RÁSAÍOCHT CON ÉIREANN

03 March 2023

Ref: S01187 PAC33

Mr. Sam Keenan,
Committee Secretariat,
Committee of Public Accounts,
Leinster House,
Dublin 2.

Response via email 3rd March, 2023

Your Ref: SO1187 PAC33

Dear Mr. Keenan,
Further to your correspondence dated 13th February, 2023 on behalf of the Committee of Public Accounts the information requested is set out below and attached hereto.

Should the Committee require any further information or clarifications please advise and we will address same.

Yours sincerely,

J. Tuohey

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John Tuohey,
Interim Chief Executive Officer
Rásaíocht Con Éireann

Rásaíocht Con Éireann /Greyhound Racing Ireland
Greenpark, Dock Rd, Limerick, Ireland, V94 Y17X

t: 061 448000
pr@grireland.ie www.grireland.ie

GREYHOUND RACING IRELAND

RÁSAÍOCHT CON ÉIREANN

1. An analysis of the income, expenditure and profit in respect of catering during the last five years (exclusive of 2020), comparing when catering was outsourced, and provided in-house (pg. 12).

RCÉ Response:
The table below outlines the income, expenditure and profit in respect of Events & Hospitality Services T/A Abargrove Limited during the last five years exclusive of 2020.

For an outsourced model best estimates of income generated by Events & Hospitality Services currently are approximately 4.5% of Turnover.

	2021	2019	2018	2017	Total
Total F&B Sales	949,529	5,192,563	5,825,498	5,591,415	17,559,005
Total Expenditure including Costs of Goods sold	(1,443,515)	(4,885,073)	(5,202,622)	(5,104,950)	(16,636,160)
Profit / (Loss) from Catering Operations	(493,986)	307,490	622,876	486,465	922,845

Outsourced Model (Best Estimates currently are approximately 4.5% of Turnover)	42,729	233,665	262,147	251,614	790,155

Wider organisational costs such as Facilities Management and cleaning costs are borne by Events & Hospitality Services; both of which would remain a cost to RCÉ with an outsourced model.
Please note that results for 2021 were severely impacted by the Government restrictions imposed as a result of the Covid 19 pandemic and are not reflective of normally trading results.

Events & Hospitality Services contributes 10% of Food Sales to the Care Fund.

Rásaíocht Con Éireann /Greyhound Racing Ireland
Greenpark, Dock Rd, Limerick, Ireland, V94 Y17X

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pr@grireland.ie www.grireland.ie

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2. The legal costs to Rásaíocht Con Éireann (RCÉ) for 2017, 2018 and 2019 (pgs. 19-20).

RCÉ Response:

The legal costs for the requested years are outlined below.

Legal Costs:-	2019	2018	2017
Legal	3,567	34,871	138,336
Legal Fees - Legal Proceedings	218,254	118,240	38,165
	221,821	153,111	176,501

3. A copy of the Indecon report commissioned by RCÉ (pgs. 25-27).

RCÉ Response:

The Indecon report commissioned by RCÉ is attached.

4. A copy of the Jim Power report commissioned by RCÉ in 2021 (pg. 27).

RCÉ Response:

The Jim Power report commissioned by RCÉ is attached.

5. The Exchequer funding sought by RCÉ for 2023 (pg. 30).

RCÉ Response:

The RCÉ Budget 2023 Submission is attached.

Rásaíocht Con Éireann /Greyhound Racing Ireland
Greenpark, Dock Rd, Limerick, Ireland, V94 Y17X

t: 061 448000
pr@grireland.ie www.grireland.ie

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6. The cost of the IGB business model analysis carried out by Preferred Results Limited (pg. 31).

RCÉ Response:
The cost of the IGB business model analysis carried out by Preferred Results Limited totalled €116,680 net of VAT.

7. A note on the greyhound care fund, including the funding and management of same, and a breakdown on the funding and expenditure through the fund for 2019, 2020 and 2021 (pg. 36).

RCÉ Response:
The funding and expenditure of the Greyhound Care Fund are outlined below.

Rásaíocht Con Éireann /Greyhound Racing Ireland
Greenpark, Dock Rd, Limerick, Ireland, V94 Y17X

t: 061 448000
pr@grireland.ie www.grireland.ie

RÁSAÍOCHT CON ÉIREANN

Care Fund		2019	2020	2021
		€	€	€
Source of Funding				
Sponsorship - Prizemoney	Internal	116,015	108,681	238,598
Gate Receipts	Internal	53,241	30,602	-
EHS	Internal	64,856	41,994	-
Tote	Internal	13,236	3,400	-
Top-Up Funding from Welfare Budget	Internal	-	-	278,282
Total Care Centre Contributions	External	-	600	5,650
Total Fostering Contributions	External	-	-	1,250
Sponsorship - Direct Funding	External	-	27,550	-
Transport Funding	External	-	10,161	-
		247,348	222,988	523,780
Funding Distribution				
Care Fund Spend - Promotion & Sundry			(3,000)	(15,278)
Fostering Costs		(13,751)	(177,921)	(133,753)
Foster Care Centre			-	(138,851)
Care Centre Costs		(5,524)	(28,876)	(59,677)
Transportation U.S.A.		(3,629)	(29,480)	(173,361)
Injury Scheme		(958)	(2,086)	(4,505)
Funding to IRGT		(80,000)	(123,461)	
		(103,862)	(364,824)	(525,425)

8. A breakdown of the funding (from public or private sources) and number of employees (both full-time and part-time) across all greyhound racecourses in Ireland (pg. 37).

RCÉ Response:

In 2021, RCÉ received an allocation of €19.2m from the Horse & Greyhound Racing Fund. In 2021, RCÉ was in receipt of €1.1m from the Employment Wage Subsidy Scheme (EWSS). As per the 2021 Annual Report, full time and part time staff totalled 147 FTE's.

9. A table outlining the annual revenue figures and attendance records for greyhound venues, once concessions are deducted, particularly in relation to Shelbourne Park for the last three years (pg. 37).

RCÉ Response:

RÁSAÍOCHT CON ÉIREANN

The table below outlines the annual revenue figures and attendance figures for 2019, 2020 & 2021.

	2021		2020		2019	
Greyhound Racing Operations Ireland Ltd.	Revenue	Attendances less Promotional tickets	Revenue	Attendances less Promotional tickets	Revenue	Attendances less Promotional tickets
Galway	108,193	9,560	92,250	8,164	241,214	25,518
Limerick	96,934	12,991	94,622	9,382	241,420	28,777
Waterford	96,571	9,350	101,421	6,937	151,585	19,521
Cork	208,388	14,637	185,555	12,018	404,955	42,260
Shelbourne Park	403,946	28,871	413,433	22,753	1,276,477	122,829
Tralee	120,606	13,954	133,560	12,332	255,106	36,748
Youghal	76,127	9,270	51,236	6,759	55,380	11,417
Newbridge	70,213	5,365	65,166	4,516	145,091	18,609
Mullingar	68,592	9,094	76,779	7,463	123,190	15,531
Total	**1,249,570**	**113,092**	**1,214,022**	**90,324**	**2,894,418**	**321,210**

10. A detailed breakdown by category of the traceability system for 2022 (pg. 42).

RCÉ Response:

The following information was taken from the system on January 1st 2023 and relates to figures on RCÉTS for 2022.

Since the inception of RCÉTS on January 1st 2021 there have been 35,701 greyhound on the system. This includes both active and inactive greyhounds. These are divided into racing greyhounds 27,387 and unraced greyhounds 8,314.

A detailed breakdown of the greyhounds that became inactive by category on the traceability system for 2022 is as follows:

Exported Overseas	5,312
Retained For Breeding	204
Retained as a Pet	198
Retained for Coursing	6
Retained for Schooling	5
Rehomed Via Charity	1,543
Died	1,867
Total	**9,135**

Died Total broken down as follows:	
Died of Natural Causes	203
Euthanised on Humane Grounds	272
Euthanised Terminal Illness	53
Euthanised Unsuitable as Pet	98
Deaths Reported to I.C.C	1,241
Total	**1,867**

11. The percentage of concession tickets against total ticket sales for 2021 and 2022 (pg. 47).

RCÉ Response:

The percentage of concession tickets against total ticket sales for 2021 was 1.90%.
The percentage of concession tickets against total ticket sales for 2022 was 3.78%.

Rásaíocht Con Éireann /Greyhound Racing Ireland
Greenpark, Dock Rd, Limerick, Ireland, V94 Y17X

t: 061 448000
pr@grireland.ie www.grireland.ie

SUBMISSION

Background

The operating environment for Rásaíocht Con Éireann (RCÉ) has been extremely challanging in recent years. The advent of the Covid-19 pandemic in March 2020 has impact very severely on the commercial operations of RCÉ for 2020 and 2021 with restrictions lifted at the end of January 2022. The table below sets out the main source of commerical income and the level of income for 2019, 2020, 2021 and 2022 (to 31st May).

	2019	2020	2021	2022 (May YTD)
Income	€	€	€	€
Admissions Income	1,680,051	306,013	375,936	421,535
Tote Turnover less winnings paid	5,043,040	2,107,802	2,642,085	1,624,984
F&B Gross Profit	3,474,837	573,186	619,580	833,661
Other GRI Income	1,113,903	855,368	824,632	558,499
Total	11,311,831	3,842,369	4,462,233	3,438,679

There was a collapse in commercial revenues since March 2020 which have been somewhat off-set by the increase in the Horse & Greyhound Fund allocation for 2021 and the availing of government employee support schemes including TWSS and EWSS. RCÉ)

RCÉ budgeted in 2022 on the basis that commercial activity would return to 70% of 2019 levels i.e. the last full year pre-Covid. Restrictions didn't lift until the end of January 2022 and the return of public confidence in attending Stadia has been slower than anticipated so that May YTD activity has not yet reached budget levels. However RCÉ is still confident that it can deliver close to the budget surplus of €1.3m for 2022. However inflationary pressures are negatively impacting the industry particularly in respect of the sharp increase in greyhound feed costs and transport cost. RCÉ requests that emergency funding be provided for owners and trainers similar to the supports provided to the farming community to allivate these extraordinary cost increases and assist with greyhound welfare.
In framing the budget for 2023 it is clear that restoring commercial activitities to 70% of 2019 levels will still be a stretch target and maintaining a budget surplus with the anticipated increase in inflation coupled with the geo-political pressures that have affected animal welfare initiatives such as rehoming of retired greyhounds, will require continued if not increased government support.

Greyhound Racing as an Industry

RCÉ has commissioned an update on the 2017 report on the economic and financial significance of the Irish greyhound industry. The updated report (July 2021) is attached and details the significant contribution made by the greyhound racing industry to the Irish exchequer and rural employment.

The report, compiled by consultant economist Jim Power, shows the industry made a net contribution to the Irish economy of €132.3 million in 2019 and supported 4,150 full-time and part-time jobs. An additional 6,211 active greyhound owners derived economic benefit from the industry in 2019, the last full year of activity before the pandemic.
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 report also points to the fact that 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.
The Greyhound Racing Act of 2019 was enacted in May 2019. This legislation modernises much of the regulatory framework for greyhound racing which was originally set out in the Greyhound Industry Act 1958. It is the Board's priority to implement in full the Greyhound Racing Act 2019 as sections of the Act are commenced by the Minister.

RCÉ Objectives

RCÉ is currently implementating a Strategic Plan 2018 – 2022. It is recognised that the plan needs to be re-visited and updated to reflect the changing circumstances arising from Covid-19. This process commenced in Q4 of 2021 and KPMG have been engaged to facilitate the process with a view to completing the strategic plan for the next number of years by October 2022. Notwithstanding this review, the key priority set out in the 2018 – 2022 Strategic Plan remain the key priorities of the Board ie **that animal welfare remains the core priority** at the centre of our industry and to ensure the highest standard of integrity and regulation in the sport. Significant programmes of work have been undertaken to progress these objectives and aspects of these programmes are elaborated on further below.

Capital Investment

The surplus proceeds from the Harold's Cross sale in 2018 amounting to some €5.8M enable the Board to provide much needed investment in equipment and infrastructure which had not seen investment for some considerable period. Funding was allocated to track improvement works, fire safety improvement works, IT improvements as well as significant allocations towards the upgrade of Shelbourne Park Greyhound Stadia. A further €1M, on foot of an objective contained in the Strategic Plan, was allocated for Kilkenny greyhound stadium upgrade.
At this point the design team is finalising the tender documentation for the development works at Shelbourne Park planned to commence in January 2023, which will exhaust the funds available from the Harold's Cross surplus proceeds. An application has been processed in relation to the Kilkenny stadium upgrade and Kilkenny Greyhound Racing Company have received tenders for the works. The Board at its meeting held on 22nd July 2021 approved the grant of €1M to this project and approval of the Department to the allocation of this sum is awaited.

The effect of the above is that a source of funding for capital investment needs to be identified and will inevitably be derived from annual surpluses generated on the operational account. There remains very signficant investment in terms of improving and upgrading facilities across the stadia network. The scope for progressing such provision in RCÉ's budget for 2023 is very limited given the overall constraints on commercial revenues.

Care & Welfare

A comprehensive update on all aspects of RCÉ's ambitious Care & Welfare Programme is attached. Attention is drawn to key elements of the programme as follows:

- The implementation of a traceability system for racing greyhounds with effect from 1st January 2021. This system will require to be expanded and supported by statutory regualtion. It is also a resource intensive to ensure that traceability records are maintained up to date.

- The re-homing programme has significantly expanded in recent years as can be seen from the data below :-

Rehomings financially assisted by the IRGT
2019 – 974 greyhounds
2020 – 1,775 greyhounds
2021 – 2,234 greyhounds
2022 – 960 greyhounds (to 31st May)

- RCÉ, through its established entity the Irish Retired Greyhound Trust (IRGT) has expanded its greyhound rehoming programme in recent years. RCÉ is also progressing a network of care centres to support the rehoming of greyhounds. Following a procurement process in 2021 five parties have been approved as foster care centres.
- A strategic review is at present underway in relation to the Irish Retired Greyhound Trust with a view to ensuring that the structures associated with the Trust are in keeping with the expanding level of activity and the corporate governance requirements under the Charities Governance Code.

Conclusion

The main element impacting on Budget 2023 is the very significant challenge in terms of restoring commercial income for 2023 to the levels evident in 2019. This is not considered realistic and accordingly on going support is required from the Horse & Greyhound Fund at a minimum of 2022 levels to maintain operations and meet statutory obligations in 2023.
In addition, there are increased welfare costs in meeting the rehoming needs of animals due to the surplus of animals in Europe looking for refuge as a direct fall out of the war in Ukraine. Our European partner organisations are under considerable pressure and new initiatives need to be funded domestically to off- set the loss of such avenues. In addition, extraordinary inflationary pressures are being experienced by the industry and it's resultant impact on care and welfare expenditure requires immediate attention.
The main targeted areas of additional spend in 2023 (over expenditure provisions in 2022) are as follows:
Traceability system Phase 2 development - €200K

Care & Welfare programmes –€400K

Capital equipment replacement - €300k

Dearbhla O'Brien
Chief Executive Officer
28th June, 2022

Enc

R1774 (iv) PAC33

Indecon Independent Strategic Review of Irish Greyhound Racing Stadia to Underpin a Viable Long Term Sustainable Industry

Submitted to

The Irish Greyhound Board

Prepared by

Indecon International Economic Consultants

Indecon
www.indecon.ie

27 November 2019

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Executive Summary

INTRODUCTION AND BACKGROUND

Indecon Economic Consultants is one of Ireland's leading firms of advisors. Following a competitive tender process, Indecon was appointed by the Irish Greyhound Board (IGB) to undertake an independent strategic review of Irish greyhound stadia. As part of this project Hamilton Architects on behalf of Indecon conducted an examination of the facilities available at Irish greyhound stadia. Our analysis included the following elements:

- Assessment of the infrastructure, services available and standard of facilities.
- An analysis of population catchments and access arrangements.
- An analysis of racing schedules for each greyhound stadium.
- A financial assessment of the future sustainability of each individual track.
- An assessment of any impacts arising from availability of breeders or trainers.
- An analysis of relevant competing sporting facilities.
- Recommendations regarding the appropriate industry footprint for the future.

The IGB is a commercial semi-state organisation established in 1958 that is responsible for the control and development of the greyhound industry in the Republic of Ireland and was allocated €16.8 million in funding from the DAFM in 2019. There are currently 16 greyhound stadia in Ireland, nine are run by the IGB while seven are run independently as private entities.

GREYHOUND RACING INTERNATIONALLY

As background context it is useful to consider the footprint of the greyhound sector in Ireland compared to other countries where greyhound racing takes place. Ireland has the highest number of tracks per head of population of any of the countries reviewed. The number of tracks in other countries are listed below, along with their population and the per-capita number. Ireland has 3.3 greyhound tracks per million population, compared to an average of 0.9 in the other countries. In many countries there has been a radical restructuring of the sector with the closure of tracks in order to ensure a financially viable sector. Also of note is that in a number of regions greyhound racing has been prohibited, which highlights the importance of giving priority to measures to ensure high levels of animal welfare.

Number of Greyhound Tracks by Country

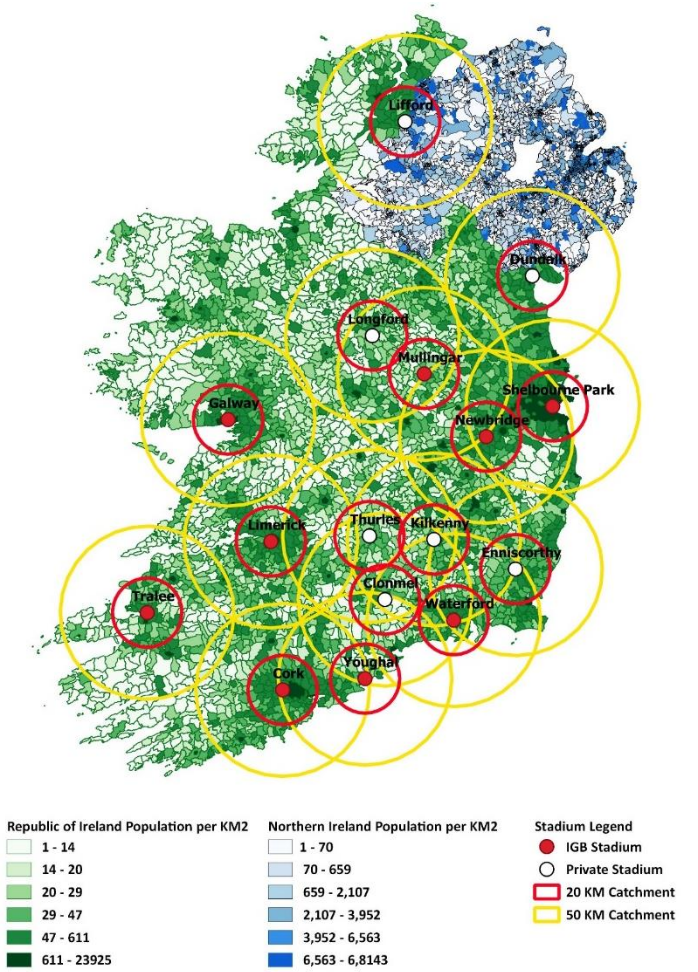
Country	Number of Tracks	Population (Millions)	Tracks per Million Pop
Australia (1)	65	25.0	2.6
Denmark	2	5.8	0.3
Great Britain	25	64.2	0.5
Hungary	4	9.8	0.4
New Zealand	7	4.7	1.5
Northern Ireland	2	1.9	1.1
United States	19	326.2	0.1
Average	-	-	**0.9**
Average (ex- Australia)	-	-	**0.6**
Ireland	16	4.9	**3.3**

Source: Indecon
(1)Indecon notes that in November 2019 a further track has closed in Australia bringing the number to 64

LOCATION OF STADIA, ACCESS ARRANGEMENTS AND OTHER SPORTING FACILITIES

There are currently 16 greyhound stadia in Ireland and two in Northern Ireland. The population catchment areas of each of the stadia for distances of 20km and 50km are illustrated below.

Population Catchment Areas for Irish Greyhound Stadia



Source: Indecon analysis of CSO and NISRA small area population data

There is a wide dispersion of greyhound racing tracks across urban and rural regions. Population catchment within 20km ranged from 1.4 million in Shelbourne Park, to around 50,700 for Youghal. In general, the private tracks have smaller catchment areas than the IGB-owned stadia. The extent to which a greyhound stadium serves a catchment area is also influenced by the proximity of that stadium to other greyhound tracks. There are four stadia within 60km driving distance of each other in the South-East, namely Kilkenny, Clonmel, Enniscorthy, Thurles and Waterford. In contrast, there are no stadia within 60km of Galway, Limerick, Tralee and Dundalk. On an all island basis, the most isolated greyhound stadium is Tralee, which is 98.8km from its nearest neighbouring stadium, Limerick. The closest stadia to Dundalk and Lifford are in Northern Ireland. (Excluding Northern Ireland, Lifford is particularly isolated from other tracks and the nearest track to Lifford in the Republic of Ireland is Dundalk which is over 138 kms.)

Nearest Greyhound Stadium to Each Stadia (Driving Distance)				
	Nearest Stadium			Stadia within 60km
	Distance (km)	Time	Stadium	Number (Names) of Stadia
IGB Stadia				
Cork	53.6	40 min	Youghal	1 (Youghal)
Galway	96.0	1 hr 5 min	Limerick	0
Limerick	80.4	55 min	Thurles	0
Mullingar	45.7	40 min	Longford	1 (Longford)
Newbridge	48.0	50 min	Shelbourne	1 (Shelbourne Park)
Shelbourne Park	48.0	50 min	Newbridge	1 (Newbridge)
Tralee	98.8	1 hr 20 min	Limerick	0
Waterford	50.2	55 min	Clonmel	3 (Clonmel; Enniscorthy; Kilkenny)
Youghal	53.6	40 min	Cork	1 (Waterford)
Private Stadia				
Clonmel	46.0	45 min	Thurles	3 (Kilkenny; Thurles; Waterford)
Dundalk	71.7	50 min	Drumbo	0
Enniscorthy	55.8	50 min	Waterford	2 (Kilkenny; Waterford)
Kilkenny	47.1	45 min	Thurles	4 (Clonmel; Enniscorthy; Thurles; Waterford)
Lifford	23.6	22 min	Derry	1 (Derry - Northern Ireland)
Longford	45.7	40 min	Mullingar	1 (Mullingar)
Thurles	46.0	45 min	Clonmel	2 (Clonmel; Kilkenny)
Source: Indecon and Google Maps				

The ease of speedy access to greyhound stadia is also influenced by the quality of the transport network. In recent decades, the construction of the Irish motorway network has decreased journey times across Ireland and made greyhound stadia more accessible. Most stadia are in close proximity to motorways, however, there are exceptions.

It is also important that attendees, owners, trainers and breeders are able to access the track in a safe and comfortable manner and that access for individuals with a disability are facilitated. The next table shows the access arrangements at each of the greyhound stadia. Five stadia have no marked car parking spaces for people with disabilities, three have no lifts, two have no level access to assist people with disabilities and three have no viewing provision for those in wheelchairs.

Access Arrangements at Irish Greyhound Stadia, 2019						
	Marked Car Parking Spaces	**Marked Bus Spaces**	**Marked Disabled Spaces**	**Lift Provision**	**Level Access**	**Wheelchair Viewing Provision**
IGB Stadia						
Cork	370	0	8	Yes	Yes	Yes
Galway	85	0	6	Yes	Yes	Yes
Limerick	560	3	8	Yes	Yes	Yes
Mullingar	42	0	0	Yes	Yes	Yes
Newbridge	200	0	2	Yes	Yes	Yes
Shelbourne Pk	256	0[b]	5	Yes	Yes	Yes
Tralee	80	0	2	Yes	Yes	Yes
Waterford	150	0	11	Yes	Yes	Yes
Youghal	0[a]	0	0	No	Yes	No
Private Stadia						
Clonmel	185	0	4	Yes	Yes	Yes
Dundalk	247	0	6	Yes	Yes	Yes
Enniscorthy	0[a]	0	0	No	No	No
Kilkenny	0[a]	0	2	No	Yes	No
Lifford	0[a]	0	3	Yes	Yes	Yes
Longford	0[a]	0	0	No	No	No
Thurles	130	0	0	No	Yes	Yes

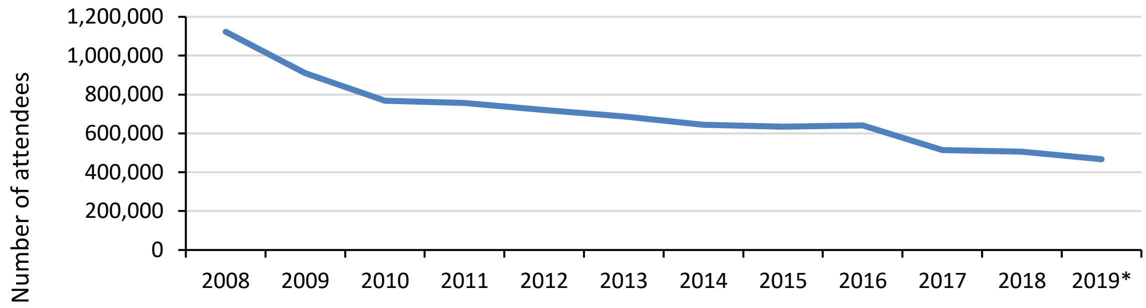
Source: Hamilton Architects
Note: a: In these places car parking considered not an issue as there is considerable car parking due to the size of the site.
b: Shelbourne Park is located in Dublin city centre and therefore has excellent public transport access.

The presence of alternative sporting facilities within the catchment area of each greyhound stadium is likely to impact on the commercial sustainability of the track and the social and economic significance in local areas. It is noted that, particularly in the case of urban tracks, greyhound racing is not just competing with other sports but also with other entertainment venues. Our analysis suggests that there are extensive sporting and other facilities that compete with greyhound stadia and there are GAA facilities within 20km of 12 of the 16 stadia.

ATTENDANCE LEVELS

The greyhound racing industry in Ireland has witnessed a significant decline in attendance over the last decade. While 1.1m attended races in 2008, this had fallen to just over 0.5m by 2018, a decline of 55%. Numbers of attendees have continued to decline in 2019.

Total Number of Attendees at Greyhound Race Meetings, 2008 - 2019



Source: IGB

Note:* 2019 figure is calculated by applying rate of reduction for first 10 months of the year to 2018 total.

There is great uncertainty regarding future attendance levels and these will depend in part on actions taken by the sector and by how the public responds. The actual attendance by stadium is shown below as well as potential scenarios for future attendance levels. The four stadia with the lowest projected attendance across all three projected scenarios are Youghal, Longford, Lifford and Enniscorthy. Attendance is an important measure of demand for the facilities and is of critical importance in influencing the commercial sustainability of stadia. The long term impact is uncertain and this has been taken into account in development of a number of alternative scenarios for future attendance levels.

Actual (2018) and Scenarios (2022) Attendance in Greyhound Stadia in Ireland

		2022		
	2018	**Scenario 1: 2015-2018 attendance change continues**	**Scenario 2: 2015-2019 attendance change continues**	**Scenario 3: Econometric Model attendance decline**
Cork	49,903	31,583	34,691	34,338
Galway	29,156	22,621	22,836	20,669
Limerick	36,655	25,181	22,685	24,500
Mullingar	20,121	16,097	16,896	14,515
Newbridge	20,929	20,485	18,838	15,362
Shelbourne Park	147,858	156,778	147,124	111,283
Tralee	46,596	41,019	35,743	32,861
Waterford	26,570	22,753	18,613	18,318
Youghal	10,291	8,009	9,207	7,542
IGB Stadia	***388,079***	***344,527***	***326,633***	***279,387***
Clonmel	17,992	14,464	14,570	12,862
Dundalk	38,308	28,836	28,402	26,787
Enniscorthy	13,515	7,676	10,191	9,491
Kilkenny	16,672	17,776	16,677	12,565
Lifford	11,226	7,343	6,326	7,330
Longford	6,451	3,449	2,777	3,938
Thurles	13,899	9,112	11,604	10,012
Independent Stadia	***118,063***	***88,656***	***90,548***	***82,983***
All Stadia	**506,142**	**433,183**	**417,180**	**362,370**

Source: Indecon Analysis

In June 2019, RTÉ aired a programme, "RTÉ Investigates: Greyhounds Running for Their Lives" which featured alleged abuses of animals within the greyhound industry. This received widespread commentary nationally, which resulted in the withdrawal of a small number of sponsors from the sport. The adverse publicity following the programme has had a further negative impact on attendances, particularly in the large urban stadia. The long term impact is uncertain and this has been taken into account in the development of a number of alternative scenarios for future attendance levels.

RACING SCHEDULES

The number of races, and time slots for those races, differs between stadia, with the larger, typically IGB-owned tracks having a greater number of races meetings. Overall the number of races and race meetings in IGB tracks have increased by 14.5% and 10.9% respectively over the period 2015 - 2018, while the number of races and race meetings in independent tracks decreased by 7.9% and 8.7% respectively. Friday and Saturday night racing tends to be dominated by the larger tracks, with Cork, Galway, Shelbourne Park, Tralee and Dundalk all operating race meetings on both those nights. There are also some regional differences in the patterns of race meet timing, for example Limerick holds regular Thursday night races, though Cork and Galway do not.

Racing Activity in Greyhound Stadia, 2018

	Number of races	Number of race meetings	Number of runners
IGB Stadia			
Cork	1,126	103	6,656
Galway	912	93	5,362
Limerick	1,229	106	7,272
Mullingar	1,056	101	6,255
Newbridge	558	54	3,315
Shelbourne Park	2,186	200	12,719
Tralee	1,844	192	10,966
Waterford	796	90	4,622
Youghal	1,016	101	6,026
Total	*10,723*	*1,040*	*63,193*
Average	*1,191*	*116*	*7,021*
Private Stadia			
Clonmel	867	99	5,139
Dundalk	949	103	5,523
Enniscorthy	757	86	4,460
Kilkenny	794	92	4,718
Lifford	573	51	3,317
Longford	710	69	4,182
Thurles	487	46	2,880
Total	*5,137*	*546*	*30,219*
Average	*734*	*78*	*4,317*
All Stadia – Total	**15,860**	**1,586**	**93,412**
All Stadia – Average	**991**	**99**	**5,838**

Source: Indecon analysis of IGB Data

ANALYSIS OF BREEDERS, TRAINERS AND OWNERS

The greyhound industry makes an economic and social contribution to many regions through the support of breeders, trainers and owners. One estimate suggested that in 2016 the greyhound industry in Ireland supported 5,058 full-time and part- time jobs in the Irish economy, with the total number of individuals deriving economic benefit from the industry being estimated at 12,371.[1] Indecon notes that all economic sectors interact with other parts of the economy and there is likely to be high levels of economic displacement in attendance spending at greyhound races and much of the expenditure would likely have been made elsewhere in the economy.[2] However, it is clear that in local areas the sector contributes to the economy and we also note the use of greyhound racing for fundraising purposes by charitable and other organisations.

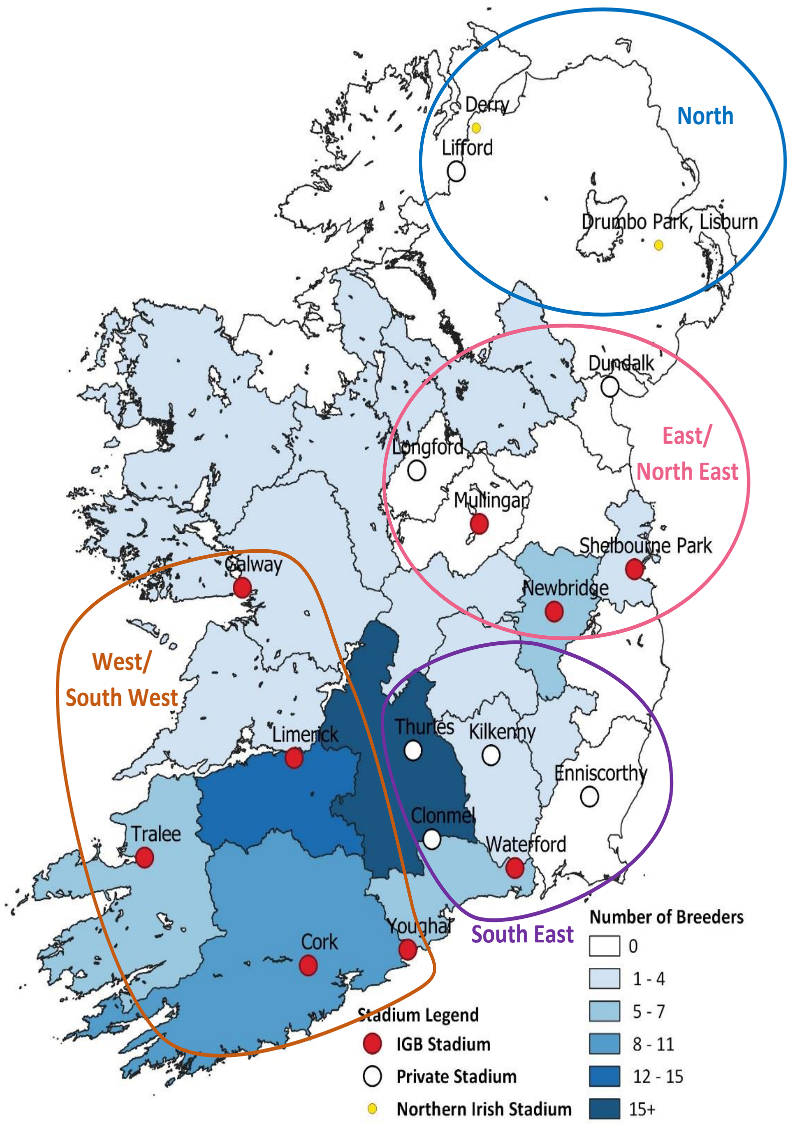
As of 1 October 2019, there were 81 registered breeding establishments or breeders in Ireland with five or more greyhounds. The geographic distribution of greyhound breeders in Ireland is illustrated below. The largest number of breeders were in Tipperary (20) and Limerick (13). An alternative measure of geographical distribution of industry activity can be taken from the distribution of trainers[3]. This also shows that Tipperary has the highest concentration of trainers (11.6%), followed by Cork and Kerry (9.2% each). By contrast, Donegal only accounted for 2.6% of all trainers. These numbers exclude smaller non-registered breeders.

[1] Jim Power Economics 2017, "The Economic and Financial Significance of the Irish Greyhound Industry, November 2017". Available at: https://www.igb.ie/globalassets/power-report-2018/power-report---the-economic--financial-significance-of-the-irish-greyhound-industry---november-2017.pdf (accessed 08/07/2019)

[2] For a further discussion of economic displacement see Gray, A. W., (1995), 'Guide to Evaluation Methods,', Published by Gill and MacMillan, ISBN 07171 22425.

[3] "The Economic and Financial Significance of the Greyhound Industry", IGB 2017.

Geographic Distriubtion of Greyhound Breeders in Ireland, 2019



Source: Irish Coursing Club
Note: Breeders are only required to register where they have five greyhounds or more

Most dog trainers in Ireland have relatively small operations, and train between one and nine dogs. The next table disaggregates respondent breeders, owners and trainers by the number of dogs they owned/trained between 2015 and 2019. The proportion of trainers with 1-4 dogs varied between 41% and 48% between 2015 and 2018. Nine out of ten respondents stated that they were dog owners while 62% and 45% stated that they were breeders and trainers, respectively. Most of those who participate in the sport engage in two or more of breeding, owning and training activities. 65% of respondent breeders, owners and trainers were over the age of 45. The average age of respondents to the survey was just over 50 years old, around three years older than the general adult population based on the results of Census 2016. This survey had a total sample size of 394.

Respondents Disaggregated by Number of Dogs Owned/Trained, 2015-2020						
Number of Dogs	**2015**	**2016**	**2017**	**2018**	**2019**	**2020 (Forecast)**
1-4	42%	41%	44%	48%	45%	38%
5-9	25%	27%	28%	25%	30%	28%
10-15	11%	13%	11%	11%	10%	17%
15-20	5%	5%	4%	4%	3%	4%
20-50	10%	8%	8%	9%	9%	10%
50-100	4%	4%	3%	3%	2%	2%
100+	2%	1%	1%	2%	1%	1%
Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers						

In analysing the spatial distribution of greyhound stadia, it is also important to determine the extent to which there are breeders/trainers in the area surrounding a greyhound stadium. Indecon's analysis suggests that the absence of sufficient numbers of greyhounds/breeders is seen as a significant challenge by about half of industry participants.

Many breeders/trainers and owners involved in the greyhound industry attend more than one stadium. The next table shows, for each stadium, the stadia that are also used by respondents on a regular basis. It is apparent that few of the respondent breeders, trainers and owners use only one track. For the following track clusters where cross-usage of tracks is high. These are:

- South-West/West: Tralee; Cork; Limerick; Youghal and Galway;
- South-East: Enniscorthy; Waterford; Kilkenny; Thurles and Clonmel; and
- North and North East: Lifford; Longford; Mullingar; Newbridge; Dundalk and Shelbourne Park.

In spite of widespread use of other tracks, 57% of respondents to Indecon's survey stated that they would end their involvement with greyhound racing were the stadium they use most regularly to close. Indecon accepts that closure of stadia will impact on the scale of the sector and its economic contribution. The results represent responses from 317 breeders, owners and trainers. The number of responses for those who use any track vary between 20-155.

Tracks Regularly Used by Respondents (Percentages of Totals for Each Stadium)																
Stadium	Other Stadium Used															
	Clonmel	Cork	Dundalk	Enniscorthy	Galway	Kilkenny	Lifford	Limerick	Longford	Mullingar	Newbridge	Shelbourne Park	Thurles	Tralee	Waterford	Youghal
Clonmel	**8%**	44%	6%	13%	8%	39%	2%	37%	5%	10%	13%	45%	45%	19%	40%	15%
Cork	48%	**11%**	7%	5%	11%	21%	2%	50%	5%	7%	11%	39%	32%	32%	21%	25%
Dundalk	8%	8%	**8%**	13%	12%	10%	27%	6%	33%	37%	37%	77%	12%	4%	10%	6%
Enniscorthy	15%	6%	13%	**17%**	6%	31%	2%	6%	4%	6%	25%	48%	12%	4%	56%	6%
Galway	22%	26%	26%	13%	**0%**	22%	9%	70%	39%	35%	35%	57%	30%	17%	17%	9%
Kilkenny	38%	19%	8%	25%	8%	**5%**	2%	14%	6%	19%	37%	62%	41%	8%	37%	8%
Lifford	5%	5%	70%	5%	10%	5%	**5%**	5%	40%	20%	30%	65%	5%	5%	5%	10%
Limerick	35%	43%	5%	5%	25%	14%	2%	**15%**	8%	8%	8%	37%	34%	34%	12%	8%
Longford	7%	7%	39%	5%	20%	9%	18%	11%	**14%**	48%	36%	59%	11%	5%	5%	5%
Mullingar	12%	8%	37%	6%	16%	24%	8%	10%	41%	**4%**	65%	69%	18%	6%	8%	4%
Newbridge	8%	6%	19%	13%	8%	23%	6%	5%	16%	32%	**23%**	60%	10%	4%	10%	2%
Shelbourne Park	18%	14%	26%	16%	8%	25%	8%	15%	17%	23%	39%	**9%**	17%	9%	19%	4%
Thurles	51%	33%	11%	11%	13%	47%	2%	40%	9%	16%	18%	47%	**7%**	16%	25%	5%
Tralee	32%	47%	5%	5%	11%	13%	3%	58%	5%	8%	11%	37%	24%	**24%**	11%	8%
Waterford	45%	21%	9%	52%	7%	41%	2%	14%	4%	7%	18%	52%	25%	7%	**5%**	9%
Youghal	41%	64%	14%	14%	9%	23%	9%	23%	9%	9%	9%	27%	14%	14%	23%	**18%**
Source: Indecon Survey of Greyhound Breeders, Dog Owners and Trainers re. Irish Greyhound Racing Stadia Infrastructure																

ASSESSMENT OF INFRASTRUCTURE, SERVICES AND FACILITIES

An overview of the infrastructure assessment of each stadium conducted for this study is shown below. More than half of the stadia in Ireland are judged to have some deficiencies, and only one stadium in the country was deemed 'good' or 'excellent' across all measures. Our analysis suggests that capital investment in the sector is required to improve the quality of the stadia and ensure adequate facilities for spectators.

Summary of Architectural Assessment of Infrastructure, Services and Facilities (Number of Stadia)					
	Excellent	**Good**	**Fair**	**Poor**	**Very Poor**
Internal Building Fabric	0	6	6	4	0
External Building Fabric	0	6	6	4	0
Furniture, Fixtures and Equipment	0	3	8	4	1
Building Energy Efficiency	0	2	3	7	4
Ease of Access	1	7	2	1	5
General Ambience	0	5	6	5	0
Toilets	1	2	4	6	3
Overall quality of facilities for spectators	0	7	4	5	0
Overall quality of facilities for race participants	2	7	6	1	0
Standard of services provided at race meets	1	8	2	5	0
Source: Hamilton Architects					

FINANCIAL SUSTAINABILITY OF EACH STADIUM

The future financial viability of stadia will be influenced by attendance levels which have been showing long-term decline. While future attendance levels are inevitably uncertain, it is critical to consider the likely scenarios for future attendance (demand) at greyhound stadia in Ireland. To help inform the identification of appropriate scenarios Indecon developed an econometric model to estimate time trends and build in further detail with additional explanatory variables. A basic model of attendance demand can be written as:

$$Y_{it} = Ae^{\beta t}e$$

Where Y_{it} is demand, attendance at each park, indexed by i, and for each year, indexed by t. By taking the natural logs of both sides, we can write:

$$lnY_{it} = \alpha + \beta t + \varepsilon$$

Beta, β, is an estimate of the annual rate of change; lnε=e, and lnA=α. The regression results from the simple regression show a downward trend but the coefficient estimates are not statistically significant. We therefore repeat the regression controlling for the panel structure of the data, the results of which are displayed in the next table. The panel effects are significant, and the overall trend estimate is now significant. However, the overall magnitude of the trend is nearly the same, having gone from 9.2% per annum to 9.4% per annum.

Attendance vs Time Random Effects Regression		
Variable	**Coefficients**	**Standard Errors**
Year	- 0.094***	0.032
Constant	200.078***	64.910
Dependent Variable: Attendance (Natural Logarithm)		
R-Squared: 0.0204 (within = 0.1470; between = 0.0003)		
Number of Observations: 67		
Source: Indecon analysis of IGB Data ****** p<0.01, ** p<0.05, * p<0.1***		

The summary results across a number of different econometric models are displayed in the next table. Overall, while there is some significant variation, it can be seen that attendance is estimated to decline between 6% and 14% per annum. The results from most of the models would suggest a somewhat narrower range of circa 9-12% average annual rates of decline in greyhound track attendance. In our modelling we use a 9% decline per annum as a long-term trend in one of our scenarios but we note that even greater declines in attendance levels are possible. There is also potential for the sector to enhance animal welfare, marketing and the product offering to help stabilise attendance levels. This will however require investment and decisive action by the IGB and by the sector.

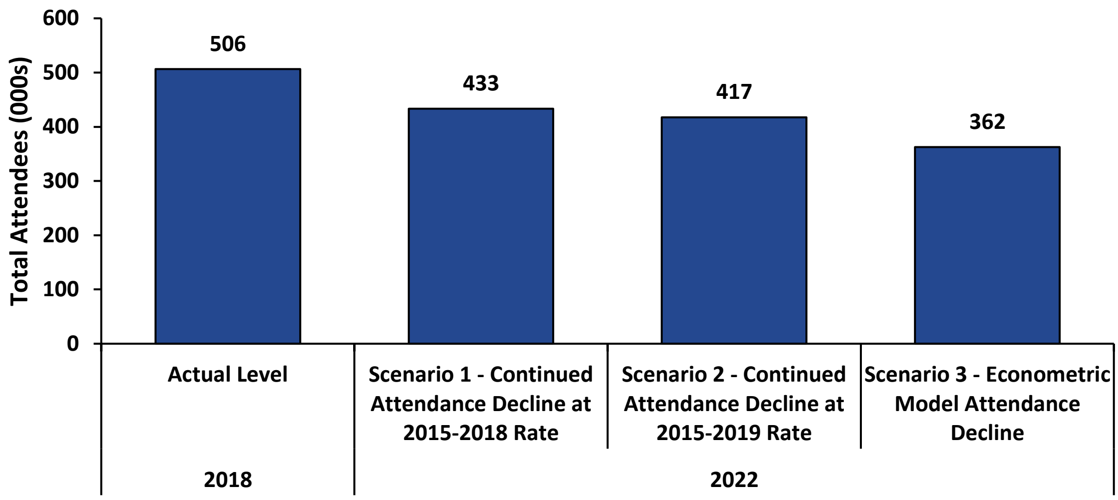
Summary of Regression Results							
VARIABLES	**(1) lnattendance**	**(2) lnattendance RE**	**(3) lnattendance FE**	**(4) lnattendance RE**	**(5) lnattendance FE**	**(6) lnattendance ME**	**(7) lnattendance ME**
Year	-0.0927	-0.140***	-0.0897***	-0.0965***	-0.0602**	-0.122***	-0.0840***
	(0.0796)	(0.0328)	(0.0326)	(0.0298)	(0.0294)	(0.0304)	(0.0273)
ln IGB Prize Money		0.453**	0.157	0.343**	0.119	0.345**	0.267*
		(0.177)	(0.179)	(0.155)	(0.156)	(0.165)	(0.143)
ln Race Meets		0.536***	0.843***	0.315*	0.576***	0.648***	0.403**
		(0.198)	(0.197)	(0.182)	(0.184)	(0.184)	(0.168)
ln Entry Fees				0.194***	0.178***		0.189***
				(0.0441)	(0.0444)		(0.0408)
Constant	197.0	285.0***	185.3***	197.0***	125.7**	248.7***	172.5***
	(160.5)	(64.84)	(64.49)	(59.05)	(58.10)	(60.04)	(54.12)
Observations	67	67	67	67	67	67	67
R-squared	0.020		0.904		0.929		
Source: Indecon. Note: Standard errors in parentheses; *** p<0.01, ** p<0.05, * p<0.1							

In addition to using our formalised econometric modelling, Indecon has examined a number of other scenarios concerning future underlying trends as set out below:

- Scenario 1: Gradual decline in attendance at 2015 – 2018 rate;
- Scenario 2: Gradual decline plus 2019 impacts;
- Scenario 3: Accelerated decline (based on econometric results and 2019 impacts).

The following figure outlines the attendance at greyhound stadia in Ireland under the three different scenarios. In all scenarios, the average rate of change in attendance between 2015 and the first 10 months of 2019 in each stadium is applied to 2018 figures. The totals for each scenario are obtained by summing the projected attendance levels for each stadium under each scenario. Under Scenario 3, where there is a decline of 9% (based on Indecon's econometric analysis) in subsequent years, attendances fall to 362,000 in 2022. In Scenario 2, where attendances change in line with the percentage change estimated between 2015 and 2019, attendance figures fall to approximately 417,000 in 2022. In Scenario 1, attendances decline at the same rate as between 2015 and 2018, and fall to 433,000 in 2022.

Greyhound Stadia Attendance Scenarios (2018-2022)

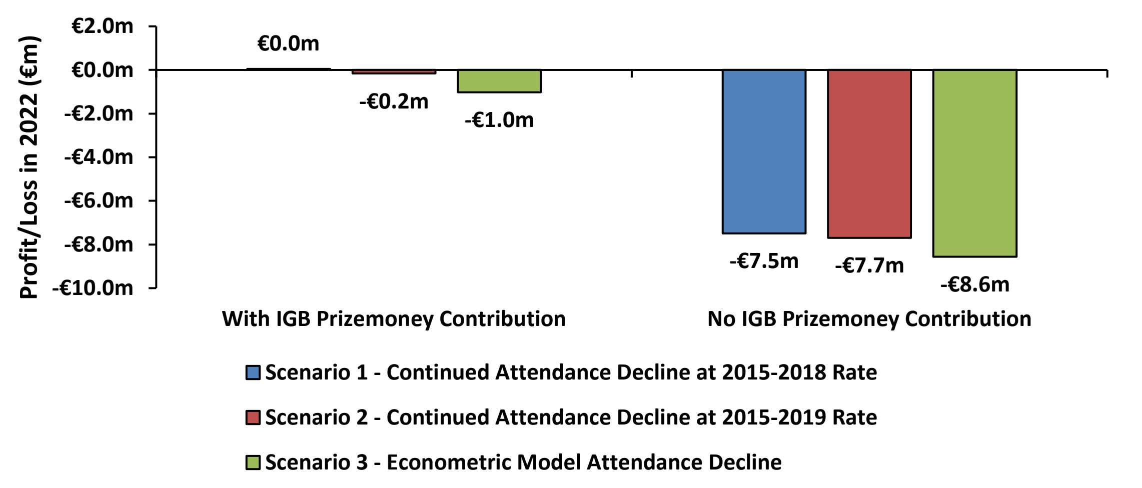


Source: Indecon analysis of IGB Data

The next table provides the operating profit/loss at Irish greyhound stadia in 2022 under the three different scenarios. For each scenario, figures have been presented with and without IGB prizemoney contributions, which are assumed to have been fixed at a maximum of 2018 levels. While there is inevitable uncertainty for financial outcomes in a sector which is subject to significant change, the results show increased levels of financial losses and highlight the need for decisive action if the sector is to be financially sustainable. The analysis assumes that increase in staff and other costs are confined to a maximum of one per cent per annum. Costs of sales are assumed to decline aligned with the decline in levels of attendance.

The estimated levels of financial losses likely in the sector based on Scenario 3 show that by 2022 the stadia would be incurring annual losses of approximately €8.6 million without IGB prize money.

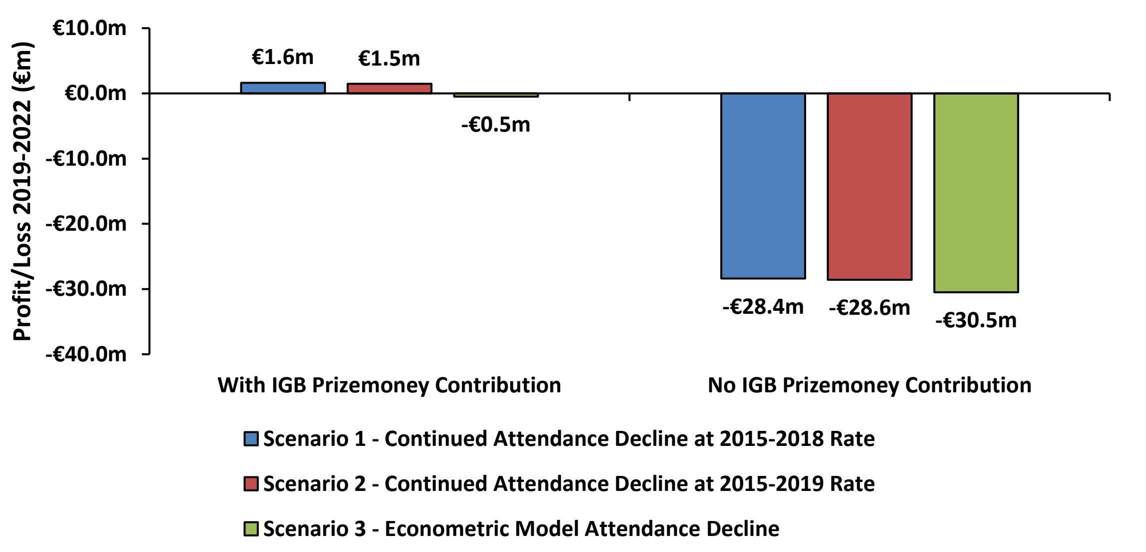
Greyhound Stadia Operating Profit/Loss Scenarios, 2022



Source: Indecon analysis
Note: Where there were once-off adjustments evident in the accounts, these were omitted from the analysis to ensure consistency of approach. As these are scenarios of operating profit/loss, interest payable and similar charges and tax on profit and ordinary activities are excluded. IGB prize money contribution includes grant funding provided to stadia. Figures include Tote and EHS profits/losses.

It is also useful to show the cumulative operating loss for greyhound stadia between 2019 and 2022. In Scenario 3 (the decline scenario based on econometric analysis) the expected loss is estimated to be €30.5 million without the IGB prizemoney contribution.

Greyhound Stadia Operating Profit/Loss Scenarios (2019-2022)



Source: Indecon analysis
Note: Where there were once-off adjustments evident in the accounts, these were omitted from the analysis to ensure consistency of approach. As these are scenarios of operating profit/loss, interest payable and similar charges and tax on profit and ordinary activities are excluded. IGB prize money contribution includes grant funding provided to stadia. Figures include Tote and EHS profits/losses.

SUMMARY OF ASSESSMENTS

The overall summary of assessments is shown below. This is aimed at providing the detailed evidence base to consider in making decisions on the future footprint of the sector. Data on the profitability of individual private stadia is not included for reasons of commercial sensitivity.

Summary Assessment

	Quality of Facilities for Spectators	Attendance levels	Net Contribution from IGB for Prizemoney, grants less tote revenue	Net Contribution from IGB for Prizemoney, grants less tote revenue per attendee	Presence of Stadia within 60kms	% of owners /trainers /breeders who use a track regularly[1]	2018 Operating Profit (Adj for exception al items)[2]	2022 Operating Profit – Scenario 3
East/North East								
Dundalk	Good	38,308	€302,978	€7.91	No	15%	[redacted]	[redacted]
Longford	Poor	6,451	€323,264	€50.11	Yes	13%	[redacted]	[redacted]
Mullingar	Good	20,121	€391,786	€19.47	Yes	15%	-€0.12m	-€0.23m
Newbridge	Fair	20,929	€155,374	€7.43	Yes	29%	-€0.00m	-€0.08m
Shelbourne	Fair[3]	147,858	€1,033,677	€6.99	Yes	45%	€0.93m	€0.26m
South East								
Waterford	Fair	26,570	€273,988	€10.31	Yes	16%	-€0.15m	-€0.24m
Clonmel	Good	17,992	€ 386,076	€ 21.46	Yes	18%	[redacted]	[redacted]
Enniscorthy	Poor	13,515	€ 362,608	€ 26.83	Yes	15%	[redacted]	[redacted]
Kilkenny	Poor	16,672	€ 403,912	€ 24.23	Yes	18%	[redacted]	[redacted]
Thurles	Poor	13,899	€ 267,408	€ 19.24	Yes	16%	[redacted]	[redacted]
West/South West								
Cork	Good	49,903	€337,340	€6.76	Yes	16%	-€0.09m	-€0.33m
Galway	Fair	29,156	€244,626	€8.39	No	7%	€0.04m	-€0.11m
Limerick	Good	36,655	€428,027	€11.68	No	19%	-€0.31m	-€0.45m
Tralee	Good	46,596	€757,674	€16.26	No	11%	-€0.20m	-€0.32m
Youghal	Poor	10,291	€433,451	€42.12	Yes	6%	-€0.15m	-€0.19m
North								
Lifford	Good	11,226	€ 214,995	€ 19.15	Yes (NI)	6%	[redacted]	[redacted]

***Source**: Indecon*

[1]Based on Indecon survey of 394 trainers and breeders.

[2]Includes an adjustment for tote revenue.

[3]While architects rate quality of facilities for spectators as fair, more positive views were expressed by trainers and breeders on general attendance. There were also differences in perspectives for other stadia.

CONCLUSIONS

Indecon's independent conclusions are presented below.

Summary of Conclusions

1. **Greyhound Industry is Likely to Experience a Continued Decline in Attendance Levels**
2. **Ireland has an Exceptionally High Number of Stadia for the Population Size**
3. **A number of Stadia are in Poor Condition and Require Capital Investment**
4. **The Absence of Sufficient Breeders is likely to be an increasing Challenge for the Sector**
5. **Most Greyhound Tracks in Ireland are Loss-Making**
6. **Losses are Likely to be Unsustainable in the Absence of a Radical Restructuring of Sector**
7. **There is potential to develop a viable greyhound industry in Ireland**

Source: Indecon

1. Greyhound Industry is Likely to Experience a Continued Decline in Attendance Levels

The greyhound racing industry in Ireland has witnessed a significant decline in attendance over the last decade. While 1.1m attended races in 2008, this fell by 55% to just over 0.5m by 2018. The latter part of 2019 has also shown a further negative impact which is likely exacerbate the pre-existing long-term decline. Indecon believes that a continued decline in overall attendance numbers should be the basis for planning for the sector. Greyhound racing attendances have been in decline internationally, with falls of 27%-37% observed in Great Britain, New Zealand, Western Australia and New South Wales over the space of a decade or less. Only a small number of countries internationally still operate greyhound racing at a significant commercial level.

Ireland has an Exceptionally High Number of Stadia for the Population Size

Ireland has 16 greyhound stadia, which is the largest number of stadia per capita of any countries examined at 3.3 per million population compared to an average of 0.9 in other countries. In some countries, stadia are operated by local clubs and there may be options for some stadia to operate on more of a voluntary/non-commercial basis. However, there are minimum health and safety standards which are applicable and the number of stadia in Ireland is exceptionally high on a per capita basis. It is also clear that the inevitable restructuring of the number of stadia to reflect the scale of decline in demand has not happened in Ireland.

A number of Stadia are in Poor Condition and Require Capital Investment

The analysis in this review has evaluated the stadia in terms of internal and external building fabric as well as areas such as building energy efficiency, ease of access and facilities for spectators and race participants. While some of the IGB and private stadia are in very good condition, it is also evident from the assessment that many are in poor condition. In some cases, capacity is restricted and in a number of cases if the stadia are to remain open, urgent investment is needed to meet infrastructural and other requirements. A number of stadia have ambitious plans for major capital investment. However, it is likely that some investment projects could not be justified on either financial or wider economic and social criteria.

The Absence of Sufficient Breeders is likely to be an increasing Challenge for the Sector

To be successful stadia require access to high quality dogs for race meetings. There is a need for feeder tracks as well as larger stadia, to be in a position to have sufficient dogs to sustain an effective racing schedule. The shortage of breeders is currently a challenge facing the sector. If there is a closure of tracks, this is likely to be an increased challenge for the sector as some breeders are likely to exit the industry.

Most greyhound tracks in Ireland are loss making.

Even with IGB supports most of the tracks are currently loss making. Indecon's analysis suggest that given scenarios for declining attendance levels, the financial sustainability of stadia is a key challenge for the sector.

Losses are Likely to be Unsustainable in the Absence of a Radical Restructuring of Sector

Indecon's examination of the likely scenario for individual stadia suggests that losses will be unsustainable in the absence of a radical restructuring of the sector. Even with a more fit for purpose footprint following rationalisation, the sector will face financial challenges. This is particularly the case given the need to invest in infrastructural improvements, animal health and welfare, and marketing. Indecon believes that as well as a restructuring, it will be essential to implement ongoing cost-cutting measures to reduce staff and operational costs at individual stadia.

There is Potential to develop a Viable Greyhound Industry in Ireland

Despite the challenges facing the sector there is potential to develop a viable greyhound industry in Ireland. This however will require decisive action in a range of areas which are outlined in our recommendations.

RECOMMENDATIONS

A summary of Indecon's recommendations are outlined below.

Summary of Recommendations
1. **A radical restructuring of the footprint of the sector is recommended.**
2. **The rationalisation of the sector should be based on objective criteria.**
3. **Cease funding for a number of stadia.**
4. **Targeted investment in animal health and welfare, marketing and infrastructure is recommended.**
5. **Ongoing cost efficiency measures are recommended.**
Source: Indecon

1. A radical restructuring of the footprint of the sector is recommended.

Supporting the existing 16 stadia to operate on a commercial basis is not sustainable given the annual levels of financial resources available to IGB and likely market developments. We also note the number of stadia per capita is significantly out of line with international norms. It is also evident that the rationalisation of the sector has not kept pace with the scale of decline in attendance numbers. Indecon therefore recommends a radical restructuring of the footprint of the sector. Without this, the strategic problems facing the industry will be exacerbated.

2. The rationalisation of the sector should be based on objective criteria.

The analysis presented in this report provides an evidence-based evaluation of each of the stadia based on existing infrastructure, attendance levels, financial sustainability, proximity to other stadia and the implications for the sector. Indecon believes that geographical balance is needed to underpin the breeding and training sector. However, rationalisation of the number of stadia, which are operating on a commercial basis and which receive exchequer resources to support prize money is required in all of the main regions. This will necessitate closure of both IGB stadia and ceasing of funding for some other stadia.

3. Cease funding for a Number of Stadia.

Indecon are aware of the impact of rationalisation in local areas and also the potential wider impacts of closing feeder tracks on the sector. However, without decisive action the overall viability of the sector is in doubt and IGB will not have sufficient resources to enhance annual welfare and rebuild a sustainable sector. This requires an alignment of support for the number of commercially focused stadia with the changes in attendance. This will involve focusing Exchequer resources on a smaller number of stadia. In identifying specific stadia for IGB to cease funding, all factors were considered by Indecon on an objective basis. These factors were analysed in our summary assessment and include the quality of existing infrastructure in each stadia, the likely attendance levels, the impact on the wider industry, including the percentage of trainers/breeders who use the track, the proximity to other stadia, the scenarios for financial sustainability and the levels of net IGB contribution per attendee.

In the case of private stadia there may be opportunities for individual stadia to continue to operate without IGB prize money if they can generate internal resources or sufficiently reduce costs. We therefore are not recommending that IGB withdraws licences from any stadia provided they meet safety standards. We are however recommending the cessation of support for a number of private stadia and an IGB stadium.

Indecon notes that market pressures have already led to the closure of the stadium in the northern part of the country, (Lifford). While Indecon was impressed with the quality of infrastructure in Lifford, due to its location we understand the stadium is not financially sustainable with existing support from IGB, and the stadia has closed. Our analysis for future scenarios for attendance levels for Lifford and other stadia suggests attendance will decline further with implications for financial viability. Indecon also notes that there is a relatively small number of registered greyhound breeders and trainers nationally who utilise Lifford.

In the east/north-east region, Longford temporarily closed but has since reopened. We note that the infrastructure in Longford is poor and attendance levels are the lowest of any stadia in the country. These numbers are likely to decline further. Indecon notes that there is an alternative stadium within 46 kms of Longford. Longford had the highest level of net contribution per attendee from IGB of any stadia in the region. Taking these factors into account suggests that support for Longford should also cease. As well as these two stadia, support should also cease for one stadium in the south-east and a stadium in the west/south-west.

Based on our evaluation of a range of factors we believe that the IGB should cease support for Enniscorthy. In the case of Enniscorthy, there are two alternative stadia within 60 kms. The quality of infrastructure is judged to be poor and Enniscorthy had lower attendance levels than other stadia within the catchment area. Enniscorthy had the highest level of net contribution per attendee of any stadia in the region.

In the west/south-west, the IGB owned Youghal stadium has by far the lowest attendance levels of any stadia in the region. The infrastructure is poor and the stadia is loss making and the stadia has a higher level of net contribution from IGB per attendee of any stadia in the region and there is a relatively small percentage of trainers/breeders who use the track. We therefore recommend closure of Youghal stadium. In the case of Youghal, in addition to savings in prize money, this will result in savings in future operating losses and in the required investment in capital improvements. These funds should be used to reduce overall losses and to invest in animal welfare, marketing and capital improvements in other stadia.

However even with the cessation of support for Lifford, Longford, Enniscorthy and Youghal the sector would not be financially sustainable if the decline in attendance continues and if the existing cost base is not reduced. In such a case we believe there could be a future need to withdraw funding for three additional stadia. Decisions on this should be made by IGB by the end of 2022 and should be informed by objective evidence on financial outturns and attendance levels as well as the other criteria identified in this report. Over the period to 2022 there is therefore an opportunity for individual stadia to improve their performance which would impact on any further phase of rationalisation which may be needed.

Recommendations for Radical Restructuring of Industry				
Area	**Stadia**	**Current Position**	**Required Additional Rationalisation of Stadia Supported by IGB**	
			Urgent Additional Short Term Action	**Additional Action IF Decline in Attendance Continues**
North	Lifford	Lifford Closed	Cease support for Lifford	N/A
East / North East	Newbridge, Shelbourne, Dundalk, Mullingar, Longford	Longford Reopened	Cease support for Longford	Review support for all remaining stadia based on performance including financial outturns and attendance levels and make decisions regarding funding for potentially a further three stadia
South East	Thurles, Clonmel, Waterford, Kilkenny, Enniscorthy	All Stadia Currently Remain open	Cease support for Enniscorthy	
West/South West	Galway, Limerick, Cork, Tralee, Youghal	All Stadia Currently remain open	Cease support for Youghal	
Source: Indecon				

4. Targeted investment in animal health and welfare, marketing and infrastructure is recommended.

There is a need to ensure sufficient investment is made in animal health and welfare and the effective monitoring of this. Concerns over this area has led to the banning of greyhound racing in some other countries. It is essential that the highest levels of animal welfare are maintained and this should be a priority for the sector. There is also a need for investment in marketing and infrastructure improvements to underpin a modernised sector.

5. Ongoing cost efficiency measures are recommended.

There is a need for ongoing cost efficiency measures to support the long-term viability of the industry. This will require efficiencies in staff and other operational costs within stadia.

1 Introduction and Background

1.1 Introduction

Indecon is one of Ireland's leading firms of advisors. Indecon was appointed by Bord na gCon, the Irish Greyhound Board to undertake an independent strategic review of Irish greyhound stadia. This review analyses stadia in terms of their economic viability, catchment areas and the physical condition of their infrastructure. As part of this project Hamilton Architects conducted an examination of the standard of facilities available at Irish greyhound stadia.

1.2 Background

The focus of this review is to provide recommendation regarding the future footprint of the greyhound industry in Ireland, including on a stadium-by-stadium basis. This systematic review was mandated in the IGB's five-year strategic plan, and our analysis included the following elements:

- An assessment of the infrastructure, services available and standard of facilities.
- An analysis of population catchments and access arrangements.
- An analysis of racing schedules for each greyhound stadium.
- A financial assessment of the future sustainability of each individual track.
- An assessment of any impacts arising from availability of breeders or trainers.
- An analysis of relevant competing sporting facilities within the catchment area.
- Recommendations regarding the appropriate industry footprint for the future.
- A consultation process with stakeholders within the industry.

In Ireland, greyhound racing is under the remit of the Department of Agriculture, Food and the Marine (DAFM). The IGB is a commercial semi-state organisation established in 1958 that is responsible for the control and development of the greyhound industry in the Republic of Ireland and was allocated €16.8 million in funding from the DAFM in 2019. Additional sources of revenue are from stadia gate receipts and levies on on-course bookmaker's betting in the Republic, as the IGB operates Tote facilities at greyhound tracks in Ireland. These sources of funding allow the IGB to fund:

- Prize money at all greyhound racing levels;
- Financial supports to stadia to improve infrastructure and facilities; and
- Promotion of the industry.

There are currently 16 greyhound stadia in Ireland which are the subject of this review, though racing ceased in Lifford on 17 August 2019. Of the 16 greyhound stadia, nine are run by the IGB while seven are run independently as private entities. The IGB stadia are:

- Curraheen Park, Cork (referred to as Cork Greyhound Stadium in this report)
- Galway Greyhound Stadium
- Limerick Greyhound Stadium
- Mullingar Greyhound Stadium
- Newbridge Greyhound Stadium
- Shelbourne Park Greyhound Stadium
- Kingdom Greyhound Stadium (referred to as Tralee Greyhound Stadium in this report)
- Kilcohan Park, Waterford (referred to as Waterford Greyhound Stadium in this report)
- Youghal Greyhound Stadium

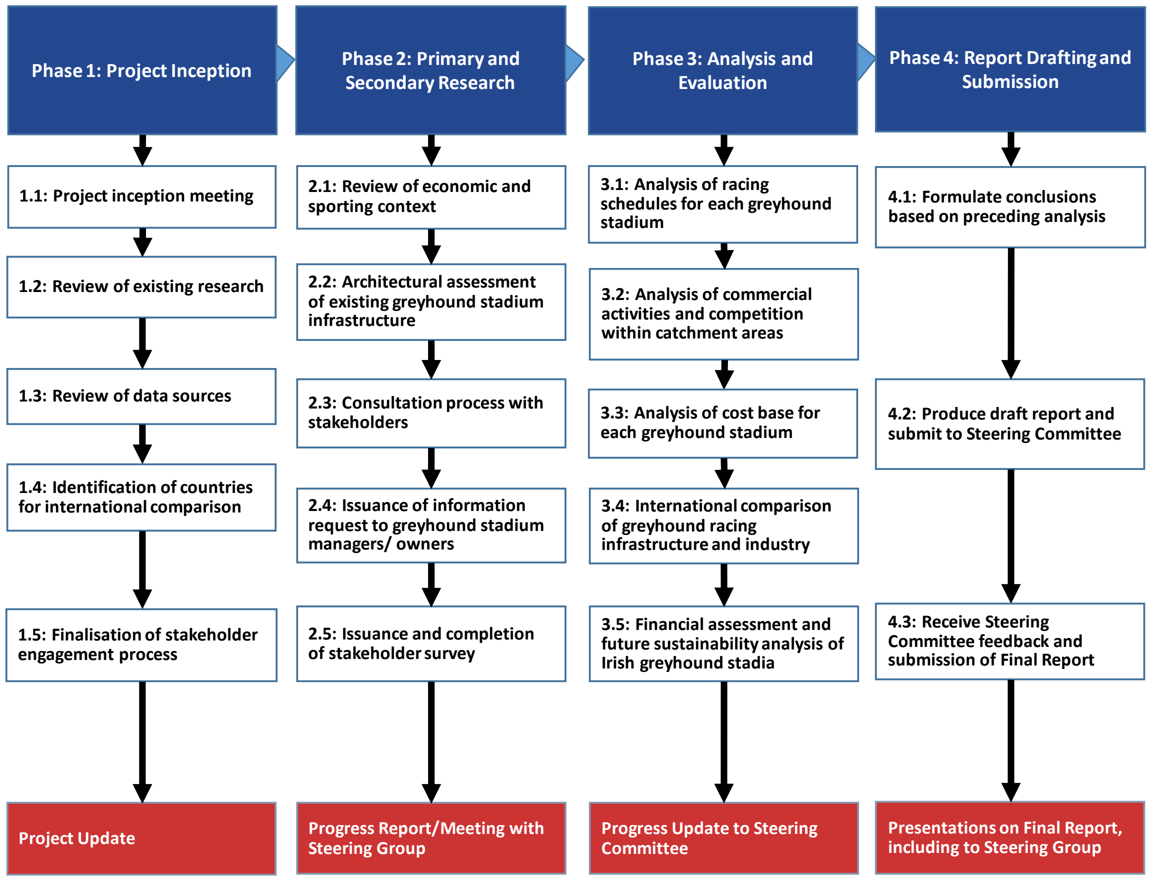
The private stadia are:

- Davis Road Stadium, Clonmel (referred to as Clonmel Greyhound Stadium in this report)
- Dundalk Greyhound Stadium
- Enniscorthy Greyhound Stadium
- Kilkenny Greyhound Stadium
- Lifford Greyhound Stadium
- Longford Greyhound Stadium
- Thurles Greyhound Stadium

1.3 Methodology

This review was completed using a detailed methodological approach and work programme, which was designed to comprehensively address the objectives and specific requirements as set out by the IGB. This methodology consisted of four distinct phases and is outlined in Figure 1.1. Some key elements of this methodological approach are discussed further in the subsequent text.

Figure 1.1: Methodological Approach



Source: Indecon

Stakeholder engagement programme

The review was supported and informed by an extensive programme of engagement with a wide range of organisations and individuals. Note that there are currently two bodies who use the title "Irish Greyhound Owners and Breeders Federation", and representatives of both of these bodies were met. As well as individual breeders, owners and trainers, the bodies that Indecon met with include:

- Irish Greyhound Board
- National Greyhound Consultative Forum
- Irish Greyhound Owners and Breeders Federation (Meeting - Portlaoise)
- Irish Greyhound Owners and Breeders Federation (Meeting - Tipperary)

In addition, a physical inspection of all stadia was completed and inputs were separately obtained from individual stadia in response to a detailed information request from Indecon. We also obtained detailed information from the Irish Coursing Club. In addition, we met representatives from a number of stadia and from Newbridge Supporters Club and reviewed all submissions received.

As part of our analysis we examined detailed data from a number of sources including:

- Financial information (turnover, profit and loss, assets and liabilities, details of fixed assets etc.) on all IGB owned tracks and from most of the private tracks.
- Information on quantity of prize money (broken down by the quantity of it that came from the IGB and from track entry fees), number of race meetings and races, number of running dogs, and attendances at all greyhound stadia in Ireland, both IGB and non-IGB owned.
- Information on racing schedules.

In addition, other data was obtained from the Central Statistics Office (CSO) and Northern Ireland Statistics and Research Agency (NISRA). In particular, population data at small area level was used to calculate population catchment areas for each stadium. In addition, information on breeders was obtained from the Irish Coursing Club.

As part of the review of stadia infrastructure, Indecon believed that it was also important to survey greyhound owners, breeders and trainers. A survey was issued through an advertisement, and responses could be returned either electronically or through physical forms sent in the post. This survey generated 394 responses and was an important addition to our stakeholder consultations.

1.4 Structure of Report

The remainder of this report is structured as follows:

- Section 2 provides the international context concerning greyhound racing and the prevalence of greyhound stadia in countries where commercial greyhound racing has a continued significant presence;
- Section 3 outlines the location of greyhound stadia in Ireland both geographically and in terms of population catchment, the access arrangements at stadia both in terms of roads, parking facilities and ease of access as well as outlining the competing sporting facilities;
- Section 4 presents Indecon's analysis of attendance levels and racing schedules at Irish stadia;
- Section 5 shows the findings of Indecon's analysis of greyhound breeders, trainers and owners in terms of their age profile, availability and location (for breeders), among others;
- Section 6 contains the assessment of the standard of infrastructure, service and facilities at each of the 16 Irish stadia and includes an assessment of the challenges facing each stadium;
- Section 7 presents a scenario analysis of the financial sustainability of each greyhound stadium, with a detailed econometric analysis of the future trends in greyhound racing attendance in Ireland and scenarios of future financial viability; and
- Section 8 concludes the report, with an outline of the recommendations for a radical restructuring to underpin the sustainability of the future development of the greyhound racing sector in Ireland.

1.5 Acknowledgements

Indecon would like to acknowledge the information provided by the Irish Greyhound Board as well as the stadium managers and owners for their valuable inputs. Furthermore, we would like to thank all individuals and organisations who provided submissions or met representatives of the review team.

2 Greyhound Racing Internationally

2.1 Introduction

In order to understand recent developments in greyhound racing in Ireland it is useful to contextualise the situation in Irish greyhound racing with that internationally. This section outlines the current state of commercial greyhound racing in the countries where it has a significant continued presence.

2.2 Comparative Countries

Ireland has the highest number of tracks per head of population of any of the countries reviewed. The number of tracks in other countries are listed in Table 2.1, along with their population and the per-capita number of tracks they have. Ireland has 3.3 greyhound tracks per million population, compared to an average of 0.9 in the other countries.

Table 2.1: Number of Greyhound Tracks by Country

Country	Number of Tracks	Population	Tracks per Million
Australia	65	25.0	2.6
Denmark	2	5.8	0.3
Great Britain	25	64.2	0.4
Hungary	4	9.8	0.4
New Zealand	7	4.7	1.5
Northern Ireland	2	1.9	1.1
United States	19	326.2	0.1
Average	-	-	**0.9**
Average (ex- Australia)	-	-	**0.6**
Ireland	**16**	**4.9**	**3.3**

Source: Indecon

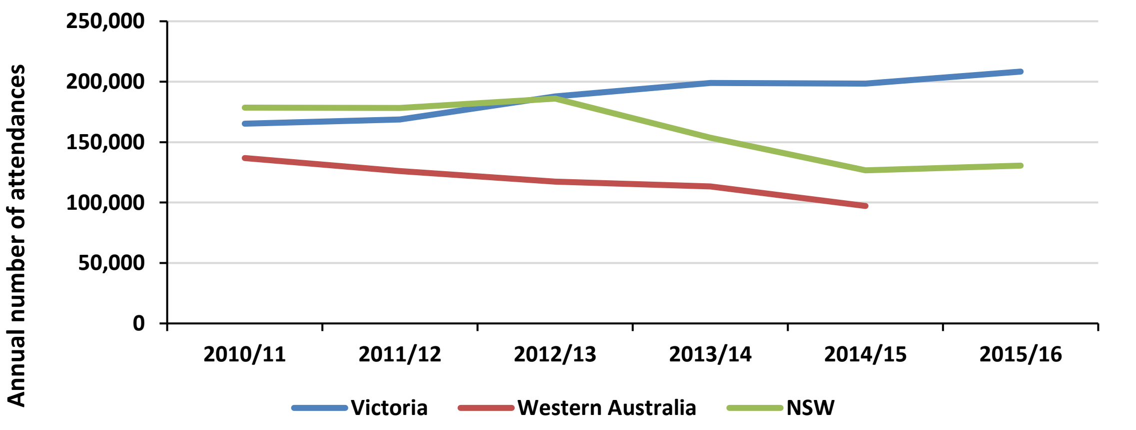
2.3 Australia

Australia is second only to Ireland in terms of number of tracks per million population. There are 65 greyhound tracks in Australia, almost half of which are in New South Wales. New South Wales announced a ban on greyhound racing in 2016, after the completion of a report by a Special Commission into reports of cruelty in the industry, though this decision was subsequently reversed. A legislative ban on greyhound racing came into effect in Australian Capital Territory (Canberra) from April 2018. While the track run by the Canberra Greyhound Racing Club still exists, racing activity related to this track has been transferred to Goulburn in New South Wales to ensure compliance with the state-wide ban.

Table 2.2: Greyhound Stadia in Australia			
	Number of Tracks	Population (Millions)	Tracks per Million Persons
New South Wales	32	7.99	4.01
Victoria	13	6.46	2.01
South Australia	5	1.74	2.88
Western Australia	3	2.60	1.16
Queensland	7	5.01	1.40
Tasmania	3	0.53	5.68
Northern Territory	1	0.25	4.04
Australian Capital Territory (Canberra)	1	0.42	2.38
Total	65	24.99	2.60
Source: Indecon			

Attendances at greyhound races in the states of New South Wales and Western Australia have been in decline, as can be seen in Figure 2.1. Between 2010/11 and 2015/16, attendances at greyhound races in New South Wales declined by 27%, while attendances in Western Australia declined by 29% between 2010/11 and 2014/15. However, this has been offset by a rise in attendance in Victoria, where attendances at greyhound race meetings increased by 26% between 2010/11 and 2015/16. It should be noted that the aggregate attendance across Victoria, Western Australia and New South Wales (combined population of 17m) was significantly lower than that in Ireland (population 4.9m).

Figure 2.1: Australia Greyhound Meeting Attendance, 2007-2016



Source: Greyhound Racing Victoria Annual Reports, Western Australian Greyhound Racing Association Annual Reports and Greyhound Racing New South Wales Annual Reports. Note: No attendance figures for Western Australia have been available since 2015/16 when the Western Australian Greyhound Racing Federation stopped reporting on them as a KPI as they abolished attendance fees.

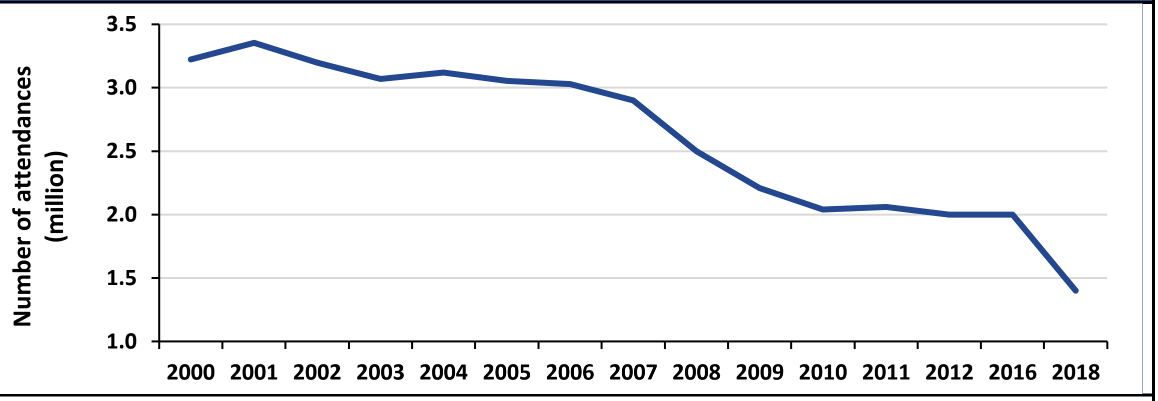
2.4 Denmark

There are two greyhound racing stadia in Denmark, the Kallerupbanen Greyhound Stadium in Hedehusene, Roskilde (which is in the Copenhagen Metro area and approximately 27km from the City Centre) on Zeeland and the Midtjysk Greyhound Stadium near Viborg on Jutland (located approximately 50km from Aarhus, Denmark's second city).[4] Denmark has a greyhound stadium density of 0.3 tracks per million people. Both of the Danish stadia have basic facilities without large covered grandstands.[5] Dogs run in races can be greyhounds or whippets.[6] Greyhound racing in Denmark is organised by the DHV - Dansk Hunde Væddeløb.[7] For the 2018 season, DHV has received a grant from the Danish Ministry of Culture of DKK 101,000 (approx. €13,000) for the promotion of its activities.[8] In 2019 there were 27 race meetings scheduled to take place in greyhound stadia in Denmark, an indication as to the small size of greyhound racing in that country relative to Ireland.[9]

2.5 Great Britain

The UK greyhound industry has witnessed a significant long-term decline in attendance, which has accelerated in recent years. Published evidence suggests that attendances dropped from 2 million in 2010 to 1.4 million in 2018. This is illustrated in Figure 2.2 below.

Figure 2.2: GB Greyhound Meeting Attendance, 2000-2018



Source: Figures derived by Indecon from Baker Tilly[10], Deloitte[11], Two Circles[12]

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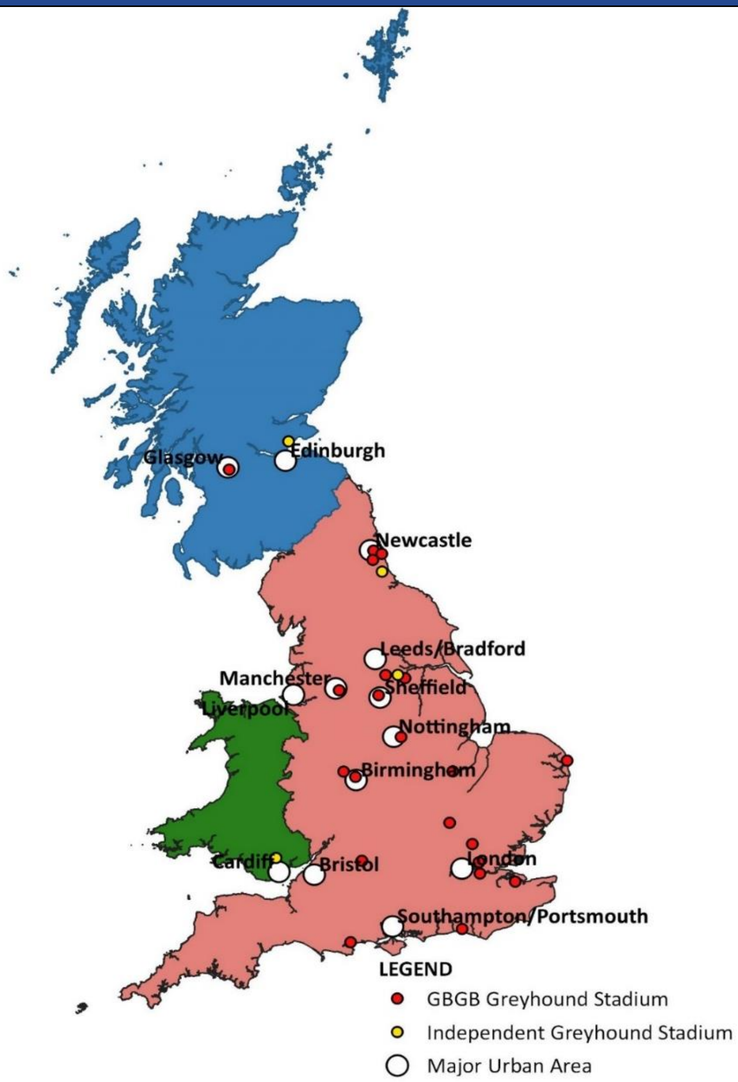
[4] https://hundebetting.dk/hundevaeddeloebsbaner-i-danmark/ (accessed 25/10/2019)
[5] Indecon reviewed the condition of these stadia using google maps satellite imagery.
[6] http://www.kallerupbanen.dk/kvf.php (accessed 25/10/2019)
[7] http://d-h-v.dk/ (accessed 25/10/2019)
[8] http://info.d-h-v.dk/ (accessed 25/10/2019)
[9] http://www.kallerupbanen.dk/loeb.php and http://www.midtjyskgreyhoundstadion.dk/l%C3%B8bs%20info/l%C3%B8bskalender.html (accessed 25/10/2019)
[10] https://www2.merton.gov.uk/5_site_37_r086_graa___afcw_appendix_4_-_gra_report_on_viability_of_wimbledon_dog_track.pdf
[11] https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/sports-business-group/deloitte-uk-2016-attendance-info-graphic.pdf
[12] https://twocircles.com/us-en/articles/sports-golden-decade-takes-attendance-and-spending-records-into-2018/

Figure 2.3 provides the location of Greyhound Stadia in Great Britain in relation to some of its largest urban centres. There are now 21 licensed greyhound tracks in Great Britain which are regulated by Greyhound Board of Great Britain (GBGB), one of which (Shawfield) is in Scotland with the remainder in England. There are two tracks in the Greater London area, in Romford and Crayford. There are four active independent or 'flapping' tracks not licenced by the British Greyhound Board.[13] One of these 'flapping' tracks is located in Wales (the Valley Stadium in Ystrad Mynach), being the only facility in Wales for greyhound racing.

Figure 2.3: Location of UK Stadia



Source: Indecon

[13] Up until March 2019 there were five 'flapping' tracks.

In the UK the number of tracks has declined from 77 in 1946 to 21 currently. Over the past ten years, there has been a 39% fall in the number of greyhound tracks. Seven of the eleven flapping (i.e., unlicensed) tracks have closed, compared to nine of the 30 licensed tracks, representing a fall of 64% and 30% respectively.

Table 2.3: Number of Greyhound Stadia in Great Britain, 2008 and 2019

Year	GBGB Licensed Tracks	Flapping Tracks	All Tracks
2008	30	11	41
2019	21	4	25
Percentage Change	*-30%*	*-64%*	*-39%*

Source: GreyhoundPredictor.com for GBGB Licensed Tracks[14]; BBC for Flapping Tracks[15]
Note: During this period a greyhound stadium was opened in Towcester, Northamptonshire on 13/12/14. It closed on 16/08/18. This stadium is not counted in the above table.

2.6 Hungary

There are four greyhound racing stadia in Hungary: Kincsem Park in Budapest (7km from the city centre), Alsonemedi Greyhound Park (28km from Budapest City Centre), Isazeg Greyhound Stadium (32km from Budapest City Centre) and Rábapatona Greyhound Stadium (19km from Győr, Hungary's sixth largest city), which gives Hungary a track density of 0.4 tracks per million people.[16] All of these stadia have basic facilities without large covered grandstands except Kincsem Park.[17] Kincsem Park is shared with horse and trotter racing and has a 3,500 seater grandstand – greyhound racing was only reintroduced at that venue in 2015.[18] Greyhound racing in Hungary uses different breeds of dog, but races in Kincsem Park are only open to greyhounds.[19] The Magyar Versenyagár Egyesület is the body responsible for running greyhound racing in Hungary.[20]

2.7 New Zealand

There are seven tracks in New Zealand. These are displayed in Table 2.4. In total there are 11 clubs, but some of these share facilities with other clubs.

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[14] *http://www.greyhoundpredictor.com/info/track-types.html* (accessed 25/10/2019)

[15] *https://www.bbc.co.uk/programmes/b00c5143* (accessed 25/10/2019)

[16] http://greyhound-data.com/stadia.htm?land=eu&st=11004 (accessed 25/10/2019)

[17] Indecon reviewed the condition of these stadia using google maps satellite imagery.

[18] https://kincsempark.hu/park_en/ (accessed 25/10/2019)

[19] https://kincsempark.hu/park_en/ (accessed 25/10/2019)

[20] http://mavedogracing.hu/ (accessed 25/10/2019)

Table 2.4: Greyhound Stadia in New Zealand	
Stadium	**Status**
Auckland Greyhound Racing Stadium	Greyhound Racing Only
Addington Raceway, Christchurch	Shared with Harness Racing
Forbury Park, Dunedin	Shared with Harness Racing
Manawatu Raceway, Palmerston North	Shared with Harness Racing
Ascot Park, Porirua	Shared with Harness and Horse Racing
Cambridge Raceway, Cambridge	Shared with Harness Racing
Hatrick Raceway, Wanganui	Greyhound Racing Only
Source: Greyhound Racing New Zealand[21]	

It can be seen from Table 2.4 that in many of the tracks where greyhound racing occurs in New Zealand, services are shared with harness racing. The latter is a far larger sport in New Zealand than greyhound racing, as is evidenced by it having an attendance of 222,150 in 2017 as opposed to 31,057 for greyhound racing in the same year. Table 2.5 provides the annual attendance at greyhound racing meetings in New Zealand for various years. It can be seen that attendances in New Zealand are on a downward trend, having decreased from over 47,000 in 2009 to just over 31,000 in 2017, a decline of 35%.

Table 2.5: Attendance at New Zealand Greyhound Racing Meetings	
Year	**Attendance**
2003	45,270
2009	47,685
2012	44,243
2017	31,057
Source: New Zealand Size and Scope Reports	

2.8 United States

At the end of 2018 there were 19 active greyhound tracks in operation in the US, located in six states as Table 2.6 shows. The vast majority of tracks in the US are located in Florida. However, in 2018 voters in that state voted to ban greyhound racing under Amendment 13, which comes into force after 31 December 2020.[22]

[21] https://www.grnz.co.nz/catch-the-action/clubs-and-venues.aspx

[22] http://www.fl-counties.com/amendment-13

Table 2.6: Number of Greyhound Tracks in the US by State (end-2018)	
State	**Number of Tracks**
Alabama	1
Arkansas	1
Florida	11
Iowa	1
Texas	3
West Virginia	2
Total	**19**
Source: National Greyhound Association,[23] VerroNews.com[24] and the Telegraph[25]	

2.9 Summary of Key Findings

In this section an overview of the greyhound racing facilities in the countries where commercial racing has a significant presence was outlined. Specific attention was paid to the number of stadia in these countries as well as trends in attendance levels. The main findings were:

- Among the countries where commercial greyhound racing has a significant presence, Ireland has the largest number of greyhound stadia per capita, at 3.3 per million individuals compared to an average of 0.9 in the other countries examined.
- Internationally, greyhound racing attendances have been in decline, with declines of 30% observed in Great Britain between 2010 and 2018; 37% in New Zealand between 2009 and 2017; and falls of 27%-29% in Western Australia and New South Wales, respectively. The Australian State of Victoria did see an increase in attendances by 26% from 2010/11 to 2015/16.
- In many countries there has been a radical restructuring of the sector with the closure of tracks. For example, in the UK the number of tracks has declined from 77 in 1946 to 21 currently. Over the past 10 years, there has been a 39% fall in the number of tracks in Great Britain. In a number of regions greyhound racing (for example Florida in the US and Canberra in Australia) has been prohibited resulting in the closure of tracks.

[23] https://www.ngagreyhounds.com/race-tracks (accessed 25/10/2019)

[24] http://veronews.com/2018/12/27/melbourne-greyhound-park-president-resigned-fate-dying-industry/ (accessed 25/10/2019)

[25] https://www.telegraph.co.uk/pets/news-features/greyhound-racing-an-industry-interminal-decline/ (accessed 25/10/2019)

3 Location of Stadia, Access Arrangements and Other Sporting Facilities

3.1 Introduction

This section outlines the location of greyhound stadia in Ireland as well as Indecon's analysis of the population catchment areas of these stadia in Ireland in terms of population. The access arrangements for stadia are also examined along with the neighbouring sporting facilities that are potentially in competition with each of the greyhound stadia.

3.2 Location of Greyhound Stadia in Ireland

As outlined in Section 1.2, there are currently 16 greyhound stadia in Ireland, though racing in Lifford ceased in August 2019. Racing at Longford greyhound stadium closed for a period in July/August but reopened in late September.

There are two greyhound stadia in Northern Ireland. These are Drumbo Park, outside Lisburn, and the Brandywell in Derry. Drumbo Park in Lisburn was closed from January[26] to July 2019,[27] though subsequently reopened. At the time declining attendance was cited as the primary reason for closing.[28] Both venues are shared with Association Football with the Brandywell being home to Derry City Football Club and Drumbo Park being home to Lisburn Distillery Football Club (the stadium being known in football under the name of the New Grosvenor Stadium).

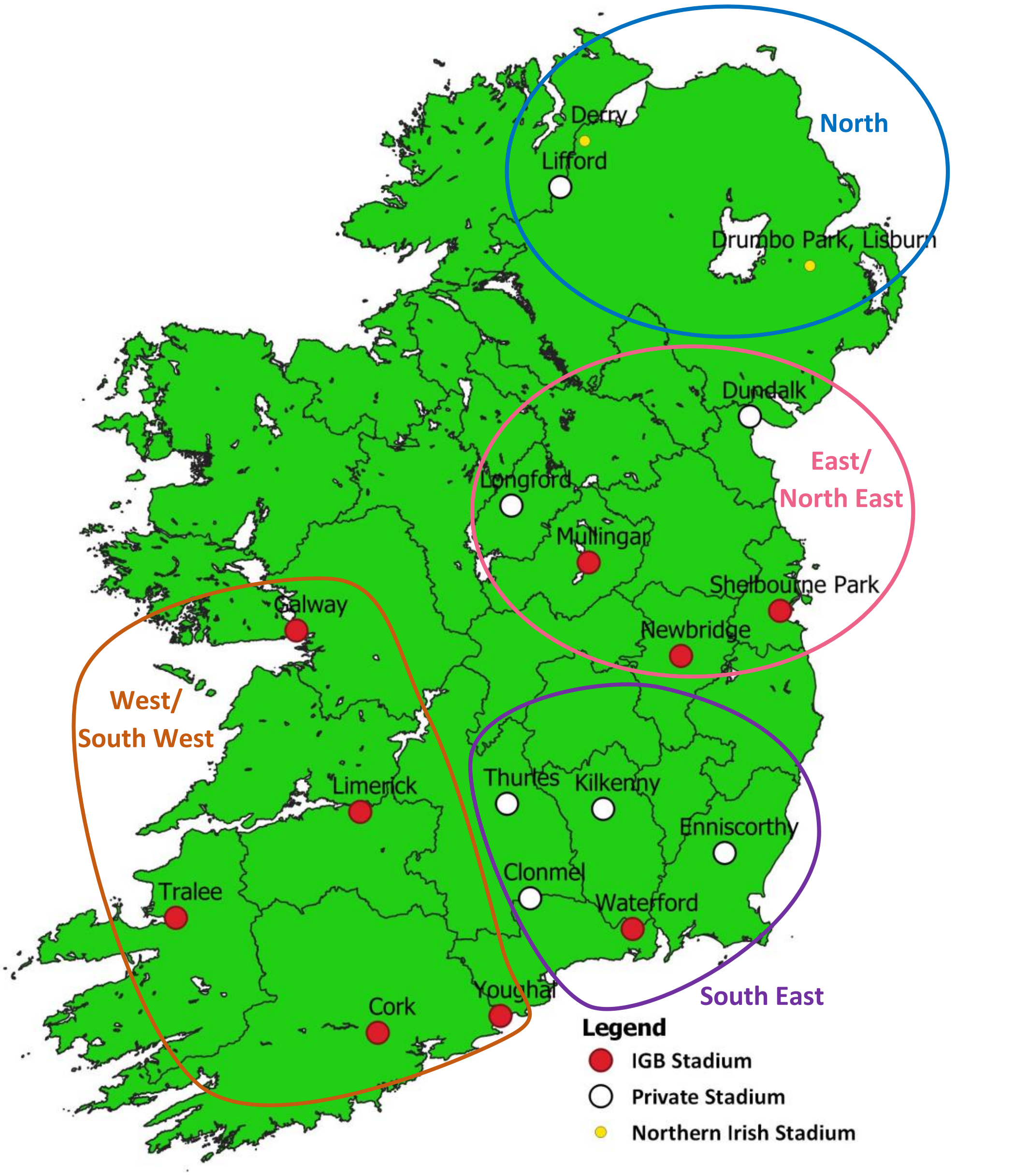
The geographic location of all greyhound stadia on the island of Ireland are provided in Figure 3.1. As can be seen, greyhound stadia are concentrated in the southern half of the island.

[26] https://www.irishexaminer.com/breakingnews/sport/co-antrim-greyhound-stadium-closed-with-immediate-effect-896966.html

[27] http://greyhoundstar.co.uk/running-on-passion/

[28] https://www.bbc.com/news/uk-northern-ireland-46835738

Figure 3.1: Location of Greyhound Stadia in Ireland



Source: Indecon and IGB

The time distance between each stadium is shown in the next table, and gives an indication of the travel distance when quality of roads and typical traffic conditions are taken into consideration.

Table 3.1: Time Distance Between Each Stadium

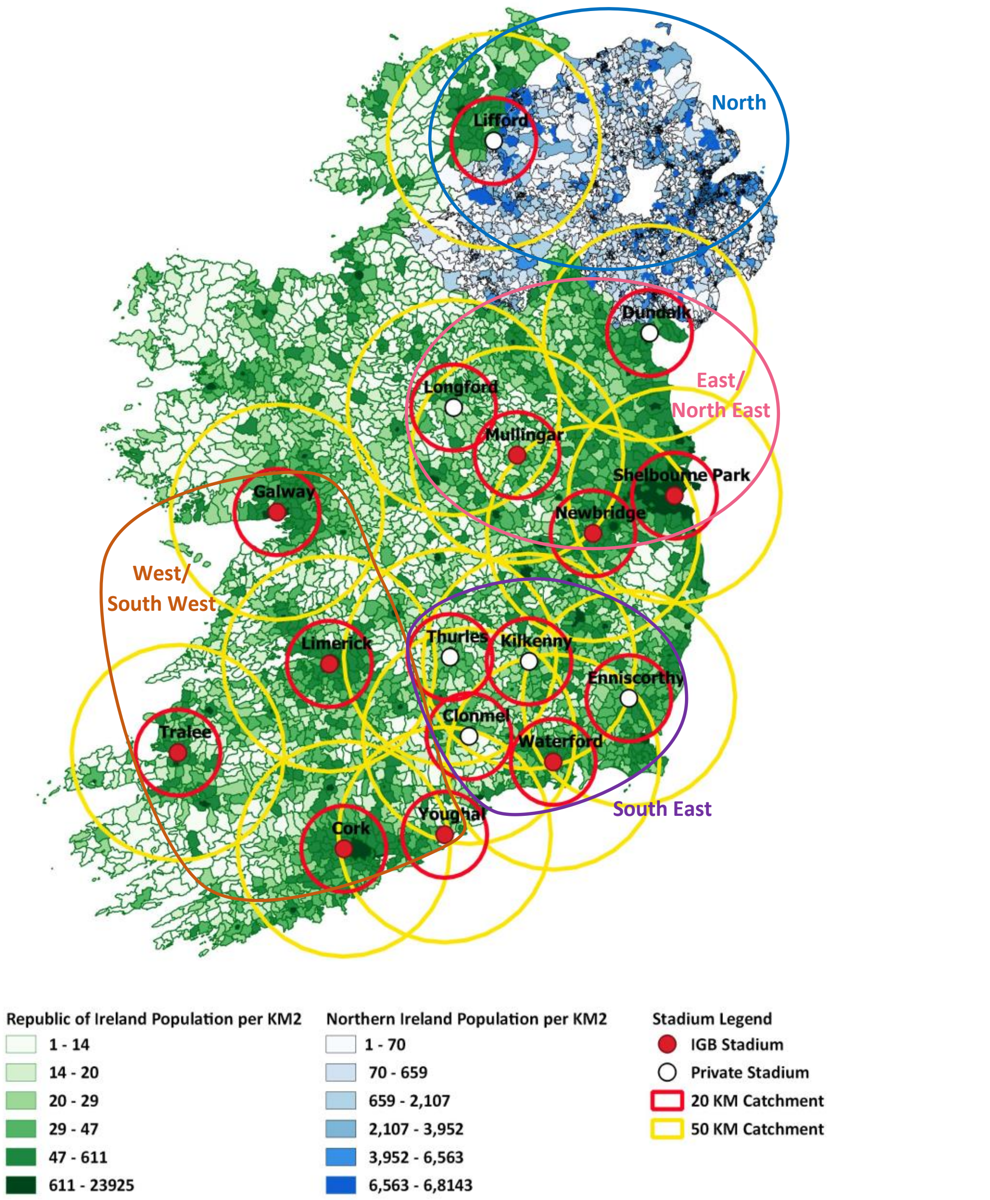
	Clonmel	Cork	Dundalk	Enniscorthy	Galway	Kilkenny	Lifford	Limerick	Longford	Mullingar	Newbridge	Shelbourne	Thurles	Tralee	Waterford	Youghal
Clonmel	-	1h 5m	2h 40m	1h 20m	2h 10m	50m	4h 20m	1h 10m	2h 30m	2h	1h 30m	2h	45m	2h 10m	55m	1h 5m
Cork	1h 5m	-	3h 10m	2h 10m	2h 20m	1h 40m	4h 50m	1h 40m	3h	2h 30m	2h	2h 30m	1h 10m	1h 40m	1h 40m	40m
Dundalk	2h 40m	3h 10m	-	2h 10m	2h 40m	2h 10m	1h 50m	2h 40m	2h	1h 30m	1h 25m	1h	2h 20m	3h 50m	2h 30m	3h 20m
Enniscorthy	1h 20m	2h 10m	2h 10m	-	3h	1h	3h 40m	2h 20m	2h 20m	2h	1h 15m	1h 20m	1h 50m	3h 30m	50m	1h 50m
Galway	2h 10m	2h 20m	2h 40m	3h	-	2h 20m	3h 10m	1h 5m	1h 25m	1h 25m	2h	2h 10m	1h 50m	2h 20m	3h	2h 40m
Kilkenny	50m	1h 40m	2h 10m	1h	2h 20m	-	3h 40m	1h 40m	2h 20m	1h 50m	1h	1h 25m	45m	2h 40m	40m	1h 40m
Lifford	4h 20m	4h 50m	1h 50m	3h 40m	3h 10m	3h 40m	-	3h 50m	2h 20m	2h 40m	3h	2h 30m	4h	5h	4h 10m	5h
Limerick	1h 10m	1h 40m	2h 40m	2h 20m	1h 5m	1h 40 m	3h 50m	-	2h 10m	2h	1h 25m	2h	55m	1h 20m	2h	1h 50m
Longford	2h 30m	3h	2h	2h 20m	1h 25m	2h 20m	2h 20m	2h 10m	-	40m	1h 30m	1h 30m	2h	3h 10m	2h 40m	3h 20m
Mullingar	2h	2h 30m	1h 30m	2h	1h 25m	1h 50m	2h 40m	2h	40m	-	1h	1h	1h 30m	3h	2h 10m	2h 50m
Newbridge	1h 30m	2h	1h 25m	1h 15m	2h	1h	3h	1h 25m	1h 30m	1h	-	50m	1h 5m	2h 40m	1h 25m	2h 10m
Shelbourne	2h	2h 30m	1h	1h 20m	2h 10m	1h 25 m	2h 30m	2h	1h 30m	1h	50m	-	1h 40m	3h 10m	1h 50m	2h 40m
Thurles	45m	1h 10m	2h 20m	1h 50m	1h 50m	45m	4h	55m	2h	1h 30m	1h 5m	1h 40m	-	2h	1h 20m	1h 40m
Tralee	2h 10m	1h 40m	3h 50m	3h 30m	2h 20m	2h 40m	5h	1h 20m	3h 10m	3h	2h 40m	3h 10m	2h	-	3h	2h 10m
Waterford	55m	1h 40m	2h 30m	50m	3h	40m	4h 10m	2h	2h 40m	2h 10m	1h 25m	1h 50m	1h 20m	3h	-	1h 5m
Youghal	1h 5m	40m	3h 20m	1h 50m	2h 40m	1h 40m	5h	1h 50m	3h 20m	2h 50m	2h 10m	2h 40m	1h 40m	2h 10m	1h 5m	-

Source: Indecon, based on Google Maps estimate of minimum time to travel at 7pm on a Friday evening.

3.3 Population Catchment Areas for Greyhound Stadia

In order to determine each stadium's population catchment area, Indecon calculated the population within a straight-line distance of each greyhound stadium. The resulting catchment areas for distances of 20km and 50km are illustrated in Figure 3.2.

Figure 3.2: Population Catchment Areas for Irish Greyhound Stadia



Source: Indecon analysis of CSO and NISRA small area population data
Note: There are 3,409 small areas displayed at Electoral Division Level in the above map in the Republic of Ireland and 4,537 small areas in Northern Ireland. Therefore, there is a higher density of population in Northern Irish small areas due to their small size.

There is a wide dispersion of greyhound racing tracks across urban and rural regions. Table 3.2 shows the population in the catchment areas for each stadium for both 20km and 50km. Population catchment ranged from 1.4 million in Shelbourne Park under the 20km to approximately 50,700 for Youghal under the 20km distance. In general, the private tracks have smaller catchment areas than the IGB-owned stadia.

Table 3.2: Population Catchment Areas for Irish Greyhound Stadia (000s)

	Population within 20km	Population within 50km
IGB Stadia		
Cork	334.2	516.1
Galway	151.5	310.0
Limerick	182.6	396.3
Mullingar	64.7	486.0
Newbridge	187.0	1,902.2
Shelbourne Park	1,418.0	1,860.3
Tralee	74.2	192.6
Waterford	115.7	341.7
Youghal	50.7	453.1
Private Stadia		
Clonmel	65.5	378.2
Dundalk	166.7	680.6
Enniscorthy	88.3	393.0
Kilkenny	85.5	473.1
Lifford	107.3	418.5
Longford	53.4	298.9
Thurles	53.1	352.4

Source: Indecon analysis of CSO and NISRA small area population data

The extent to which a greyhound stadium serves a catchment area is also influenced by the proximity of that stadium to other greyhound tracks. Table 3.3 shows the nearest greyhound stadium to each stadium based on road-distance, as well as displaying the number of stadia within 60km of each stadium.

The closest two greyhound stadia are Clonmel and Thurles, which are 46km apart. On an all island basis, the most isolated greyhound stadium is Tralee, which is 98.8km from its nearest neighbouring stadium, Limerick. The next nearest stadium to Tralee is Cork, a distance of 113.5km. The closest stadia to Dundalk and Lifford are in Northern Ireland. The nearest stadium to Lifford in south of the border is Dundalk at 138.8km (this journey involves travelling through Northern Ireland), while the nearest stadium to Dundalk is Shelbourne Park, at 92.7km.

There are four stadia within 60km driving distance of Kilkenny, namely, Clonmel, Enniscorthy, Thurles and Waterford. This reflects the prevalence of tracks in the southern half of the country. In contrast, there are no stadia within 60km of Galway, Limerick, Tralee and Dundalk. While Derry stadium is located within 60km of Lifford, there are no stadia within 60km of Lifford in the Republic.

Table 3.3: Nearest Greyhound Stadium to Each Stadia (Driving Distance)

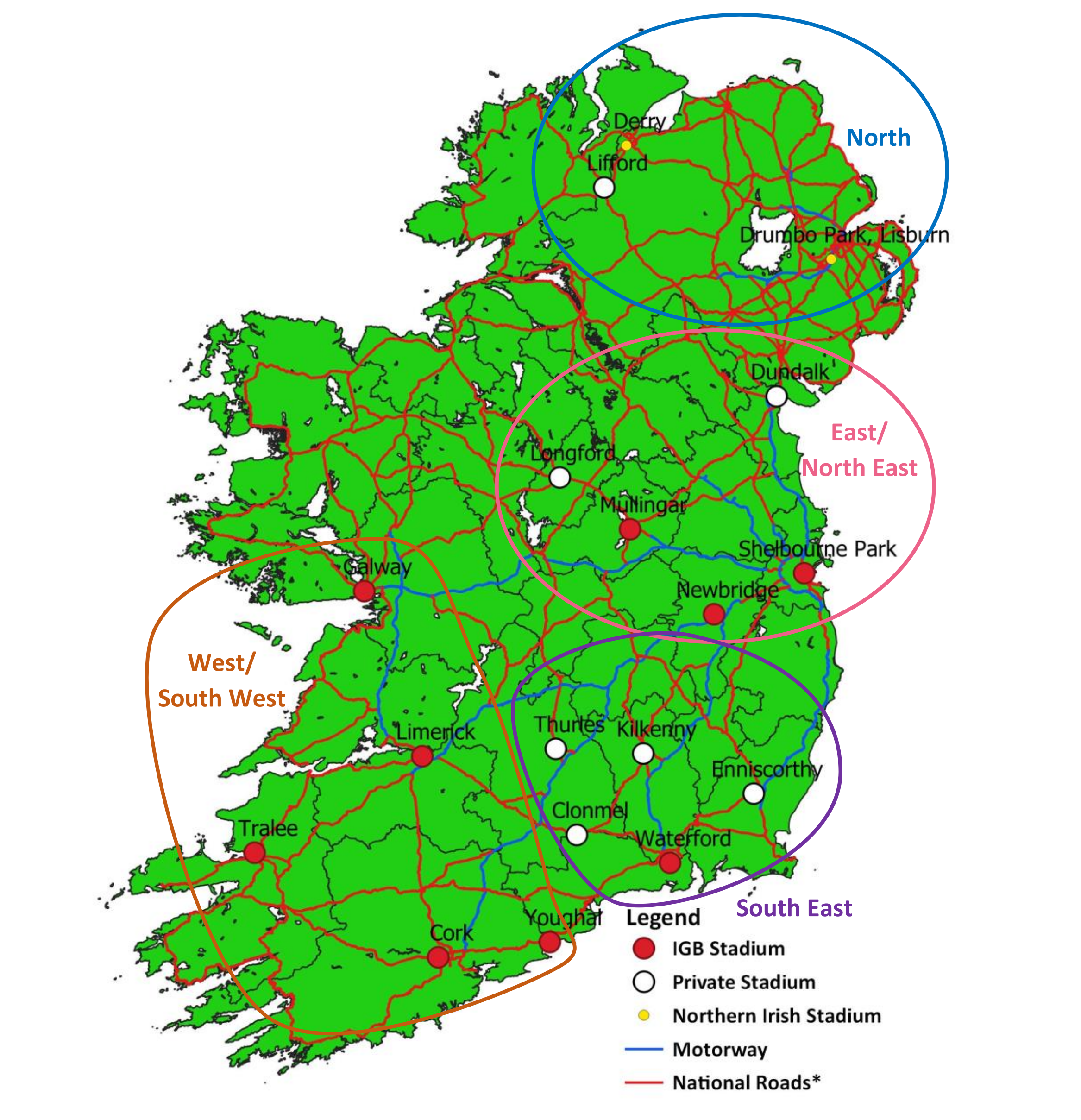
IGB Stadia	Nearest Stadium		Stadia within 60km
	Distance (km)	Stadium	Number (Names) of Stadia
Cork	53.6	Youghal	1 (Youghal)
Galway	96.0	Galway	0
Limerick	80.4	Thurles	0
Mullingar	45.7	Longford	1 (Longford)
Newbridge	48.0	Shelbourne Pk	1 (Shelbourne Park)
Shelbourne Park	48.0	Newbridge	1 (Newbridge)
Tralee	98.8	Limerick	0
Waterford	50.2	Clonmel	3 (Clonmel; Enniscorthy; Kilkenny)
Youghal	53.6	Cork	1 (Waterford)
Private Stadia			
Clonmel	46.0	Thurles	3 (Kilkenny; Thurles; Waterford)
Dundalk	71.7	Drumbo Park	0
Enniscorthy	55.8	Waterford	2 (Kilkenny; Waterford)
Kilkenny	47.1	Thurles	4 (Clonmel; Enniscorthy; Thurles; Waterford)
Lifford	23.6	Derry	1 (Derry - Northern Ireland)
Longford	45.7	Mullingar	1 (Mullingar)
Thurles	46.0	Clonmel	2 (Clonmel; Kilkenny)

Source: Indecon and Google Maps
Note: Distances are shortest driving distances using google maps. Nearest stadium to Lifford in the Republic is Dundalk (138.8km), while the nearest stadium to Dundalk in the Republic is Shelbourne Park (92.7k). There is no stadium within 60K of Lifford in the Republic.

3.4 Access Arrangements

The access to greyhound stadia is also influenced by the quality of the transport network and the adequacy of the access arrangements at each of the tracks. In recent decades, the construction of the Irish motorway network has decreased journey times across Ireland and made greyhound stadia more accessible. Given their location, road transport is the only realistic form of transport to most of the stadia, and is a requirement for greyhound owners and trainers to transport their dogs. It is also the way most attendees of greyhound stadia would likely travel. Figure 3.3 shows Ireland’s greyhound stadia in the context of Ireland’s motorway and national road networks. In general, many stadia are in close proximity to motorways, with the exception of Lifford, Longford, Tralee and Youghal.

Figure 3.3: Greyhound Stadia and Ireland's Major Road Network



Source: Indecon analysis of CSO and NISRA small area population data; Open Street Map for Road Vector Data
*Note: *National Roads are those which are classed as National Primary or National Secondary in the Republic (with prefix N before number e.g. N1) and those which are classed as A Class in Northern Ireland (with prefix A before number e.g. A1).*

In order to further contextualise the location of Irish greyhound stadia with respect to Ireland's motorway and dual carriageway network, Table 3.4 shows the distances between each of the 16 greyhound stadia and the nearest motorway or dual carriageway. The latter were classed with national roads in Figure 3.3 and are usually National Primary Roads or A-Class roads in Ireland and Northern Ireland respectively.

Table 3.4: Nearest Motorway or Dual Carriageway Class Road to Each Stadia (Driving Distance)	
IGB Stadia	
Cork	600 metres to N40 Dual Carriageway/Cork South Ring-road
Galway	1.6 km to N6 Dual Carriageway/Galway Bypass N6. 11.2 km to M6 Dublin Motorways
Limerick	2 km to N18 Dual Carriageway/Limerick Bypass
Mullingar	3.3 km to Dual Carriageway M4 (10.7km to M4 Motorway)
Newbridge	4.7 km to M7 Motorway
Shelbourne Park	3.6 km to M50/Dublin Port Tunnel
Tralee	2.9 km to N22 Dual Carriageway/Tralee Bypass. 82.9 km to N21 Dual Carriageway which links into M7 Dublin-Limerick Motorway and M18 Limerick-Galway Motorway
Waterford	6.5 km to N25 which links into M9 Dublin-Waterford Motorway
Youghal	2.6 km to N25 Dual Carriageway/Youghal Bypass. 39.8 km to M8 Motorway Dublin-Cork Road
Private Stadia	
Clonmel	17.8km to M8 Motorway/Dublin-Cork Road
Dundalk	2.5km to M1 Motorway/Dublin-Belfast Road
Enniscorthy	5.5 km to N30 Dual Carriageway which links into M11 Dual Carriageway/Dublin-Wexford Road
Kilkenny	10.2 km to M9 Motorway/Dublin Waterford Road (via N10)
Lifford	17.3 km to N13 Dual Carriageway (via N14 which is 170 metres from the stadium)
Longford	37.6 km to N4 Dual-Carriageway (50 km to M4 Motorway)
Thurles	8.8 km to M8 Dublin-Cork Motorway (via N62 which is 550 metres from stadium)

Source: Indecon
Note: Distances are driving distances, not straight line.

It is also important that attendees, owners, trainers and breeders are able to access the track in a safe and comfortable manner and that individuals with disabilities are facilitated. For example, it is important that those who are living with a disability are able to park in a clearly marked spot that is designated for those with disabilities. Table 3.5 shows the access arrangements at each of the 16 greyhound stadia. While many greyhound stadia have no marked car parking spaces, these stadia still largely have a sufficiently large car park to accommodate all patrons. Five stadia have no marked car parking spaces for people with disabilities, three have no lifts, two have no level access (ramps etc.) to assist people with disabilities and three have no viewing provision for those in wheelchairs.

Table 3.5: Access Arrangements at Irish Greyhound Stadia, 2019

	Marked Car Parking Spaces	Marked Bus Spaces	Marked Disabled Spaces	Lift Provision	Level Access	Wheelchair Viewing Provision
IGB Stadia						
Cork	370	0	8	Yes	Yes	Yes
Galway	85	0	6	Yes	Yes	Yes
Limerick	560	3	8	Yes	Yes	Yes
Mullingar	42	0	0	Yes	Yes	Yes
Newbridge	200	0	2	Yes	Yes	Yes
Shelbourne Pk	256	0[b]	5	Yes	Yes	Yes
Tralee	80	0	2	Yes	Yes	Yes
Waterford	150	0	11	Yes	Yes	Yes
Youghal	0[a]	0	0	No	Yes	No
Private Stadia						
Clonmel	185	0	4	Yes	Yes	Yes
Dundalk	247	0	6	Yes	Yes	Yes
Enniscorthy	0[a]	0	0	No	No	No
Kilkenny	0[a]	0	2	No	Yes	No
Lifford	0[a]	0	3	Yes	Yes	Yes
Longford	0[a]	0	0	No	No	No
Thurles	130	0	0	No	Yes	Yes

Source: Hamilton Architects
Note: a: In these places car parking considered not an issue as there is considerable car parking due to the size of the site.
b: Shelbourne Park is located in Dublin city centre and therefore has excellent public transport access.

3.5 Competing Sporting Facilities

The presence of alternative sporting facilities within the catchment area of each greyhound stadium is likely to impact on the commercial sustainability of the track as this impacts on the market for attendees. The lists provided in this section are not exhaustive, particularly in the case of cities. Therefore, the table only sets out to capture the larger sporting facilities within 20km of the Irish greyhound stadia. In all locations there are multiple GAA clubs present and therefore, instead of listing them they are referenced as 'local GAA clubs'.

It must also be noted that, particularly in the case of urban tracks, greyhound racing is not just competing with other sports but also with other entertainment venues. This is relevant as it has been suggested that up to 80% of attendees at Shelbourne Park may have no connection to greyhound racing other than attending a race meeting or event.[29] The issue of competing sporting facilities is most relevant in rural areas.

[29] Indecon correspondence with Shelbourne Park Greyhound Stadium

Table 3.6 shows the alternative sporting facilities to greyhound racing that are located within at least 20km of stadia that are not located in cities.

Table 3.6: Alternate Sporting Facilities Within 20km of Greyhound Stadia not in Cities

IGB Stadium	Alternate Sporting Facility
Mullingar	Westmeath GAA County Ground (Cusack Park) – capacity 11,000; Local GAA Clubs; Mullingar Town and Mullingar Athletic football clubs Mullingar Rugby Club; swimming pool; Mullingar Golf Club; Horse Racing: Kilbeggan Racecourse (20.6K – just outside zone)
Newbridge	Kildare GAA County Ground (St Conleth's Park) – capacity 8,200; Horse Racing: Curragh Racecourse (capacity 30,000), Punchestown Racecourse (capacity 3,500 in Grand Stand); Naas Racecourse; Local GAA Clubs; Newbridge Town and Naas Football Clubs; Newbridge Rugby Club; swimming pools; 3 Golf Courses: Newbridge, Royal Curragh, Craddockstown Golf Club
Tralee	Large GAA Ground (Austin Stack Park) – capacity 12,000; Local GAA Clubs; Tralee Dynamos football club; Tralee Rugby Club; swimming pool; Tralee Golf Club;
Youghal	Local GAA Clubs; Youghal Rugby Club; Youghal United FC; Youghal Golf Course; Aura Leisure Centre (swimming pool etc.)
Private Stadium	**Alternate Sporting Facility**
Clonmel	Local GAA Clubs; Clonmel Rugby Club; Three Football Clubs; Clonmel Golf Club Clonmel Racecourse (Horse Racing) – capacity 3,500 (Grand Stand),
Dundalk	Local GAA and football clubs; Dundalk Rugby Club; Dundalk Golf Club; swimming pool; Dundalk Racecourse (shared with Greyhound Racing); Oriel Park home to Dundalk FC League of Ireland Premier Division Football Club (capacity 4,500)
Enniscorthy	Local GAA Clubs; Enniscorthy Golf Club; Enniscorthy Rugby Club; Wexford Youths Football Cub; Enniscorthy Sports Hub (Athletics Track); swimming pool; Horse Racing: Wexford Racecourse (22K away)
Kilkenny	Kilkenny GAA County Ground (Nowlan Park) – capacity 25,000; Local GAA Clubs; 2 football clubs; Kilkenny Rugby Club; swimming pool; 4 Golf Clubs (Kilkenny, Callan, Gowran Park, Mount Juliet and Castlecomer); Horse Racing: Gowran Park
Lifford	Local GAA Clubs; Lifford Celtic FC and Strabane Athletic FC; Strabane Rugby Club; Strabane Golf Club; swimming pool at Riversdale Leisure Centre Strabane;
Longford	Longford GAA County Ground (Pearse Park) – capacity 6,000; Local GAA Clubs; Longford Golf Club; Longford Town FC (League of Ireland Third Division Football Club); swimming pool.
Thurles	Tipperary GAA County Ground (Semple Stadium) – capacity 45,690; Local GAA Clubs; Thurles Town Football Club; Thurles Rugby Club; swimming pool; Horse Racing: Thurles Racecourse;

Source: Indecon

The alternative sporting facilities close to city-based tracks are much more extensive. Table 3.7 displays examples of the major alternate sporting facilities that are within 20km of Shelbourne Park Greyhound Stadium. These include GAA, soccer, rugby, horseracing, basketball, tennis, boxing, cricket, athletics and other sports facilities.

Table 3.7: Illustrative Examples of Alternate Sporting Facilities Within 20K of Shelbourne Park Greyhound Stadia	
IGB Stadia	**Alternate Sporting Facilities**
Shelbourne Park	❑ GAA Headquarters at Croke Park and location of All Ireland Finals (capacity 82,300); Dublin GAA County Ground at Parnell Park (capacity 13,000); ❑ Aviva Stadium Lansdowne Road, venue for international home matches for Ireland's national football and rugby teams (capacity 51,7000); ❑ League of Ireland Premier Division home grounds for Bohemians at Dalymount Park (capacity 4,227), St Patricks Athletic at Richmond Park (capacity 5,340), Shamrock Rovers at Tallaght Stadium (capacity 8,000); League of Ireland First Division home grounds for Shelbourne FC at Tolka Park (capacity 4,300), Cabinteely at Stradbrook Road (capacity 1,620), Bray Wanders at the Carlisle Grounds (capacity 3,200); ❑ Energia Donnybrook Stadium (capacity 6,000) for rugby; RDS Stadium (capacity 18,500) for rugby and equestrian sports (home to the Irish Horse Show); Morton Stadium Santry for athletics (capacity 4,000); ❑ Horse racing at Leopardstown Racecourse (capacity 16,000); ❑ National Aquatics Centre Abbottstown (capacity of 2,500 for international competition pool); ❑ National Basketball Arena Tallaght (capacity 2,500); ❑ National Stadium for Boxing (capacity 2,000); and ❑ Sports facilities provided by the main universities (University College Dublin, Trinity College, Technical University of Dublin, Dublin City University, various Institutes of Technology and other educational institutions).
Source: Indecon	

Table 3.8 shows examples of major alternate sporting facilities within 20K of each greyhound stadium that is located in Ireland's other cities (Cork, Galway, Limerick and Waterford).

Table 3.8: Examples of Alternate Sporting Facilities Within 20km of IGB Greyhound Stadia in Cities	
Cork	❑ Cork GAA County Grounds at Páirc Uí Chaoimh (capacity 45,000) and Páirc Uí Rinn (capacity 16,640); ❑ Cork City (League of Ireland Premier Division Club) home ground at Turners Cross (capacity 7,485); ❑ University College Cork Mardyke Sports Grounds (athletics, swimming, football, basketball, GAA etc.); Cork Institute of Technology Sporting Facilities; and ❑ Musgrave Park for rugby (capacity 8,000).
Galway	❑ Galway GAA County Ground at Pearse Stadium (26,197); ❑ Galway United (League of Ireland First Division Club) home ground at Eammon Deacy/Terryland Park (capacity 3,300 seated, 5,000 overall); ❑ Connacht Rugby home ground at the Sports Grounds (same venue as Galway Greyhound Stadium); ❑ Sporting facilities at National University of Ireland Galway (athletics, swimming, football, basketball, GAA etc.); Galway Institute of Technology sporting facilities; and ❑ Horse Racing at Ballybrit Racecourse (capacity 45,000) home to the Galway Races, Ireland's largest horse racing festival.
Limerick	❑ Limerick GAA County Ground at the Gaelic Grounds (capacity 49,500); ❑ Limerick Town FC (League of Ireland First Division Club) home ground at the Markets Field (capacity 1,710 seated, 3,000 overall); ❑ Munster Rugby home ground at Thomond Park (capacity 25,600); ❑ Sporting Facilities at the University of Limerick (athletics, swimming, football, basketball, GAA etc.); Limerick Institute of Technology sports facilitates; and ❑ Horse Racing at Limerick Racecourse.
Waterford	❑ Waterford GAA County Ground (Walsh Park) – capacity 11,046; ❑ Local GAA, football, rugby, and other sports clubs; swimming pools; 6 Golf Clubs: Waterford, Williamstown, Waterford Castle, Faithlegg, Tramore and Dunmore East; ❑ Waterford Regional Sports Centre Carriganore (Waterford FC – League of Ireland Premier Division Football Club) – capacity: 5,000, includes athletics facilities; and ❑ Horse Racing at Tramore Racecourse.
Source: Indecon	

3.6 Summary of Findings

This section outlined the location of greyhound stadia in Ireland, the population catchment area of each stadia, the access arrangements in each stadia and the alternative sporting facilities that each greyhound stadia in Ireland competes with. Some key findings were as follows:

- There were 16 greyhound stadia in Ireland at the beginning of 2019. Of these stadia, nine were run by the IGB with the remainder run privately.
- There is a wide dispersion of greyhound racing tracks across urban and rural regions. Population catchment within 20km ranged from 1.4 million in Shelbourne Park, to around 50,700. In general, the private tracks have smaller catchment areas than the IGB-owned stadia. The extent to which a greyhound stadium serves a catchment area is also influenced by the proximity of that stadium to other greyhound tracks. The closest two greyhound stadia are Clonmel and Thurles, which are 46km apart. There are four stadia within 60km driving distance of Kilkenny, namely, Clonmel, Enniscorthy, Thurles and Waterford. This reflects the concentration of tracks in the southern half of the country. In contrast, there are no stadia within 60km of Galway, Limerick, Tralee and Dundalk. On an all island basis, the most isolated greyhound stadium is Tralee, which is 98.8km from its nearest neighbouring stadium, Limerick. The next nearest stadium to Tralee is Cork, a distance of 113.5km. The closest stadia to Dundalk and Lifford are in Northern Ireland. (Excluding Northern Ireland, Lifford is particularly isolated from other tracks and the nearest track to Lifford is Dundalk which is over 138 kms.)
- The ease of speedy access to greyhound stadia is also influenced by the quality of the transport network. In recent decades, the construction of the Irish motorway network has decreased journey times across Ireland and made greyhound stadia more accessible. Most stadia are in close proximity to motorways, however, there are exceptions.
- It is also important that attendees, owners, trainers and breeders are able to access the track in a safe and comfortable manner and that access for individuals with a disability are facilitated. The next table shows the access arrangements at each of the greyhound stadia.
- Five stadia have no marked car parking spaces for people with disabilities, three have no lifts, two have no level access (ramps etc.) to assist people with disabilities and three have no viewing provision for those in wheelchairs.
- The presence of alternative sporting facilities within the catchment area of each greyhound stadium is likely to impact on the commercial sustainability of the track and the social and economic significance in local areas. It is noted that, particularly in the case of urban tracks, greyhound racing is not just competing with other sports but also with other entertainment venues. Our analysis suggests that there are extensive sporting and other facilities that compete with greyhound stadia and there are GAA facilities within 20km of 12 of the 16 stadia.

4 Attendance Levels and Racing Schedules

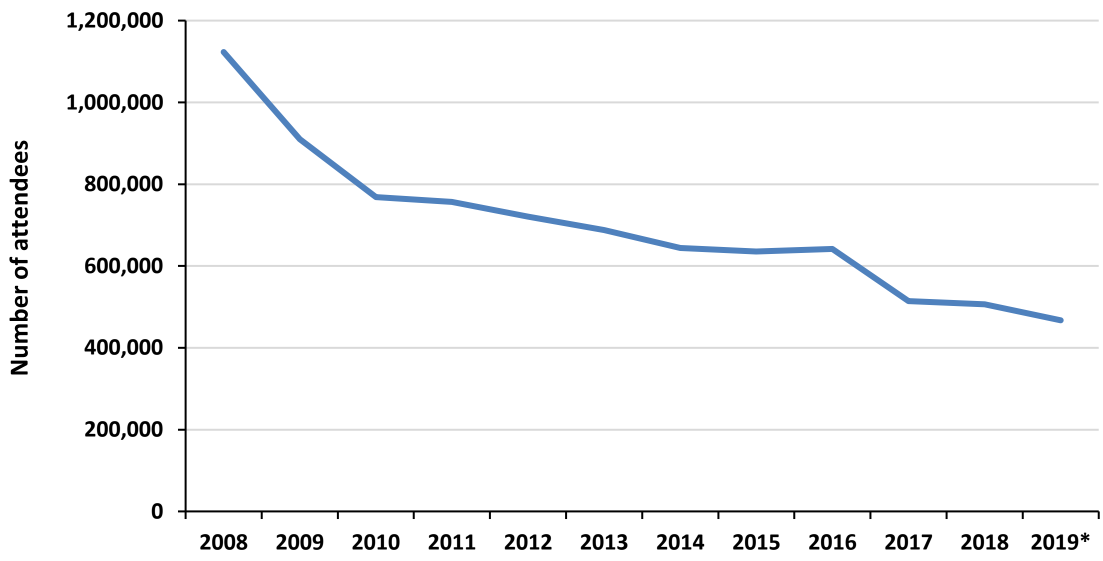
4.1 Introduction

In this section, the trends in attendances at greyhound racing meetings in Ireland are outlined. Attendances are a key indicator of the popularity of the sport and it is important to establish the current and future trajectory of greyhound racing in Ireland. The timeslots when racing occurs can affect attendances and therefore the racing schedules in Irish greyhound racing stadia are also examined in this section.

4.2 Trends in Attendance

The greyhound racing industry in Ireland has witnessed a significant decline in attendance over the last decade. While 1.1m attended races in 2008, this had fallen to just over 0.5m by 2018, a decline of 55%.

Figure 4.1: Total Number of Attendances at Greyhound Race Meetings, 2008 – 2019(f)



Source: IGB
Note: The figure for 2019 is calculated by applying the % change from the first ten months of 2019 with the same period in 2018, and applying to the 2018 aggregate.

The number of attendees per stadium has fallen in 13 of the 16 stadia, with attendance numbers stagnating in the other three.

Table 4.1: Change in Attendance by Stadia, 2015-2018					
	2015	**2016**	**2017**	**2018**	**2015-2018 Average % Change**
IGB Stadia					
Cork	71,999	72,132	61,853	49,903	-11.50%
Galway	35,352	34,758	32,374	29,156	-6.22%
Limerick	47,325	46,304	42,390	36,655	-8.16%
Mullingar	24,076	23,033	20,598	20,121	-5.81%
Newbridge	20,827	19,371	25,155	20,929	0.16%
Shelbourne	139,272	146,214	103,951*	147,858	2.01%
Tralee	49,536	50,511	48,524	46,596	-2.02%
Waterford	28,386	28,287	24,971	26,570	-2.18%
Youghal	12,860	12,701	11,526	10,291	-7.16%
IGB Total	429,633	433,311	371,342	388,079	-3.33%
Private Stadia					
Clonmel	21,231	19,556	19,327	17,992	-5.37%
Dundalk	47,223	45,795	44,239	38,308	-6.74%
Enniscorthy	22,173	21,259	19,927	13,515	-15.21%
Kilkenny	15,638	15,754	17,309	16,672	2.16%
Lifford	14,870	14,323	12,722	11,226	-8.95%
Longford	9,773	8,700	8,701	6,451	-12.93%
Thurles	20,266	19,057	16,632	13,899	-11.81%
Private Total	151,174	144,444	138,857	118,063	*-7.91%*
All Stadia	580,807	577,755	510,199	506,142	**-4.48%**

Source: Indecon analysis of IGB Data
****Shelbourne Park closed for a 20 week period in mid 2017.***

In June 2019, RTÉ aired an investigation, "RTÉ Investigates: Greyhounds Running for Their Lives" which featured alleged abuses of animals within the greyhound industry. The adverse publicity following the programme has had a further negative impact on attendances, particularly in the large urban stadia. This is shown in Table 4.2 below.

The average decline from January to October 2018 to January to October 2019 was 7.6%, compared to an attendance decline of 4.5% across all stadia over the previous three years. The decline was particularly noticeable in IGB-owned stadia, which showed a fall of 8.9% in attendance. It is also noticeable that stadia in large urban centres appear to have fared worse than rurally-based stadia. The IGB suspended marketing in July and August of 2019 following the airing of the programme, which may have had some impact on attendances. Marketing activity resumed in early September 2019. Table 4.2 also shows the estimated attendance for 2019, based on applying the differential rate observed between the first ten months of 2018 and the first ten months of 2019. The percentage annual average rate of change between these estimated attendance levels and the attendance levels in 2015 can also be observed, with IGB stadia experiencing a decline to 353,000.

Table 4.2: Change in Attendance by Stadia, Jan-Oct 2018 to Jan-Oct 2019 and Attendance Scenario in 2019		
	Jan-Oct 2019	**Estimated 2019**
IGB Stadia		
Cork	39,698	50,052
Galway	22,319	27,688
Limerick	24,187	29,289
Mullingar	16,332	20,218
Newbridge	14,135	18,746
Shelbourne	110,788	138,580
Tralee	33,194	37,998
Waterford	16,511	19,885
Youghal	9,900	11,505
IGB Total	*287,064*	353,422
Private Stadia		
Clonmel	14,272	17,193
Dundalk	26,853	35,012
Enniscorthy	13,809	16,720
Kilkenny	13,148	15,643
Lifford	6,839	8,380
Longford	3,686	4,207
Thurles	13,170	16,919
Private Total	*91,779*	113,911
All Stadia	**378,843**	**467,237**
Source: Indecon analysis of IGB Data		

Almost half of all industry participants rated the falling number of spectators as a very significant challenge. Table 4.3 shows the views of respondents to Indecon's survey of greyhound breeders, trainers and owners concerning the challenges facing the stadium they use most often in terms of the falling number of spectators.

Table 4.3: Challenges Facing Stadia (Unweighted Average Response)					
	Very Significant Challenge	**Significant Challenge**	**Minor Challenge**	**Not a Challenge**	**Don't Know**
Falling numbers of spectators	45%	32%	12%	10%	1%
Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers					

In terms of breeders, owners and trainers, there is a high level of awareness of the significance of falling number of spectators for the stadium they attend most regularly.

Table 4.4: Falling Numbers of Spectators – Response by Stadium						
		Very Significant Challenge	**Significant Challenge**	**Minor Challenge**	**Not a Challenge**	**Don't Know**
<-----Stadia ranked highest to lowest ----->	Limerick	70%	30%	0%	0%	0%
	Thurles	63%	32%	5%	0%	0%
	Clonmel	56%	38%	6%	0%	0%
	Longford	59%	29%	0%	12%	0%
	Waterford	53%	35%	12%	0%	0%
	Cork	56%	32%	8%	0%	4%
	Enniscorthy	45%	41%	10%	3%	0%
	Tralee	50%	35%	10%	5%	0%
	Dundalk	50%	30%	15%	5%	0%
	Galway	40%	40%	20%	0%	0%
	Lifford	50%	25%	25%	0%	0%
	Newbridge	31%	35%	12%	20%	1%
	Mullingar	36%	27%	27%	9%	0%
	Shelbourne Park	40%	19%	12%	30%	0%
	Kilkenny	19%	38%	44%	0%	0%
	Youghal	0%	33%	50%	17%	0%
Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers						

4.3 Analysis of Racing Schedules

The number of races, and time slots for those races, differs between stadia, with the larger, typically IGB-owned tracks having a greater number of races meetings. Table 4.5 displays the number of races, the number of race meetings and the number of runners in each greyhound stadia in 2018. Unsurprisingly, Shelbourne Park had the greatest amount of activity with 2,186 races, 200 race meetings and 12,719 runners. IGB Stadia reported an average of 1,191 races (116 race meetings) as compared to independent tracks (734 and 78 respectively).

Table 4.5: Racing Activity in Greyhound Stadia, 2018

	Number of races	Number of race meetings	Number of runners
IGB Stadia			
Cork	1,126	103	6,656
Galway	912	93	5,362
Limerick	1,229	106	7,272
Mullingar	1,056	101	6,255
Newbridge	558	54	3,315
Shelbourne Park	2,186	200	12,719
Tralee	1,844	192	10,966
Waterford	796	90	4,622
Youghal	1,016	101	6,026
Total	*10,723*	*1,040*	*63,193*
Average	*1,191*	*116*	*7,021*
Private Stadia			
Clonmel	867	99	5,139
Dundalk	949	103	5,523
Enniscorthy	757	86	4,460
Kilkenny	794	92	4,718
Lifford	573	51	3,317
Longford	710	69	4,182
Thurles	487	46	2,880
Total	*5,137*	*546*	*30,219*
Average	*734*	*78*	*4,317*
All Stadia – Total	**15,860**	**1,586**	**93,412**
All Stadia – Average	**991**	**99**	**5,838**

Source: Indecon analysis of IGB Data

The period 2015-2018 has seen an increase in the number of races increase in aggregate in IGB-owned tracks, though a decrease in private tracks. Table 4.6 shows the percentage change in the number of races, race meetings and runners in Irish greyhound stadia between 2015 and 2018. Overall the number of races and race meetings in IGB tracks have increased by 14.5% and 10.9% respectively over the period 2015 - 2018, while the number of races and race meetings in independent tracks decreased by 7.9% and 8.7% respectively. Thurles saw the greatest decrease in the number of races and race meetings (34.9% and 43.9%) while Shelbourne Park saw the greatest increase in races (40.1%, race meetings increased by 38.9%), and Tralee saw the greatest increase in race meetings (43.3%, races increased by 40.1%).

Table 4.6: Percentage Change in Racing Activity in Greyhound Stadia from 2015 to 2018

	Number of races	Number of race meetings	Number of runners
IGB Stadia			
Cork[1]	-16.5%	-25.4%	-16.8%
Galway	-4.5%	-2.1%	-5.2%
Limerick	5.0%	5.0%	4.7%
Mullingar	13.7%	7.4%	14.5%
Newbridge	-0.7%	-3.6%	-0.7%
Shelbourne Park	42.2%	38.9%	41.7%
Tralee	40.1%	43.3%	40.7%
Waterford	-1.4%	1.1%	-3.2%
Youghal	37.1%	16.1%	37.1%
IGB Stadia - Total	*14.5%*	*10.9%*	*14.2%*
Independent Stadia			
Clonmel	-3.1%	-2.9%	-3.0%
Dundalk	-7.9%	-1.0%	-8.6%
Enniscorthy	-0.8%	-2.3%	-0.6%
Kilkenny	4.1%	7.0%	3.9%
Lifford	-6.1%	-1.9%	-7.8%
Longford	-7.4%	-17.9%	-8.5%
Thurles	-34.9%	-43.9%	-34.6%
Private Stadia - Total	*-7.9%*	*-8.7%*	*-8.3%*
All Stadia - Total	**6.1%**	**3.3%**	**5.8%**

Source: Indecon analysis of IGB Data
1: A third night in Cork had been eliminated during this period but was subsequently reintroduced

Friday and Saturday night racing tends to be dominated by the larger tracks, with Cork, Galway, Shelbourne Park, Tralee and Dundalk all operating race meetings on both those nights. Table 4.7 provides the regular race meeting schedule (in blue cells) at Irish greyhound stadia with the number of race meetings that took place from January to October 2019. It is necessary to stagger races across the week to ensure a sufficient availability of racing dogs.

Only Shelbourne and Tralee have racing on four nights of the week (Tuesday, Thursday, Friday and Saturday for Shelbourne and Tuesday, Friday, Saturday and Sunday for Tralee). On rare occasions, meetings can occur on days outside of the normal schedule. For example, additional race meetings were held in Limerick on Monday 8 April 2019, Friday 8 March, Friday 26 July and Sunday 23 June. The normal racing schedule for Limerick greyhound stadium is for meetings to occur on Thursday and Saturday nights. From January to October 2019, 39 meetings occurred on a Thursday evening in Limerick while 37 meetings occurred on a Saturday evening. In Galway Greyhound Stadium at the Galway Sportsgrounds, some meetings are periodically changed to days other than Friday and Saturday (regular schedule) in order to facilitate Connacht Rugby, with whom they share their stadium. There are also some regional patterns of race meet timing, for example Limerick holds regular Thursday night racing, though Cork and Galway do not.

Table 4.7: Greyhound Race Meeting Schedule

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
IGB Stadia							
Cork			14	2	39	38	
Galway*			1	1	34	36	
Limerick	1			39	2	37	1
Mullingar						39	39
Newbridge					39		
Shelbourne Park		34		34	39	39	
Tralee		38			38	32	39
Waterford				39	1	38	
Youghal	38	-	25		14		
Independent Stadia							
Clonmel	1				38	1	39
Dundalk					39	39	
Enniscorthy	30			33			
Kilkenny			37		35		2
Lifford						32	
Longford	30	-	1	1	2		
Thurles						36	

Legend:

- (blue) Indicates days on which regular evening race meetings are scheduled
- (peach) Indicates days on which regular morning race meetings are scheduled
- **33** Numbers indicate the number of race meetings held from 1 January 2019 to 1 October 2019 in the relevant stadium on the relevant day of the week.

A white cell with a number indicates that an unscheduled race meeting was held in that stadium on that day of the week during the January - October 2019 period.

In Youghal regular meetings were held on Monday and Wednesday up until June 2019 when meetings were switched to Monday and Friday.

Third night in Cork re-introduced in mid-2019

Source: Indecon Analysis of IGB Racing Schedule Data[30]

[30] Past racing schedules for races in Irish greyhound stadia and results are available at: https://www.igb.ie/results/

The main companies providing coverage of greyhound races are Sports Information Services (SIS) and Bookmakers' Afternoon Greyhound Service (BAGS) who provide a similar service in the UK. For some race meetings at Limerick, Cork, Tralee, Mullingar and Youghal, SIS has the exclusive rights under an agreement with the IGB to collect and distribute greyhound racing content to online and retail betting operators. This allows them to beam greyhound racing to online and physical betting outlets internationally, and has resulted in the emergence of morning SIS races at Waterford and Kilkenny which are not intended to be attended by patrons as they are focused on international betting customers. In particular, morning racing is suited to Australian betting customers, due to the time difference between Ireland and Australia.

In contrast, BAGS pays stadium operators to conduct races which they then televise in their member bookies' betting shops, which, being a UK based company, are largely located in that jurisdiction.

4.4 Summary of Findings

This Section presented Indecon's analysis of attendance levels and racing schedules at Irish greyhound stadia. Some key findings are outlined below:

- Greyhound racing in Ireland saw a large decline of 55% in attendances from 2008 to 2018, from 1.1 million to just over 0.5 million.
- In June 2019, RTÉ aired an investigation, "RTÉ Investigates: Greyhounds Running for Their Lives" which featured alleged abuses of animals within the greyhound industry. Following the adverse publicity there has been a further negative impact on attendances, particularly in the large urban stadia. The long term impacts is uncertain and this has been taken into account in development of a number of alternative scenarios for future attendance levels.
- The number of races, and time slots for those races, differs between stadia, with the larger, typically IGB-owned tracks having a greater number of race meetings. Overall the number of races and race meetings in IGB tracks have increased by 14.5% and 10.9% respectively over the period 2015 - 2018, while the number of races and race meetings in independent tracks decreased by 7.9% and 8.7% respectively. Friday and Saturday night racing tends to be dominated by the larger tracks, with Cork, Galway, Shelbourne Park, Tralee and Dundalk all operating race meetings on both those nights. There are also some regional patterns of race meet timing, for example Limerick holds regular Thursday night races, though Cork and Galway do not.

5 Analysis of Breeders, Trainers and Owners

5.1 Introduction

In this section, Indecon provides an analysis of breeders and trainers in Ireland in terms of aspects such as their age, number of dogs trained or owned, and their most regularly used stadia. The continued presence of these industry participants is critical to the future survival of the sector.

5.2 Economic Impact of Greyhound Breeders, Trainers and Owners

The greyhound industry makes an economic and social contribution to many regions through the support of breeders, trainers and owners. One estimate suggested that the greyhound industry in Ireland supported 5,058 full-time and part-time jobs in the Irish economy, with the total number of individuals deriving economic benefit from the industry being estimated at 12,371.[31] A breakdown of this employment is provided in Table 5.1.

It was estimated in 2016 that the cumulative cost of greyhound owners maintaining, breeding and racing dogs was €135 million, with much of this supporting local employment in rural areas. An additional economic impact arises from the use of greyhound racing for fundraising purposes by charitable and other organisations. In 2016 it was estimated that charitable causes raised €8 million annually at greyhound stadia. Indecon notes that all economic sectors interact with other parts of the economy and unemployment levels have declined significantly in recent years. However, it is clear that in local areas the sector contributes to the economy.

Table 5.1: Employment Generated by the Greyhound Industry, 2016

Activity	Employment
Irish Greyhound Board Payroll	850
Private Tracks Payroll	149
Irish Coursing Club	180
Cleaning & Security Services at Stadia	380
Food & Drink Suppliers to Catering Operators	436
Private & Public Trainers	543
Dog Food Manufacturers – Manufacture/Sales/Distribution	300
Greyhound Ancillary Products – Medicines/Treatments/Walkers/Baths/Veterinary Services/Manufacture/Distribution/Sales	750
Betting Sector	1,170
Miscellaneous – Facilities Management, Printers, Outside Contractors	300
Direct & Indirect Employment	5,058
Active Greyhound Owners	7,313
Total Number Deriving Economic Benefit	**12,371**

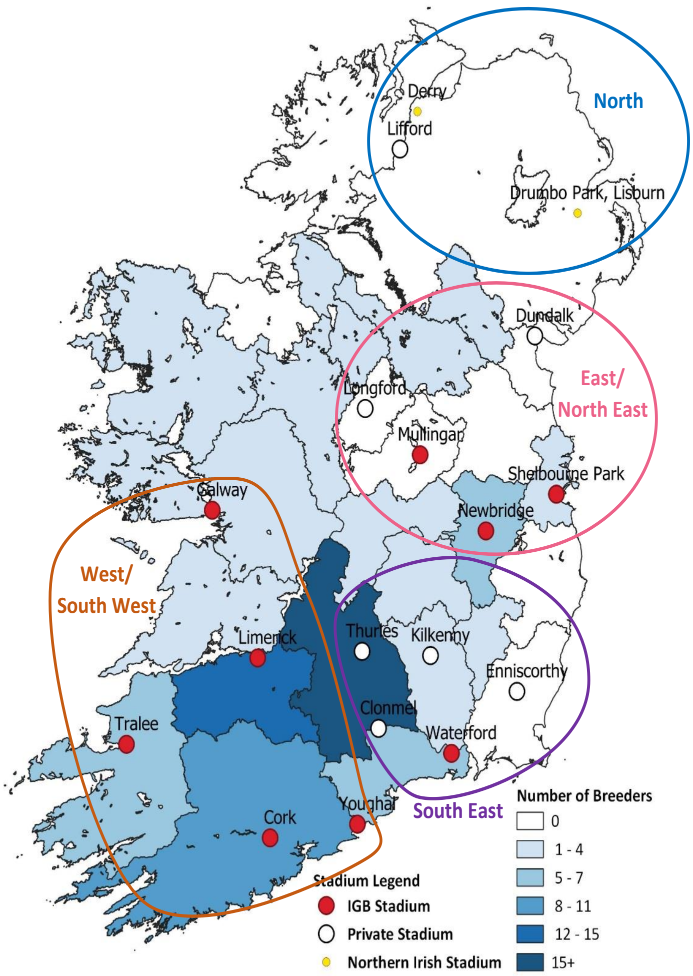
Source: Jim Power Economics, 2017. The Economic and Financial Significance of the Irish Greyhound Industry

[31] Jim Power Economics 2017, "The Economic and Financial Significance of the Irish Greyhound Industry, November 2017". Available at: https://www.igb.ie/globalassets/power-report-2018/power-report---the-economic--financial-significance-of-the-irish-greyhound-industry---november-2017.pdf (accessed 08/07/2019)

5.3 Profile of Greyhound Breeders, Trainers and Owners

All greyhound breeding establishments with 5 or more greyhounds are required to register with the Irish Coursing Club under the provisions of the Greyhound Welfare Act 2011. As of 1 October 2019, there were 81 registered breeding establishments or breeders in Ireland with five or more greyhounds. The geographic distribution of greyhound breeders in Ireland is outlined in Figure 5.1. The largest number of breeders were in Tipperary (20) and Limerick (13). An alternative measure of geographical distribution of industry activity can be taken from the distribution of trainers[32]. This also shows that Tipperary has the highest concentration of trainers (11.6%), followed by Cork and Kerry (9.2%). Donegal only accounted for 2.6% of all trainers. These numbers exclude smaller non-registered breeders.

Figure 5.1: Geographic Distribution of Greyhound Breeders in Ireland, 2019



Source: Irish Coursing Club. Note: Breeders are only required to register where they have five greyhounds or more

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32 "The Economic and Financial Significance of the Greyhound Industry", IGB 2017.

Most dog trainers in Ireland have relatively small operations, and train between one and nine dogs. Table 5.2 disaggregates respondent breeders, owners and trainers by the number of dogs they owned/trained between 2015 and 2019. Respondents were also asked to forecast the number of dogs they would own or train in 2020. The proportion of trainers with 1-4 dogs varied between 41% and 48% between 2015 and 2018. The table also indicates that the structure of greyhound ownership and training over recent years has been broadly stable, and this is forecast to continue.

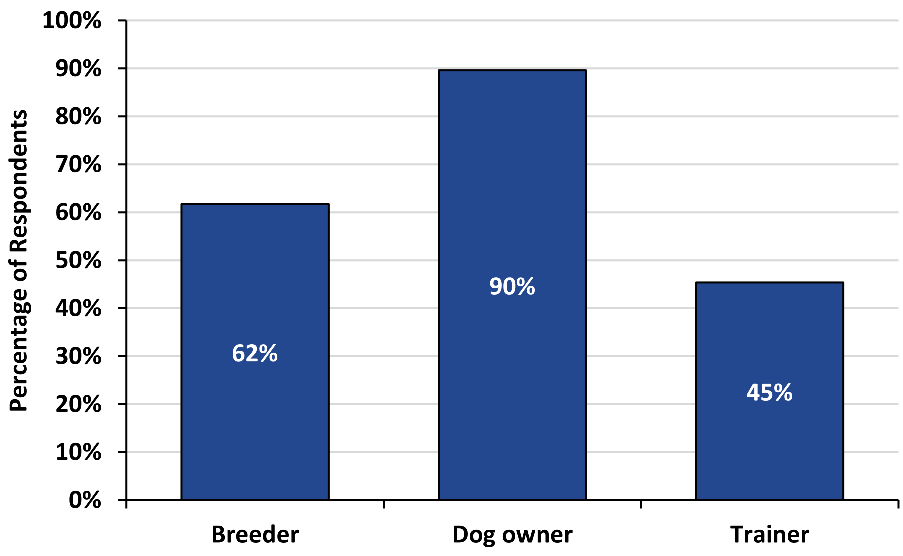
Table 5.2: Respondents Disaggregated by Number of Dogs Owned/Trained, 2015-2020

Number of Dogs	2015	2016	2017	2018	2019	2020 (Forecast)
1-4	42%	41%	44%	48%	45%	38%
5-9	25%	27%	28%	25%	30%	28%
10-15	11%	13%	11%	11%	10%	17%
15-20	5%	5%	4%	4%	3%	4%
20-50	10%	8%	8%	9%	9%	10%
50-100	4%	4%	3%	3%	2%	2%
100+	2%	1%	1%	2%	1%	1%

Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Nine out of ten respondents stated that they were dog owners while 62% and 45% stated that they were breeders and trainers, respectively. Figure 5.2 shows the proportion of respondents to Indecon's survey of breeders, owners and trainers by category.

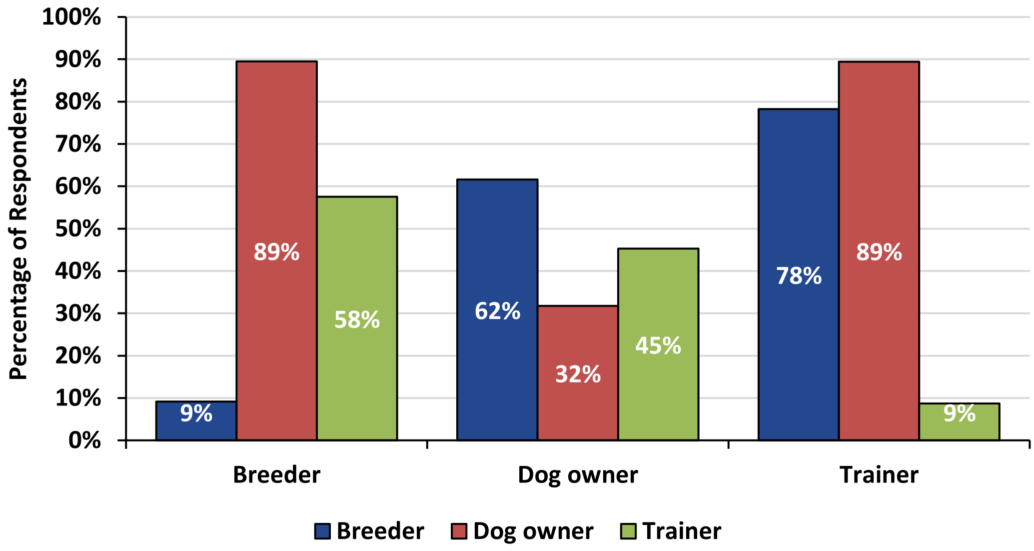
Figure 5.2: Surveyed Breeders, Owners and Trainers by Category



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers
Note: Respondents could select more than one category hence percentages do not add up to 100.

Most of those who participate in the sport engage in two or more of breeding, owning and training activities. Figure 5.3 disaggregates the respondent breeders, owners and trainers by whether they belonged to each other's category or their own category only. Only 9% of breeders were breeders only, with 89% of them being dog owners also and 58% of them being trainers also. 62% of respondent dog owners were breeders also, with 45% being also trainers – 32% were dog owners only. Turning to trainers, only 9% who responded to Indecon's survey were trainers only, with 78% being breeders and 89% being dog owners.

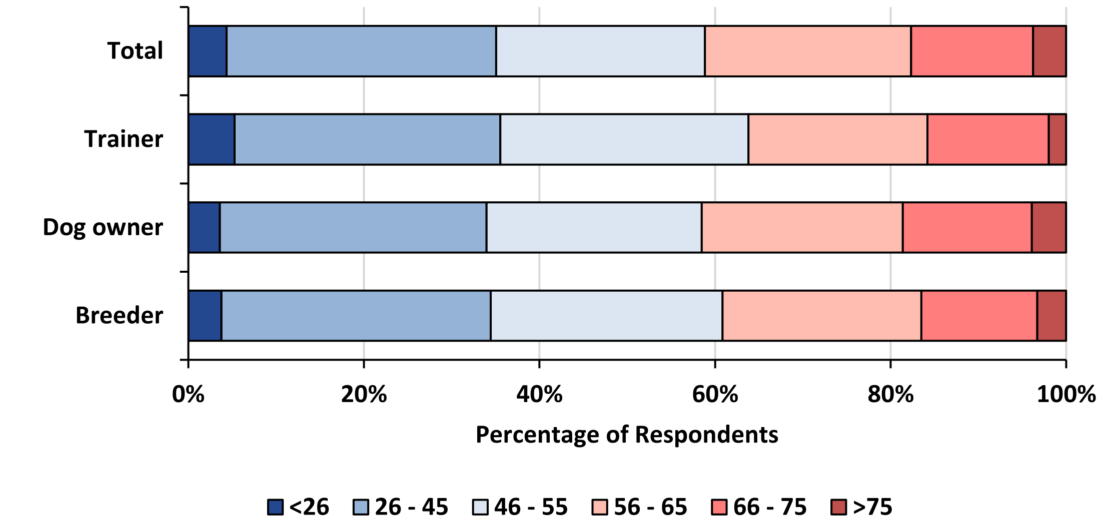
Figure 5.3: Surveyed Breeders, Owners and Trainers by Whether they Belong to Each Other's Categories



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Figure 5.4 provides the age profile of breeders, owners and trainers that responded to Indecon's survey. Overall, 65% of respondent breeders, owners and trainers were over the age of 45. The average age of respondents to the survey was just over 50 years old, around three years older than the general adult population based on the results of Census 2016.

Figure 5.4: Age Profile of Respondent Breeders, Owners and Trainers



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

5.4 Availability of Breeders and Trainers

In analysing the spatial distribution of greyhound stadia, it is also important to determine the extent to which there are breeders/trainers in the area surrounding a greyhound stadium and to what extent the availability of these is a challenge to stadia. As part of Indecon's survey of greyhound owners, breeders and trainers, respondents were asked to provide their views on the extent to which they believed that an absence of sufficient greyhounds and breeders posed a challenge to greyhound stadia. As can be seen, the absence of greyhounds/breeders is seen as a significant or very significant challenge by around half of industry participants.

Table 5.3: Challenges Facing Stadia (Unweighted Average Response)

	Very Significant Challenge	Significant Challenge	Minor Challenge	Not a Challenge	Don't Know
Absence of sufficient greyhounds/breeders	25%	26%	29%	19%	1%
Absence of sufficient greyhound trainers	10%	22%	38%	30%	0%

Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers
Survey Question: Which do you believe are the greatest challenges facing the racetrack you use most regularly?

The results from this survey question by track are displayed in Table 5.4. Having sufficient greyhounds/breeders was seen as a challenge for most stadia.

Table 5.4: Views of Greyhound Stadium Owners Breeders and Trainers on How Significant a Challenge Absence of Sufficient Greyhounds/Breeders Poses to Stadia

IGB Stadia	Very Significant Challenge	Significant Challenge	Minor Challenge	Not a Challenge	Don't Know
Cork	52%	32%	8%	4%	4%
Galway	20%	20%	60%	0%	0%
Limerick	48%	15%	26%	11%	0%
Mullingar	9%	55%	18%	18%	0%
Newbridge	20%	32%	21%	25%	1%
Shelbourne Park	26%	21%	47%	7%	0%
Tralee	40%	15%	30%	15%	0%
Waterford	12%	35%	47%	6%	0%
Youghal	17%	33%	50%	0%	0%
Average (IGB-owned)	*27%*	*29%*	*34%*	*10%*	*1%*
Private Stadia					
Clonmel	25%	25%	13%	31%	6%
Dundalk	40%	10%	35%	15%	0%
Enniscorthy	14%	34%	24%	28%	0%
Kilkenny	0%	25%	44%	31%	0%
Lifford	0%	25%	75%	0%	0%
Longford	12%	12%	24%	53%	0%
Thurles	26%	32%	21%	21%	0%
Average (private)	*17%*	*23%*	*34%*	*26%*	*1%*
Average (total)	**23%**	**26%**	**34%**	**17%**	**1%**

Source: Indecon Survey of Greyhound Breeders, Dog Owners and Trainers re. Irish Greyhound Racing Stadia Infrastructure

5.5 Track Usage by Breeders and Trainers

The usage of tracks by breeders and trainers is discussed in this section. Table 5.5 shows the tracks used by respondents to Indecon's survey of breeders, owners and trainers on a regular basis. The most used track among respondents was Shelbourne Park (45%).

Table 5.5: Tracks Used by Respondents on a Regular Basis	
	Percentage of Respondents
IGB Stadia	
Cork	16%
Galway	7%
Limerick	19%
Mullingar	15%
Newbridge	29%
Shelbourne Park	45%
Tralee	11%
Waterford	16%
Youghal	6%
Independent Stadia	
Clonmel	18%
Dundalk	15%
Enniscorthy	15%
Kilkenny	18%
Lifford	6%
Longford	13%
Thurles	16%
Source: Indecon Survey of Greyhound Breeders, Dog Owners and Trainers re. Irish Greyhound Racing Stadia Infrastructure	

Many breeders/trainers and owners involved in the greyhound industry attend more than one stadium. Table 5.6 shows, for each stadium, the stadia that are also used by respondents on a regular basis. It is apparent that few of the respondent breeders, trainers and owners use only one track. Tralee has the highest proportion of respondents stating that they use that track only (24%), though when averaged across tracks only 11% of industry participants stated that they only attended one stadium. Based on these results, it is possible to identify the following track clusters where cross-usage of tracks is high. These are:

- South-West/West: Tralee; Cork; Limerick; Youghal and Galway;
- South-East: Enniscorthy; Waterford; Kilkenny; Thurles and Clonmel; and
- North and North East: Lifford; Longford; Mullingar; Newbridge; Dundalk and Shelbourne Park.

Table 5.6: Tracks Regularly Used by Respondents (Percentages of Totals for Each Stadium)																
Stadium	**Other Stadium Used**															
	Clonmel	**Cork**	**Dundalk**	**Enniscorthy**	**Galway**	**Kilkenny**	**Lifford**	**Limerick**	**Longford**	**Mullingar**	**Newbridge**	**Shelbourne Park**	**Thurles**	**Tralee**	**Waterford**	**Youghal**
Clonmel	**8%**	44%	6%	13%	8%	39%	2%	37%	5%	10%	13%	45%	45%	19%	40%	15%
Cork	48%	**11%**	7%	5%	11%	21%	2%	50%	5%	7%	11%	39%	32%	32%	21%	25%
Dundalk	8%	8%	**8%**	13%	12%	10%	27%	6%	33%	37%	37%	77%	12%	4%	10%	6%
Enniscorthy	15%	6%	13%	**17%**	6%	31%	2%	6%	4%	6%	25%	48%	12%	4%	56%	6%
Galway	22%	26%	26%	13%	**0%**	22%	9%	70%	39%	35%	35%	57%	30%	17%	17%	9%
Kilkenny	38%	19%	8%	25%	8%	**5%**	2%	14%	6%	19%	37%	62%	41%	8%	37%	8%
Lifford	5%	5%	70%	5%	10%	5%	**5%**	5%	40%	20%	30%	65%	5%	5%	5%	10%
Limerick	35%	43%	5%	5%	25%	14%	2%	**15%**	8%	8%	8%	37%	34%	34%	12%	8%
Longford	7%	7%	39%	5%	20%	9%	18%	11%	**14%**	48%	36%	59%	11%	5%	5%	5%
Mullingar	12%	8%	37%	6%	16%	24%	8%	10%	41%	**4%**	65%	69%	18%	6%	8%	4%
Newbridge	8%	6%	19%	13%	8%	23%	6%	5%	16%	32%	**23%**	60%	10%	4%	10%	2%
Shelbourne Park	18%	14%	26%	16%	8%	25%	8%	15%	17%	23%	39%	**9%**	17%	9%	19%	4%
Thurles	51%	33%	11%	11%	13%	47%	2%	40%	9%	16%	18%	47%	**7%**	16%	25%	5%
Tralee	32%	47%	5%	5%	11%	13%	3%	58%	5%	8%	11%	37%	24%	**24%**	11%	8%
Waterford	45%	21%	9%	52%	7%	41%	2%	14%	4%	7%	18%	52%	25%	7%	**5%**	9%
Youghal	41%	64%	14%	14%	9%	23%	9%	23%	9%	9%	9%	27%	14%	14%	23%	**18%**

Source: Indecon Survey of Greyhound Breeders, Dog Owners and Trainers re. Irish Greyhound Racing Stadia Infrastructure

The following table shows the usage of different greyhound stadia by breeders, dog owners and trainers. Mullingar has the highest percentage of its users using another track in the same region (94.1%), whilst Shelbourne had the lowest (60%). Newbridge and Tralee had the fewest using another track, with 22.5% and 23.7% using only those tracks respectively. In contrast all respondents who indicated that they used the track in Galway also use at least one other track frequently.

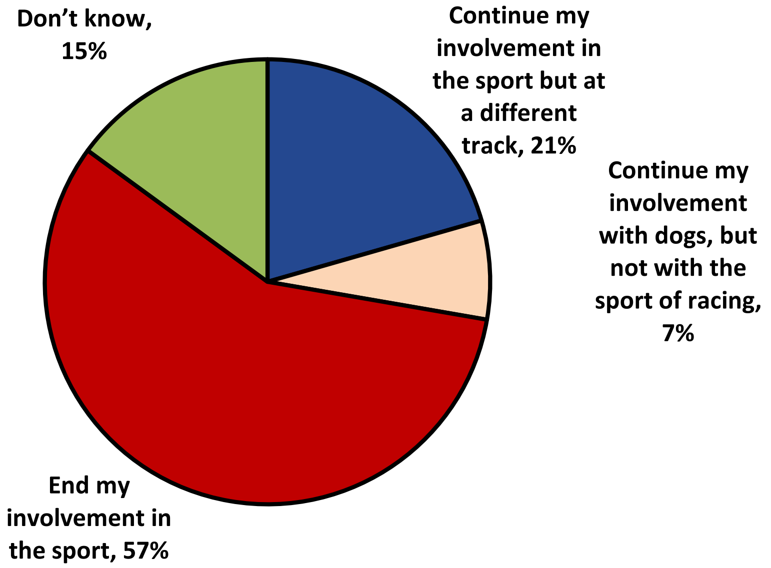
Table 5.7: Summary of Usage of Greyhound Stadia

	Percentage Who Use At Least One Other Track in Region	Percentage Who Use At Least One Other Track in Country
East/North East		
Dundalk	86.5%	92.3%
Longford	75.0%	86.4%
Mullingar	94.1%	96.1%
Newbridge	69.6%	77.5%
Shelbourne	60.0%	91.0%
South East		
Waterford	87.5%	94.6%
Clonmel	71.0%	91.9%
Enniscorthy	71.2%	82.7%
Kilkenny	74.6%	95.2%
Thurles	74.5%	92.7%
West/South West		
Cork	73.2%	89.3%
Galway	73.9%	100.0%
Limerick	70.8%	84.6%
Tralee	68.4%	76.3%
Youghal	63.6%	81.8%
North		
Lifford	N/A	95.0%

Source: Indecon Survey of Greyhound Breeders, Dog Owners and Trainers re. Irish Greyhound Racing Stadia Infrastructure

In spite of widespread use of other tracks being reported in the table above, 57% of respondents to Indecon's survey stated that they would end their involvement with greyhound racing were the stadium they use most regularly to close. Indecon accepts that closure of stadia will impact on the scale of the sector. This can be observed in Figure 5.5.

Figure 5.5: Views of Breeders, Owners and Trainers on their future with Greyhound Racing were the Stadium they use most regularly to close



Source: Indecon

5.6 Summary of Findings

This section provided a profile of greyhound breeders, trainers and owners in Ireland. Some key findings were:

- The greyhound industry makes an economic and social contribution to many regions through the support of breeders, trainers and owners. One estimate suggested that in 2016 the greyhound industry in Ireland supported 5,058 full-time and part- time jobs in the Irish economy, with the total number of individuals deriving economic benefit from the industry being estimated at 12,371.[33] Indecon notes that all economic sectors interact with other parts of the economy and there is likely to be high levels of economic displacement in attendance spending at greyhound races and much of the expenditure would likely have been made elsewhere in the economy.[34] However, it is clear that in local areas the sector contributes to the economy and we also note the use of greyhound racing for fundraising purposes by charitable and other organisations.
- As of 1 October 2019, there were 81 registered breeding establishments or breeders in Ireland. The largest number of breeders were in Tipperary (20) and Limerick (13).
- Most dog trainers in Ireland have relatively small operations, and train between one and nine dogs. The next table disaggregates respondent breeders, owners and trainers by the number of dogs they owned/trained between 2015 and 2019. The proportion of trainers

[33] Jim Power Economics 2017, "The Economic and Financial Significance of the Irish Greyhound Industry, November 2017". Available at: https://www.igb.ie/globalassets/power-report-2018/power-report---the-economic--financial-significance-of-the-irish-greyhound-industry---november-2017.pdf (accessed 08/07/2019)

[34] For a further discussion of economic displacement see Gray, A. W., (1995), 'Guide to Evaluation Methods,', Published by Gill and Mac-Millan, ISBN 07171 22425.

with 1-4 dogs varied between 41% and 48% between 2015 and 2018. Nine out of ten respondents stated that they were dog owners while 62% and 45% stated that they were breeders and trainers, respectively. Most of those who participate in the sport engage in two or more of breeding, owning and training activities. 65% of respondent breeders, owners and trainers were over the age of 45. The average age of respondents to the survey was just over 50 years old, around three years older than the general adult population based on the results of Census 2016.

- In analysing the spatial distribution of greyhound stadia, it is also important to determine the extent to which there are breeders/trainers in the area surrounding a greyhound stadium. Indecon's analysis suggests that the absence of sufficient numbers of greyhounds/breeders is seen as a significant challenge by about half of industry participants.
- In spite of widespread use of other tracks, 57% of respondents to Indecon's survey stated that they would end their involvement with greyhound racing were the stadium they use most regularly to close. Indecon accepts that closure of stadia will impact on the scale of the sector and its economic contribution. The results represent responses from 317 breeders, owners and trainers. The number of responses for those who use any track vary between 20 – 155.

6 Assessment of Infrastructure, Services and Facilities

6.1 Introduction and Overview

This section presents the assessment of the infrastructure, services and facilities at each of the 16 greyhound stadia in Ireland conducted as part of this report. This assessment is informed by a survey of industry participants' own views on the issues facing the tracks they frequent, along with an independent architectural assessment of each of the 16 tracks conducted as part of this review. This section begins with a review of the challenges facing stadia averaged across all tracks, before reporting on a detailed track-by-track analysis.

6.2 Assessment of Infrastructure, Services and Facilities

In this section, the summaries of the assessments of infrastructure, services and facilities conducted by Hamilton Architects on each of the 16 greyhound stadia are presented, as well as the views of breeders, trainers, owners and stadium managers. IGB stadia are presented first, followed by the private stadia. In the case of all stadia, two summary tables are displayed with the first table showing a summary rating of the following aspects of stadium infrastructure, services and facilities, from excellent/best practice to very poor:

- Internal Building Fabric
- External Building Fabric
- Furniture, Fixtures and Equipment
- Building Energy Efficiency
- Ease of Access
- General Ambience
- Toilets
- Overall quality of facilities for spectators
- Overall quality of facilities for race participants
- Standard of services provided at race meets

Indecon notes that the assessment of information was completed by Hamilton Architects in April-July 2019. Since then some investments and other changes have been made by individual stadia. The findings therefore represent an assessment at a point in time.

IGB Stadia

Cork

The facilities in Cork are rated as mostly 'Good'. However, building energy efficiency and ease of access were judged as poor, as per the following table.

Table 6.1: Ranking of Infrastructure, Services and Facilities (Cork)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric		Good			
External Building Fabric			Fair		
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency				Poor	
Ease of Access				Poor	
General Ambience		Good			
Toilets			Fair		
Overall quality of facilities for spectators		Good			
Overall quality of facilities for race participants		Good			
Standard of services provided at race meets			Fair		

Source: Hamilton Architects

A summary assessment of the standard of infrastructure, services and facilities at Cork suggest that reflecting the age of the stadia there are some areas which would merit capital investment. See Table 6.2.

Table 6.2: Summary Assessment of Standard of Infrastructure, Services and Facilities (Cork)

Issue	Commentary
Capacity	Total – 1340 persons, between the ground and first floor as per the public dance licence issued by Cork County Fire Service.
Fire Safety	There are regular inspections from the Cork County Fire Service - no issues to report.
Ease of Access	Accessible access from the reserved spaces should be reviewed with a clear route provided with the correct dropped kerbs and textured surfaces to provide better access. Within the stadium the restaurant access should be reviewed so that public needing to use the lift to access the restaurant don't have to travel through the back of house areas.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E[35] & HVAC[36]	Internal building fabric is generally in good condition. The external terrace which is closed due to H&S issues should be considered being reviewed and the issues resolved to allow this to be utilised. The FF&E is functional and in good condition but if the stadium was being considered for complete refurbishment these could be reviewed to provide a more modern appearance. The HVAC should be reviewed to resolve the issues of the chiller not working and the systems not being run from the BMS.

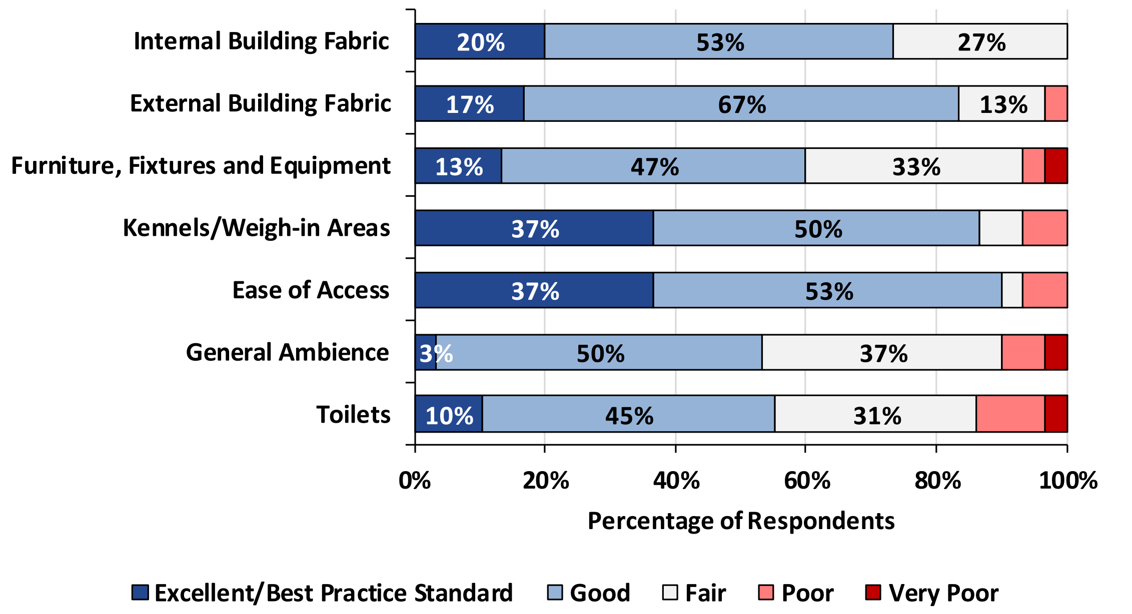
Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

[35] Furniture, Fixtures and Equipment

[36] Heating, ventilation, and air conditioning

Breeders, trainers and dog owners had views in line with the architects' assessment, indicating they deemed services and facilities to be of a good or excellent standard. See Figure 6.1.

Figure 6.1: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Cork Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Galway

The Galway racetrack is rated as good/fair on most aspects, though its energy rating was judged to be poor.

Table 6.3: Ranking of Infrastructure, Services and Facilities (Galway)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric			Fair		
External Building Fabric			Fair		
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency				Poor	
Ease of Access		Good			
General Ambience			Fair		
Toilets			Fair		
Overall quality of facilities for spectators			Fair		
Overall quality of facilities for race participants		Good			
Standard of services provided at race meets		Good			

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The review of the stadium revealed that general finishes could benefit from investment. The following table outlines that the toilet provision for example could be replaced to provide a more modern appearance.

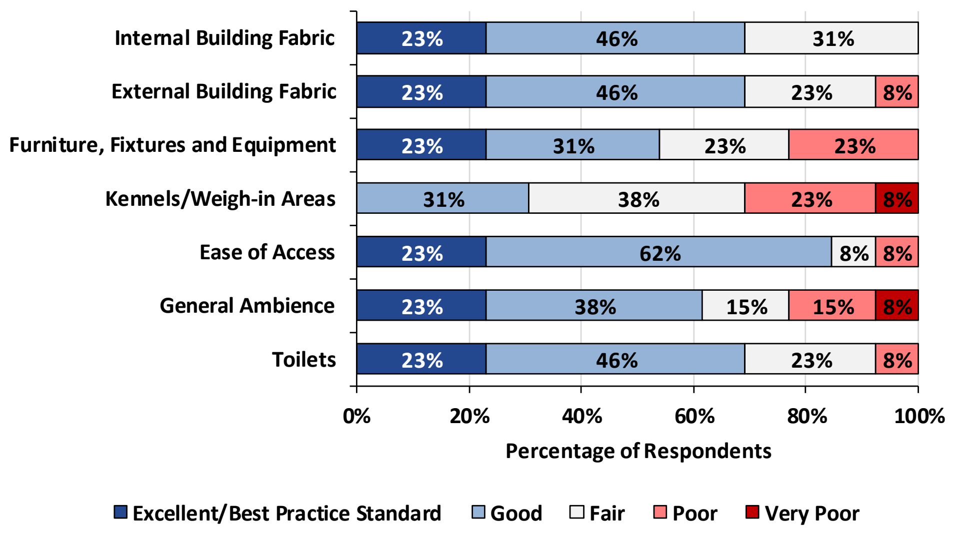
Table 6.4: Summary Assessment of Standard of Infrastructure, Services and Facilities (Galway)

Issue	Commentary
Capacity	Total – 974 persons, between the ground and first floor including staff members as per the fire safety certificate.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.
Ease of Access	Access is good to the building and within the building with all areas being accessible.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is generally in good condition. The FF&E is functional and in good condition but if the stadium was being considered for complete refurbishment these could be reviewed to provide a more modern appearance. The HVAC should be reviewed to resolve the issues of the heating not working correctly and the systems not being run from the BMS.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The following figure shows that the overall views of breeders, owners and trainers indicate that the that track is 'good', though respondents were negative on some of the facilities for race participants, in particular kennels and weigh-in areas.

Figure 6.2: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Galway Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Limerick

Limerick stadium, opened in 2010, was rated as 'good' across all aspects with the exception of the toilets, which were rated as fair by the architects. See Table 6.5.

Table 6.5: Ranking of Infrastructure, Services and Facilities (Limerick)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric		Good			
External Building Fabric		Good			
Furniture, Fixtures and Equipment		Good			
Building Energy Efficiency		Good			
Ease of Access		Good			
General Ambience		Good			
Toilets			Fair		
Overall quality of facilities for spectators		Good			
Overall quality of facilities for race participants		Good			
Standard of services provided at race meets		Good			

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The following table shows that the review highlighted some general finishes such as carpets which could be replaced, as well as the finishes on the toilets which could be replaced to provide a more modern appearance.

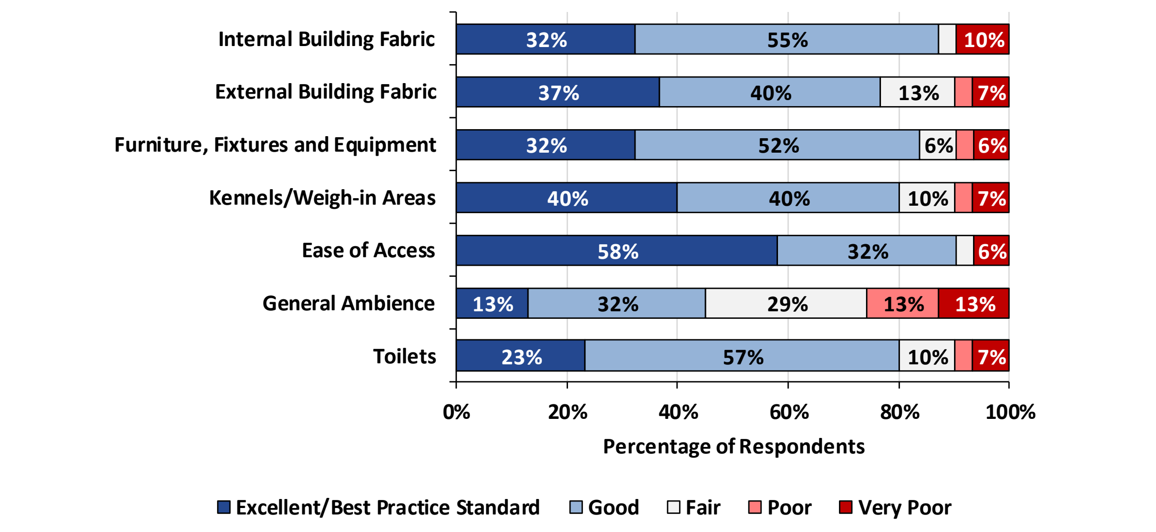
Table 6.6: Summary Assessment of Standard of Infrastructure, Services and Facilities (Limerick)

Issue	Commentary
Capacity	Total – 2012 persons, between the ground and first floor as per the public dance licence issued by Limerick County Fire Service.
Fire Safety	There are regular inspections from the Limerick County Fire Service and there are no issues to report.
Ease of Access	Access is good to the building and within the building with all areas being accessible.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets should be considered being replaced to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is generally in good condition with no issues reported.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

Industry participants were very positive on the Limerick facilities, both for race participants and attendees. However, the majority of respondents indicated that the general ambience was either fair, poor or very poor. See Figure 6.3.

Figure 6.3: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Limerick Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Mullingar

Mullingar is a relatively small stadium, holding 255 persons between the two floors. The stadium is in good condition, as per the architect's views contained in the following table.

Table 6.7: Ranking of Infrastructure, Services and Facilities (Mullingar)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric		Good			
External Building Fabric		Good			
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency			Fair		
Ease of Access		Good			
General Ambience			Fair		
Toilets				Poor	
Overall quality of facilities for spectators		Good			
Overall quality of facilities for race participants		Good			
Standard of services provided at race meets		Good			

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects noted that there are areas which could be updated to provide a more modern appearance and a better ambience, such as the carpets, suspended ceilings and toilet provision.

Table 6.8: Summary Assessment of Standard of Infrastructure, Services and Facilities (Mullingar)

Issue	Commentary
Capacity	Total – 255 persons, between the ground and first floor including staff members as per the fire safety certificate.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.[1]
Ease of Access	Access is good to the building and within the building with all areas being accessible.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is generally in good condition. The FF&E is functional and in good condition but if the stadium was being considered for complete refurbishment these could be reviewed to provide a more modern appearance.

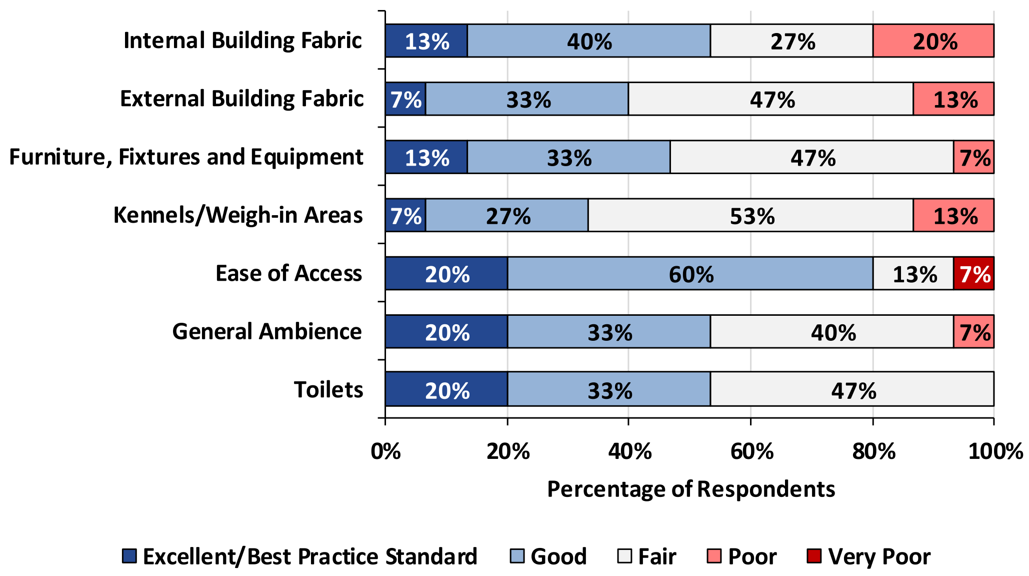
Source: Hamilton Architects

*[1]**One the issue of fire safety, Indecon has been informed that capacity in the upper has been restricted due to inadequate fire escape but that planning permission was obtained in 2019 for new access.***

Note: This was the position at the time of the inspection and may have changed subsequently.

Industry participants mostly viewed the facilities in Mullingar as good to fair. This is consistent with the architects' assessment.

Figure 6.4: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Mullingar Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Newbridge

The facilities at Newbridge have a capacity of 630 persons, and is judged to be mostly in fair condition, with ease of access and external building fabric noted as good as per the following table.

Table 6.9: Ranking of Infrastructure, Services and Facilities (Newbridge)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric			Fair		
External Building Fabric		Good			
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency			Fair		
Ease of Access		Good			
General Ambience			Fair		
Toilets				Poor	
Overall quality of facilities for spectators			Fair		
Overall quality of facilities for race participants			Fair		
Standard of services provided at race meets			Fair		

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects noted that at the time of their visit there was a need to remove the cold room from the first-floor stair lobby and also to ensure a clear route is provided from the reserved spaced. However, we have been informed by IGB that the cold room has been removed from the 1st floor stair lobby. Areas such as the toilets could always be improved to provide a more modern appearance, with provision of female facilities on the ground floor suggested.

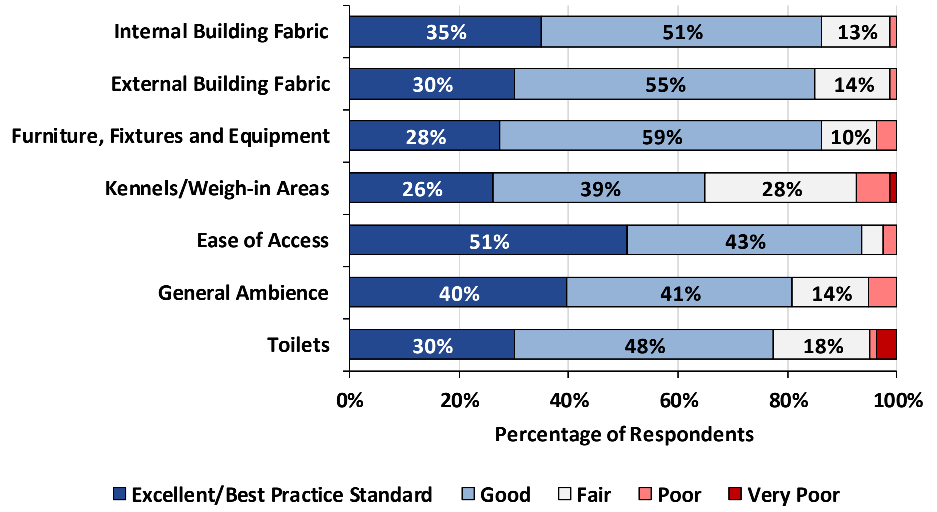
Table 6.10: Summary Assessment of Standard of Infrastructure, Services and Facilities (Newbridge)

Issue	Commentary
Capacity	Total – 630 persons, between the ground and first floor as per the public dance licence issued by Kildare County Fire Service.
Fire Safety	There are regular inspections from the Kildare County Fire Service and only issue to be resolved is the removal of the cold room from the first-floor stair lobby. [1]
Ease of Access	Accessible access from the reserved spaces should be reviewed with a clear route provided. Access within the building is good with all areas being accessible.
Commercial Capacity	All facilities are well catered for within the stadium and there is good flexibility with the external building with standalone facilities also being available if required.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision could be reviewed to provide female facilities on the ground floor, and the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is generally in good condition. The FF&E is functional and in good condition but if the stadium was being considered for complete refurbishment these could be reviewed to provide a more modern appearance.

Source: Hamilton Architects
[1]As noted above, Indecon has been informed by IGB that this has since been removed.
Note: This was the position at the time of the inspection and may have changed subsequently.

Industry participants generally rated Newbridge as good to excellent, which was more positive than the architects were in their assessment. Respondents were less positive about the kennels and weigh-in areas, a trend that is seen in responses for other stadia too.

Figure 6.5: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Newbridge Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Shelbourne Park

Shelbourne Park acts as the national stadium for greyhound racing, and hosts the most important races in the sports calendar, including for example the Irish Greyhound Derby. The stadium is judged to be in 'fair' condition mostly, with a rating of poor indicated for building energy efficiency and toilets.

Table 6.11: Ranking of Infrastructure, Services and Facilities (Shelbourne Park)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric			Fair		
External Building Fabric			Fair		
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency				Poor	
Ease of Access			Fair		
General Ambience			Fair		
Toilets				Poor	
Overall quality of facilities for spectators			Fair		
Overall quality of facilities for race participants			Fair		
Standard of services provided at race meets		Good			

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects recommend improvements in the general finishes, toilets and the HVAC to improve the appearance and also to make the stadium more energy efficient.

Table 6.12: Summary Assessment of Standard of Infrastructure, Services and Facilities (Shelbourne Park)

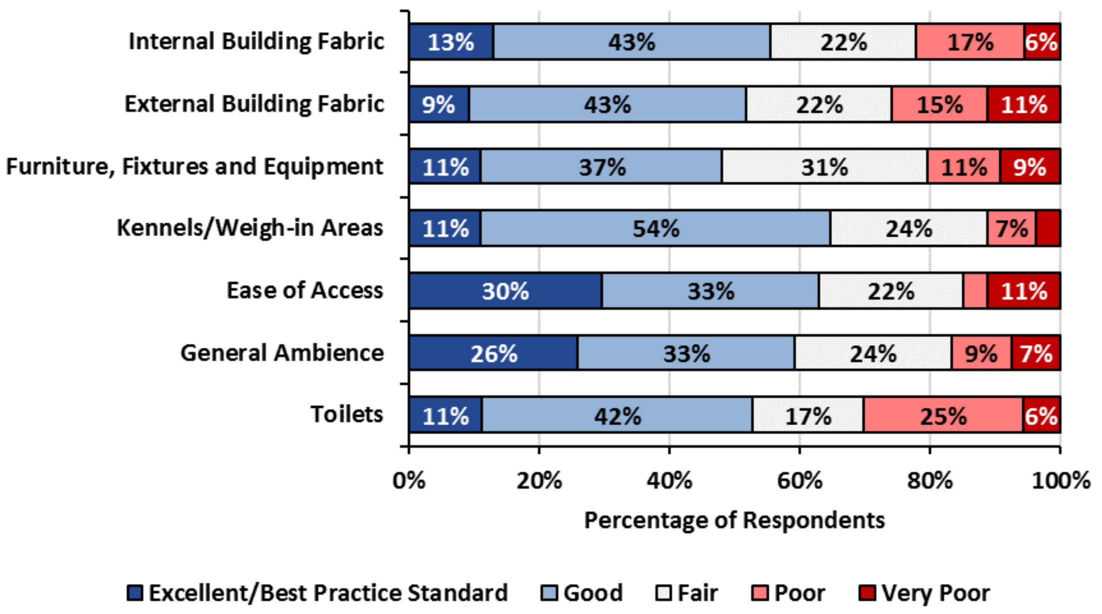
Issue	Commentary
Capacity	Total – 4200 persons, between the ground, intermediate, first and second floor as per the fire safety certificate.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.
Ease of Access	Accessible access from the reserved spaces should be reviewed with a clear route provided with the correct dropped kerbs and textured surfaces to provide better access.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces. If the issues with the external open terrace were resolved this space has the potential to be utilised better.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced on the ground and first floor to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal building fabric is generally in good condition. External building fabric is generally in good condition with the only issues being reported on the outside open terrace pavilion which should be resolved to utilise this space better. The HVAC should be reviewed to resolve the issues of the heating within the second floor to see if this could be more energy efficient.

Source: Hamilton Architects

Note: This was the position at the time of the inspection and may have changed subsequently.

The general ambience of Shelbourne Park was rated as excellent/good/fair by most industry participants.

Figure 6.6: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Shelbbourne Park Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Tralee

The Kingdom Greyhound Stadium, based in Tralee, holds 1310 persons, and is judged to be in good condition generally. The architects noted that there was room for improvement in certain areas such as the building's energy efficiency which was rated as poor.

Table 6.13: Ranking of Infrastructure, Services and Facilities (Tralee)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric		Good			
External Building Fabric		Good			
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency				Poor	
Ease of Access		Good			
General Ambience		Good			
Toilets			Fair		
Overall quality of facilities for spectators		Good			
Overall quality of facilities for race participants		Good			
Standard of services provided at race meets		Good			

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The following table notes that as with many of the other stadia, general wear and tear because of age is evident. The architects recommend replacing the general finishes to provide a more modern appearance.

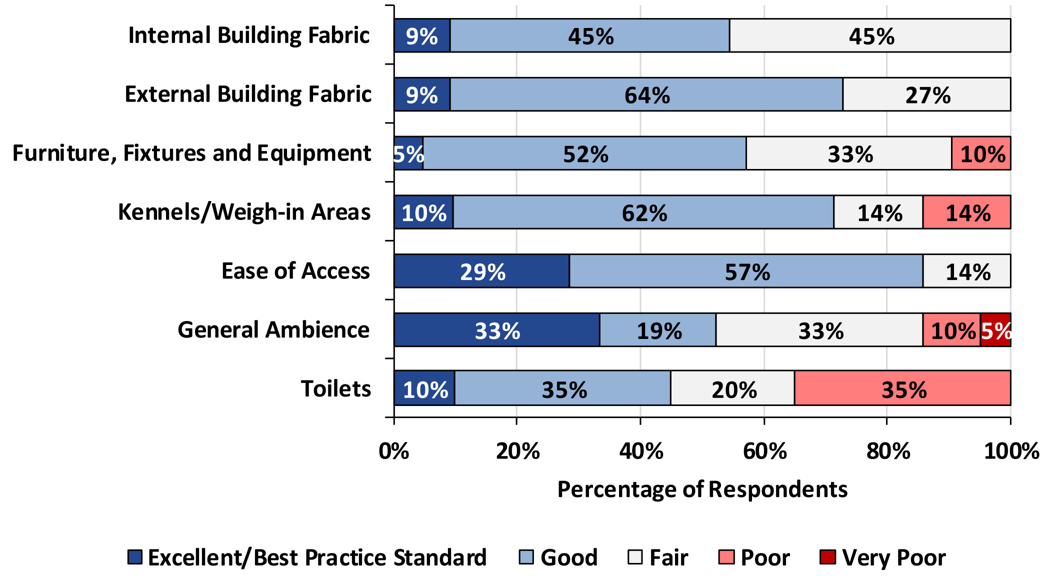
Table 6.14: Summary Assessment of Standard of Infrastructure, Services and Facilities (Tralee)

Issue	Commentary
Capacity	Total – 1310 persons, based on the capacities calculated within our assessment of fire safety.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.
Ease of Access	Accessible access from the reserved spaces into the stadium is good with level access throughout and a lift to the first-floor restaurant and bar. There is no wheelchair access to the corporate suites on the second floor.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is generally in good condition. The FF&E is functional and in good condition but if the stadium was being considered for complete refurbishment these could be reviewed to provide a more modern appearance. The stadium would benefit from the heating system being reviewing to provide a more efficient system on the second floor.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The facilities in Tralee are good for both race participants and attendees, according to both the survey of breeders, owners and trainers, with only the toilets having less than half of respondents indicated excellent or good for that service/facility.

Figure 6.7: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Tralee Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Waterford

Waterford stadium has a capacity of 450, and is judged to be in fair condition. Whilst some items such as fire safety were ranked as good, some were ranked as poor, including building energy efficiency and the toilets.

Table 6.15: Ranking of Infrastructure, Services and Facilities (Waterford)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric			Fair		
External Building Fabric			Fair		
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency				Poor	
Ease of Access			Fair		
General Ambience			Fair		
Toilets				Poor	
Overall quality of facilities for spectators			Fair		
Overall quality of facilities for race participants		Good			
Standard of services provided at race meets			Fair		

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects highlighted issues in relation to access, both in terms of the stadium itself but also in terms of internal toilets, as per the following table.

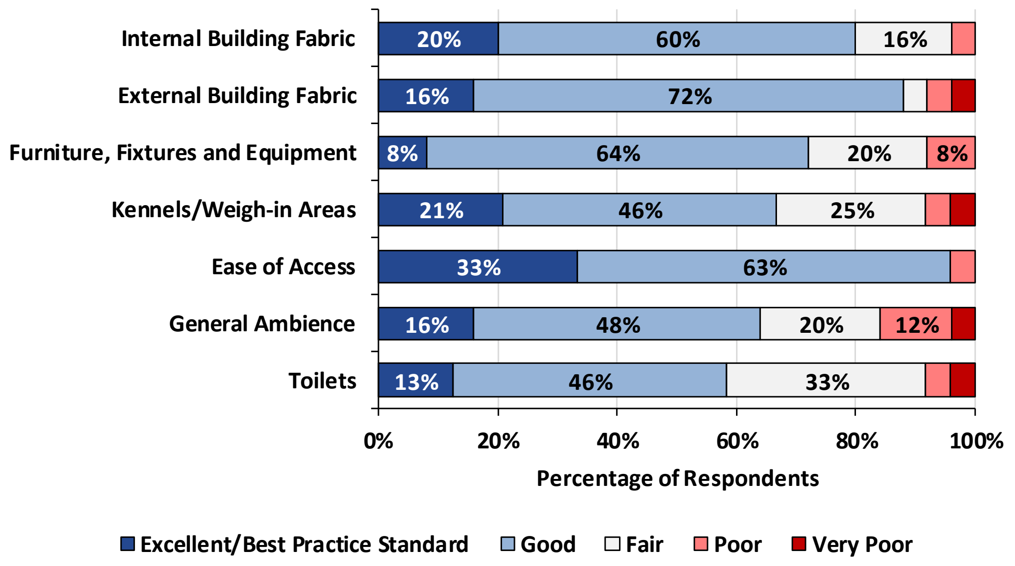
Table 6.16: Summary Assessment of Standard of Infrastructure, Services and Facilities (Waterford)

Issue	Commentary
Capacity	Total – 450 persons, between the ground and first floor as per the public dance licence issued by Waterford County Fire Service.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.
Ease of Access	Accessible access from the reserved spaces should be reviewed with a clear route provided with the correct dropped kerbs and textured surfaces to provide better access. Accessible toilet provision on the first flor should be reviewed to limit people with disabilities having to travel to the ground floor to use the toilet.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is generally in good condition. The FF&E is functional and in good condition but if the stadium was being considered for complete refurbishment these could be reviewed to provide a more modern appearance. The HVAC should be reviewed to resolve the issues of the heating.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

Waterford stadium's facilities are generally viewed as being good, by breeders, trainers and dog owners as shown in the following figure.

Figure 6.8: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Waterford Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Youghal

Youghal judged to be in poor condition and merited a rating of 'very poor' on fire safety, building energy efficiency and ease of access. The general visitor experience is also judged to be poor.

Table 6.17: Ranking of Infrastructure, Services and Facilities (Youghal)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric				Poor	
External Building Fabric				Poor	
Furniture, Fixtures and Equipment				Poor	
Building Energy Efficiency					V. Poor
Ease of Access					V. Poor
General Ambience				Poor	
Toilets				Poor	
Overall quality of facilities for spectators				Poor	
Overall quality of facilities for race participants			Fair		
Standard of services provided at race meets				Poor	

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects recommend an assessment of fire safety and accessibility standards, and also a complete refurbishment of the facilities and reviewing issues with the roof and steel structure. The stadium also has limited capacity to take advantage of commercial opportunities.

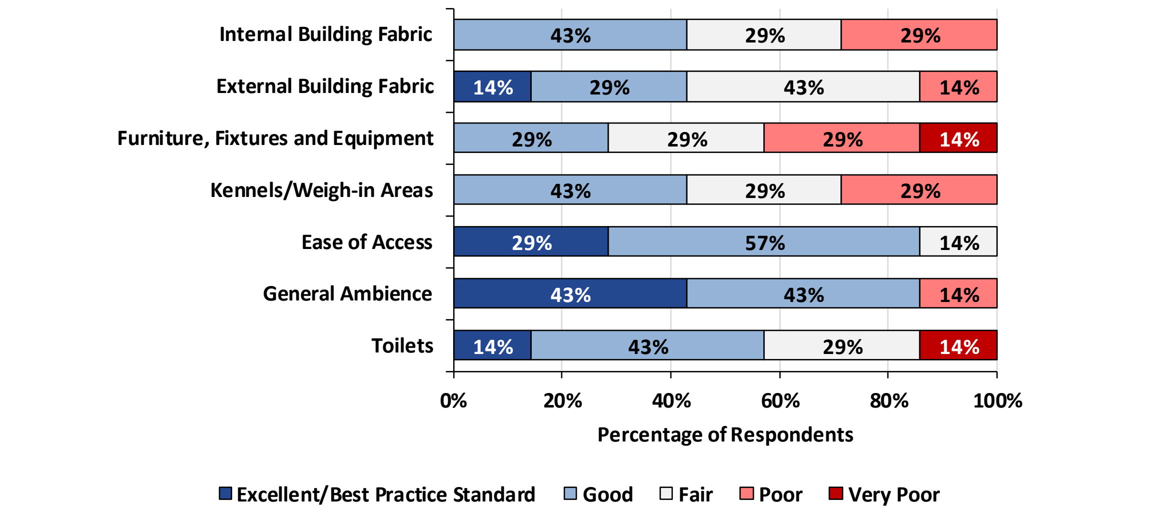
Table 6.18: Summary Assessment of Standard of Infrastructure, Services and Facilities (Youghal)

Issue	Commentary
Capacity	The permitted occupancy of the upstairs bar / seating area is 268 persons.
Fire Safety	This would need to be reviewed as a matter of priority and a fire risk assessment carried out.
Ease of Access	Access would need to be reviewed as the stadium does not fully facilitate use by anyone with a disability as it is now.
Commercial Capacity	There is limited catering available and limits the use of the stadium for large parties.
General Ambience	Due to the age of the stadium the general finishes are very poor, and a complete refurbishment of the facilities should be considered to create a better ambience.
Toilet Provision	Due to the age of the stadium the toilet facilities are very poor, and a complete refurbishment of these facilities should be considered.
Condition of building fabric, external areas, FF&E and HVAC	Due to the age of the stadium there are several issues that should be reviewed such as the issues with the roof and as a matter of priority the deterioration of the steel structure.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The stadium in Youghal received a more positive rating locally than from the architectural assessment conducted as part of this study.

Figure 6.9: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Youghal Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Private Stadia

Indecon will now examine the view of the architects, breeders, trainers, owners and stadium managers on the private stadia that host greyhound events.

Clonmel

Clonmel track has capacity for over 500 attendees and is judged by the architects to be in an excellent or good condition, as shown in the following table.

Table 6.19: Ranking of Infrastructure, Services and Facilities (Clonmel)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric		Good			
External Building Fabric		Good			
Furniture, Fixtures and Equipment		Good			
Building Energy Efficiency		Good			
Ease of Access	Excellent				
General Ambience		Good			
Toilets	Excellent				
Overall quality of facilities for spectators		Good			
Overall quality of facilities for race participants	Excellent				
Standard of services provided at race meets		Good			

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects also indicated that the stadium and its finishes are modern looking, as well as being in good condition.

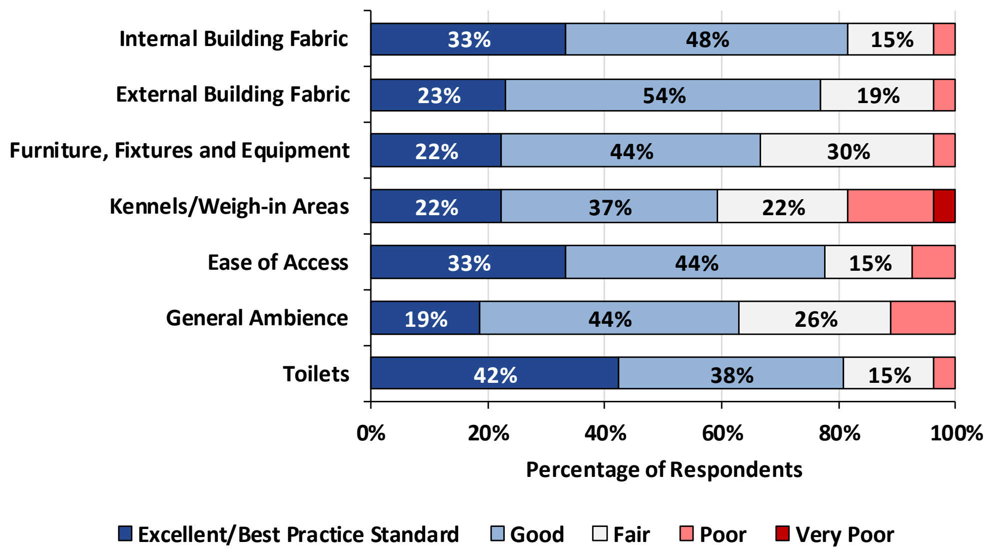
Table 6.20: Summary Assessment of Standard of Infrastructure, Services and Facilities (Clonmel)

Issue	Commentary
Capacity	Total – 541 persons, between the ground, first and lower ground floor as per the fire safety certificate.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.
Ease of Access	Access is good to the building and within the building with all areas being accessible.
Commercial Capacity	All facilities are well catered for within the stadium, and there is good flexibility with the external bar also being able to be used if required.
General Ambience	The stadium is modern looking and in good condition.
Toilet Provision	Toilet provision is good, and the finishes are modern looking and in good condition.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is in good condition and there are no issues with the HVAC.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

Clonmel stadium is generally rated as good by breeders, trainers and dog owners, with the majority of respondents indicating the stadium is good or excellent in each area contained in the following figure.

Figure 6.10: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Clonmel Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Dundalk

Dundalk has one of the highest capacities for attendance, with 3,390 able to be accommodated. Generally, the stadium it is rated as being excellent or good, though it was ranked by the architects as fair in terms of building energy efficiency.

Table 6.21: Ranking of Infrastructure, Services and Facilities (Dundalk)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric		Good			
External Building Fabric		Good			
Furniture, Fixtures and Equipment		Good			
Building Energy Efficiency			Fair		
Ease of Access		Good			
General Ambience		Good			
Toilets		Good			
Overall quality of facilities for spectators		Good			
Overall quality of facilities for race participants	Excellent				
Standard of services provided at race meets	Excellent				

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects noted that general finishes could be replaced to give the stadium a more modern appearance and a better ambience. They also indicated that access routes should be reviewed to ensure clear routes are provided from the reserved spaces.

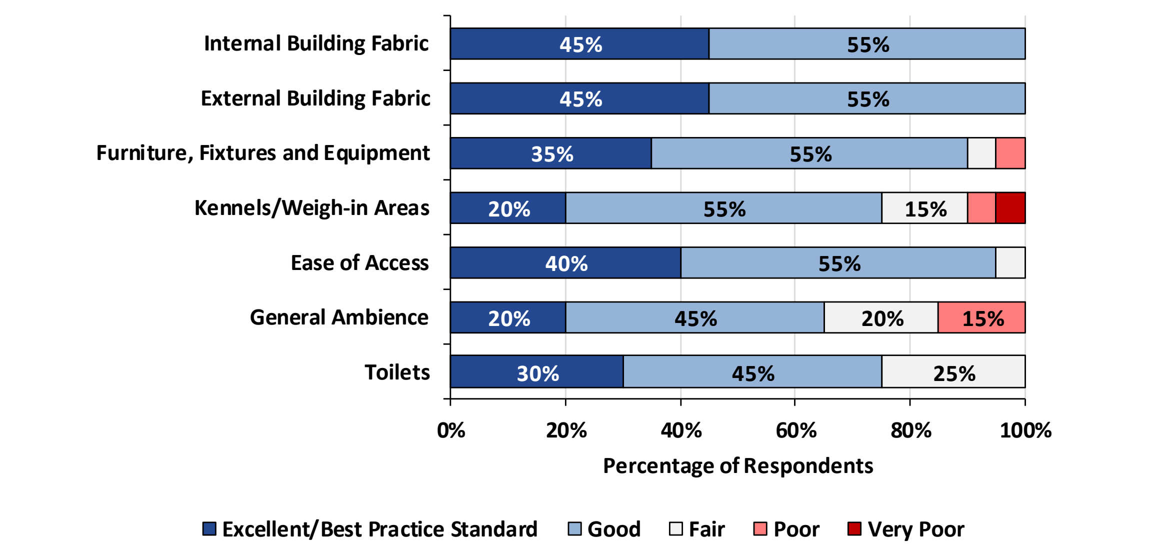
Table 6.22: Summary Assessment of Standard of Infrastructure, Services and Facilities (Dundalk)

Issue	Commentary
Capacity	Total – 3390 persons, between the ground, intermediate and first floor as per the fire safety certificate.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.
Ease of Access	Accessible access from the reserved spaces should be reviewed with a clear route provided with the correct dropped kerbs and textured surfaces to provide better access.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and suspended ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal building fabric is generally in good condition. External building fabric is generally in good condition with a few minor issues reported.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The facilities at Dundalk are rated as being good or excellent across all aspects by a majority of industry participants, as shown in the following figures.

Figure 6.11: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Dundlalk Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Enniscorthy

The track in Enniscorthy holds a maximum of 264 people, and was generally rated as being poor or very poor.

Table 6.23: Ranking of Infrastructure, Services and Facilities (Enniscorthy)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric				Poor	
External Building Fabric				Poor	
Furniture, Fixtures and Equipment				Poor	
Building Energy Efficiency					V. Poor
Ease of Access					V. Poor
General Ambience				Poor	
Toilets					V. Poor
Overall quality of facilities for spectators				Poor	
Overall quality of facilities for race participants			Fair		
Standard of services provided at race meets				Poor	

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

A complete refurbishment of the toilet facilities is recommended by the architects, as well as a refurbishment of the general facilities. They also note issues with fire safety, accessibility and structural issues with the stadium.

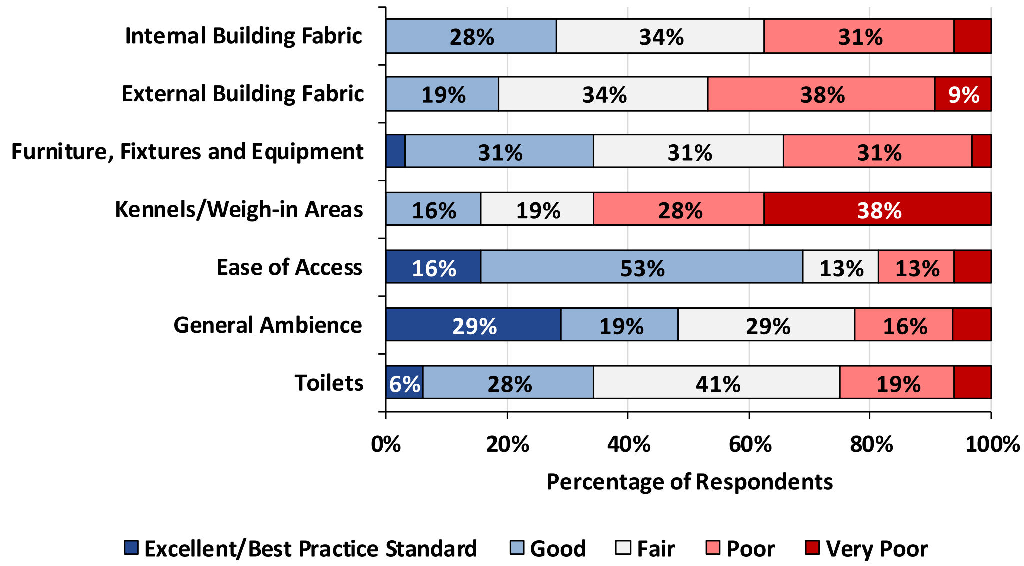
Table 6.24: Summary Assessment of Standard of Infrastructure, Services and Facilities (Enniscorthy)

Issue	Commentary
Capacity	The permitted occupancy of the upstairs bar / seating area is 264 persons.
Fire Safety	This would need to be reviewed as a matter of priority and a fire risk assessment carried out. The external fire escape needs urgently reviewed due to it being unsafe to use in an emergency.
Ease of Access	Access would need to be reviewed as the stadium does not facilitate use by anyone with a disability as it is now.
Commercial Capacity	There is limited catering available and limits the use of the stadium for large parties.
General Ambience	Due to the age of the stadium the general finishes are very poor, and a complete refurbishment of the facilities should be considered to create a better ambience.
Toilet Provision	Due to the age of the stadium the toilet facilities are very poor, and a complete refurbishment of these facilities should be considered, along with providing an accessible W.C.
Condition of building fabric, external areas, FF&E and HVAC	Due to the age of the stadium there are several issues that should be reviewed such as the issues with concrete terracing and the deterioration of the steel structure.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The views of industry participants on Enniscorthy highlighted that kennels/weigh-in areas were poor or very poor.

Figure 6.12: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Enniscorthy Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Kilkenny

Kilkenny stadium holds up to 170 people in the two sections, though because of its age is rated as being poor or very poor across all dimensions.

Table 6.25: Ranking of Infrastructure, Services and Facilities (Kilkenny)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric				Poor	
External Building Fabric				Poor	
Furniture, Fixtures and Equipment					V. Poor
Building Energy Efficiency					V. Poor
Ease of Access					V. Poor
General Ambience				Poor	
Toilets					V. Poor
Overall quality of facilities for spectators				Poor	
Overall quality of facilities for race participants				Poor	
Standard of services provided at race meets				Poor	

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The following table shows that the architects deem that the stadium currently does not facilitate use by anybody with a disability. They also note the need for a review of fire safety, as well as a complete refurbishment of the finishes, and a review of the structure of the building.

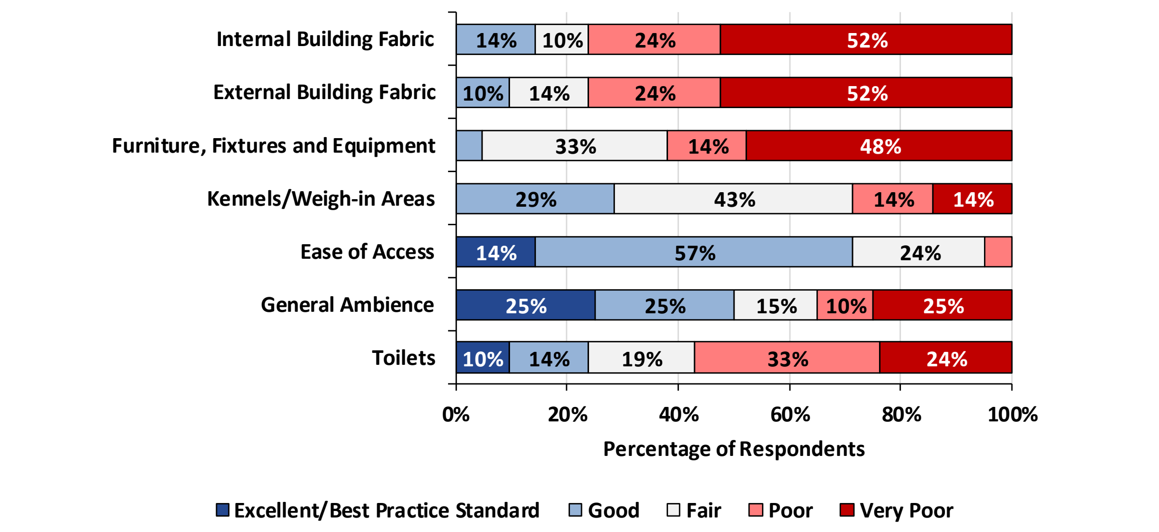
Table 6.26: Summary Assessment of Standard of Infrastructure, Services and Facilities (Kilkenny)

Issue	Commentary
Capacity	The permitted occupancy of the upstairs bar/seating area is 110 persons and the café/seating area is 60 persons.
Fire Safety	This would need to be reviewed as a matter of priority and a fire risk assessment carried out. The fire signage, emergency lighting and fire detection and alarm system would need to be reviewed and brought up to current standards.
Ease of Access	Access would need to be reviewed as the stadium does not fully facilitate use by anyone with a disability as it is now.
Commercial Capacity	There is limited catering available and limits the use of the stadium for large parties.
General Ambience	Due to the age of the stadium the general finishes are very poor, and a complete refurbishment of the facilities should be considered to create a better ambience.
Toilet Provision	Due to the age of the stadium, the toilet facilities are very poor and a complete refurbishment of these facilities should be considered.
Condition of building fabric, external areas, FF&E and HVAC	Due to the age of the stadium there are several issues that should be reviewed such as the roof, cracks within the wall and the floor in the café.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The facilities at Kilkenny are rated very negatively by industry participants, particularly with respect to the building due to its age. The following figure shows that at least half of the respondents deem the general ambience and ease of access to be good or excellent.

Figure 6.13: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Kilkenny Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Lifford

Lifford is a large stadium which caters for up to 1,289 attendees. The main grandstand was opened in 2003 following a €12m investment. Facilities were generally judged as good or fair, as per the following table.

Table 6.27: Ranking of Infrastructure, Services and Facilities (Lifford)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric			Fair		
External Building Fabric			Fair		
Furniture, Fixtures and Equipment			Fair		
Building Energy Efficiency				Poor	
Ease of Access		Good			
General Ambience			Fair		
Toilets			Fair		
Overall quality of facilities for spectators		Good			
Overall quality of facilities for race participants		Good			
Standard of services provided at race meets		Good			

Source: Hamilton Architects

Note: This was the position at the time of the inspection and may have changed subsequently.

The architects did note some minor issues such as lighting and carpets being mentioned as possible areas of improvement. These general finishes, as well as the toilet provision, could be updated to provide a more modern appearance and a better ambience.

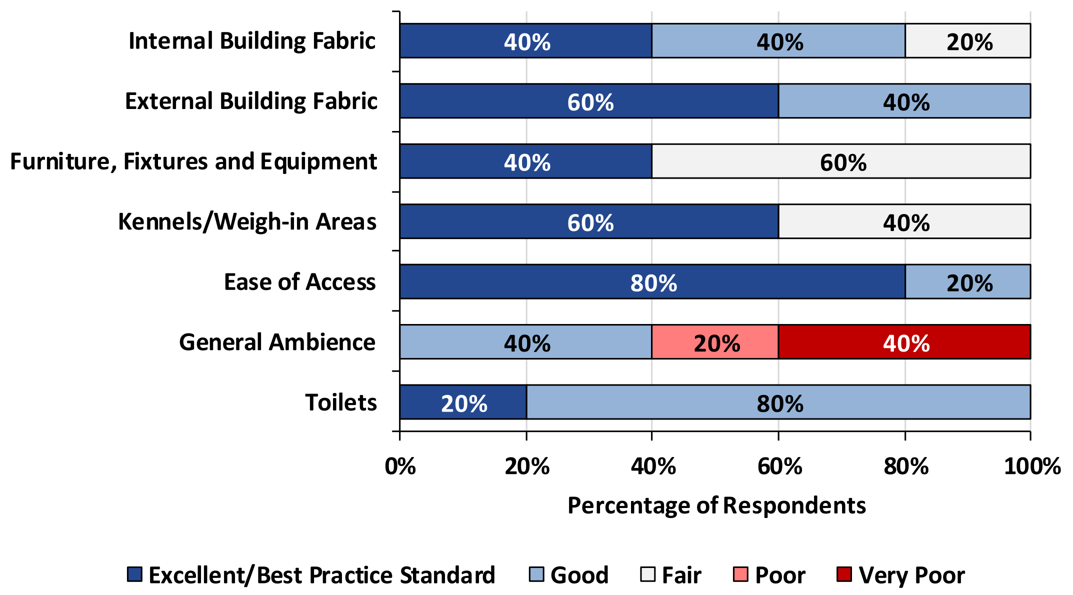
Table 6.28: Summary Assessment of Standard of Infrastructure, Services and Facilities (Lifford)

Issue	Commentary
Capacity	Total – 1289 persons, between the ground, intermediate and first floor as per the fire safety certificate.
Fire Safety	There are regular inspections from the Fire Service and there are no issues to report.
Ease of Access	Access is good to the building and within the building with all areas being accessible.
Commercial Capacity	All facilities are well catered for within the stadium with good flexibility of spaces.
General Ambience	Considering the age of the stadium the general finishes, such as the carpets and suspended are in good condition with a few very minor issues, although replacing the lighting could create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal building fabric is generally in good condition. External building fabric is generally in good condition.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

Industry respondents and rated the facilities at Lifford positively, as per the following figure. The respondents, however, indicate that the general ambience was poor or very poor.

Figure 6.14: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Lifford Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Longford

Longford greyhound track caters for 110 people in the bar/seating area. It is judged as being in a poor or very poor condition, with fire safety and access in particular getting a very poor rating at the time of the architect's review. However, Indecon understands that fire safety works have been undertaken in August 2019.

Table 6.29: Ranking of Infrastructure, Services and Facilities (Longford)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric				Poor	
External Building Fabric				Poor	
Furniture, Fixtures and Equipment				Poor	
Building Energy Efficiency					V. Poor
Ease of Access					V. Poor
General Ambience				Poor	
Toilets					V. Poor
Overall quality of facilities for spectators				Poor	
Overall quality of facilities for race participants			Fair		
Standard of services provided at race meets				Poor	

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects indicated that the stadium does not fully facilitate the use by anyone with a disability as it is now. A complete refurbishment of the general finishes and toilet facilities was also recommended by the architects.

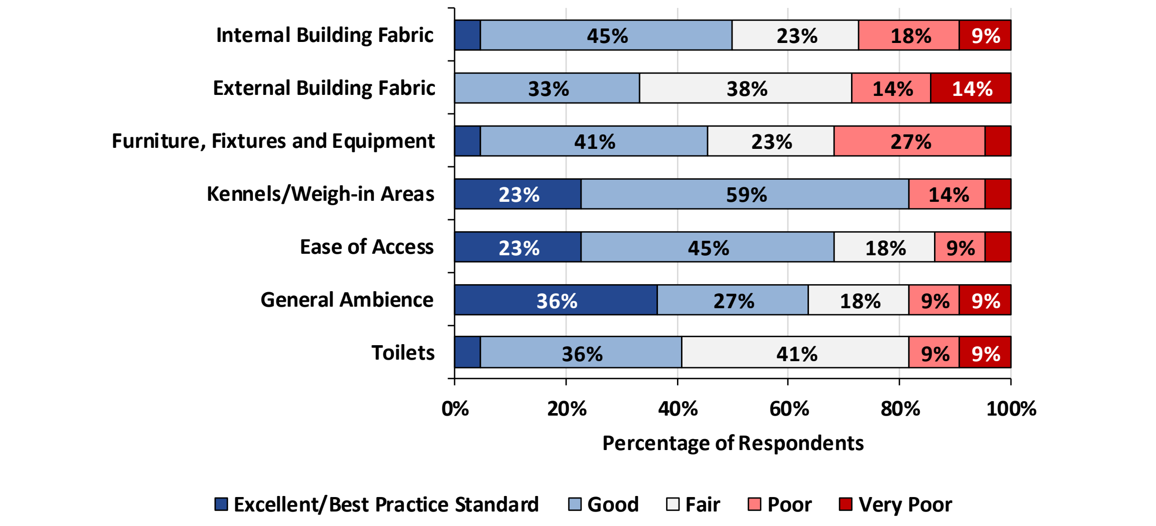
Table 6.30: Summary Assessment of Standard of Infrastructure, Services and Facilities (Longford)

Issue	Commentary
Capacity	The permitted occupancy of the upstairs bar/seating area is 110 persons.
Fire Safety*	This would need to be reviewed as a matter of priority and a fire risk assessment carried out. Emergency lighting and a fire detection and alarm system would need to be installed up to current standards.
Ease of Access	Access would need to be reviewed as the stadium does not fully facilitate use by anyone with a disability as it is now.
Commercial Capacity	There is limited catering available and limits the use of the stadium for large parties.
General Ambience	Due to the age of the stadium the general finishes are poor, and a complete refurbishment of the facilities should be considered to create a better ambience.
Toilet Provision	Due to the age of the stadium the toilet facilities are very poor, and a complete refurbishment of these facilities should be considered.
Condition of building fabric, external areas, FF&E and HVAC	Due to the age of the stadium there are several issues that should be reviewed such as the internal fabric and the heating.

Source: Hamilton Architects
****Indecon notes that since the inspection was undertaken, fire safety works were undertaken in August 2019.***
Note: This was the position at the time of the inspection and may have changed subsequently.

Longford's track is generally deemed as 'good' by industry participants, though the architects' assessment across all aspects is generally rated as 'poor' or 'very poor'.

Figure 6.15: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Longford Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

Thurles

Thurles has a capacity of 440, though because of the age of the stadium access for those with a disability is very limited. Generally, the stadium is classed as 'poor', though it is rated as very poor for ease of access.

Table 6.31: Ranking of Infrastructure, Services and Facilities (Thurles)

	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric			Fair		
External Building Fabric			Fair		
Furniture, Fixtures and Equipment				Poor	
Building Energy Efficiency				Poor	
Ease of Access					V. Poor
General Ambience				Poor	
Toilets				Poor	
Overall quality of facilities for spectators				Poor	
Overall quality of facilities for race participants			Fair		
Standard of services provided at race meets				Poor	

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The architects note, as per the following table, that the stadium does not facilitate anyone with a disability to use the entire stadium, and also that fire safety in the stadium needs to be reviewed, along with some minor refurbishments.

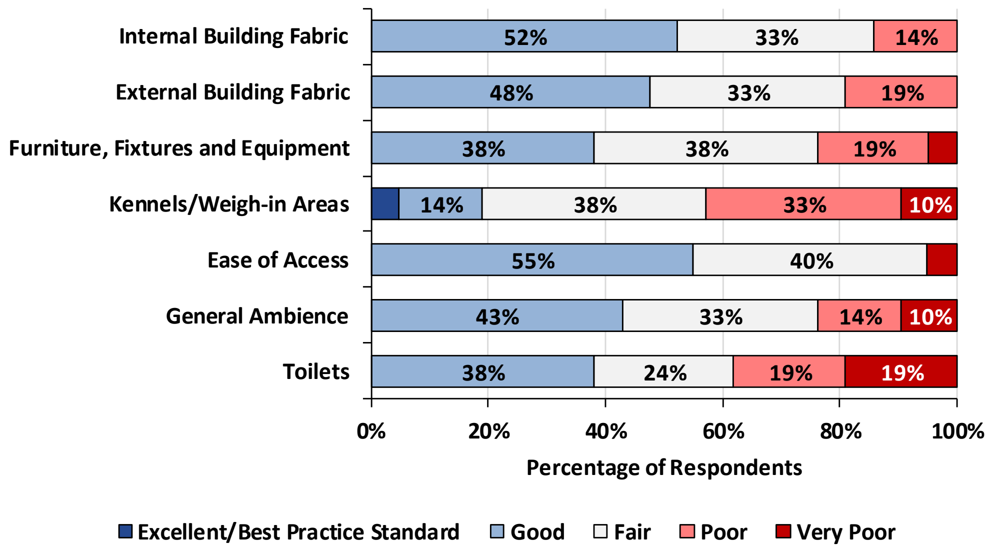
Table 6.32: Summary Assessment of Standard of Infrastructure, Services and Facilities (Thurles)

Issue	Commentary
Capacity	Total – 440 persons, there has been no assessment carried out to confirm total capacity due to the plans and fire safety certificate not being available.
Fire Safety	This would need to be reviewed as a matter of priority and a fire risk assessment carried out.
Ease of Access	Access would need to be reviewed as the stadium does not facilitate anyone with a disability to utilise the entire stadium with no access to the first floor and viewing for wheelchair users only on the external terrace.
Commercial Capacity	There is limited catering available and limits the use of the stadium for large parties.
General Ambience	Due to the age of the stadium the general finishes, such as the carpets and ceilings should be considered being replaced along with the lighting to create a better ambience.
Toilet Provision	Toilet provision is good, although the finishes should be considered being replaced to provide a more modern appearance.
Condition of building fabric, external areas, FF&E and HVAC	Internal and external building fabric is generally in good condition. The FF&E is functional and in good condition but if the stadium was being considered for complete refurbishment these could be reviewed to provide a more modern appearance.

Source: Hamilton Architects
Note: This was the position at the time of the inspection and may have changed subsequently.

The survey of breeders, owners and trainers showed that the quality of Thurles stadium was generally rated as 'fair', but kennels/weigh-in areas obtained a more negative rating.

Figure 6.16: Assessment of Greyhound Breeders, Trainers and Dog Owners on Infrastructure, Services and Facilities at Thurles Greyhound Stadium



Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

6.3 Infrastructure Challenges Facing Stadia

Table 6.33 shows the views of respondents to Indecon's survey of greyhound breeders, trainers and owners concerning the challenges facing the stadium they use most often in terms of the adequacy of racing facilities, and the access to funds for capital investment.

Table 6.33: Challenges Facing Stadia (Unweighted Average Response)

	Very Significant Challenge	Significant Challenge	Minor Challenge	Not a Challenge	Don't Know
Inadequate racing facilities	15%	16%	30%	37%	1%
Insufficient funds to meet required capital investment	30%	33%	23%	11%	4%

Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers
Survey Question: Which do you believe are the greatest challenges facing the racetrack you use most regularly?

Stadium managers and/or IGB provided estimates of capital investment requirements for each of the stadia. The results suggest capital investment of €[redacted]m, which would represent approximately [redacted]% of the IGB's total annual funding from the Horse and Greyhound Fund.

Table 6.34: Stadia Managers/IGB Assessment of Capital Requirements

Cork	€150,000
Galway	€250,000
Limerick	€50,000
Mullingar	€110,000
Newbridge	€70,000
Shelbourne	€3,000,000
Tralee	€100,000
Waterford	€40,000
Youghal	€150,000
IGB Stadia	***€3,920,000***
Clonmel	[redacted]
Dundalk	
Enniscorthy	
Kilkenny	
Lifford	
Thurles	
Private Stadia	
All Stadia	

Source: IGB and Private Track Managers

Racing facilities at most stadia were seen as either a minor challenge or as not being a challenge. Table 6.35 provides the views of respondents to Indecon's survey of greyhound breeders, owners and trainers concerning the challenge that inadequate racing facilities pose to the stadium they attend most regularly. An exception to this was Kilkenny, where 56% of respondents stated that inadequate racing facilities posed a very significant or significant challenge, despite 31% stating that they posed a minor challenge. All but one of the 14 managers that responded to this aspect of Indecon's information request stated that inadequate racing facilities were either not a challenge or only a minor challenge for their stadium. As such, the challenge in terms of the inadequacy of greyhound facilities is concentrated on attendees, not on actual racing facilities for participants.

Table 6.35: Inadequate Racing Facilities – Response by Stadium

		Very Significant Challenge	Significant Challenge	Minor Challenge	Not a Challenge	Don't Know
<-----Stadia ranked highest to lowest----->	Kilkenny	31%	25%	31%	13%	0%
	Newbridge	27%	25%	28%	20%	0%
	Enniscorthy	24%	24%	31%	21%	0%
	Thurles	16%	32%	37%	16%	0%
	Youghal	0%	33%	50%	17%	0%
	Tralee	10%	20%	35%	35%	0%
	Lifford	25%	0%	0%	75%	0%
	Cork	12%	12%	32%	28%	16%
	Dundalk	16%	5%	21%	58%	0%
	Clonmel	13%	6%	38%	44%	0%
	Mullingar	0%	18%	45%	36%	0%
	Longford	12%	6%	35%	47%	0%
	Waterford	6%	12%	29%	53%	0%
	Shelbourne Park	2%	14%	24%	57%	2%
	Limerick	12%	4%	16%	68%	0%
	Galway	10%	0%	60%	30%	0%

Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers
Note: Ranking is based on a combination of the percentage of those indicating very significant and significant challenge

6.4 Summary of Key Findings

This section provided assessments of infrastructure, services and facilities for each of the greyhound stadia in Ireland. The most important of these assessments were the architectural assessments conducted by Hamilton Architects, as outlined in Subsection 6.2. An overview of the infrastructure assessment is provided in Table 6.36, which shows that more than half of the stadia in Ireland are judged to include significant deficiency, and only one stadium in the country was deemed 'good' or 'excellent' across all measures. Our analysis suggests that capital investment in the sector would be required to ensure adequate facilities for spectators are met.

Table 6.36: Summary of Architectural Assessment of Infrastructure, Services and Facilities (Number of Stadia)					
	Excellent	Good	Fair	Poor	Very Poor
Internal Building Fabric	0	6	6	4	0
External Building Fabric	0	6	6	4	0
Furniture, Fixtures and Equipment	0	3	8	4	1
Building Energy Efficiency	0	2	3	7	4
Ease of Access	1	7	2	1	5
General Ambience	0	5	6	5	0
Toilets	1	2	4	6	3
Overall quality of facilities for spectators	0	7	4	5	0
Overall quality of facilities for race participants	2	7	6	1	0
Standard of services provided at race meets	1	8	2	5	0
Source: Hamilton Architects					

7 Financial Sustainability of Each Stadium

7.1 Introduction

The future financial viability of stadia will be influenced by attendance levels which have been showing long-term decline. While future attendance levels are inevitably uncertain, it is critical to consider likely scenarios for future attendance (demand) at greyhound stadia in Ireland. To help inform the scenario, Indecon developed an econometric equation to estimate time trends and build in further detail with additional explanatory variables.

7.2 Demand Forecast Model

The main data utilised for the econometric analysis to determine greyhound racing demand included:

- Year: data are available from 2015 to 2019. The variable year is used in the econometric model in order to determine the time trend in terms of greyhound raining attendances.
- IGB Prize Money: funding to support prize money is provided by the IGB to all stadia.
- Number of Race Meetings: this variable provides the number of race meetings at each stadium.
- Entry Fees: this variable provides the contribution that entry fees make to each greyhound stadium.

The model starts with an econometric equation to estimate simple time trends and then builds in further detail with additional explanatory variables. A basic model of growth in a variable can be written as:

$$Y_{it} = Ae^{\beta t}e$$

Where Y_{it} is demand, attendance at each park, indexed by i, and for each year, indexed by t. By taking the natural logs of both sides, we can write:

$$lnY_{it} = \alpha + \beta t + \varepsilon$$

Beta, β, is an estimate of the annual growth rate; $\ln\varepsilon = e$, and $\ln A = \alpha$. The regression results from the simple regression in Table 7.1 and Figure 7.1 show a downward trend, but the coefficient estimates are not statistically significant. We therefore repeat the regression controlling for the panel structure of the data, the results of which are displayed in Table 7.2 and Table 7.3.

The new random effects model shows the panel effects are significant, and the overall trend estimate is now significant. However, the overall magnitude of the trend is nearly the same, having gone from 9.2% per annum to 9.4% per annum.

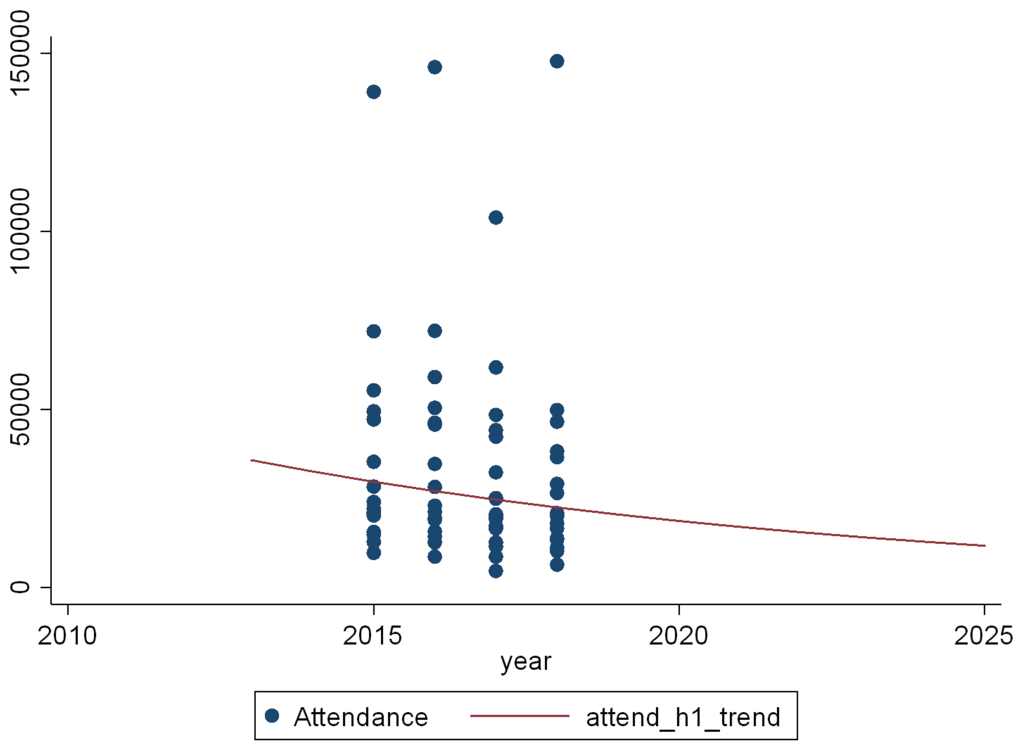
Graphical analysis of this with visual inspection of this regression versus the data is shown in Table 7.1 and Figure 7.1, respectively. Harold's Cross is included in the data as it only closed in 2017.

Table 7.1: Attendance vs Time Simple Regression and Forecast

Variable	Coefficients	Standard Errors
Year	-0.09	0.08
Constant	197.05	160.46
Dependent Variable: Attendance (Natural Logarithm)		
R-Squared: 0.0204		
Number of Observations: 67		
Source: Indecon analysis of IGB Data ****** p<0.01, ** p<0.05, * p<0.1***		

A presentation of the trend in attending levels can be seen in Figure 7.1.

Figure 7.1: Attendance vs Time Simple Regression and Forecast



Source: Indecon

The regression results from the simple regression show a downward trend but the coefficient estimates are not statistically significant. We therefore repeat the regression controlling for the panel structure of the data, the results of which are displayed in the next table. The panel effects are significant, and the overall trend estimate is now significant. However, the overall magnitude of the trend is nearly the same, having gone from 9.2% per annum to 9.4% per annum.

Table 7.2: Attendance vs Time Random Effects Regression		
Variable	**Coefficients**	**Standard Errors**
Year	- 0.094***	0.032
Constant	200.078***	64.910
Dependent Variable: Attendance (Natural Logarithm)		
R-Squared: 0.0204 (within = 0.1470; between = 0.0003)		
Number of Observations: 67		
Source: Indecon analysis of IGB Data ****** p<0.01, ** p<0.05, * p<0.1***		

Table 7.3 shows the results from a random effects regression model where the dependent variable is attendances (in logarithmic form) and the explanatory variables are the prize money contribution from the IGB, the number of race meetings, the entry fees (all logarithmic form) and years (the time trend). All coefficients except that on the number of race meetings were highly significant ($p<0.01$).

As the variables are in natural logs, coefficients can be interpreted as elasticities, where a 1% change in the explanatory variable would predict a β% change in the dependent variable, attendance. The other variables are all positive indicating that a positive impact on attendance is expected. All of the coefficient estimates are statistically significant. So, for example, the average annual growth rate is -9.6% per annum, but a 10% change (increase or decrease) in prize money would predict a 3.4% change (increase or decrease) in attendance. In our modelling we use a 9% decline as long-term trend in Scenario 3 but we note that even greater declines are possible.

Table 7.3: Extended Random Effects Model		
Variable	**Coefficients**	**Standard Errors**
Year	- 0.096***	0.030
IGB Prize Money (Logged)	0.343**	0.155
No. of Race Meetings (Logged)	0.315*	0.182
Entry Fees (Logged)	0.194***	0.044
Constant	196.959***	59.047
Dependent Variable: Attendance (Natural Logarithm)		
R-Squared: 0.716 (within = 0.925; between = 0.673)		
Number of Observations: 67		
Number of Groups/Stadia: 17		
Source: Indecon analysis of IGB Data ****** p<0.01, ** p<0.05, * p<0.1***		

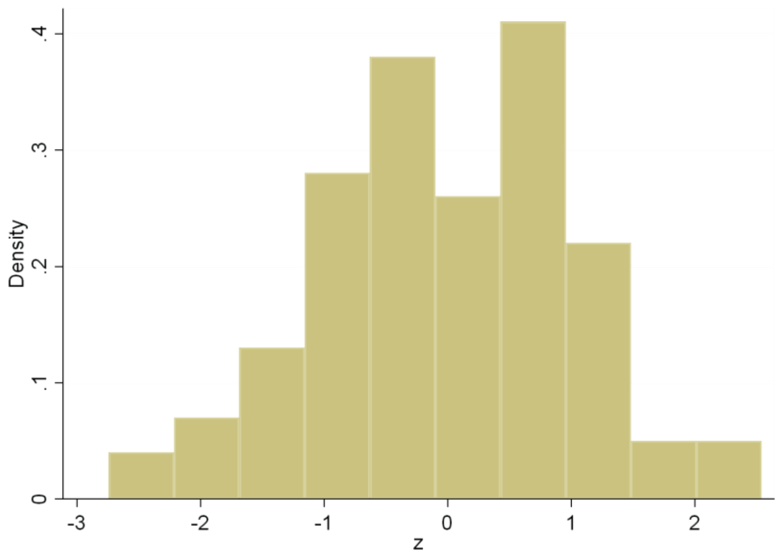
A graphic illustration suggests the model has a good fit and that the data are reasonably modelled. However, it can be observed that some of the lines are not well correlated with the observations and the residuals do not approach a normal distribution. Moreover, what is suggested is that the model allow for some random variation in both the slopes and intercepts by stadia of the trend variable. This model is known as a mixed model, and the results of this model are presented in Table 7.4.

Table 7.4: Mixed Model Regression Results

Variable	Coefficients	Standard Errors
Year	- 0.122***	0.030
IGB Prize Money (Logged)	0.345**	0.165
No. of Race Meetings (Logged)	0.648***	0.184
Constant	248.725***	60.040
Dependent Variable: Attendance (Natural Logarithm)		
R-Squared:		
Number of Observations: 67		
Source: Indecon analysis of IGB Data **** p<0.01, ** p<0.05, * p<0.1*		

The mixed effects model estimates the overall trend but allows random variance in both the slopes and the intercepts of the trend by individual stadia. This indicates similar coefficients for the price and race meets variables but a slightly higher rate of decline for the overall trend. A histogram of the residuals from the mixed model is displayed in Figure 7.2 and indicates a somewhat normal shape.

Figure 7.2: Histogram of Residuals from Mixed Effects Model



Source: Indecon

The summary results across a number of different econometric models are displayed in the next table. Overall, while there is some significant variation, it can be seen that attendance is estimated to decline between 6% and 14% per annum. The results from most of the models would suggest a somewhat narrower range of circa 9-12% average annual rates of decline in greyhound track attendance. In our modelling we use a 9% decline per annum as a long-term trend in one of our scenarios but we note that even greater declines in attendance levels are possible. There is also potential for the sector to enhance animal welfare, marketing and the product offering to help stabilise attendance levels. This will however require investment and decisive action by the IGB and by the sector.

Table 7.5: Summary of regression results

VARIABLES	(1) lnattendance	(2) lnattendance RE	(3) lnattendance FE	(4) lnattendance RE	(5) lnattendance FE	(6) lnattendance ME	(7) lnattendance ME
Year	-0.0927	-0.140***	-0.0897***	-0.0965***	-0.0602**	-0.122***	-0.0840***
	(0.0796)	(0.0328)	(0.0326)	(0.0298)	(0.0294)	(0.0304)	(0.0273)
ln IGB Prize Money		0.453**	0.157	0.343**	0.119	0.345**	0.267*
		(0.177)	(0.179)	(0.155)	(0.156)	(0.165)	(0.143)
ln Race Meets		0.536***	0.843***	0.315*	0.576***	0.648***	0.403**
		(0.198)	(0.197)	(0.182)	(0.184)	(0.184)	(0.168)
ln Entry Fees				0.194***	0.178***		0.189***
				(0.0441)	(0.0444)		(0.0408)
Constant	197.0	285.0***	185.3***	197.0***	125.7**	248.7***	172.5***
	(160.5)	(64.84)	(64.49)	(59.05)	(58.10)	(60.04)	(54.12)
Observations	67	67	67	67	67	67	67
R-squared	0.020		0.904		0.929		

Source: Indecon
*Note: Standard errors in parentheses; *** p<0.01, ** p<0.05, * p<0.1*

A final note should be considered about the impacts of prize money, entry fees, and number of meets. These variables all have a positive and significant sign across the range of models. In estimating potential scenarios in the econometric models, we held these variables constant at their most recent values. One thing that was not modelled due to the limited amount of data available, was the possibility of endogeneity between these factors and attendance. For example, it might be reasonable to expect that good attendance feeds back to more meets, more prize money, and higher entry fees, and possibly vice versa, and thus, there could be a feedback loop effect among these variables. If this were indeed the case then it is possible that the magnitude of the declines could become greater.

7.3 Scenarios of Operating Profit/Loss by Stadium

In order to identify scenarios which estimate operating profit/loss by stadium, Indecon has adopted a series of assumptions concerning future underlying trends as set out in Table 7.6. These assumptions impact on the variables that collectively determine gross profit (i.e., cost of sales subtracted from turnover) in each stadium. In all scenarios, the average rate of change in attendance between 2015 and the first 10 months of 2019 is applied to 2018 figures. Under all scenarios, it is assumed that staff costs, other administrative and other operating income will rise in line with anticipated price and wage inflation and as running the stadium will require a minimum number of employees as well as spending on overheads that are unlikely to decrease in line with turnover. These scenarios relate to operating profits and losses only, and therefore exclude interest payable and similar charges and tax on profit and ordinary activities.

Table 7.6: Scenarios for Estimating Operating Profit/Loss at Greyhound Stadia

Scenario 1: In each individual stadium, variables that affect turnover (gate receipts and programme sales, catering (food & beverages) income, bookmaker fees, trial fees, car park fees, rent receivable, and other income) and cost of sales are subjected to two different rates of change for the years 2019 and 2020-2022:

- For the first year, the average rate of change in attendance between 2015 and the first 10 months of 2019 is applied to 2018 figures. This captures the impact of the decline in 2019 due to adverse publicity.
- In the remaining scenario horizon years (2020-2022), the annual rate of change in attendance between 2015 and 2018 in each stadium is applied.

Increases in staff costs and other costs are assumed to be confined to one per cent per annum. Costs of sales are assumed to decline in line with attendance levels.

Scenario 2: In each individual stadium, variables that affect turnover (gate receipts and programme sales, catering (food & beverages) income, bookmaker fees, trial fees, car park fees, rent receivable and other income) and cost of sales are subjected to two different rates of change for the years 2019 and 2020-2022:

- For the first year, the average rate of change in attendance between 2015 and the first 10 months of 2019 is applied to 2018 figures. This captures the impact on attendance that occurred due to adverse media coverage.
- In the remaining scenario horizon years (2020-2022), the annual rate of change in attendance between 2015 and the estimated figure for 2019 in each stadium is applied.

Staff costs, other administrative costs increases are assumed to be confined to one per cent per annum.

Scenario 3: In each individual stadium, variables that affect turnover (gate receipts and programme sales, catering (food & beverages) income, bookmaker fees, trial fees, car park fees, rent receivable and other income) and cost of sales are subjected to two different rates of change for the years 2019 and 2020-2022:

- For the first year, the average rate of change in attendance between 2015 and the first 10 months of 2019 is applied to 2018 figures. This captures the impact of the decline in 2019 due to adverse publicity.
- In the remaining scenario horizon years (2020-2022), the estimated rate of change in attendances obtained in the econometric analysis of 9% is applied.

Staff costs, other administrative costs increases are assumed to be confined to one per cent per annum.

Source: Indecon

The table below shows the adjusted profit for Tote Revenue and an accounting adjustment for entertainment and hospitality representing the difference between catering costs and concession fees. While this accrues centrally to the IGB, it represents a form of revenue to the sector more broadly defined.

Table 7.7: Operating Profit/Loss at Irish Stadia in 2018 Taking Account of Net Tote

	Operating Profit (2018)	Net Tote Profit (2018)	Adjusted Operating Profit (2018)
Cork	-€0.22m	€0.20m	-€0.09m
Galway	-€0.05m	€0.11m	€0.04m
Limerick	-€0.39m	€0.12m	-€0.31m
Mullingar	-€0.20m	€0.08m	-€0.12m
Newbridge	-€0.11m	€0.06m	€0.00m
Shelbourne	€0.33m	€0.67m	€0.93m
Tralee	-€0.27m	€0.06m	-€0.20m
Waterford	-€0.18m	€0.07m	-€0.15m
Youghal	-€0.19m	-€0.01m	-€0.15m
IGB Stadia	***-€1.27m***	***€1.37m***	***-€0.05m***
Clonmel	[redacted]		
Dundalk			
Enniscorthy			
Kilkenny			
Lifford			
Longford			
Thurles			
Private Stadia			
All Stadia			

Source: Indecon Analysis;

Note: Figures have been adjusted for exceptional items.

Table 7.8 provides the operating profit/loss at Irish greyhound stadia in 2022 under the three different scenarios that were outlined in Table 7.6. For each scenario, figures have been presented with and without IGB prizemoney contributions, which are assumed to have been fixed at 2018 levels. Under Scenario 1, where revenues continue to change at the annual average rate of change between 2015 and 2018, it is estimated that only Shelbourne Park will make an operating profit out of the IGB stadia in 2022. The analysis assumes that increase in staff and other costs are confined to a maximum of one per cent per annum. Costs of sales are assumed to decline aligned with the decline in levels of attendance.

Table 7.8: Scenarios for Operating Profit and Loss at Irish Greyhound Stadia, 2022

	Scenario 1 - Continued Attendance Decline at 2015-2018 Rate		**Scenario 2 - Continued Attendance Decline at 2015-2019 Rate**		**Scenario 3 – Econometric Model Attendance Decline**	
	With IGB Prizemoney Contribution	**No IGB Prizemoney Contribution**	**With IGB Prizemoney Contribution**	**No IGB Prizemoney Contribution**	**With IGB Prizemoney Contribution**	**No IGB Prizemoney Contribution**
Cork	-€0.37m	-€0.91m	-€0.33m	-€0.87m	-€0.33m	-€0.87m
Galway	-€0.08m	-€0.43m	-€0.07m	-€0.43m	-€0.11m	-€0.46m
Limerick	-€0.43m	-€0.98m	-€0.47m	-€1.02m	-€0.45m	-€1.01m
Mullingar	-€0.20m	-€0.67m	-€0.19m	-€0.66m	-€0.23m	-€0.70m
Newbridge	-€0.02m	-€0.24m	-€0.04m	-€0.26m	-€0.08m	-€0.30m
Shelbourne	€1.01m	-€0.70m	€0.85m	-€0.86m	€0.26m	-€1.45m
Tralee	-€0.26m	-€1.08m	-€0.30m	-€1.12m	-€0.32m	-€1.14m
Waterford	-€0.20m	-€0.54m	-€0.24m	-€0.58m	-€0.24m	-€0.58m
Youghal	-€0.18m	-€0.63m	-€0.17m	-€0.62m	-€0.19m	-€0.63m
IGB Stadia	***-€0.72m***	***-€6.17m***	***-€0.96m***	***-€6.41m***	***-€1.70m***	***-€7.14m***
Clonmel	[redacted]					
Dundalk						
Enniscorthy						
Kilkenny						
Lifford						
Longford						
Thurles						
Private Stadia						
All Stadia						

Note: Where there were once-off adjustments evident in the accounts, these were omitted from the analysis to ensure consistency of approach.

As these are scenarios of operating profit/loss, interest payable and similar charges and tax on profit and ordinary activities are excluded. [redacted]

IGB prize money contribution includes grant funding provided to stadia.
Figures include net Tote profit

Table 7.9 provides the operating profit/loss per number of running dogs at Irish greyhound stadia in 2022. These were calculated by dividing the operating profit and loss figures in Table 7.8 by the number of runners at each particular stadium in 2018. Again, for each scenario, figures have been presented with and without IGB prizemoney contributions, which are assumed to have been fixed at 2018 levels. Under Scenario 3 the loss per number of runners at IGB stadia in 2022 is €26.86.

Table 7.9: Scenarios for Operating Profit/Loss per Number of Runners at Irish Greyhound Stadia, 2022

	Scenario 1 - Continued Attendance Decline at 2015-2018 Rate		Scenario 2 - Continued Attendance Decline at 2015-2019 Rate		Scenario 3 – Econometric Model Attendance Decline	
	With IGB Prizemoney Contribution	No IGB Prizemoney Contribution	With IGB Prizemoney Contribution	No IGB Prizemoney Contribution	With IGB Prizemoney Contribution	No IGB Prizemoney Contribution
Cork	-€55.60	-€136.70	-€49.34	-€130.43	-€50.05	-€131.15
Galway	-€14.49	-€80.14	-€13.86	-€79.51	-€20.88	-€86.53
Limerick	-€58.78	-€134.51	-€64.96	-€140.69	-€62.51	-€138.24
Mullingar	-€31.87	-€107.01	-€29.79	-€104.92	-€36.01	-€111.14
Newbridge	-€5.32	-€71.13	-€11.53	-€77.35	-€24.65	-€90.47
Shelbourne	€79.52	-€54.77	€66.97	-€67.32	€20.37	-€113.92
Tralee	-€23.74	-€98.57	-€27.32	-€102.15	-€29.28	-€104.10
Waterford	-€43.49	-€117.44	-€51.98	-€125.93	-€52.59	-€126.54
Youghal	-€30.19	-€104.25	-€28.53	-€102.59	-€30.84	-€104.89
IGB Stadia	***-€11.46***	***-€97.66***	***-€15.19***	***-€101.39***	***-€26.86***	***-€113.06***
Clonmel	[redacted]					
Dundalk						
Enniscorthy						
Kilkenny						
Lifford						
Longford						
Thurles						
Private Stadia						
All Stadia						

Source: Indecon Analysis
Note: In most cases, operating profit/loss scenarios are based on 2018 financial data. However, for administrative expenses in Limerick, other operational income in Mullingar and other administrative expenses in Waterford, scenarios were based on 2017 levels. This was done to remove once-off impairment assessments and the write off of a capital grant in 2018. [redacted]
IGB prize money contribution includes grant funding provided to stadia.
Figures include net Tote profit

Table 7.10 provides the operating profit/loss per 20km radius catchment population at Irish greyhound stadia in 2022 for each of the three different scenarios that were outlined in Table 7.6. These were calculated by dividing the profit and loss figures in Table 7.8 by the population within a 20km straight line radius for each particular stadium. These population catchment radii were outlined in Table 3.2. These figures have been presented with and without net IGB prizemoney contributions for each scenario.

Table 7.10: Scenarios for Operating Profit and Loss per 20km Radius Catchment Population (Thousands) at Irish Greyhound Stadia, 2022

	Scenario 1 - Continued Attendance Decline at 2015-2018 Rate		Scenario 2 - Continued Attendance Decline at 2015-2019 Rate		Scenario 3 – Econometric Model Attendance Decline	
	With IGB Prizemoney Contribution	No IGB Prizemoney Contribution	With IGB Prizemoney Contribution	No IGB Prizemoney Contribution	With IGB Prizemoney Contribution	No IGB Prizemoney Contribution
Cork	-€1.11	-€2.72	-€0.98	-€2.60	-€1.00	-€2.61
Galway	-€0.51	-€2.85	-€0.49	-€2.82	-€0.74	-€3.07
Limerick	-€2.34	-€5.34	-€2.58	-€5.59	-€2.48	-€5.49
Mullingar	-€3.07	-€10.30	-€2.87	-€10.10	-€3.47	-€10.70
Newbridge	-€0.09	-€1.26	-€0.20	-€1.37	-€0.44	-€1.60
Shelbourne	€0.71	-€0.49	€0.60	-€0.60	€0.18	-€1.02
Tralee	-€3.52	-€14.61	-€4.05	-€15.14	-€4.34	-€15.43
Waterford	-€1.73	-€4.68	-€2.07	-€5.02	-€2.10	-€5.04
Youghal	-€3.57	-€12.32	-€3.37	-€12.12	-€3.64	-€12.39
IGB Stadia	***-€0.28***	***-€2.39***	***-€0.37***	***-€2.48***	***-€0.66***	***-€2.77***
Clonmel	[redacted]					
Dundalk						
Enniscorthy						
Kilkenny						
Lifford						
Longford						
Thurles						
Private Stadia						
All Stadia						

Source: Indecon Analysis
Note: In most cases, operating profit/loss scenarios are based on 2018 financial data. However, for administrative expenses in Limerick, other operational income in Mullingar and other administrative expenses in Waterford, scenarios were based on 2017 levels. This was done to remove once-off impairment assessments and the write off of a capital grant in 2018. [redacted]
IGB prize money contribution includes grant funding provided to stadia.
Figures include net Tote profit. .

The challenge of financial viability is seen by industry participants. Table 6.1 shows the views of respondents to Indecon's survey of greyhound breeders, trainers and owners concerning the challenges facing the stadium they use most often in terms of the financial viability. 61% of respondents ranked this as a very significant challenge or a significant challenge.

Table 7.11: Challenges Facing Stadia (Unweighted Average Response)

	Very Significant Challenge	Significant Challenge	Minor Challenge	Not a Challenge	Don't Know
fFnancial viability	28%	33%	20%	14%	5%

Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers
Survey Question: Which do you believe are the greatest challenges facing the racetrack you use most regularly?

For all stadia, financial viability was highlighted as a significant challenge. Table 7.12 displays the views of respondents to Indecon's survey of Irish greyhound breeders, owners and trainers concerning the significance or not of the challenge that financial viability posed to the stadium they attend most regularly.

Table 7.12: Financial Viability – Response by Stadium

	Very Significant Challenge	Significant Challenge	Minor Challenge	Not a Challenge	Don't Know
Limerick	28%	56%	8%	4%	4%
Longford	47%	35%	18%	0%	0%
Clonmel	31%	50%	6%	13%	0%
Thurles	33%	33%	17%	17%	0%
Dundalk	35%	30%	15%	10%	10%
Enniscorthy	39%	25%	21%	7%	7%
Cork	40%	24%	24%	4%	8%
Tralee	42%	21%	32%	5%	0%
Newbridge	29%	32%	22%	13%	5%
Waterford	25%	31%	31%	13%	0%
Galway	11%	44%	11%	22%	11%
Mullingar	18%	36%	9%	18%	18%
Kilkenny	6%	44%	25%	19%	6%
Lifford	25%	25%	25%	0%	25%
Youghal	33%	17%	17%	33%	0%
Shelbourne Park	10%	29%	21%	38%	2%

Source: Indecon Survey of Irish Greyhound Breeders, Owners and Trainers

7.4 Summary of Key Findings

This section outlined Indecon's analysis of the financial sustainability of each of the 16 greyhound stadia in Ireland. It consisted of two parts, the first being an econometric analysis to project overall future attendance at greyhound racing in Ireland, the second being a scenario analysis looking at key profitability indicators.

- Indecon's econometric model suggests that greyhound attendance is estimated to decline between 6% and 14% per annum in the coming years, with the majority of the models suggesting a narrower 9-12% range for estimated decline in attendance.
- Indecon's scenarios for operating profit/loss at Irish greyhound stadia suggest that stadia, particularly IGB stadia need to reduce in the face of declining revenues, than is the case for the IGB-owned tracks.
- Under Scenario 3 the loss in IGB-owned tracks is €1.70m, which is equivalent to 10.2% of the IGB's current rate of funding from the Horse and Greyhound Fund. Losses at this level would threaten the ability of the IGB to maintain prize-levels and other expenditure, with a knock-on impact on race activity.

8 Recommendations for Radical Restructuring to Underpin Sustainable Industry Footprint

8.1 Introduction

The focus of this review is to provide the IGB with evidence to establish the appropriate future footprint of the greyhound industry in Ireland. In this section we set out some of the key analysis and evidence which emerges from the analysis conducted by Indecon. We then set out the conclusions for the study, as well as discussing recommendations regarding the future footprint of the industry in Ireland.

8.2 Summary of Key Findings

In informing our analysis it is useful to recap on the key findings. A summary of assessments with respect to the infrastructure at each track, as well as each stadium's own assessment of its required capital investment needs, are shown in Table 8.1. We also note that in a number of cases, it has been recommended from the administrative advisers that there is a need for fire safety to be reviewed at certain stadia.

Table 8.1: Summary of Assessments - Infrastructure										
	Internal Building Fabric	External Building Fabric	Furniture, Fixtures and Equipment	Building Energy Efficiency	Ease of Access	General Ambience	Toilets	Facilities for Spectators	Facilities for Race Partici-pants	**Stadia Assessment of required capital**
East/North East										
Dundalk	Good	Good	Good	Fair	Good	Good	Good	Good	Excel-lent	[redacted]
Longford	Poor	Poor	Poor	Very Poor	Very Poor	Poor	Very Poor	Poor	Fair	[redacted]
Mullingar	Good	Good	Fair	Fair	Good	Fair	Poor	Good	Good	€0.11m
Newbridge	Fair	Good	Fair	Fair	Good	Fair	Poor	Fair	Fair	€0.07m
Shelbourne	Fair*	Fair	Fair	Poor	Fair	Fair	Poor	Fair/ Good	Fair	€3.00m
South East										
Waterford	Fair	Fair	Fair	Poor	Fair	Fair	Poor	Fair	Good	€0.04m
Clonmel	Good	Good	Good	Good	Excellent	Good	Excel-lent	Good	Excel-lent	[redacted]
Enniscorthy	Poor	Poor	Poor	Very Poor	Very Poor	Poor	Very Poor	Poor	Fair	[redacted]
Kilkenny	Poor	Poor	Very Poor	Very Poor	Very Poor	Poor	Very Poor	Poor	Poor	[redacted]
Thurles	Fair	Fair	Poor	Poor	Very Poor	Poor	Poor	Poor	Fair	[redacted]
West/South West										
Cork	Good	Fair	Fair	Poor	Poor	Good	Fair	Good	Good	€0.15m
Galway	Fair	Fair	Fair	Poor	Good	Fair	Fair	Fair	Good	€0.25m
Limerick	Good	Good	Good	Good	Good	Good	Fair	Good	Good	€0.05m
Tralee	Good	Good	Fair	Poor	Good	Good	Fair	Good	Good	€0.10m
Youghal	Poor	Poor	Poor	Very Poor	Very Poor	Poor	Poor	Poor	Fair	€0.15m
North										
Lifford	Fair	Fair	Fair	Poor	Good	Fair	Fair	Good	Good	[redacted]

Source: Indecon Analysis
*While architects rate quality of facilities for spectators as fair, more positive views were expressed by trainers and breeders on general attendance. There were also differences in perspectives for other stadia.

The summary of assessments from this report with respect to the outlook for financial performance based on a number of scenarios is shown below in Table 8.2.

Table 8.2: Summary of Assessments - Financial Performance and Outlook							
					Scenarios for Operating Profit/Loss in 2022 (With IGB Prizemoney Contribution)		
	2018 Operating Profit/Loss with IGB Prize Contribution	2018 Operating Profit/Loss with IGB Prize Contribution After Adjustment for Exceptional Items[3]	2018 Operating Profit/Loss without IGB Prize Contribution After Adjustment for Exceptional Items[3]	IGB Prize Contribution and Grant Funding[1]	Scenario 1: 2015-2018 Attendance change continues	Scenario 2: 2015-2019 Attendance change continues	Scenario 3: Econometric Model Attendance Decline
East/North East							
Dundalk	[redacted]						
Longford[2]							
Mullingar	€1.24m	-€0.12m	-€0.59m	€0.47m	-€0.20m	-€0.19m	-€0.23m
Newbridge	-€0.11m	€0.00m	-€0.22m	€0.22m	-€0.02m	-€0.04m	-€0.08m
Shelbourne	€0.33m	€0.93m	-€0.78m	€1.71m	€1.01m	€0.85m	€0.26m
South East							
Waterford	-€1.23m	-€0.15m	-€0.49m	€0.34m	-€0.20m	-€0.24m	-€0.24m
Clonmel	[redacted]						
Enniscorthy							
Kilkenny							
Thurles							
West/South West							
Cork	-€0.22m	-€0.09m	-€0.63m	€0.54m	-€0.37m	-€0.33m	-€0.33m
Galway	-€0.05m	€0.04m	-€0.31m	€0.35m	-€0.08m	-€0.07m	-€0.11m
Limerick	-€1.11m	-€0.31m	-€0.86m	€0.55m	-€0.43m	-€0.47m	-€0.45m
Tralee	-€0.27m	-€0.20m	-€1.02m	€0.82m	-€0.26m	-€0.30m	-€0.32m
Youghal	-€0.19m	-€0.15m	-€0.60m	€0.45m	-€0.18m	-€0.17m	-€0.19m
North							
Lifford	[redacted]						

Source: Indecon Analysis

Note: In most cases, operating profit/loss scenarios are based on 2018 financial data. However, for administrative expenses in Limerick, other operational income in Mullingar and other administrative expenses in Waterford, scenarios were based on 2017 levels. This was done to remove once-off impairment assessments and the write off of a capital grant in 2018. [redacted]

As these are scenarios of operating profit/loss, interest payable and similar charges and tax on profit and ordinary activities are excluded. [redacted]

IGB prize money contribution includes grant funding provided to stadia.

1 – Grant funding amounted to a total of €0.38m compared to a total of €7.5m in prize money.

2 – [redacted].

3 Figures have been adjusted for net Tote profit

The summary of the financial performance in comparative context is shown in Table 8.3 below.

Table 8.3: Summary of Assessments – Financial Performance in Comparative Context

	Econometric Model Attendance Decline (Scenario 3)	
	Operating Profit/loss per runner	Operating Profit/loss per 1,000 pop. in 20km radius
East/North East		
Dundalk	[redacted]	
Longford		
Mullingar	-€36.01	-€3.47
Newbridge	-€24.65	-€0.44
Shelbourne	€20.37	€0.18
South East		
Waterford	-€52.59	-€2.10
Clonmel	[redacted]	
Enniscorthy		
Kilkenny		
Thurles		
West/South West		
Cork	-€50.05	-€1.00
Galway	-€20.88	-€0.74
Limerick	-€62.51	-€2.48
Tralee	-€29.28	-€4.34
Youghal	-€30.84	-€3.64
North		
Lifford	[redacted]	

Source: Indecon Analysis
Note: In most cases, operating profit/loss scenarios are based on 2018 financial data. However, for administrative expenses in Limerick, other operational income in Mullingar and other administrative expenses in Waterford, scenarios were based on 2017 levels. This was done to remove once-off impairment assessments and the write off of a capital grant in 2018. [redacted]
IGB prize money contribution includes grant funding provided to stadia.
Figures include net Tote profit.

The actual and projected attendance by stadium is shown below. The four stadia with the lowest projected attendance across all three projected scenarios are Youghal, Longford, Lifford and Enniscorthy.

Table 8.4: Actual (2018) and Scenarios (2022) Attendance in Greyhound Stadia in Ireland

	2018	2022		
		Scenario 1: 2015-2018 attendance change continues	**Scenario 2: 2015-2019 attendance change continues**	**Scenario 3: Econometric Model attendance decline**
Cork	49,903	31,583	34,691	34,338
Galway	29,156	22,621	22,836	20,669
Limerick	36,655	25,181	22,685	24,500
Mullingar	20,121	16,097	16,896	14,515
Newbridge	20,929	20,485	18,838	15,362
Shelbourne Park	147,858	156,778	147,124	111,283
Tralee	46,596	41,019	35,743	32,861
Waterford	26,570	22,753	18,613	18,318
Youghal	10,291	8,009	9,207	7,542
IGB Stadia	***388,079***	***344,527***	***326,633***	***279,387***
Clonmel	17,992	14,464	14,570	12,862
Dundalk	38,308	28,836	28,402	26,787
Enniscorthy	13,515	7,676	10,191	9,491
Kilkenny	16,672	17,776	16,677	12,565
Lifford	11,226	7,343	6,326	7,330
Longford	6,451	3,449	2,777	3,938
Thurles	13,899	9,112	11,604	10,012
Independent Stadia	***118,063***	***88,656***	***90,548***	***82,983***
All Stadia	**506,142**	**433,183**	**417,180**	**362,370**

Source: Indecon Analysis

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The overall summary of assessments is shown below. This is aimed at providing the detailed evidence base to consider in making decisions on the future footprint of the sector. Data on the profitability of individual private stadia is not included for reasons of commercial sensitivity.

Table 8.5: Summary Assessment

	Quality of Facilities for Spectators	Attendance levels	Net Contribution from IGB for Prizemoney, grants less tote revenue	Net Contribution from IGB for Prizemoney, grants less tote revenue per attendee	Presence of Stadia within 60kms	% of owners /trainers /breeders who use a track regularly[1]	2018 Operating Profit (Adj for exceptional items)[2]	2022 Operating Profit – Scenario 3
East/North East								
Dundalk	Good	38,308	€302,978	€7.91	No	15%	[redacted]	[redacted]
Longford	Poor	6,451	€323,264	€50.11	Yes	13%	[redacted]	[redacted]
Mullingar	Good	20,121	€391,786	€19.47	Yes	15%	-€0.12m	-€0.23m
Newbridge	Fair	20,929	€155,374	€7.43	Yes	29%	-€0.00m	-€0.08m
Shelbourne	Fair[3]	147,858	€1,033,677	€6.99	Yes	45%	€0.93m	€0.26m
South East								
Waterford	Fair	26,570	€273,988	€10.31	Yes	16%	-€0.15m	-€0.24m
Clonmel	Good	17,992	€ 386,076	€ 21.46	Yes	18%	[redacted]	[redacted]
Enniscorthy	Poor	13,515	€ 362,608	€ 26.83	Yes	15%	[redacted]	[redacted]
Kilkenny	Poor	16,672	€ 403,912	€ 24.23	Yes	18%	[redacted]	[redacted]
Thurles	Poor	13,899	€ 267,408	€ 19.24	Yes	16%	[redacted]	[redacted]
West/South West								
Cork	Good	49,903	€337,340	€6.76	Yes	16%	-€0.09m	-€0.33m
Galway	Fair	29,156	€244,626	€8.39	No	7%	€0.04m	-€0.11m
Limerick	Good	36,655	€428,027	€11.68	No	19%	-€0.31m	-€0.45m
Tralee	Good	46,596	€757,674	€16.26	No	11%	-€0.20m	-€0.32m
Youghal	Poor	10,291	€433,451	€42.12	Yes	6%	-€0.15m	-€0.19m
North								
Lifford	Good	11,226	€ 214,995	€ 19.15	Yes (NI)	6%	[redacted]	[redacted]

***Source**: Indecon*

[1]Based on Indecon survey of 394 trainers and breeders.

[2]Includes for adjustment for tote.

[3]While architects rate quality of facilities for spectators as fair, more positive views were expressed by trainers and breeders on general attendance. There were also differences in perspectives for other stadia.

8.3 Conclusions

A summary of Indecon's conclusions are presented in the table below. These are discussed in subsequent paragraphs.

Table 8.6: Summary of Conclusions
1. **Greyhound Industry is Likely to Experience a Continued Decline in Attendance Levels**
2. **Ireland has an Exceptionally High Number of Stadia for the Population Size**
3. **A number of Stadia are in Poor Condition and Require Capital Investment**
4. **The Absence of Sufficient Quality Breeders is likely to be an increasing Challenge for the Sector**
5. **Most Greyhound Tracks in Ireland are Loss Making**
6. **Losses are Likely to be Unsustainable in the Absence of a Radical Restructuring of Sector**
7. **There is Potential to Develop a Viable Greyhound Industry in Ireland**
Source: Indecon

1. Greyhound Industry is Likely to Experience a Continued Decline in Attendance Levels

The greyhound racing industry in Ireland has witnessed a significant decline in attendance over the last decade. While 1.1m attended races in 2008, this fell by 55% to just over 0.5m by 2018. The latter part of 2019 has also shown a further negative impact which is likely exacerbate the pre-existing long-term decline. Indecon believes that a continued decline in overall attendance numbers should be the basis for planning for the sector. Greyhound racing attendances have been in decline internationally, with falls of 27%-37% observed in Great Britain, New Zealand, Western Australia and New South Wales over the space of a decade or less. Only a small number of countries internationally still operate greyhound racing at a significant commercial level.

2. Ireland has an Exceptionally High Number of Stadia for the Population Size

Ireland has 16 greyhound stadia, which is the largest number of stadia per capita of any countries examined at 3.3 per million population compared to an average of 0.9 in other countries. In some countries, stadia are operated by local clubs and there may be options for some stadia to operate on more of a voluntary/non-commercial basis. However, there are minimum health and safety standards which are applicable and the number of stadia in Ireland is exceptionally high on a per capita basis. It is also clear that the inevitable restructuring of the number of stadia to reflect the scale of decline in demand has not happened in Ireland.

3. A number of Stadia are in Poor Condition and Require Capital Investment

The analysis in this review has evaluated the stadia in terms of internal and external building fabric as well as areas such as building energy efficiency, ease of access and facilities for spectators and race participants. While some of the IGB and private stadia are in very good condition, it is also evident from the assessment that many are in poor condition. In some cases, capacity is restricted and in a number of cases if the stadia are to remain open, urgent investment is needed to meet fire safety and other requirements. A number of stadia have ambitious plans for major capital investment. However, it is likely that some investment projects could not be justified on either financial or wider economic and social criteria.

4. The Absence of Sufficient Breeders is likely to be an increasing Challenge for the Sector

To be successful stadia require access to high quality dogs for race meetings. There is a need for feeder tracks as well as larger stadia, to be in a position to have sufficient dogs to sustain an effective racing schedule. The shortage of breeders is currently a challenge facing the sector. If there is a closure of tracks, this is likely to be an increased challenge for the sector as some breeders are likely to exit the industry.

5. Most Greyhound Tracks in Ireland are Loss Making

Indecon's analysis suggests that given scenarios for declining attendance levels, the financial sustainability of stadia is a key challenge for the sector. Even with IGB supports most of the tracks are currently loss making.

6. Losses are Likely to be Unsustainable in the Absence of a Radical Restructuring of Sector

Indecon's examination of the likely scenario for individual stadia suggests that losses will be unsustainable in the absence of a radical restructuring of the sector. Even with a more fit for purpose footprint following rationalisation, the sector will face financial challenges. This is particularly the case given the need to invest in infrastructural improvements, animal health and welfare, and marketing. Indecon believes that as well as a restructuring, it will be essential to implement ongoing cost-cutting measures to reduce staff and operational costs at individual stadia.

7. There is Potential to Develop a Viable Greyhound Industry in Ireland.

Despite the challenges facing the sector, there is potential to develop a viable greyhound industry in Ireland. This, however, will require decisive action in a range of areas which are outlined in our recommendations.

8.4 Recommendations

A summary of Indecon's recommendations are outlined in Table 8.7. A summary of Indecon's recommendations are outlined below.

Table 8.7: Summary of Recommendations
1. A radical restructuring of the footprint of the sector is recommended.
2. The rationalisation of the sector should be based on objective criteria.
3. Cease funding for a number of stadia.
4. Targeted investment in animal health and welfare, marketing and infrastructure is recommended.
5. Ongoing cost efficiency measures are recommended.
Source: Indecon

1. A radical restructuring of the footprint of the sector is recommended.

Supporting the existing 16 stadia to operate on a commercial basis is not sustainable given the annual levels of financial resources available to IGB and likely market developments. We also note the number of stadia per capita is significantly out of line with international norms. It is also evident that the rationalisation of the sector has not kept pace with the scale of decline in attendance numbers. Indecon therefore recommends a radical restructuring of the footprint of the sector. Without this, the strategic problems facing the industry will be exacerbated.

2. The rationalisation of the sector should be based on objective criteria.

The analysis presented in this report provides an evidence-based evaluation of each of the stadia based on existing infrastructure, attendance levels, financial sustainability, proximity to other stadia and the implications for the sector. Indecon believes that geographical balance is needed to underpin the breeding and training sector. However, rationalisation of the number of stadia, which are operating on a commercial basis and which receive exchequer resources to support prize money is required in all of the main regions. This will necessitate closure of both IGB stadia and ceasing of funding for some other stadia.

3. Cease funding for a number of stadia.

Indecon are aware of the impact of rationalisation in local areas and also the potential wider impacts of closing feeder tracks on the sector. However, without decisive action the overall viability of the sector is in doubt and IGB will not have sufficient resources to enhance annual welfare and rebuild a sustainable sector. This requires an alignment of support for the number of commercially focused stadia with the changes in attendance. This will involve focusing Exchequer resources on a smaller number of stadia. In identifying specific stadia for IGB to cease funding, all factors were considered by Indecon on an objective basis. These factors were analysed in our summary assessment and include the quality of existing infrastructure in each stadia, the likely attendance levels, the impact on the wider industry, including the percentage of trainers/breeders who use the track, the proximity to other stadia, the scenarios for financial sustainability and the levels of net IGB contribution per attendee.

In the case of private stadia there may be opportunities for individual stadia to continue to operate without IGB prize money if they can generate internal resources or sufficiently reduce costs. We therefore are not recommending that IGB withdraws licences from any stadia provided they meet safety standards. We are however recommending the cessation of support for a number of private stadia and an IGB stadium.

Indecon notes that market pressures have already led to the closure of the stadium in the northern part of the country, (Lifford). While Indecon was impressed with the quality of infrastructure in Lifford, due to its location we understand the stadium is not financially sustainable with existing support from IGB, and the stadia has closed. Our analysis for future scenarios for attendance levels for Lifford and other stadia suggests attendance will decline further with implications for financial viability. Indecon also notes that there is a relatively small number of registered greyhound breeders and trainers nationally who utilise Lifford.

In the east/north-east region, Longford temporarily closed but has since reopened. We note that the infrastructure in Longford is poor and attendance levels are the lowest of any stadia in the country. These numbers are likely to decline further. Indecon notes that there is an alternative stadium within 46 kms of Longford. Longford had the highest level of net contribution per attendee from IGB of any stadia in the region. Taking these factors into account suggests that support for Longford should also cease. As well as these two stadia, support should also cease for one stadium in the south-east and a stadium in the west/south-west.

Based on our evaluation of a range of factors we believe that the IGB should cease support for Enniscorthy. In the case of Enniscorthy, there are two alternative stadia within 60 kms. The quality of infrastructure is judged to be poor and Enniscorthy had lower attendance levels than other stadia within the catchment area. Enniscorthy had the highest level of net contribution per attendee of any stadia in the region.

In the west/south-west, the IGB owned Youghal stadium has by far the lowest attendance levels of any stadia in the region. The infrastructure is poor and the stadia is loss making and the stadia has a higher level of net contribution from IGB per attendee of any stadia in the region and there is a relatively small percentage of trainers/breeders who use the track. We therefore recommend closure of Youghal stadium. In the case of Youghal, in addition to savings in prize money, this will result in savings in future operating losses and in the required investment in capital improvements. These funds should be used to reduce overall losses and to invest in animal welfare, marketing and capital improvements in other stadia.

However even with the cessation of support for Lifford, Longford, Enniscorthy and Youghal the sector would not be financially sustainable if the decline in attendance continues and if the existing cost base is not reduced. In such a case we believe there could be a future need to withdraw funding for three additional stadia. Decisions on this should be made by IGB by the end of 2022 and should be informed by objective evidence on financial outturns and attendance levels as well as the other criteria identified in this report. Over the period to 2022 there is therefore an opportunity for individual stadia to improve their performance which would impact on any further phase of rationalisation which may be needed.

Table 8.8: Recommendations for Radical Restructuring of Industry				
Area	**Stadia**	**Current Position**	**Required Additional Rationalisation of Stadia Supported by IGB**	
			Urgent Additional Short Term Action	**Additional Action IF Decline in Attendance Continues**
North	Lifford	Lifford Closed	Cease support for Lifford	N/A
East / North East	Newbridge, Shelbourne, Dundalk, Mullingar, Longford	Longford Reopened	Cease support for Longford	Review support for all remaining stadia based on performance including financial outturns and attendance levels and make decisions regarding funding for potentially a further three stadia
South East	Thurles, Clonmel, Waterford, Kilkenny, Enniscorthy	All Stadia Currently Remain open	Cease support for Enniscorthy	
West/South West	Galway, Limerick, Cork, Tralee, Youghal	All Stadia Currently remain open	Cease support for Youghal	

Source: Indecon

4. **Targeted investment in animal health and welfare, marketing and infrastructure is recommended.**

There is a need to ensure sufficient investment is made in animal health and welfare and the effective monitoring of this. Concerns over this area has led to the banning of greyhound racing in some other countries. It is essential that the highest levels of animal welfare are maintained and this should be a priority for the sector. There is also a need for investment in marketing and infrastructure improvements to underpin a modernised sector.

5. **Ongoing cost efficiency measures are recommended.**

There is a need for ongoing cost efficiency measures to support the long-term viability of the industry. This will require efficiencies in staff and other operational costs within stadia.

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

A REPORT PREPARED FOR GREYHOUND RACING IRELAND BY JIM POWER ECONOMICS

Contents

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.

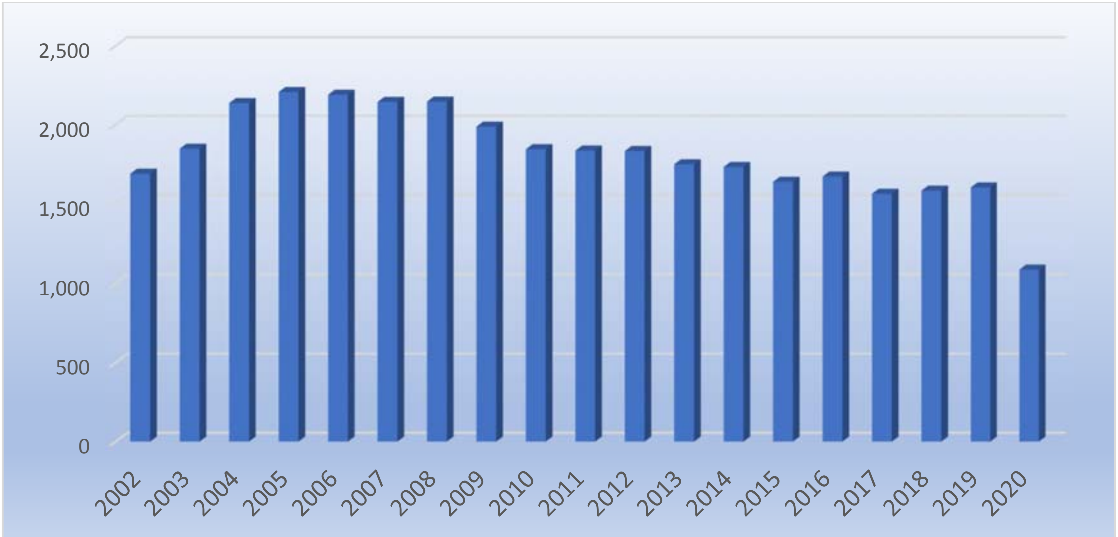
- In 2020, all racing activity was suspended for a 13-week period due to the COVID-19 pandemic.

- 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.

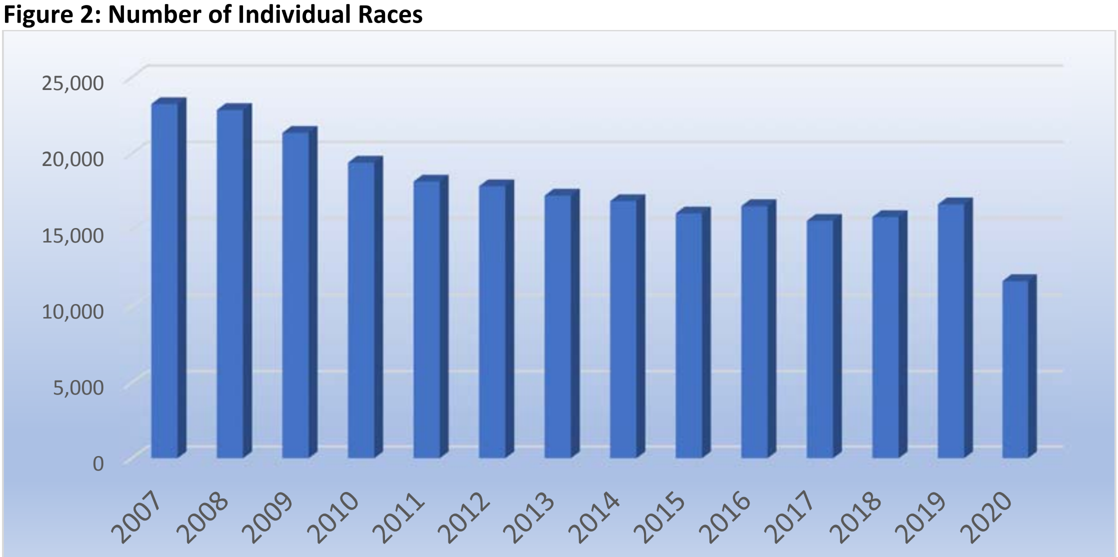
Figure 1: Number of Greyhound Race Meetings



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 though the Barking Buzz app.

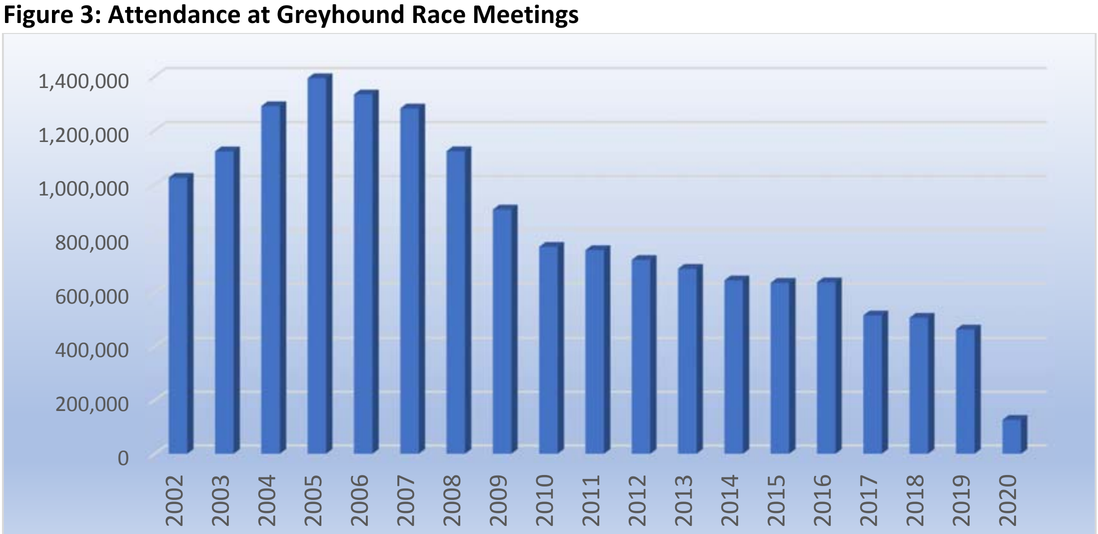
Participation levels in the industry rather than physical attendance are more reflective of activity and are higher than the published attendance figures but are not easily measured.

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.

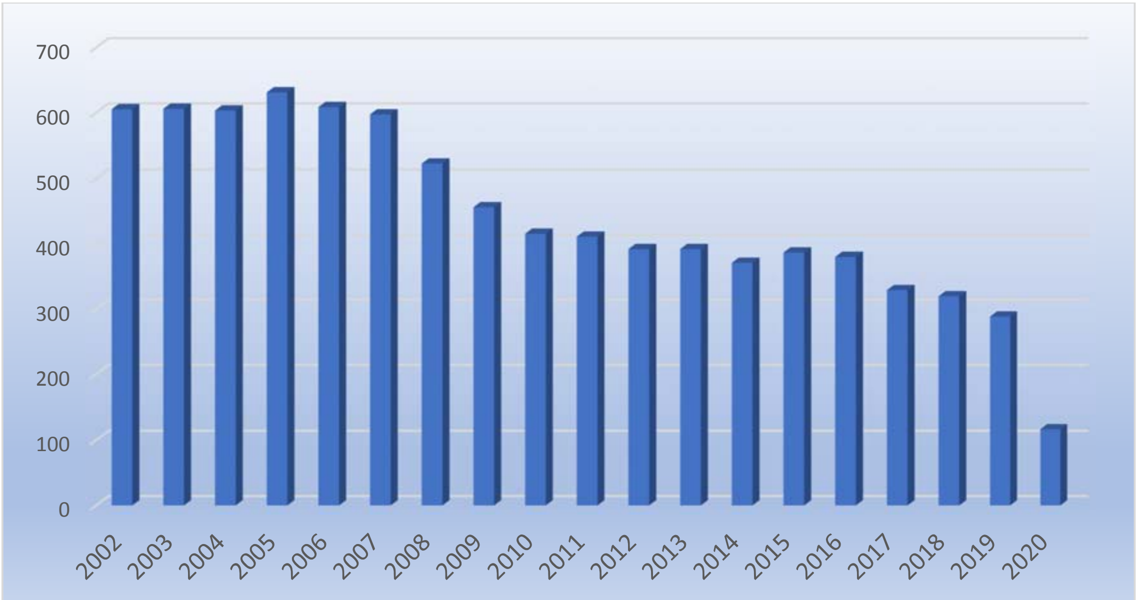
Figure 3: Attendance at Greyhound Race Meetings



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

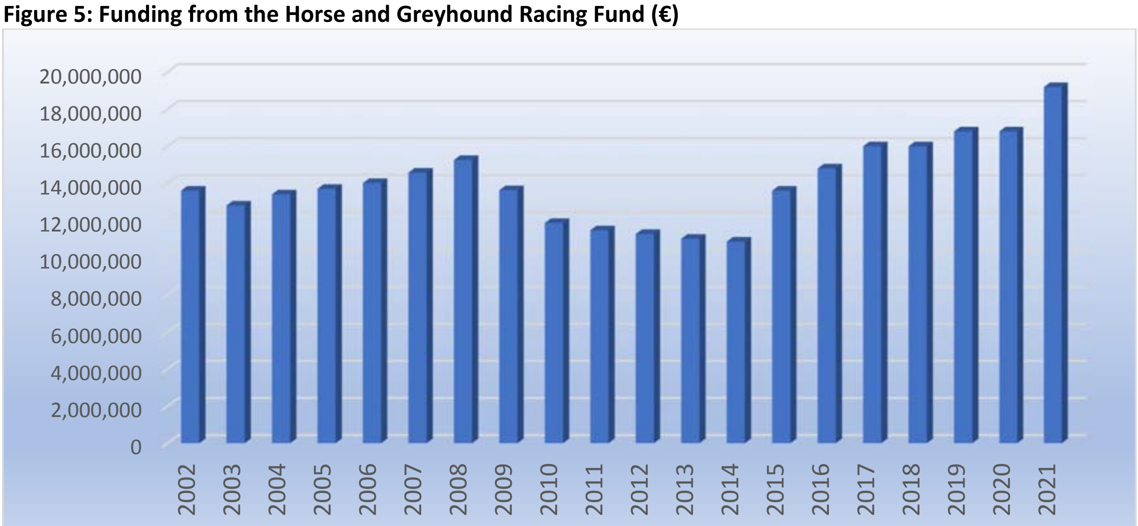
FUNDING FOR THE GREYHOUND INDUSTRY

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.

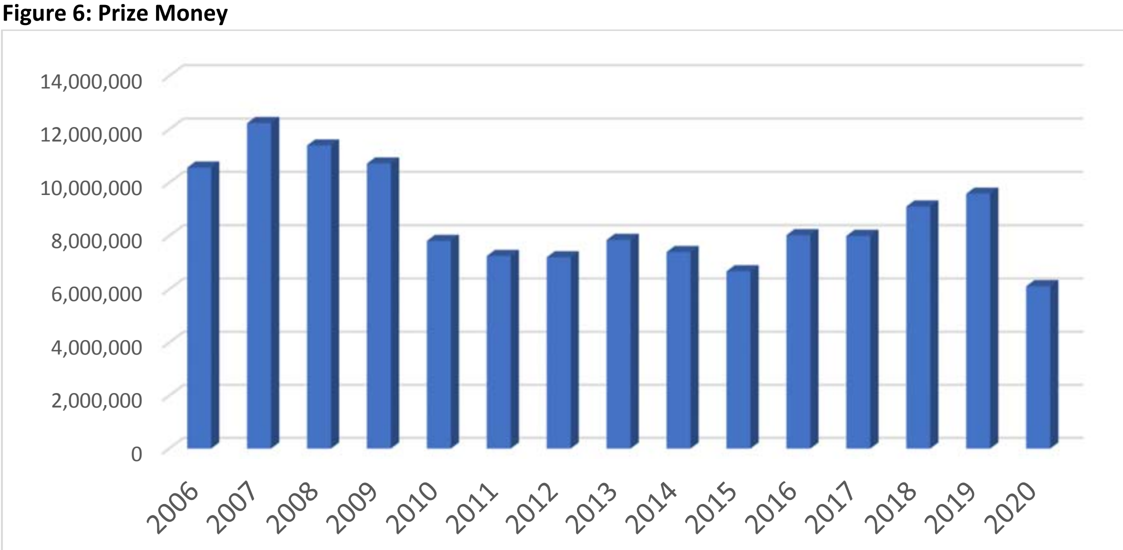
The prize money grant per race represents excellent value given the economic contribution of the greyhound sector and the level of economic activity and financial contribution involved in getting six greyhounds born, reared, trained and ready to race.

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 €.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.