI contribution of 15% is assumed. On this basis:

- The gross wage bill is estimated at €103.75 million per annum;
- PAYE/PRSI paid per annum is estimated at €15.56 million; Net incomes generated in the industry are estimated at €88.2 million;
- Based on a conservative income multiplier effect of 0.5, this would result in a total economic impact to the economy of €132.3 million per annum in terms of additional spending.

The analysis above focuses on direct and indirect employment only. The economic contribution of the 6,211 owners is not included in the analysis.

Owners represent the foundation upon which the rest of the industry is built. The owners are the ones who rear or purchase the greyhounds; who arrange the training of the greyhounds; and who ultimately facilitate everything that occurs in the industry.

Table 2 provides a breakdown of active greyhound owners in Ireland by county. There are 6,211 active owners, with a very significant spread across the country. It is clear from these figures that where there is a local stadium, the greyhound industry is very vibrant, and where a stadium does not exist, the opposite is the case. For example, Tipperary has a very vibrant greyhound industry, whereas Mayo and Sligo stand out in marked contrast.

Table 2: Breakdown of Active Owners by County

COUNTY	NUMBER	%	COUNTY	NUMBER	%
Antrim	150	2.5%	Longford	29	0.5%
Armagh	70	1.2%	Louth	87	1.5%
Carlow	97	1.6%	Mayo	39	0.7%
Cavan	38	0.6%	Meath	154	2.6%
Clare	250	4.2%	Monaghan	16	0.3%
Cork	890	15.0%	Offaly	113	1.9%
Derry	99	1.7%	Roscommon	26	0.4%
Donegal	46	0.8%	Sligo	8	0.1%
Down	105	1.8%	Tipperary	669	11.3%
Dublin	160	2.7%	Tyrone	160	2.7%
Fermanagh	11	0.2%	Waterford	224	3.8%
Galway	178	3.0%	Westmeath	94	1.6%
Kerry	599	10.1%	Wexford	314	5.3%
Kildare	262	4.4%	Wicklow	85	1.4%
Kilkenny	286	4.8%	TOTAL IRL.	5,916	100.0%
Laois	111	1.9%	Overseas	295	
Leitrim	6	0.1%	OVERALL TOTAL	6,211	
Limerick	540	9.1%			

Source: Rásaíocht Con Éireann

Table 3 provides a breakdown of active greyhound trainers in Ireland by county. There are 400 active trainers in the country, with a broad geographic spread.

Table 3: Breakdown of Active Trainers by County

COUNTY	NUMBER	%	COUNTY	NUMBER	%
Antrim	12	3.0%	Laois	8	2.0%
Armagh	7	1.75%	Limerick	30	7.5%
Carlow	8	2.0%	Longford	3	0.75%
Cavan	1	0.25%	Louth	4	1.0%
Clare	12	3.0%	Mayo	1	0.25%
Cork	38	9.5%	Meath	15	3.75%
Derry	6	1.5%	Monaghan	1	0.25%
Donegal	9	2.25%	Offaly	7	1.75%
Down	15	3.75%	Roscommon	3	0.75%
Dublin	15	3.75%	Tipperary	50	12.5%
Fermanagh	1	0.25%	Tyrone	19	4.75%
Galway	17	4.25%	Waterford	17	4.25%
Kerry	34	8.5%	Westmeath	9	2.25%
Kildare	18	4.5%	Wexford	21	5.25%
Kilkenny	13	3.25%	Wicklow	6	1.5%
			TOTAL	400	

Source: Rásaíocht Con Éireann

THE COST OF REARING AND RACING GREYHOUNDS

The activities of the greyhound breeders and trainers can be broken down into a number of different stages, covering the period from when the greyhound bitch is covered to retirement of the racing greyhound. Over this cycle the following outlays are incurred and revenues generated:

BREEDING AND REARING TO 12 WEEKS

2,819 greyhound bitches were recorded by the Irish Coursing Club (ICC) as having been mated in 2019 (last non-Covid year).

- The average mating fee is estimated at €1,200. This results in the generation and payment of stud fees of around €3.38 million for the year.
- The cost of keeping a brood bitch averages €40 per week. The estimated number of brood bitches in the greyhound population is 3,500 (*not all brood bitches would be mated every year*). This means that the annual upkeep of 3,500 brood bitches is approximately €7.28 million. Extra veterinary expenditure may be incurred due to problem deliveries or any other animal health issues.
- The average cost of rearing 2,600 litters (*the estimated number of the 2,819 brood bitches which were mated which went on to produce litters*) to 12 weeks at €1,500 per litter is estimated to total approximately €3.9 million.

- Greyhound matings and litters must be registered with the Irish Coursing Club (ICC) and pups must be earmarked and microchipped to ensure proper integrity and welfare management. Total mating registrations with the ICC cost an estimated €0.11 million; litter registrations cost an estimated €0.08 million; and Ear markings and Microchipping cost an estimated €0.24 million. Total costs estimated at €0.43 million.

THE LITTERS – 12 WEEKS TO 12 MONTHS

- The greyhound pups enter a rearing programme at 12 weeks to 12 months. Assuming a figure of 2,600 litters produced from 2,819 matings, the cost of taking the pups from 12 weeks to 52 weeks is around €18.7 million.

TRAINING 12 MONTHS TO 24 MONTHS

- Adult greyhounds must be registered and named with the ICC. This costs an average of around €25 per dog, giving a total outlay of over €0.35 million.
- The total outlay on training is estimated at €25 million during this 12-month period.

There are numerous other training expenses incurred in getting the greyhound to the racetrack to participate in a race. These include:

- Travel to greyhound tracks and Veterinary Surgeons and Physiotherapists gives rise to yearly costs of €10 million.
- Trial fees at greyhound tracks are estimated at close to €1 million.
- Race entry fees total €0.55 million.
- The cost of veterinary care, medication and vitamins & minerals is estimated at around €11 million. Extra veterinary expenditure may be incurred due to racing injuries or rehoming procedures.
- Transfer fees effected at the ICC €0.25 million.

TRAINING COSTS – 24 MONTHS TO RETIREMENT

It is estimated that 85 per cent of the greyhounds that race in the UK are bred in Ireland and hence the export market to the UK has provided a significant outlet for the greyhound breeder. Of the greyhounds that remain in Ireland, they would still be racing from 24 months to retirement. Retirement usually takes place at around 48 months. In the period from 24 months to retirement the following costs are incurred:

- It is estimated that 4,500 greyhounds remain in training in Ireland and incur around €16.4 million in training fees
- Travel to greyhound tracks and Veterinary Surgeons and Physiotherapists gives rise to total costs of around €8 million.

- Trial fees at greyhound tracks are estimated at close to €1 million
- Race entry fees total €0.55 million.
- The cost of veterinary care, medication and vitamins & minerals is estimated at around €10 million. Extra veterinary expenditure may be incurred due to racing injuries or rehoming procedures.

Table 4 provides a breakdown of the various costs and outlays involved from when the brood bitch is covered to the retirement of the racing greyhound.

The total cost to greyhound owners each year of keeping the 'greyhound pipeline' in operation is around €117.79 million. This is a significant amount of expenditure, and much of it is injected into local economies and supports thousands of local jobs.

Table 4: Cost of Preparing & Racing Greyhounds

ACTIVITY (2019)	COST
BREEDING (3,500 GREYHOUND BITCHES)	
Stud Fees	€3.38m
Keeping Brood Bitch	€7.28m
LITTER TO 12 WEEKS (15,600 PUPS)	
Rearing, Including veterinary costs	€3.90m
Registration with ICC	€0.43m
LITTER 12 WEEKS-52 WEEKS	
Rearing Programme, Including veterinary costs	€18.7m
TRAINING 12 MONTHS-24 MONTHS (14,000 PUPS)	
Registration & Naming with ICC	€0.35m
Training Costs	€25.00m
Travel	€10.00m
Trial Fees	€1.00m
Race Entry Fees	€0.55m
Transfer Fees effected at ICC	€0.25m
Veterinary Care	€11.00m
24 MONTHS-RETIREMENT - 48 MONTHS (4,500 GREYHOUNDS)	
Training Costs	€16.4m
Travel	€8.00m
Trial Fees	€1.00m
Race Entry Fees	€0.55m
Veterinary Care	€10.00m
TOTAL OUTLAYS	€117.79m

Source: Rásaíocht Con Éireann

BETTING ON GREYHOUNDS

Greyhound racing generates considerable betting activity. Table 5 gives a breakdown of betting activity on greyhounds split between betting on the tote and with on-course bookmakers.

Table 5: On-Course Betting Activity

	TOTE	ON-COURSE	TOTAL	TOTE PAYOUT	NO RACES
	€m.	€m.	€m.	€m.	
2007	49.3	90.2	139.5	38.4	23,255
2008	45.2	75.4	120.6	35.8	22,864
2009	33.5	54.3	87.8	26	21,371
2010	24.5	35.3	59.8	18.7	19,419
2011	23.9	28.2	52.1	19	18,180
2012	22.2	23.2	45.4	19.2	17,877
2013	21.4	18.4	39.8	17.2	17,262
2014	19.9	14.4	34.3	16.6	16,901
2015	19.6	13.3	32.9	16.1	16,100
2016	19.5	12.7	32.2	16.2	16,573
2017	16	9.7	25.7	11.9	15,610
2018	16.7	10.1	26.8	12.4	15,860
2019	16.8	9.7	26.5	11.7	16,691
2020	6.4	2.3	8.7	4.1	11,651

Source: Rásaíocht Con Éireann

There has been significant growth in Tote online betting (Internet Web Platform) on horses and greyhounds in recent years. Tote offers betting via the Barking Buzz app and greyhoundracingireland.ie website with live pictures from all GRI tracks. If a customer wishes to watch a live race from any one of the tracks, they must open a tote account and then a minimum €1 bet is required to watch the race live on their device. The €1 to watch a race live is the industry norm.

Figure 7 shows the trend in total IWP turnover since 2017. Between 2017 and 2020 it increased by 61 per cent.

Figure 7: Internet Web Platform (IWP) Turnover Breakdown 2017-2021



Source: Rásaíocht Con Éireann

Figure 8 shows the breakdown of IWP online turnover between 2017 and 2021. Greyhound racing accounted for 78 per cent of the turnover over that period.

Figure 8: Online Turnover 2017-2021



Source: Rásaíocht Con Éireann

Wagering activity on greyhounds contributes to the overall betting levy collected by the Exchequer. This levy was increased from 1% to 2% in 2019 resulting in a return to the Exchequer of €95 million in 2019.

There has been a considerable focus at national level in improving the legislative framework relating to gambling activities. A new gambling bill has been in discussion by government for some time and it is expected that a gambling regulator will be appointed.

Since 2018 tote has been restricted in taking any bets from under 18-year-olds at greyhound racing stadia. It is expected that the rules around gambling activity will further tighten in the years ahead.

CONCLUSIONS

The Irish Greyhound Industry suffered during the economic downturn in 2008/2009, but never re-attained the heights seen around 2005. It has been badly affected over the past couple of years by COVID-19 and damage to the reputation of the industry. However, it remains an important sector of the economy that creates considerable economic activity and employment in rural Ireland in particular. Its social contribution is also very important.

The change in public perception of the industry has been reflected in falling attendances, the refusal of a number of media outlets to cover greyhound racing most notably RTÉ, and the withdrawal by Fáilte Ireland/Tourism Ireland from including greyhound racing in its promotional activity or permitting GRI to participate in promotional activities relating to the greyhound industry.

While much has been made in media reports of withdrawal of sponsors from support of greyhound racing, this is not borne out in reality. Three sponsors withdrew from sponsorship due to targeted and significant campaigns from those opposed to greyhound racing. GRI has seen some new sponsors emerge and other sponsors are willing to continue to support the industry but have asked for a lesser public profile than heretofore.

The greyhound industry is going through a very challenging period, but the economic, financial, and employment contribution is still significant. The ongoing challenge for GRI is to continue the development of a commercial greyhound racing and breeding industry built on a consumer-focused, and high-quality entertainment product, which meets the highest possible international regulatory and welfare standards.

Government support for the sector is very important, and in the absence of such support, there would be considerable implications for rural employment and economic activity. The overall objective of Government in terms of its funding of the greyhound industry is to ensure that the sector achieves its maximum potential and ensure that it continues to make a significant contribution to economic and social development.

COVID-19 has represented a significant challenge for the industry, but as restrictions are eased, activity levels should pick up again. In 2019, 462,709 patrons attended race meetings, and it is difficult to see that total being surpassed in 2022. However, provided the public and private greyhound stadia are put on a sound commercial footing, and there is a continuance of the aggressive approach to regulating the sector it should be possible in 2023 to target attendance levels of around 630,000, which were last seen in 2015.

THIS REPORT IS BASED ON ASSUMPTIONS MADE AND INFORMATION AVAILABLE AS AT 14th JULY 2021. THE INFORMATION AND DATA UPON WHICH THE REPORT IS BASED WAS PROVIDED BY GREYHOUND RACING IRELAND.