



Victorian Greyhound Racing Assets & Infrastructure Discussion Paper

FOR INDUSTRY CONSULTATION

February 2024

Key guiding principles for the Racing Assets and Infrastructure plan

Prioritisation and decision making for the development, design and delivery of the Racing Assets and Infrastructure plan will be guided by the following core principles to ensure consistency and alignment to the objectives:

- allocation of resources will be prioritised to asset categories and projects based on assessments of industry need, utilisation and importance of the asset to the industry, risk, safety, impact on greyhound welfare and the environment and alignment with the GRV Strategic Plan;
- consideration of, and delivery against, the long-term needs of the Victorian greyhound racing industry;
- must not compromise safety, greyhound welfare or integrity of the sport;
- consideration of the long-term financial sustainability of the industry;
- consideration of whole of life costs required to sustain and maintain service levels over the asset's life, including operating and maintenance expenditure and depreciation expense;
- design of projects and initiatives will be evidence-based, leveraging existing data to inform investment options and opportunities;
- utilisation of an integrated planning approach and asset management, renewal and maintenance techniques to obtain the best outcomes for the industry, participants and Clubs;
- asset renewal will be undertaken using 'low-cost' renewal methods where practical by renewing the asset at a cost less than replacement cost where possible. Asset Renewals are to be funded from a combination of GRV and Club capital works programs and grants where available.

Recent Infrastructure Projects in Victoria

Victorian greyhound racing undertakes regular renewal of its racing and training infrastructure assets through a program of major projects and capital works programs at Clubs to enhance and improve the quality and safety of racing, training and customer facilities across the state.

GRV leads and oversees major racing infrastructure projects in consultation with Clubs including providing much of the funding for racing and training infrastructure projects. In recent times planning, management and funding of customer facility upgrades have become the sole responsibility of Clubs. GRV also receives some additional funding support for infrastructure projects from the state government through the Victorian Racing Industry Fund (VRIF).

GRV, along with Clubs and the state government, has invested more than \$30m in major racing and training infrastructure projects since 2016. To put future needs into perspective, following is a summary of the major racing and training infrastructure projects completed or in progress since 2016:

- Horsham – racetrack reconstruction
- Traralgon – major new “J-curve” track construction including LED Lights, video board and battery-operated cableless lure system
- Warrnambool – judges tower & pavilion upgrade, rail and camber lift, irrigation system, raceday kennels
- Sandown & Geelong – catching pen upgrades
- Healesville – kennels to boxes path upgrade
- All tracks – automated catching pen gates
- All tracks – upgraded lure motors and systems to accommodate automated lure run-up speed and braking capability
- Stainless steel raceday kennels at Geelong, Traralgon, Sale with three more sets currently being manufactured
- Bendigo, Sandown and Warragul upgrades to LED lights
- Sale – major racetrack reconstruction, irrigation system, new rail, outside fencing, drainage system and LED lights
- Training facilities incl straight tracks, competition yards and bull rings at Shepparton, Sale, Cranbourne, Horsham
- Ballarat – new kennel block (including stainless steel kennels) and racing operations centre due for completion in March 2024

These projects are supplemented by an ongoing statewide program of upgrades to starting boxes, lure systems, catching pens, photo finish equipment, in-race tracking systems, semaphore and video display boards and broadcast infrastructure.

Key Information & Background

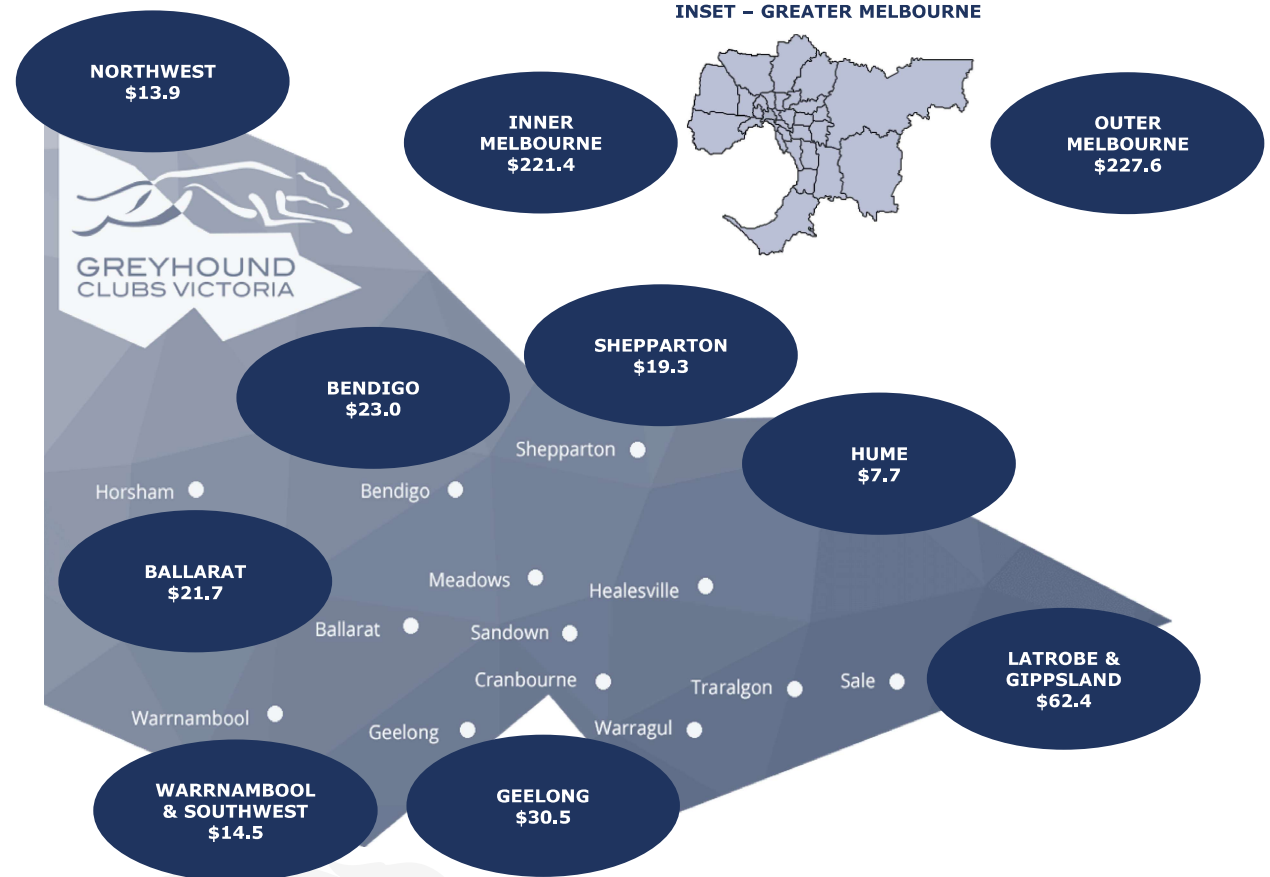
Victorian Greyhound Racing Industry Size & Scope*

The Victorian greyhound racing industry is an important economic contributor to the State and is responsible for:

- more than 4,700 full-time equivalent jobs
- more than 13,600 participants, support staff and volunteers across the network
- more than \$640 million in annual economic contribution to the state.
- \$171 million of the economic contribution is delivered within country Victoria

**Economic contribution and employment data: Size and Scope of the Victorian Racing Industry: IER April 2022*

Economic Contribution by Region (\$M)



Key Information & Background

Greyhound Population

The greyhound population is a key consideration for the number of races and meetings to be conducted and the race program required to support and maintain that population.

- Victorian and national breeding and litter numbers have reduced by around 15% to 18% over the past two years due to macro-economic circumstances, pressure on rehoming and a natural correction from the high of 4,874 Victorian-bred pups in FY22.
- It is expected that annual Vic-bred pups whelped will stabilise at between 3,800 to 4,000 over the next five years.
- The Victorian greyhound population has increased slightly in recent years following growth in Victorian-bred litter numbers and pups whelped in the FY20 to FY22 years.

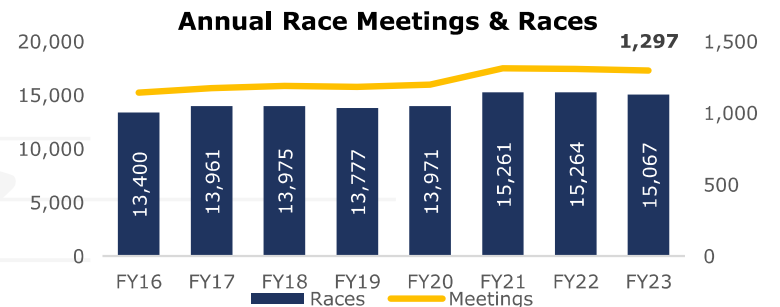
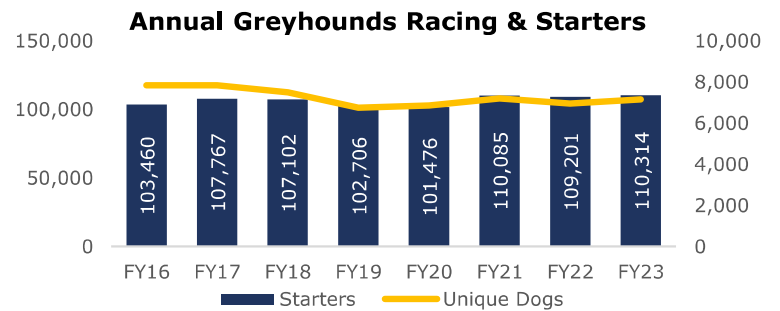
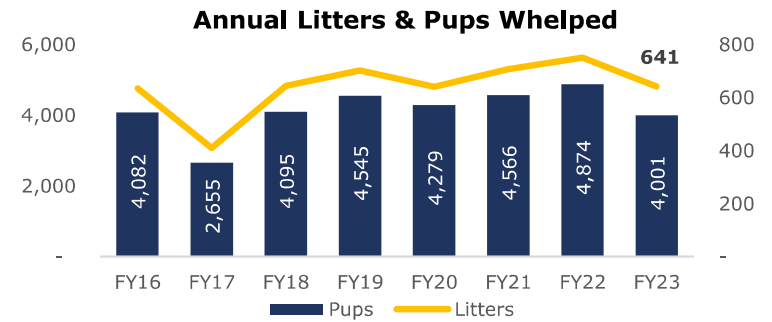
Greyhound Starters

- Greyhounds participating in the Victorian racing program and starter numbers have remained relatively consistent in recent years with an average of around 7,000 unique greyhounds competing at least once in Victoria in each of the past five years.
- Annual starters has grown to around 110,000 in each of the past three years due to the increased annual race program in FY21 and FY22.

Race Program

- The annual racing program has increased to around 1,300 race meetings and 15,000 races over the past three years.
- With the expectation of a smaller greyhound population in the next 2-3 years, resulting from reduced breeding in FY23 and FY24, the program will need to be adjusted to accommodate the population.

This paper has been prepared on the assumption that greyhound and starter numbers, race meetings and races conducted will contract slightly over coming years in line with a smaller population of pups bred, but the assumption is that any changes are likely to be within a threshold of +/- 5%.



Key Information & Background

Racing Program Structure

The racing program is structured to accommodate the greyhound population in terms of the types of meetings and races programmed to best accommodate the needs of trainers and owners and the grades of greyhounds currently competing.

There are currently five main types of race meetings programmed;

- **Level 1 Meetings**
 - Metropolitan Stakes; ~8% of races conducted
- **Level 2 Meetings**
 - Provincial Stakes; ~56%; and
 - Rank Limit; ~10%
- **Level 3 Meetings**
 - Provincial - Tier 3 ~16%
 - Bottom-up Graded ~10%

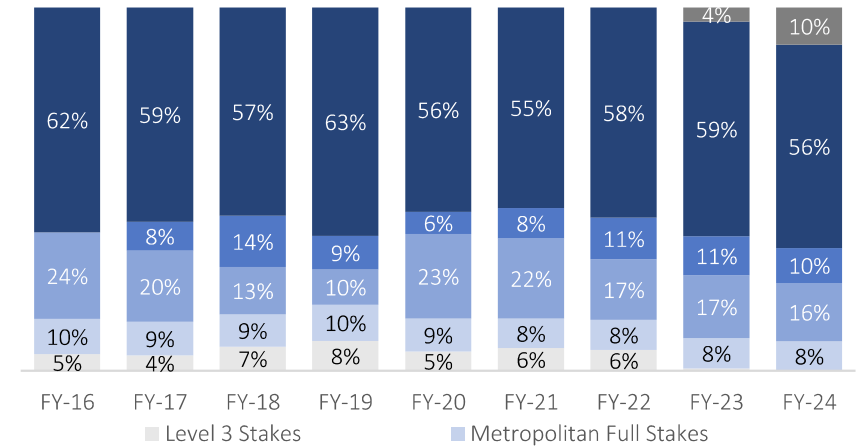
This structure has progressively changed, and it should be noted that some Level 2 meetings will also include a small number of Tier 3 and rank limit races.

Starters Per Race

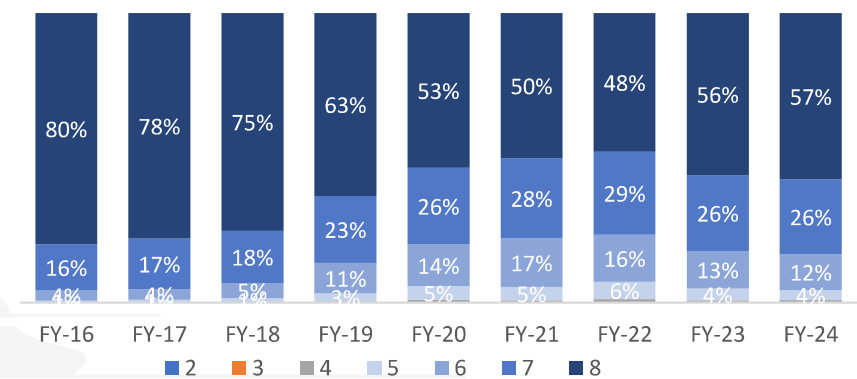
The percentage of races conducted with full fields of 8 runners is an important indicator of the efficiency of the race program, the effective utilisation of the available greyhound population and maximising wagering results.

After a sustained downward trend in the percentage of races with 8 starters between FY19 and FY22, that trend has been reversed in recent years with the current figure now at around 57% of races with 8 starters.

Race Program Structure (Races)



Starters Per Race (%)



Victorian Race Meetings & Racetracks

Racing Program & Meetings Conducted

The total number and placement of race meetings conducted across Victoria and their location is influenced by a variety of factors including:

- Track type and shape
- Participation rates (nominations and starters)
- Racing safety performance and serious injury rates
- Racing opportunities across various regions and levels of racing
- Maintenance, renovation and track reconstruction requirements
- Track availability and restrictions by other users in the case of co-tenancy
- Schedule of activities and feature events at each Club
- Wagering returns and opportunities to stimulate growth
- Availability of suitable broadcast opportunities on Sky Racing
- Cost of conducting meetings

Future Racing Program

Current trends including greyhound population, breeding and starter numbers indicate that the size of the racing program (i.e., quantum of meetings and races run) may need to be modified slightly downwards in coming years, although that change is not envisaged to dramatically impact the overall program, and within a threshold of -5%.

Over the next five years, GRV is aiming to maintain the number of meetings conducted annually within the 1,220 to 1,250 range and the number of races run within the 14,500 to 14,850 range.

Some flexibility will be required subject to the macro-economic environment and the greyhound population in future years.

Victorian registered greyhound tracks

There are 13 registered Clubs in Victoria (2 metropolitan and 11 regional) conducting racing and trialling at 12 current venues.

Racing and Trialling at Cranbourne has not been in operation since January 2022.



Racing Program Participation

Racing Program Participation

Level 2 race meetings are conducted at least once weekly at all provincial and metropolitan tracks and make up the bulk of the racing program, accounting for nearly 60% of race meetings and races run.

Of the 7,145 individual greyhounds starting in a Victorian race in FY23;

- 1,631 (23%) started at least once at Level 1 meetings;
- 6,684 (94%) started at Level 2 meetings; and
- 4,570 (64%) started at Level 3 meetings

The program and grading structure ensures that nearly all greyhounds are required to participate in Level 2 meetings at some stage in their career, before they can move up to Level 1 or down to Level 3 races, which is reflected by the high percentage of individual dogs competing at that level.

The trend in recent years has been for a higher percentage of greyhounds to compete in Level 2, and for a slight downturn at Level 3.

Participation by Distance Range

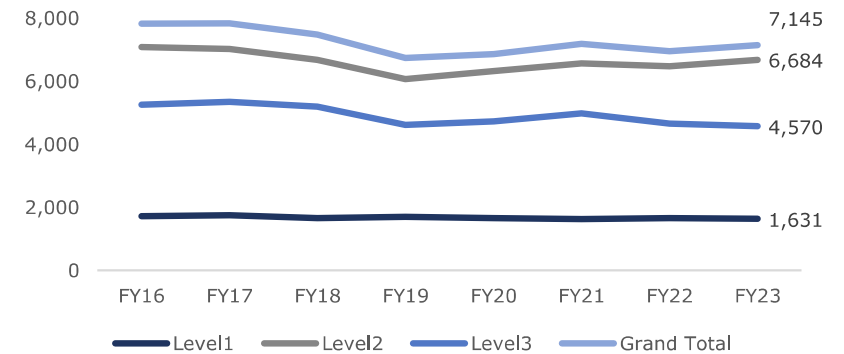
The percentage of annual starters in races at distances less than 424m (short) has been steadily increasing over the past seven years, with the percentage increasing from 34% in FY16 to 50% of all starters year-to-date in FY24.

Starters in races conducted in the 424m to 569m (middle) range have declined from 59% in FY16 to 45% in FY24 and starters in races beyond 569m have remained steady at about 4-5% of all races for the past 7 years.

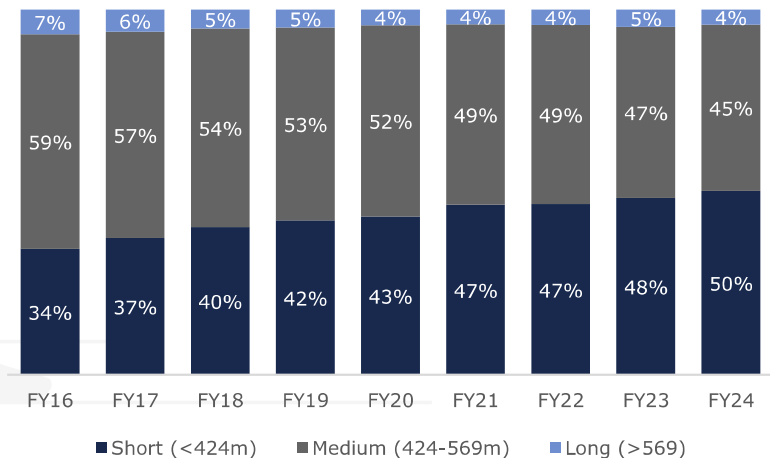
- 8 tracks (provincial) have starts accommodating racing over less than 424m
- 11 tracks have starts in the 424m to 569m range
- 9 tracks have starts over 569m or longer

For greyhound safety reasons, GRV does not support conducting short course races (less than 350m) at the two turn city tracks. The preference is to develop a stronger and deeper pool of greyhounds capable of racing competitively at 380m and beyond.

Individual Greyhounds Starting by Meeting Level



Annual Starters (%) by Distance Range



Racing Program Performance

Racing at Metropolitan Tracks

Over the coming 5-10 years, it is expected that Level 1 (Metro) Racing at the two metropolitan tracks, Sandown Park and The Meadows, will continue to be conducted no more than twice weekly (i.e., no more than 104 meetings per annum).

These meetings offer premium prizemoney and represent a unique aspirational point of difference for participation in racing in Victoria. They also produce superior wagering outcomes when compared to all other racing. Average turnover per race at Level 1 meetings is 1.65 to 1.70 times higher than the average for all other races.

Both metropolitan tracks will require redevelopment or refurbishment over the coming five years. During the period where one of those tracks is under redevelopment it is proposed that the other metropolitan track would regularly conduct two Level 1 Premier meetings per week, with alternatives required for at least one of the Level 2 meetings.

Level 2 & 3 Racing

All country and metro tracks currently conduct at least one Level 2 (Provincial Stakes) race meeting each per week, and all provincial tracks apart from Sale and Horsham conduct at least one weekly meeting at Level 3.

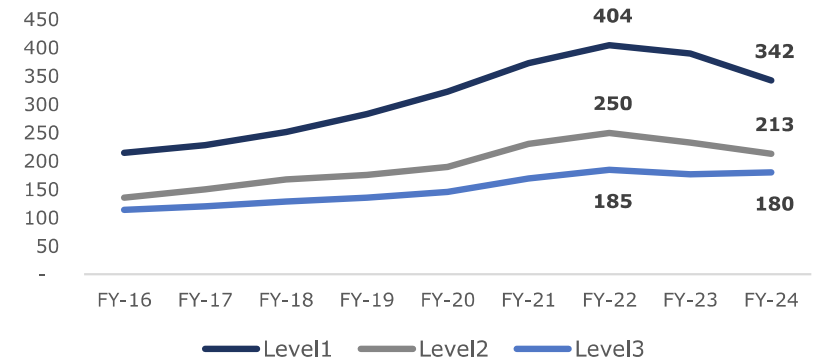
Level 2 meetings at metro tracks have been producing comparatively low average starters per race for several years, although that trend has improved in FY23 & FY24.

Future Program

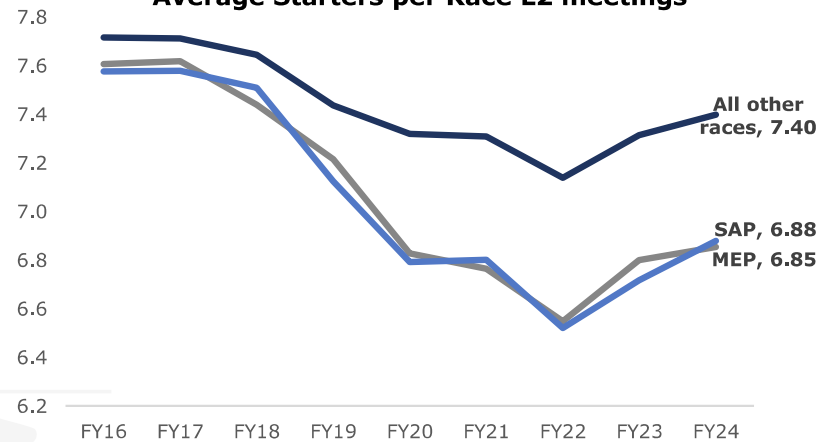
Following the program reduction to 24 meetings per week in January 2024, GRV plans to:

- maintain a consistent weekly program of volume and type of meetings, with flexibility to modify the program to meet emerging needs;
- maximise racing at the best performing tracks from a racing and wagering perspective to help ensure financial viability;
- explore opportunities to modify the program at certain times of the year where the greyhound population and nominations are lower, or where weather or track works may impact the ability to conduct meetings, or where opportunities may exist for Clubs to attract higher attendance or wagering outcomes at certain times of the year.

Average Turnover per Race by meeting Level (\$000)



Average Starters per Race L2 meetings



Racing Program

Annual Race Meeting Calendar

The annual racing calendar has included around 1,300 meetings across each of the last three years, equating to approximately 25 meetings per week.

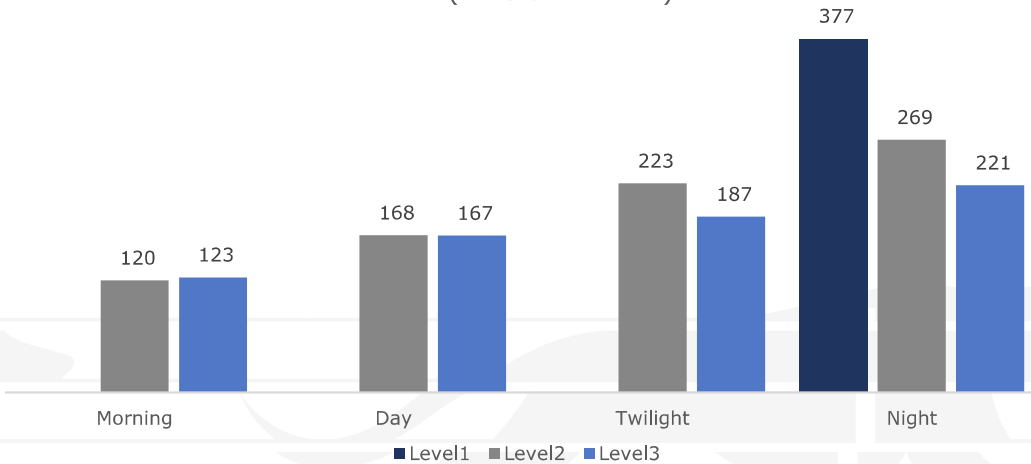
More than 70% of the program is conducted in twilight and night timeslots which are the more lucrative slots from a turnover point of view. Most day meetings are Level 3.

All tracks apart from Horsham conduct around two meetings per week (100+ meetings per year) when fully operational. In recent years Ballarat, Geelong, Warragul, Shepparton and Traralgon have regularly been required to hold three meetings per week.

Whilst conducting three meetings per week is manageable for most Clubs, without additional resourcing, that volume of racing can impact capacity to conduct trial sessions and perform track preparation and maintenance to a satisfactory standard.

GRV does not intend in the future for tracks to consistently conduct more than 3 meetings per week but will remain open and flexible to that opportunity in the right circumstances.

Average Turnover per Race by Meeting Level/Timeslot (\$000)
(FY23 & FY24YTD)



Annual Meetings	FY22	FY23	FY23 %
Morning	51	61	5%
Day	349	320	25%
Twilight	454	450	35%
Night	453	466	36%
Total	1,307	1,297	100%

Track	FY22	FY23	FY23 %
BAL	123	136	10%
BEN	116	115	9%
CRN*	58		0%
GEL	119	129	10%
HOR	66	70	5%
HVL	141	120	9%
MEA	51	52	4%
MEP	51	52	4%
SAN	54	52	4%
SAP	47	48	4%
SHP	119	121	9%
SLE**	82	42	3%
TRA	50	134	10%
WBL	97	102	8%
WGL	133	124	10%
Total	1,307	1,297	100%

* CRN closed for racing since January 2022

** SLE closed for racing for redevelopment from January to August 2023

Trainer and greyhound location

There are around 110,000 starters annually in Victoria. Over the last 12 months to the end of October 2023:

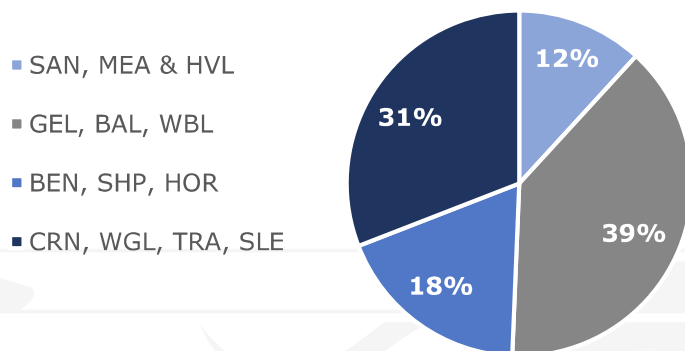
- around 1,240 trainers prepared 8,000 individual greyhounds to race in Victoria.
- 39% of starters came from the Geelong, Ballarat & Warrnambool region with the Geelong area producing double the volume of greyhounds than the next highest area around Cranbourne;
- 31% of starters came from the Southeast/Gippsland;
- 18% from the North/Wimmera; and
- 12% from the metropolitan region including Healesville.

Number of Trainers, Active Dogs and Starts all Tracks

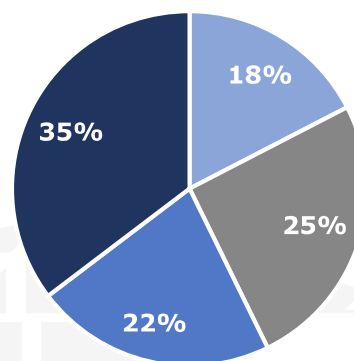
By Nearest Track, 12 months to end Oct-23

Closest Track	Trainers	Active Dogs	Starts
Cranbourne	197	1,139	14,455
The Meadows	164	714	9,789
Geelong	146	1,952	28,235
Bendigo	144	891	12,353
Ballarat	95	618	9,453
Shepparton	91	455	5,342
Sale	88	683	9,742
Warragul	84	410	5,111
Warrnambool	73	389	5,054
Traralgon	69	361	4,676
Sandown Park	37	151	1,922
Horsham	37	252	2,566
Healesville	15	79	1,264

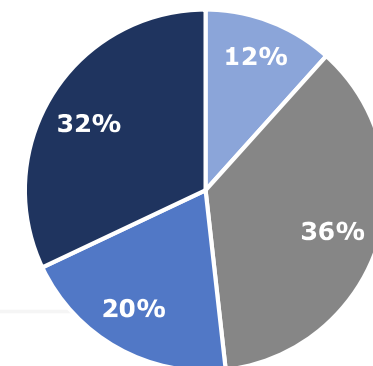
% of Annual Starters



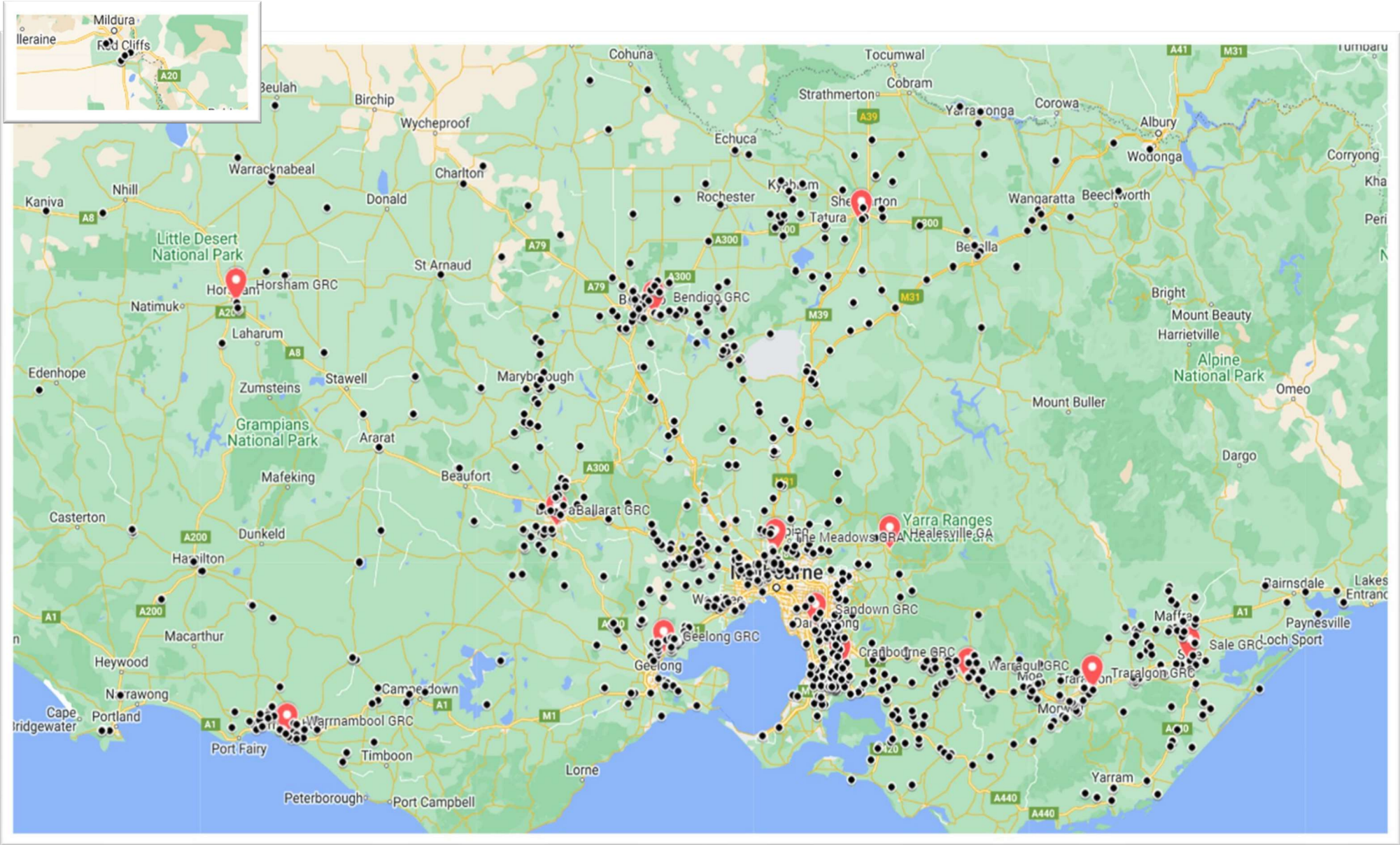
% of Trainers



% of Active Dogs



Active Racing Trainers by location – last 12 months



Starters by Sex across different track types

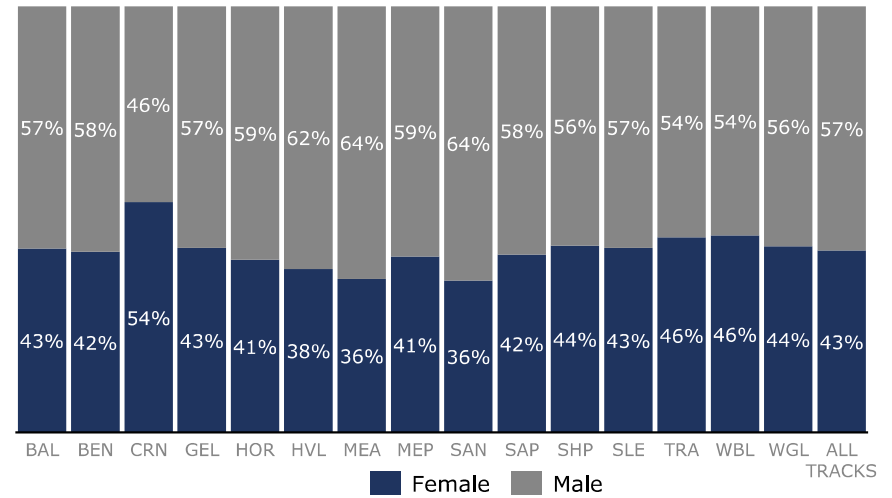
A long-held view is that a one bend, long turn transition track favours larger greyhounds, or at least reduces a competitive advantage to be gained by smaller greyhounds (usually females) in two-turn track racing scenarios.

Starter numbers across Victoria over the past four racing years shows that around 38% of all starters at two-turn metro tracks are female. This represents a smaller proportion of female starters when compared to non-metro tracks where an average of around 44% of starters are female greyhounds.

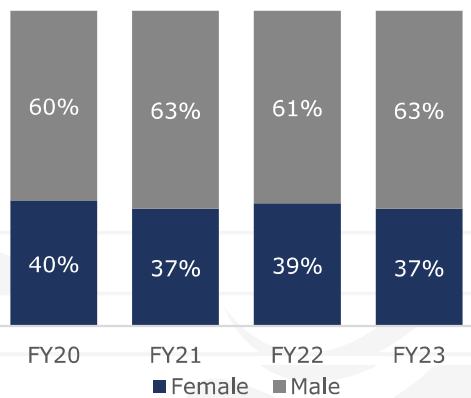
The win & place split between sexes shows that around 38% of races were won by females at metro tracks, with around 35% of races on non-metro tracks won by females.

GRV proposes to enhance racing options for female greyhounds by programming more female only races, including female and male only maiden races, to provide improved winning opportunities for female greyhounds

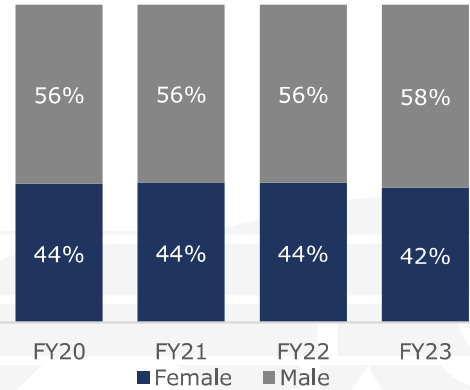
All Tracks Starts by Sex (FY20 to FY23)



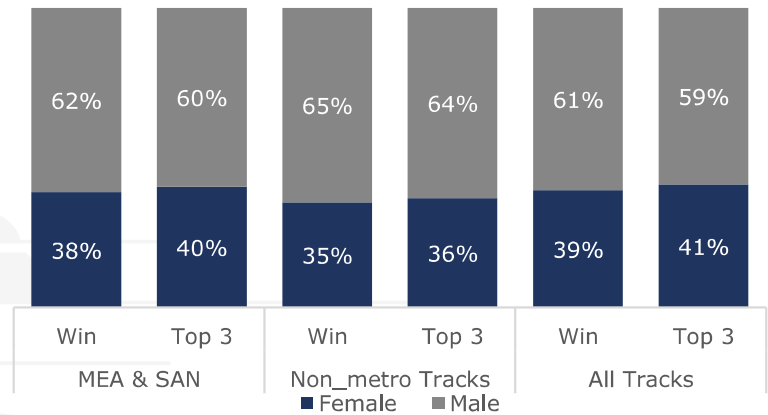
Sand & Mead Starts by Sex



Non-Metro tracks Starts by Sex



Win & Place % by sex (FY20 to FY23)



Greyhound Racing Injury Trends

The rate of racing injuries and fatalities on Victorian greyhound tracks has been steadily declining over the past five years.

The total all injury rate per 1,000 starters has declined by 19% since the 2018/19 racing year, while total fatalities have declined by 51% and the fatality rate per 1,000 starters has fallen by 55%.

Continuing to reduce injury rates and fatalities is a high priority of the GRV Strategic Plan, and future decisions regarding racing infrastructure investments will need to carefully consider this priority objective.

GRV intends to prioritise racing infrastructure projects and initiatives that have the potential to have a positive impact on the welfare and safety of greyhounds in racing and training.

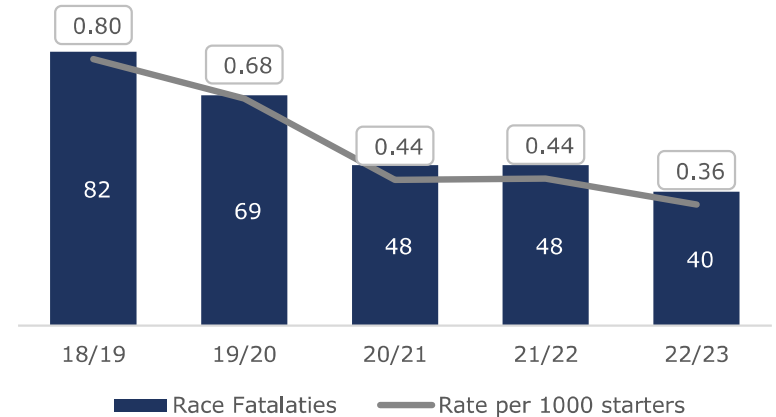
This commitment would include investments to continually improve track shape, width consistency, layout and design, track surface preparation methods and equipment, track maintenance and diagnostics programs, drainage, irrigation systems and methods, starting positions, track cambers, transitions and alignment and rail composition.

This approach would also include consideration of options where additional and/or upgraded greyhound training and education facilities can be managed by and provided at greyhound Clubs, or at nearby properties for the use of trainers and educators in the region.

High quality and well-maintained greyhound training and education facilities can have the benefit of maintaining the fitness and wellbeing of greyhounds.

Further to this, GRV proposes to, in conjunction with Clubs, explore opportunities and options to address the industry need for long-term access to and availability of specialist greyhound veterinary services in various regions around the state.

Race Fatalities & Rate per 1,000 starters



Total Injuries & Rate per 1,000 starters

