



Irish Greyhound Board

# STRATEGIC PLAN



# 2018 2022

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# FOREWORD FROM THE CHAIRMAN

Thank you for taking the time to read this emerging strategy for the industry. Greyhound racing is as Irish as Hurling or Céilí Dancing and has been part of our culture for more than 200 years.

Today, owning and racing greyhounds is a pastime that's open to people from all walks of life. Greyhound ownership and racing has always been an inclusive sports arena that's open to everyone. As a greyhound enthusiast for many years, I know how much joy (and sometimes frustration), this sport can bring to individuals and families.

## It's part of who we are.

The preparation of this strategic plan has allowed us to take stock of where we in the greyhound industry are today and plan a way forward.

It will result in a renewed interest in the industry, bringing greyhound racing - a unique sport - to many more people. Specifically, it will increase the level of Greyhound ownership, result in a fairer deal for breeders, owners, trainers and patrons to our stadia and continue to provide a social engagement for people just looking for a fun night out.

The plan is built around seven key areas which encompass the entire of the greyhound industry. Implementation of the initiatives outlined in the plan are aimed at restoring viability to the greyhound industry and creating a vibrant future for all those involved or who become involved in the sector.

This plan has the issue of animal welfare as a key consideration and a central part of the work of the IGB and the greyhound industry over the plan period. As an industry we need to clearly demonstrate and promote the

very positive welfare initiatives that are already in place and implement further progressive measures to allay any public concerns that may exist on welfare within the industry.

Implementation of proposals contained in the strategy will support direct and indirect employment in the industry and in support services.

The proceeds from the sale of Harold's Cross will remove the burden of debt and facilitate significant improvements in animal welfare, upgrading our stadia and driving the greyhound industry.

Full details on proposals are outlined in this strategy. In particular we want to ensure that Shelbourne Park continues to be the flagship for our industry - with utilisation across four or more nights each week of the year.

Following through on the commitments made, we will also strive to make IGB a great place to work for our dedicated staff, many of whom have given a lifetime of service to Greyhounds and to the wider organisation. In this regard, I would like to extend a particularly warm welcome to our new Chief Executive - Gerard Dollard. Ger brings a wealth of experience to the table and will lead the next phase of our journey.

As Chairperson, it's my great privilege to lead the Board of Directors, helping to steer this semi-state organisation, working with the wider industry, towards a bright and positive future. That journey has already begun.

Phil Meaney  
Chairman: Irish Greyhound Board



# MESSAGE FROM THE CHIEF EXECUTIVE OFFICER

The greyhound industry is an important and significant industry for Ireland. It is embedded in Irish society and is an important economic, social and cultural activity, particularly in rural Ireland. It provides strong local employment for those engaged in the sport and for a variety of service providers in the wider industry.

The international greyhound industry faces significant challenges and the Irish greyhound industry is no different in that regard.

This strategic plan has been prepared against the background of significant challenges facing the greyhound industry. The plan sets out the strategic thrust for the sector but will evolve over time in response to ever changing circumstances.

Proposals set out in the plan under seven key pillars will require to be further developed to ensure that the objectives of the proposals are fully realised.

There is much to be positive about. The commitment and passion of owners, breeders and trainers is clear to see, as is their belief in a strong greyhound industry. The resolution of financial debt issues within IGB offers a platform for a new beginning for the sector.

The strong Government support for the industry through the Horse and Greyhound Fund, together with the legislative commitment to concluding the Greyhound Industry Bill is very welcome and is key to the future development of the industry. The successful enactment of the Bill will offer further opportunities in the creation of Greyhound Racing Ireland to grow the industry and extend its appeal to a wider audience.

All proposals contained within the plan are subject to resource provision and the economic and financial circumstances pertaining during the life of the plan. Adjustments to the plan may be necessary where the financial projections within the plan do not materialise as anticipated.

The contribution of the staff of the Irish Greyhound Board is critical to achieving growth and development within the greyhound industry and to delivering on the actions set out in this strategic plan.

I look forward to working with all stakeholders in delivering on the proposals in this plan and to promoting a vibrant industry both at home and abroad.

**Gerard Dollard**  
Chief Executive Officer

# EXECUTIVE SUMMARY

This is a critical time in the history of IGB and the Irish greyhound industry, with a mixture of extreme pressures on the one hand, and exciting possibilities on the other.

The pressures include poor economic returns across the industry recently, from breeders to owners, trainers, bookmakers, and tracks. Many key indicators show a concerning trend as the industry battles against many challenges.

The industry has been the subject of a range of studies, reports and analysis in recent years. These all offer an in-depth analysis of the issues and challenges facing the greyhound industry. These studies have formed part of the consideration of this strategic plan. The plan is also informed by submissions made in response to the IGB's request for submissions on the plan.

The plan is formulated on a multi-dimensional and cross-industry approach. It recognises the commercial mandate of the IGB and the necessity to have a financially viable organisation to underpin the further development of the sector.

- Actions under the plan are grouped under seven key pillars:
- Develop & support owning, breeding and training
- Promote a focused racing centric and betting model for the industry
- Improve customer experience and deliver increase in attendances
- Ensure the highest standards of integrity and regulation in the sport

- Enhance animal welfare at the centre of our industry
- Developing our people and creating an organisation structure that reflects the needs of the industry
- Maximise use of information and communications technology.

The seven pillars cover a range of actions which individually will be developed and progressed to ensure progress on the key elements that underpin the greyhound industry.

The Plan has a key focus on the organisation being a racing-centric organisation with integrity and welfare considerations at its core.

The plan will require a restructuring of the organisation, its resources and infrastructure to maximise benefits from the proposals contained within the Plan and to ensure a lean and efficient organisation.

On foot of the resolution of debt issues and the availability of capital funds for reinvestment, the plan commits to a reinvestment programme in the greyhound stadia network to upgrade infrastructure and provide an improvement in facilities to meet modern standards and the expectations of our customers.

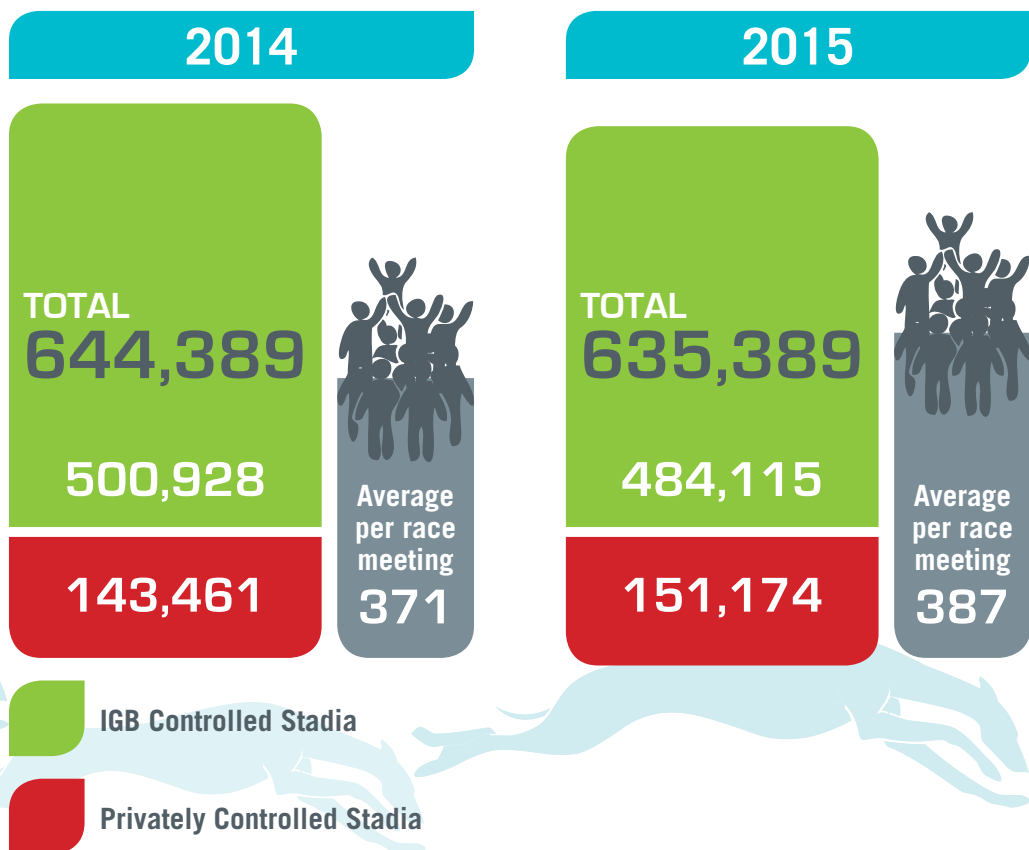
The operational element of the plan will be reviewed on an annual basis in line with the annual budgetary cycle of IGB to ensure available financial resources are targeted at actions identified in this strategic plan.

# MARKET ANALYSIS

Greyhound racing prospered in an era when there were fewer alternatives. Today customers have a myriad of choices - from staying-at-home, watching entertainment on-line to a huge variety of social options.

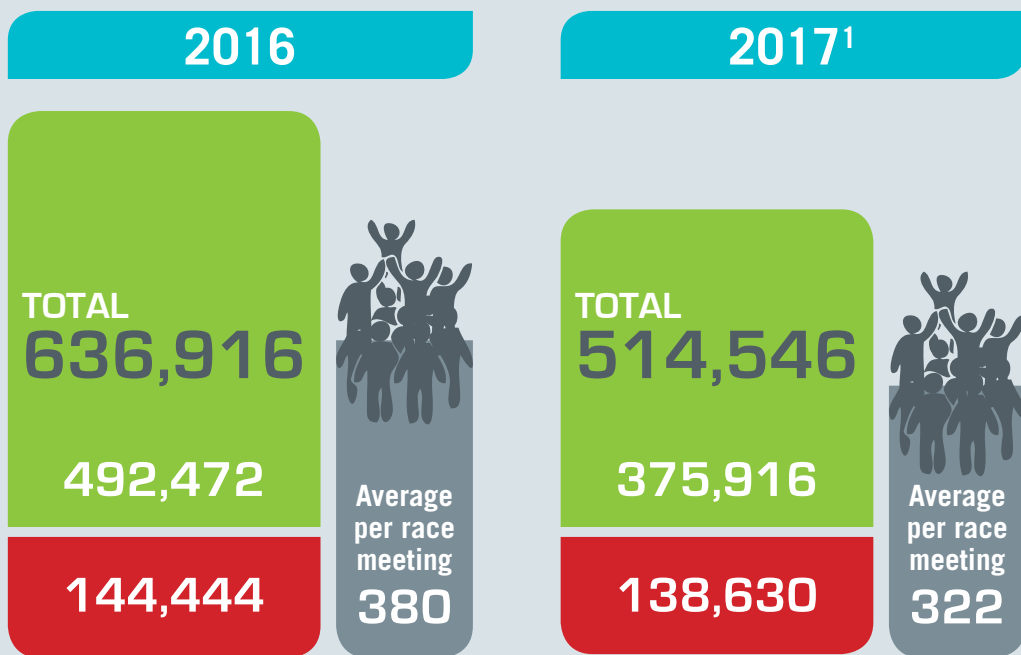
In the past decade, the footfall at Greyhound racing has declined significantly.

## ATTENDANCE OVER RECENT YEARS



This decrease is particularly acute in urban areas where greyhound racing competes against many alternatives. This is our central challenge, one that faces the industry in every developed country where the sport of greyhound racing is a part of the social fabric.

However, the decrease in footfall is not fully explained by 'alternatives'. The industry has come under scrutiny from those who believe that practices around 'betting' and 'animal welfare' leave a lot to be desired, and this has created a negative perception of the industry. Animal welfare is an important issue across all parts of Irish society.



In a society which has a special love of dogs, the care of greyhounds - a specialised sports animal - needs to be above reproach. Animal welfare is a leading element in this strategy.

A related point is the reduction in the level of financial sponsorship of the industry. Getting key sponsors back 'onside' is one of the challenges addressed in this strategic plan. A coordinated

industry-wide approach to dealing with perception issues relating to animal welfare and poor standards is essential to convincing potential sponsors that significant opportunities exist as part of the positive activity being undertaken at all levels in the sector.

<sup>1</sup>2017 data is adversely affected by a dispute which impacted on attendances at Shelbourne Park over a 20 week period in February – June. All 2017 data presented in tables throughout this plan should be adjusted for this consideration.

## BASIS FOR OPTIMISM

# UNIQUE PROPERTIES OF GREYHOUND RACING

Greyhound racing in Ireland has many unique features, a strong heritage, extensive assets and privileged positions across the country. The network supports an extensive range of meetings and races at each location:

## RACE MEETINGS 2014 – 2017

Year	Meetings	Races	No of Participating Greyhounds
2014	1,736	16,901	87,065
2015	1,642	16,100	83,893
2016	1,675	16,573	86,694
2017 <sup>2</sup>	1,548	15,610	81,208

There are many reasons for optimism, and this strategic plan outlines a series of measures that will counter-act the above weaknesses. This strategic plan, while retaining many existing ideas, also adds some fresh ideas on how to rejuvenate the industry.

Interestingly, most of these practical ideas carry insignificant cost and low risk, but there are also recommendations for substantial investments in facilities, animal welfare, IT, marketing, PR, greyhound breeding, ownership, career pathways and staff development.

The resolution of debt issues has given IGB a rare opportunity to invest in facilities, people, and in expanding the greyhound industry.

**Only a substantial transformation - a step change across a whole spectrum of modernisation and professionalisation - will realise the potential of the industry, initiated by a bottom-up approach from grass roots level.**

This Strategic Plan addresses all these key issues in a holistic way, and suggests viable, cost-effective measures to reinvigorate the industry, to the benefit of all stakeholders, including the wider community.

<sup>2</sup>2017 data is adversely affected by a dispute which impacted on attendances at Shelbourne Park over a 20 week period in February – June. All 2017 data presented in tables throughout this plan should be adjusted for this consideration.



# PRIMARY OBJECTIVE OF THIS STRATEGIC PLAN

**Rejuvenate our industry from the grassroots, creating a clear pathway to engage all stakeholders in our highly-charged passionate sport.**

## OUR MISSION

To deliver a commercial, well-regulated Greyhound Racing and Breeding industry whilst enabling the delivery of a customer centered, highly exciting and value led entertainment experience.

The purpose is to promote excellence in every single aspect of the greyhound racing industry with the highest standards of welfare so that this unique sport can be enjoyed by current and future generations.

## OUR VISION

We will work towards world-class performance and an attractive, vibrant and valuable industry, for the benefit of all stakeholders.

A positive image for the Irish Greyhound Industry can, and must be, restored.

The industry has a strong rural base but provides a significant boost to urban areas where stadia are located.

The business model must be such that it offers suitable rewards for all those who work in it. Attendees at our stadia will be treated to world-class, immersive experiences of the kind that only greyhound racing can provide.



# METHODOLOGY

This strategic business plan is the culmination of the work of many people, and integrates the essence of recent (2017) surveys and plans across the spectrum of IGB activities.

The main surveys focused on Stakeholder Perceptions, Brand Identity, Staff Engagement, providing a timely and reasonably comprehensive view of IGB and the industry.

The key plans accessed included recent reports and proposals on the future of greyhound racing, infrastructure development, facilities, customer experience, IT, innovation, process development, financial management, animal welfare, revenue growth, asset utilisation, contract racing, partnerships, catering, IT, audio-visual, gambling and wagering. The most significant of these include:

- Indecon Report – Review of Certain Matters Relating to Bord na gCon (2014)
- Morris Report – Anti Doping and Medication Review (2015)
- Jim Power Economics Ltd. Report – Economic and Financial Significance of the Irish Greyhound Industry (2017)
- Coyne Research – Reputational Research Report (2017)
- Various submissions from stakeholders (2017)
- Surveys:
  - Staff climate & culture survey
  - Customer satisfaction surveys
  - Stakeholders input



# SCOPE AND TERMS OF REFERENCE OF THIS PLAN

This plan has an extensive remit and is intended as an open presentation of the current realities of the industry and its immediate future. Access has been provided to all relevant information; to IGB staff at all levels and to all relevant stakeholders.

Surveys were undertaken and the views of a wide range of stakeholders was sought and obtained.

This plan addresses seemingly obvious, but critical questions, such as:

*In which industries are we really competing?*

*Where we are now, and where are we going?*

*Who are we and what do we stand for?*

*How are we going to get there?*

*How will we develop and realise our vision for the industry?*

*What are the costs, risks, constraints and hidden opportunities?*

*Who will make the journey with us, and are we organised for success?*



# OUR HISTORY - BORD NA GCON/IRISH GREYHOUND BOARD

## Promoting Excellence in the Greyhound Industry

The Irish Greyhound Board - Bord na gCon - is a commercial semi-state body which is responsible for the management and development of the greyhound industry in the Republic of Ireland.

The Board was established under special legislation by the Government in 1958. The Greyhound Industry Act (1958) ( as amended) gives the Board 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, trainers and the implementation of the rules of racing.

The Irish Greyhound Board has responsibility for the overall administration, regulation, governance, development and promotion of the Irish greyhound industry.

The Irish Greyhound Board has licensed a total of sixteen tracks in the Republic, of which nine are managed by the Board. The remainder are operated by private enterprise. There are also a further two privately owned stadia in Northern Ireland which are not under the jurisdiction of the IGB.

The Greyhound industry in Ireland delivers an economic gain to over 12,000 people throughout the country, a statistic that may initially cause surprise until one considers the 850 staff directly employed in IGB racing and hospitality services at the various tracks, plus 7,313 unique owners, 540 active trainers and up to a further 4,000 people in ancillary services (The Economic and Financial Significance of The Irish Greyhound Industry ( 2017) – Jim Power Economics Ltd.).

Greyhound racing is particularly appealing to high-spending overseas visitors.

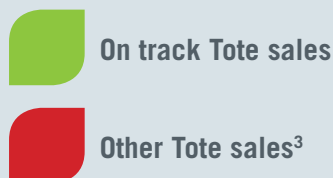
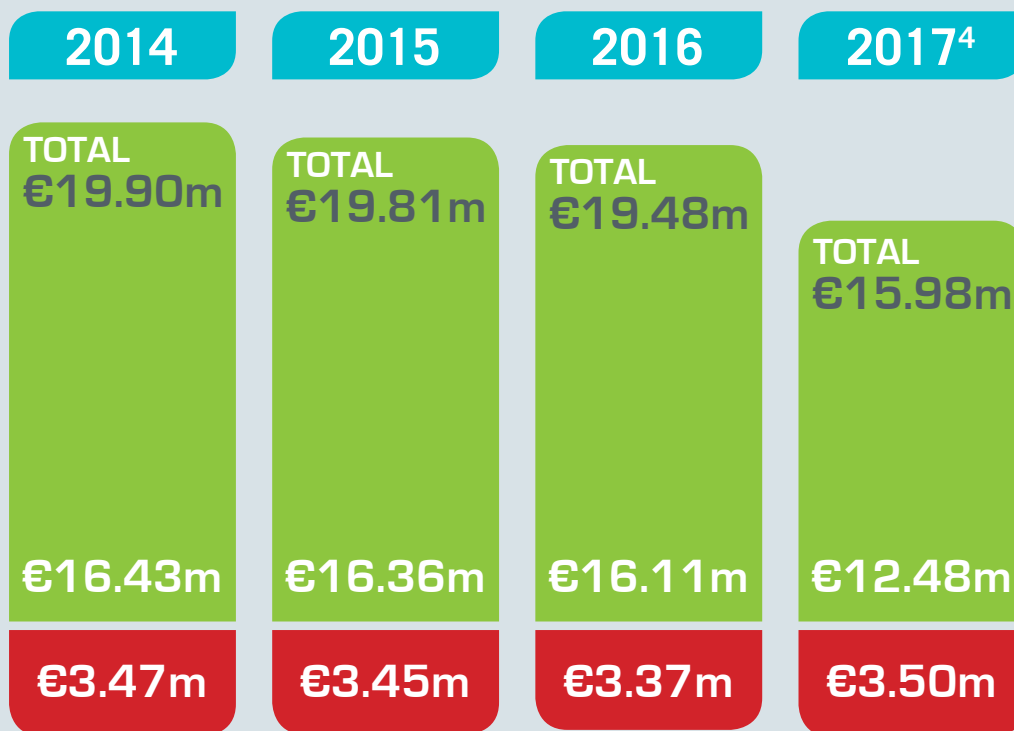
In addition, the Irish greyhound industry is the main provider of high-quality racing dogs to Britain, where they are perennial Derby winners e.g. Astute Missile (2017).

The Board operates Tote facilities at all greyhound tracks in the Republic and applies an on-course levy on all bookmakers' betting in the Republic.

The revenue generated from all track activities (Trialling/Gate/Entry fees/Tote), funds the industry and allows the Board:

- Supplement prize money at all levels of greyhound racing
- Provide development loans and grants to greyhound tracks
- Improve facilities
- Advertise and market the industry on a national and international level
- Develop and improve greyhound stadiums nationwide.

#### TOTE INCOME OVER RECENT YEARS



<sup>3</sup>Other Tote sales includes income from all web based tote platforms, international markets and income from the sale of media rights

<sup>4</sup>2017 data is adversely affected by a dispute which impacted on attendances at Shelbourne Park over a 20 week period in February – June. All 2017 data presented in tables throughout this plan should be adjusted for this consideration.



The Greyhound has long been an iconic symbol of Ireland, back even to the legendary days of Cú Chulainn. Ireland's heritage is deeply entwined with this noble animal, bred since pre-history as the original fast sight-hound, capable of speeds of 50 km/hour due to its lean and flexible anatomy and bone structure. Despite this prowess, greyhounds make excellent pets, and are easily managed: indeed, they are known for their "couch-potato" disposition and fondness for human company.

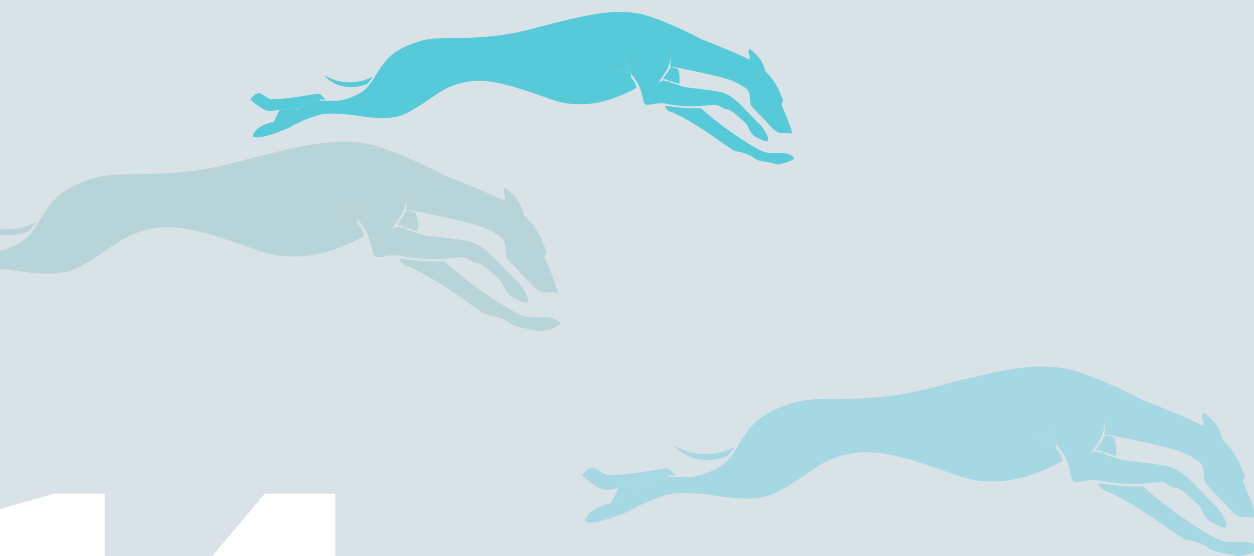
An element of this strategic plan will be to give greater prominence to the nobility of the greyhound, and to honour champion greyhounds suitably in each stadium, in a manner similar to that achieved in premier sports stadia, such as Croke Park.

The greyhound, of course, is a deeply-rooted aspect of rural life, one where Irish people can show their prowess in animal husbandry and enjoy the excitement of winning at their local track.

In a time when the revitalisation of rural areas is a priority for Government, and as other entities reduce their footprint and involvement at rural level, it is essential that the activity of greyhound breeding, ownership and racing be maintained as part of the fabric of rural life and as an economic contributor to the rural and urban economies.

This heritage, and the enjoyment of going greyhound racing, fuels a clear sense of pride and is part of "who we are" in Ireland.

Elite sports provide many temptations for owners, trainers and others, and the Irish greyhound industry has not differed from other sports in that respect: the IGB are acutely aware of the need for the highest standards, rigorously enforced and this plan strengthens that resolve by adding dedicated resources and enhancing transparency, as well as substantially strengthening welfare aspects.



# EXTERNAL ANALYSIS

In general, the issues facing the greyhound sector are not dissimilar to those facing many other sports both in Ireland and Great Britain.

It is recognised that greyhound racing in Ireland has distinctions that are important (such as greater frequency of events, on the one hand but reputation and welfare perception problems on the other), and these distinctions have been taken into account.

Macro-economic forces, notably Brexit (because of its impact on the export of greyhounds), need to be addressed during the period of the plan. It is estimated, based on 2016 data that 85% of greyhounds raced in the UK come from Ireland. This is a key export market for the sector and underpins significant employment within the sector.

The IGB will work closely with other national organisations and through the Department of Agriculture, Food and the Marine to ensure that the existing arrangement for ease of movement of exports between Ireland and the UK is maintained as part of any arrangement agreed between the two Governments within the wider EU framework.

While the overall rise in economic activity in Ireland would normally be expected to increase disposable income which could be spent greyhound racing, the drop in positive sentiment, especially among young and female audiences, will likely offset that gain, unless the image and perception of the sport is changed significantly.

The reputational challenge is particularly acute among the 18-25 age cohort who are the customers and potential owners of the future.

Rivalry is high: there are many substitutes for the sport of greyhound racing, for gambling and for entertainment, and the IGB finds itself competing with dynamic commercial ventures.

On the other hand, IGB has very valuable and well-located assets nationwide that could be leveraged for greater income and for wider appeal to their communities. Assets under control of private interests also offer a similar capability to be drivers of activity in their local areas.

The network of stadia, both public and private, underpins greyhound racing and its associated services in the wider economy with a particularly positive impact in rural locations. The support by IGB for the network of stadia is not solely based on economic viability considerations but on the significant economic, social and cultural benefits to the wider community.

# INTERNAL ANALYSIS

Internally, the industry is far from speaking with one voice, or from taking concerted action: the lack of trust and dearth of collaboration is evident. It will take considerable investment in change management to turn these weaknesses into strengths, but such a transformation can and must be achieved. The sector needs to have confidence in itself and collectively act to promote the very positive benefits of the industry.

## ECONOMICS OF GREYHOUND DEVELOPMENT IN IRELAND

At a micro-economic level, the cost of rearing a greyhound is a challenge for those involved in the sport. It is recognised that significant costs arise in breeding, rearing and training a greyhound and while a break-even situation may not be achieved, the enjoyment derived from involvement in the sport is a strong consideration for all involved.

The decision by IGB to increase prize money by 25% from October 2017 has assisted in reducing the costs associated with rearing and caring for a greyhound. The Plan provides for additional financial incentives to further improve the viability of greyhound ownership.

The above analysis is relevant as we look at practical means to attract and educate new entrants to the business and increase the calibre of greyhounds to support racing in Ireland.

## NAMED GREYHOUND BREEDING STATISTICS

Year	Named Greyhounds Bred
2014	14,898
2015	15,338
2016	13,967
2017 <sup>5</sup>	13,649

As with many sports, the sport of greyhound racing is not economically self-sufficient, and it relies on ancillary income from hospitality and catering: indeed, the greyhound racing spectacle requires large attendances and real fans to generate maximum excitement. This, coupled with the significant support of the Horse & Greyhound Fund, is central to maintaining an active industry.

The hospitality and catering industries are highly competitive and dynamic, and therefore offer real challenges to IGB. However, IGB's fixed asset base, although in need of investment is a real and substantial advantage.

\*2017 DATA IS ADVERSELY AFFECTED BY A DISPUTE WHICH IMPACTED ON ATTENDANCES AT SHELBOURNE PARK OVER A 20 WEEK PERIOD IN FEBRUARY – JUNE. ALL 2017 DATA PRESENTED IN TABLES THROUGHOUT THIS PLAN SHOULD BE ADJUSTED FOR THIS CONSIDERATION.

# CORE COMPETENCIES

IGB has a unique and valuable core competence in greyhound racing and related activities.

Competency sets need to be continually nurtured and developed, but the pathway into greyhound racing (breeding, training, ownership and related activities) is serendipitous and craft-based, with no clear career structure, or, at the moment, sufficient economic incentive.

Similarly, race goers can be divided into three clear categories, those who participate primarily for their interest in greyhound racing, those who come mainly for entertainment, and those who are involved (remotely via the Internet or TV, or in person at a stadium) for betting & wagering purposes.

It is important that IGB address these different categories separately and distinctively, as proposed in this plan. These different categories each have different needs.

**Briefly put, the bloodline enthusiast and those seeking the “destination experience” must be catered for in radically different ways: one is an enthusiastic participant; the other is an observer, there for entertainment.**

**The wagerer, a vital patron, can be physically present or remotely connected, but clearly requires different approaches from IGB.**

It is vital that IGB address the different customer types in a way that is distinctly layered, with separate treatment for enthusiasts, casual attendees and bettors.

Greyhound racing which is core, needs to be distinguished as such in all activities, through an emphasis on messaging specific to the sport, while separate recognisable “brands” need to be further developed for the stadium aspects (this is already under way and will be further progressed).



# SUMMARY OF ISSUES

There are a large number of issues across a broad range of activities.

To address such a range, the proposed “solutions” have been organised into seven categories or “Pillars” (such as animal welfare, customer experience or infrastructure development) that address key issues:

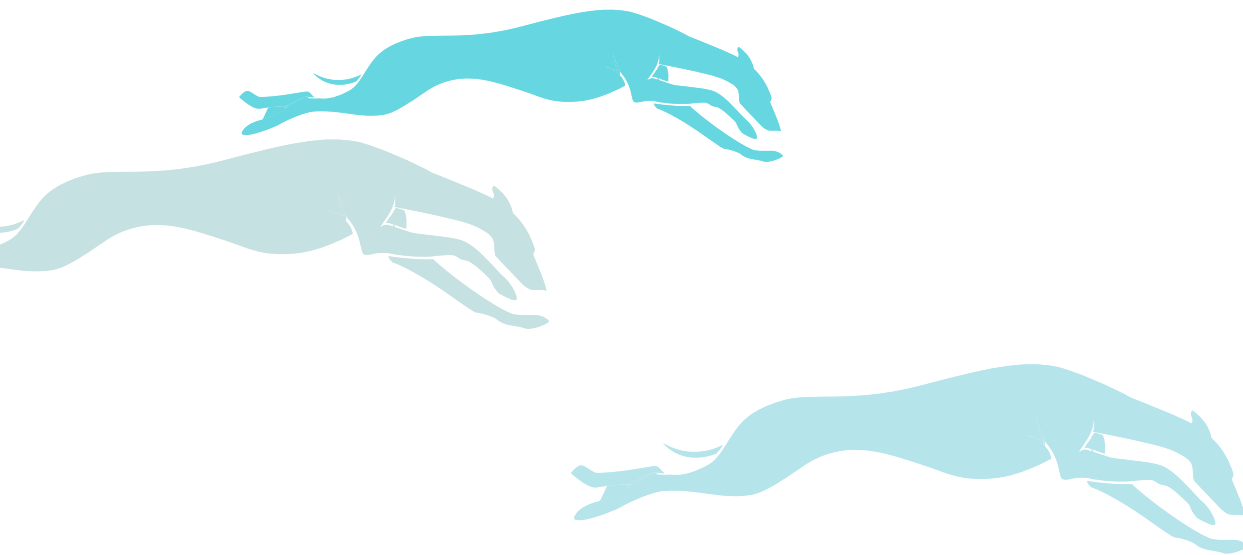
- Promote animal welfare as a central focus within the industry
- Decline in breeding resulting in a limited pool of greyhounds to race or sell
- Excellence in industry standards in the area of doping and medication control
- Historic decline in prize money (prior to October 2017) that affected viability of ownership
- Bookmakers’ revenues falling, so there are now less bookmakers. On-line wagering is having a high impact
- Decline in number of owners and consequent impact on attendance and all stadium revenues including Tote
- Sponsorship/Advertising falling due to reputational issues and increased activism
- Industry profile is ageing. There are fewer new entrants to the sport
- Technology continues to advance, and IGB need to stay current. Attendees expect essential technology, such as WiFi, as a minimum
- Activists continue to target industry aggressively
- Weak Brand Perception. Sectors of the population don’t regard a “night at the track” as a “fun night out”
- Entertainment market is fiercely competitive
- Facilities need significant upgrading
- Weekly challenges in respect of gate/attendances

# INTRODUCTION TO KEY PROPOSALS

The plan rests on a multi-dimensional and cross-industry approach, over “Seven Pillars”. These “pillars” address both the underlying fundamentals, such as the breeding of greyhounds and improving the economics of greyhounds ownership, through to increasing participation at various tracks throughout the country.

It incorporates the assessments in a number of reports and other studies undertaken by IGB.

**These are an array of inter-locking proposals, as only an integrated, comprehensive and holistic plan is likely to deliver on the potential of the sector and address the recent decline in the industry’s prospects.**



# ACHIEVING OUR VISION - KEY RECOMMENDATIONS

This is an industry that has declined over time, is fragmented, is craft-based, facing strong competition from other excitement-based sports, entertainment venues and new gambling platforms, with severe pressure on animal welfare aspects.

A recent omnibus survey (1,000 people throughout Ireland) presented a key challenge in the 18-25 age category regarding the promotion of Greyhound Racing as a “Fun” night out and also the need to convince this cohort that welfare concerns are being addressed. Encouraging people to enter the industry early as a career is essential as is the encouragement of the younger generation as spectators and regular attendees at greyhound race meetings.

It has been suggested that there is “no human face” to greyhound racing in Ireland and there is a lack of promotion of the trainer, the owner and animal stories. Those looking for information on greyhound racing should be presented with positive information, imagery and stories.

Similarly, sponsors, with some notable exceptions, are reluctant to be associated with the sport because of concerted campaigns by animal activists and ongoing negative reputational issues.

On a commercial level, gambling on greyhounds is only a very small fraction of the turnover of the on-line betting chains & platforms, although it is much stronger in the retail outlets (UK/Ireland). This is fixed odds which can offer many derivatives of a given race or meeting, whereas the Tote revenue would be miniscule in proportion to the aforementioned revenues generated by the major bookmakers. It is still a sought-after product on track and in many other countries.

The off-course betting market (including on-line) currently offer the consumer three Irish tracks for betting purposes. This is an under-explored area and offers further potential for the future. The scope for expansion of betting activity in international markets is constrained due to betting on greyhound racing not being permitted in certain countries

The historic and exciting sport of greyhound racing, with its committed core base and dedicated organisation has unique features and a large un-addressed market. To realise the undoubted potential, IGB and the industry in general must coalesce, speak with a unified voice and act in a concerted manner. Until now, there has been little scope or funding for the step-change transformation needed.

The proposed Greyhound Industry Bill 2018 will give the industry an opportunity to rebuild and create a viable future underpinned by a modern legislative framework.

The key initiatives are inter-connected and provide an holistic approach to re-generating the industry, as shown below: each “Pillar” will be supported by a specified project leader who will ensure the desired outcomes are properly achieved.

## IGB'S 7 PILLARS OF INDUSTRY REGENERATION

### GROWTH PILLARS

1

INCREASE  
OWNERS,  
BREEDERS

2

KPIs  
RACING  
& BETTING

3

CUSTOMER  
ATTENDANCE

### FINANCE/RESOURCES

## FOUNDATION PILLARS

4

INTEGRITY &  
REGULATION

5

WELFARE &  
TRAINING

6

PEOPLE  
DEVELOPMENT

7

EMBRACING  
TECHNOLOGY

FINANCE/RESOURCES



# PILLAR 1 - DEVELOP & SUPPORT OWNING, BREEDING AND TRAINING

**Goal: Incentivise greyhound ownership, breeding and training to ensure a continuous supply of high quality Greyhounds**

To counter-act falling numbers of breeders, owners and trainers and develop high quality dog pools the following actions are proposed:

## ➤ **INCREASED SYNDICATION**

IGB will promote syndication to widen dog ownership. We need to target the next generation of younger owners to ensure continuity of dedication to the unique sport of Greyhound Racing. A targeted syndication programme with the key goal of introducing greyhound ownership to a wider/younger audience will be put in place. ‘Own a Greyhound’ programme – controlled, vetted and managed by IGB.

## ➤ **BREEDING APPRENTICESHIPS**

A project group will be established to consider how the Greyhound industry can create a Breeding Apprenticeship programme under the Greyhound Centre of Excellence Academy initiative proposed in this strategy. This will provide a framework for attracting additional owners and improving retention levels within the industry.

## ➤ **BREEDING INCENTIVE**

The IGB will assess current breeding incentive schemes and adapt and refine same to support quality breeding within the industry. To further incentivise breeding excellence, the breeding incentive scheme will be developed for every greyhound which is registered on the RMS system.

## ➤ **CONTRACT TRAINERS**

During the first year of this plan, we will actively examine the viability of Contract Trainers at a single venue.

## ➤ **EXPORT POTENTIAL**

Part of the success and popularity of Irish Greyhound racing is based on the quality of the bloodstock - the dogs being produced are world-class. As an example, the British Afternoon Greyhound Service (BAGS) has benefitted from the export of Irish greyhounds at relatively low cost. IGB will enter into discussions with the Greyhound Breeders to maximise such export opportunities at economic cost.

## ➤ **GREYHOUND GRADING**

It is mostly greyhounds in the A5/A6 categories that are currently exported. To ensure the continued integrity of greyhound racing (where greyhounds of



the same standard race against each other), IGB will conduct a consultation process around improving the dog grading/seeding system.

### ➤ **PRIZE-MONEY FUNDING**

The IGB increased prize money by 25% on 1st October 2017 at an additional annual cost of €1.2m. The prize money fund will be reviewed annually subject to overall funding and budgetary requirements.

### ➤ **COMMUNICATION**

Increased engagement with existing and potential owners through improved communication and a programme of work professionalisation, with career pathways.

### ➤ **TRAINING**

Develop a range of training programmes and supports for all owners/trainers focusing on all aspects of the industry including welfare, social media, and media training to ensure a coordinated approach from within the industry and for external stakeholders. Initiatives could include:

- Training programme/apprenticeship in conjunction with other third parties to encourage younger people into the industry.
- Industry support for trainers in relation to PR and social media so that they too can act as brand ambassadors.

### ➤ **RESEARCH**

Identify opportunities to encourage breeders to grow the racing pool through innovative racing programmes, drawing on existing research and anticipated new research from the proposed Centre of Excellence.

### ➤ **INFORMATION TECHNOLOGY**

Develop a web-based ownership platform which will:

- Enable potential owners, individuals and groups to engage and interact with trainers and breeders to increase ownership levels.
- Be a source of all relevant ownership engagement information and provide a mechanism for communicating with people who cannot be reached by traditional methods.
- Address queries and concerns regarding ownership of a greyhound.
- Promoted across online and social platforms as well as the entire marketing infrastructure within the stadium network.
- This will also include an advertising (digital/radio) and PR campaign to generate awareness of the programme.
- Better education for trainers in respect of racing rules, regulations and welfare of greyhounds.
- Smarter technology to process integrated prize money and trial fees payment system with a prompt payment guarantee.

# KEY INITIATIVE: GREYHOUND CENTRE OF EXCELLENCE ACADEMY

## THE VISION FOR THE ACADEMY

**To be a leading centre for training and education within the greyhound racing industry, offering training of the highest standard to meet the practical needs of the racing industry and the personal development of our learners.**

Horse racing identified the need for Racing Academy & Centre of Education (RACE) as far back as 1973 as a social project to offer support to young racing apprentices and has gradually evolved over more than forty years to become the national training academy for the Irish horseracing industry offering courses for jockeys, stable staff, racehorse trainers, breeders and others involved in the thoroughbred sector. RACE is a not-for-profit educational initiative and registered charity supported by various State agencies and the racing industry.

The Greyhound industry should examine the potential for a programme around the same principles, perhaps utilising the available ground around a selected track to create a kennel block, offering an apprentice scheme based around training and caring of an agreed number of greyhounds per person.

The training programmes would be Government and education accredited with leading educational institutions. Where it would differ from RACE is that this will be “live” on the job training where the greyhounds would be supplied by owners and trained on site by the trainees who would introduce the training and care techniques under supervision as the programme unfolds. The trainees and the greyhounds would have the full use of the facilities they are housed under and become part of one of the race days at the track.

This would allow new owners the chance to own a greyhound at reduced training rates however, they would also get the opportunity to visit the centre and to watch their greyhound in action whether training or racing.

The proposed Centre of Excellence will provide a focal point for the various occupations connected with greyhound racing, such as trainers, kennel hands, track managers, but also those who love animals (horses, dogs and similar) and who would aspire to care for them and understand the husbandry and veterinary aspects.

Such a centre also provides the opportunity for kids to visit and experience first-hand the joy of working with greyhounds. Some of these aspects (the pet aspects, the care of greyhounds and similar animals) could be replicated in part, at some bigger stadia.

To showcase greyhounds, especially notable greyhounds, such as Derby winners, these should be accompanied by a Hall of Fame or Greyhound Museum.

There are a number of potential options for delivery of the academy including purpose-built development, area within an existing stadium, lease of property, a development partnership with a strategic involvement of third parties. All options need to be explored to deliver the most cost effective model of delivery.

## KEY PERFORMANCE INDICATORS

- Number of additional syndicates created on an annual basis
- Creation of a breeding apprenticeship programme
- Average prize money grant per race
- Number of training /briefing sessions undertaken
- Number of participants on web ownership platform
- Number of participants in breeding incentive scheme and level of incentive per participant
- Average greyhound racing pool



# PILLAR 2 - PROMOTE A FOCUSED RACING CENTRIC AND BETTING MODEL FOR THE INDUSTRY

**Goal: To generate excitement, additional revenues and to prepare for market challenges.**

## > TOTE INCOME

The Tote is a valuable income stream for IGB. The IGB believes that more can be achieved with attendees on race nights through creative marketing and attractive betting options. Providing short-term sales training and incentives to Tote staff is an immediate response that has been put in place.

We will:

Grow track tote pools through mobile and **international** investment

Create and **promote exotic bets** through value guarantees on track and on-line

Increase number of **betting partners** (internationally) annually

**Integrate** Tote system with EPOS and CRM to enhance the modern customer's experience

Deploy a **digital marketing** approach to recruit/retain/reinvest

Top 5 tracks to be considered for **"protocol" racing**

Competitive and **compelling racing**

Widen the product range available on-line

**Embrace technology** to promote the product

Create efficiencies at tracks through the advancement of technology

Trial contract trainer concept.

## Key Performance Indicators

- Increase in on-line Tote sales
- Increase the Tote Turnover to an average of €1,200 (2010 level) per race run within the lifetime of this strategy
- Broaden the on line Tote product range having assessed the viability of each product
- Increase the number of tracks that are ready for broadcast of TV pictures to take advantage of opportunities developed
- Increase the international reach of Irish Greyhounds by signing up additional international operators
- Number of downloads of the Barking Buzz app

# PILLAR 3 - IMPROVE CUSTOMER EXPERIENCE AND DELIVER INCREASE IN ATTENDANCES

**Goal: A 'night at the dogs' to become a top-class experience across all venues to attract new customers and retain existing ones.**

## › HIGH QUALITY

The core offering - Greyhound Racing - depends on a number of issues being right at each track (e.g. racing, trials, track repairs and maintenance). We will strengthen the existing scorecard and ensure rigorous compliance at all tracks.

## › STADIA INFRASTRUCTURE

Where possible we will develop facilities in such a way that income from this core resource will be multi-purpose - used outside of race meetings for business conferences and non-racing activities. This Plan outlines a reinvestment programme in stadia over the lifetime of the plan.

## › SIX GREYHOUNDS

Currently, as per Irish tradition, Greyhound racing involves 6 dogs in each race. In other jurisdictions, the number increases to 8 greyhounds. The increased numbers means that more betting options can be introduced and it offers a wider variety of experiences for those wishing to place a bet. A change to the current arrangement merits consideration and if feasible, should be trialed at Limerick Greyhound Stadium over the lifetime of this plan.

## › REVISED WINNINGS

To enhance our prizes, we will provide more attractive betting options e.g. jackpot bets.

## › MARKETING

Marketing is a critical function to support the industry. A strategic review of the marketing function will be undertaken to assess the correct blend and functions appropriate to in-house capabilities and outsourced arrangements with marketing suppliers. The preparation of an updated marketing plan will address key elements including understanding consumers, customer segmentation, and market sizing.





## ➤ **SYSTEMATIC REVIEW OF INDUSTRY FOOTPRINT**

During the period of this plan it is intended to conduct a systematic review of stadia and determine exact future needs. Some of these tracks are in areas of low population that cannot economically support local racing. In other areas, the growth in motorway development allows patrons to easily access tracks, while some other regions may not be adequately serviced.

## ➤ **SPONSORS**

Engage with sponsors to ensure alignment of their needs with the greyhound product on offer/ being promoted. Develop approaches to deliver omni-channel reach for sponsors into key audience segments with positive association of their brand/area of activity to the various elements of the greyhound industry.

## ➤ **PRODUCT FORMAT**

The product format is mature, and is in need of reinvention and reinvigoration. We will re-tell our story completely and:

- Embark on a journey of re-invention, with new innovative themed nights for the “experience hungry millennial generation”.
- Move from a transaction-based relationship to a more engaged relationship based on content and interests.
- Change the negative political and media narrative and create a better reputation.
- Change from a focus on tactical short term leisure-based sales initiatives and pro-actively take control of the conversation and tell the compelling story surrounding the industry, the sport, the greyhounds, the owners, the trainers and the fans.
- This will be a major initiative for the industry and will involve every facet and touch-point of the business from the stadia, to the website, to advertising, social content and PR.
- Provide confidence for the public, the participants and the fans; stimulate increased participation, ownership, syndication, training and attendance.
- IGB will use themed nights to link together the already popular key events for more consistent year-long engagement.
- Create events that will be used to drive reappraisal, trial and create demand.

### **Key Performance Indicators**

- Average attendance per race meeting
- Number of on-line reservations
- Annual change in sponsorship
- Complete review of industry footprint
- Increase in media coverage of greyhound racing and the greyhound industry



# PILLAR 4 - ENSURE THE HIGHEST STANDARDS OF INTEGRITY AND REGULATION IN THE SPORT

**Goal: Enhance the reputation of the greyhound industry as a fair, transparent and highly regulated sport. Significant investments have been made in hiring scientific expertise, in the provision of world-class equipment and in process development that has put us on par with best practices worldwide.**

To further strengthen the present regime the following is proposed:

## ➤ **RULE CLARITY**

The standards will be communicated to all parties with zero ambiguity.

We will:

- Implement, manage and provide advice on the Rules of Racing
- Implement an appropriate licensing system for greyhound stadia, trainers, owners, kennel staff and track officials
- Inspect and maintain standards required of all licensed parties
- Manage an extensive drug sampling programme
- Implement strict standards for racing integrity, and communicate them exhaustively
- Thoroughly and expeditiously investigate complaints, alleged breaches of the Rules of Racing and, where necessary, implement the disciplinary process.

## ➤ **REGULATION**

The objective is to ensure standard operating guidelines and procedures, developed in line with legislation, and used in every venue. Systems and controls are in place to engender confidence and remove the use of prohibited substances.

We will:

- Seek to impose a system of fines and sanctions to act as a deterrent to possible cheats with the goal of fines covering the cost of testing.
- Provide greater education to all stakeholders on rules and regulations. Booklet available for everyone involved in greyhound racing.



- Develop more detailed processes for applying and granting licences to trainers.
- Further improve efficiency of testing systems, intelligence-led with quicker results that lend themselves to sweepstakes.

### ➤ **RACING STUD BOOK**

Given the specific requirements of the greyhound racing sector, the industry will seek to move towards a position where the racing greyhound is recognised as a distinct breed. A medium term objective of this plan is to create a 'Racing Stud Book' to cater for the racing greyhound.

### ➤ **SCIENTIFIC CLARITY**

Keeping up with the latest developments in pharmacology and veterinary medicine is a key task. The Scientific Committee appointed by the IGB comprises highly qualified professionals. This significantly upgrades our internal capacity to maintain integrity within the sport.

### ➤ **SANCTIONS RANGE**

With the proposed enactment of a Greyhound Industry Bill, this will be operated through an independent disciplinary and appeals system. A key goal is consistency with the application of penalties that will be strictly enforced.

### ➤ **IN-HOUSE EXPERTISE**

The availability of in-house expertise in this area is critically important in terms of sending a clear and unambiguous signal to the industry. In keeping with this philosophy, we are improving our staff capability and keeping fully up-to-speed on international developments in substance detection and emerging chemical compounds. Investment in this area will remain a priority for the IGB. As a further signal of the IGB's commitment to robust controls, a Veterinary Director reporting to the CEO was appointed in September 2017.

#### **Key Performance Indicators**

- Number of tests undertaken
- Number of adverse analytical findings
- Number of tests undertaken off-track
- Number of cases referred to Control Committee/Appeal Committee
- Number of cases upheld by Control Committee/Appeal Committee
- Number and level of fines imposed
- Number of track inspections
- Number of inspections of greyhound establishments

# PILLAR 5 - MAINTAIN ANIMAL WELFARE AT THE CENTRE OF OUR INDUSTRY

We love our greyhounds, and we care for them.

**Goal: Address the perception that greyhound welfare takes second place to racing performance, in our industry the greyhound comes first. Greyhounds are born to run. Racing allows the dogs to follow their natural behavioural instinct.**

The following approaches will be progressed:

## ➤ **WHOLE OF LIFE APPROACH**

We will develop a whole of life approach to greyhounds and communicate this to the general public. IGB own the responsibility for the welfare of all racing greyhounds. Every Greyhound is valued - regardless of on-track performance - a message that has to be sent loud and clear across the industry.

## ➤ **TRACEABILITY**

We will develop a computerised database to 'track' all racing greyhounds from the time they register with the IGB. Through earmarking and microchips, this system will guarantee traceability, require a range of life events to be notified to the IGB and allow us to ensure that each dog is known and tracked throughout its racing life and post that period.

## ➤ **EXTENDED LIFETIME**

Historically, there has been a focus on dogs in the 18-48 months categories i.e. the age when Greyhounds typically hit peak speeds. By extending the 'racing life' of dogs to circa 72 months we will ensure that (a) less dogs are required and (b) that the post-racing career of dogs is shorter. To make this happen (c) all race cards would have at least one event for 'senior' dogs (and one event for bitches) - ensuring that slightly older dogs become a recognised part of the dog racing fraternity. These proposals will be further examined, in conjunction with the industry, and progressed during the lifetime of this Plan.

## ➤ **STRATEGIC PARTNERSHIP**

Retired Greyhounds make terrific family pets - a fact that is currently not well communicated to the general public. To encourage higher levels of post-racing Greyhound ownership, the IGB will work with its Retired Greyhound Trust and formalise strategic partnerships with other organisations solely dedicated to the welfare of greyhounds. The goal here is to ensure that all Greyhounds have a happy and healthy 'retirement



period' when their racing career is completed. We need to set our sights high by placing all retired dogs in happy homes, not simply re-housing these in boarding kennels.

### ➤ **WELFARE OFFICER**

IGB will employ an additional Welfare Officer to liaise with external organisations - helping to sell the message that retired Greyhounds make excellent family pets and ensuring a smooth transition from Racing Greyhound to happy retiree.

### ➤ **ANIMAL EXPORTS**

To support the continued breeding of quality Greyhounds in Ireland, IGB will work with others and within legislative frameworks to support the export of Greyhounds to other jurisdictions where strong welfare codes are in place.

### ➤ **CARD REBALANCING**

At the present time (for historical reasons), prize money is weighted in favour of dogs that compete in the fastest possible times. During the lifetime of this strategic plan, we will assess prize money schemes to incentivise greyhounds ranked at the A4-A10 categories in order to extend their racing career and improve the economic viability of them remaining in the Irish greyhound industry.

### ➤ **REHOMING**

Re-home an ever-greater percentage of retired greyhounds working closely with the Retired Greyhound Trust and other welfare organisations, with the ultimate aim of almost total re-homing.

We will:

- Promote re-homing process at all major meetings and via the in house TV racing channel
- Promote a key PR story around retired Greyhounds each month and circulate to press
- All racing programmes will include a clear re-homing message
- Extensively advocate and promote rehoming within the Irish market
- Work with GBGB and review worldwide re-homing methods
- Provide a comprehensive training and development portfolio for trainers and kennel hands. This will integrate well with the proposed Centre of Excellence Academy.

#### **Key Performance Indicators**

- Number of welfare inspections undertaken
- Number of fines issued
- Number of prosecutions taken
- Number of dogs rehomed in (a) Ireland and (b) internationally
- Number of 'senior races' held

# PILLAR 6 - DEVELOPING OUR PEOPLE AND CREATING AN ORGANISATION STRUCTURE THAT REFLECTS THE NEEDS OF THE INDUSTRY

**Goal: To support a single, committed, and innovative team across IGB.**

## › WORKING ENVIRONMENT

Create a stimulating working environment with creativity and novelty by:

- Treating each other with respect and dignity
- Embracing diversity as an essential component in the way we work
- Applying the highest standard of excellence in all roles
- Promoting a growth and development culture
- Contributing positively to our racing communities and environment
- Recognising that profitability is essential to the sustainability of our industry.

## › OUTSOURCING OPTIONS:

During the first year of this strategic plan, we will take a radical look at existing operations with a view to whether existing services represent best 'value for money' and quality and whether some services can be outsourced and produce a better outcome.

## › PERSONNEL RETRAINING

A key part of the service offering is the quality of the people who provide the service. In the initial year of this plan, all customer-facing staff will conduct retraining to upgrade skills and to re-commit to excellence in service standards.

## › MANAGEMENT STRUCTURES

Consolidating our management structures across stadia will help to both deliver an excellent, standardised product and reduce costs. This will require an evaluation of the current operating model and a move towards a more flexible and lean model of operation commensurate with activity levels.



## ➤ SALES CAPACITY

The centralised call centre in Thurles is 'inward bound' with limited outwards sales involved. There is an identified requirement for a defined 'selling' system and this needs to form a central element of organisational structure.

## ➤ ENCOURAGING VOLUNTEERING

Nothing in the above should detract from the fact that volunteering is a hugely positive factor in the success of the current racing infrastructure. In seeking to place the greyhound racing industry footprint on a more sustainable basis, we will ensure that we don't dilute the enormous goodwill and skilled inputs currently received from volunteers.

### Key Performance Indicators

- Staff absenteeism percentage
- Number of training hours annually
- Recruitment activity per quarter
- Good and improving staff morale as measured by surveys





# PILLAR 7 - MAXIMISE USE OF INFORMATION AND COMMUNICATIONS TECHNOLOGY

**Goal: Develop a technology implementation roadmap that priorities the investment in time and money, reduces operational risk and enhances operational effectiveness and, crucially, the customer experience.**

## > ATTRACT

Use search engine optimisation, pay per click advertising and social media advertising to get in front of potential leisure and tote customers.

## > ENGAGE

Use social media marketing, blogging, email marketing and content marketing, Search Engine Result Pages (SERP) optimisation to increase brand awareness and trust and move towards conversion.

## > CONVERT

Have a compelling and intuitive user experience, with clear and relevant page content with strong call to actions to drive conversion rates. The investment in IT will improve efficiencies and costs, and in most cases will give us an immediate return on investment.

## > ON-LINE

IGB have already made a technology play as it's now possible to 'bet on line' with our customised application Barking Buzz. We will pursue the following initiatives:

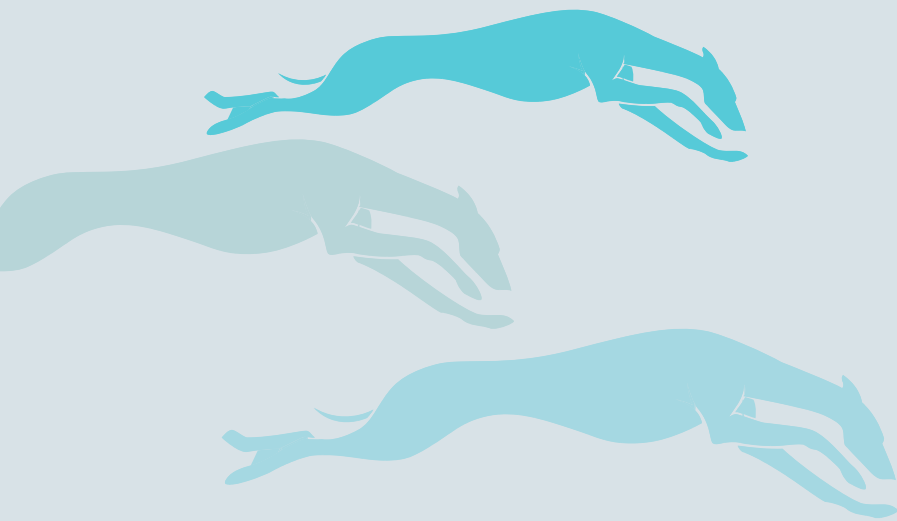
- Live Streaming: With regards to remote betting, we 'live stream' races to the USA (there's a 1-second delay) that opens up Irish Greyhound racing to a much wider audience. This imposes high standards on the IGB to ensure the integrity of races.
- Archive 'Pictures': At the present time there is no cost for those who wish to view completed races. While this is a good service, no revenue is generated for IGB. We will examine options to monetise this service. Any monies generated through this mechanism will be reinvested in Prizes, partly overcoming the resistance to the introduction of any charge and further incentivising breeding and participation in the industry.

## ➤ **LOYALTY PROGRAMME**

The implementation of an automated loyalty system that rewards our customers/patrons for spending on our premises. Such a programme will strengthen a positive customer experience while showing customers that it's worthwhile to return to our venues. It will also encourage customer referrals and build a stronger relationship with our customers.

### **Key Performance Indicators**

- Engage all stakeholders in the development and upgrade of the Racing Management System( RMS)
- Progress on a paperless system
- Engage with GBGB to achieve integration with the GBGB system
- Number of participants in loyalty programme



# STAKEHOLDER MAPPING AND COMMUNICATIONS

The Greyhound Racing industry has a diverse range of stakeholders. The needs of some of these stakeholders can sometimes seem contradictory - and not well understood, posing a difficult management challenge.

The IGB recognises that local involvement is critical to the operations of local stadia and to the greyhound industry in general. The challenge is to ensure that there are active and open channels of communication between local stakeholders and the Board on key strategic issues of importance to individual stadia and to the local greyhound industry.

The IGB is putting in place a network of Advisory Councils for the purpose of ensuring that the views and voices of local stadia inform the work of the IGB. This combined with the input of private stadia will enable a wide coverage of the sector and represent the geographic footprint of the industry nationally.

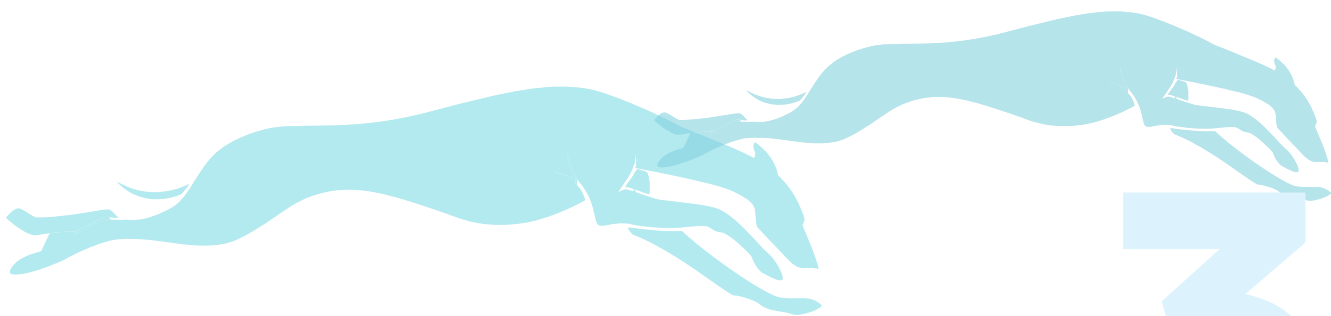
The IGB has also established a National Greyhound Consultative Forum to enable all representative groups engage with the IGB on matters relevant to the industry.

**Positive Messaging:** Some of the 'greyhound racing messaging' has been monopolised by parties who are negatively disposed towards the sport. IGB need to determine the 'key positive messages' that we want to communicate - and build a communications plan outwards from this.

A strategic approach to communications and branding of the overall industry is essential and will be developed by the IGB.

**Communications Infrastructure:** Historically we have underestimated the level of time, commitment and expertise that needs to be dedicated to this area. A key communications challenge is explaining how the industry works and that the greyhound racing industry is differentiated from other sporting activities. The size of this challenge has, historically, been vastly underestimated.

As part of this endeavour, our medium-term objective is to move towards a position where the Racing Greyhound is recognised as a distinct breed.



# KEY FINANCIALS: CAPITAL EXPENDITURE PROGRAMME AND REVENUE PROPOSALS

The audited Financial Statements for the IGB have shown a reduction in turnover over the period 2014 – 2017. Over the same period significant cost reductions were also achieved through elimination of head count and generating savings in many operational areas.

Against a backdrop of significant debt, the main emphasis in recent years has been to manage and control costs and to ensure a basic standard of service delivery.

The impact of the recession together with a pressure on consumers' disposable income allied with the various other activities that are available to the consumer has been a significant negative backdrop in the context of IGB growing the business and investing in infrastructure.

This Plan represents a step change for the industry and IGB: such an extensive transformation presents formidable challenges, not just financially but in terms of execution.

The investments in time and money will have to be phased: some, such as the internal renewal, are in process. Others such as capital investments in IT and the Academy can be staged in phases over the life of this Plan.

The resolution of debt issues and sale of assets has made funding available for investment in infrastructure, systems and organisational capability. It is intended to assign these funds over the lifetime of the plan to the following priority areas which have been identified in this plan:

- Shelbourne Park redevelopment ( Dublin)
- Curraheen Park upgrading (Cork)
- Potential redevelopment at Kilkenny Greyhound Stadium
- Other stadia and tracks - improvements/enhancement programme
- Animal welfare and re-homing initiatives
- IT and systems upgrades
- Industry training and organisational development

Details of the proposed capital expenditure programme are outlined in Appendix 1.

A costing of the key initiatives under the seven Pillars over the life of the plan has been undertaken and this is presented in Appendix 2.

A projected Profit & Loss Account for each year of the plan is presented in Appendix 3.

The allocation from the Horse and Greyhound Fund has been a critical financial support to underpinning the industry in recent years.

As the industry now moves into a developmental phase and addresses infrastructure under investment and provides for the necessary supports to maintain and grow activity within the industry, it is essential that the allocation from the Fund is maintained and increased over the plan period.

This will ensure that the necessary elements identified under the various pillars can be adequately funded and supported.

An increased allocation from the Horse and Greyhound Fund is assumed over the period 2018-2022.

Implementation of the initiatives set out under each Pillar is contingent on sufficient annual funding being available from commercial operations and other income sources. The financial position will be reviewed at each annual budgetary cycle and decisions made on the basis of available resources.

**The schedules in Appendix 1 and 2 should be viewed as a road map for implementation subject to satisfactory economic and financial circumstances prevailing.**

# SUMMARY

IGB and the industry are at a crossroads, but have a unique and valuable core competence and potentially excellent assets.

The investments needed are no longer unaffordable.

The desire for meaningful change has never been greater.

The essential transformations are to develop IGB itself as a potent force for transformation, and consequently the industry itself.

IGB compete in at least three different arenas (a) the greyhound (sports) industry; (b) the entertainment, catering, hospitality, tourism industries and (c) the betting industry, where physical location is no longer significant.

Rural economies and communities need bolstering, now more than ever. The Greyhound industry has strong roots in rural areas with, the local stadium being a key focal point for the area supporting economic, social and cultural needs.

Any transformation must start with recognition of the current realities and with a vision for the future based on prescient insight, coupled with the generation of enthusiasm for the plan and a realistic, adequately-resourced blueprint to secure the desired vision. Any delay makes the transformation more difficult. The best time to start is now.

This Plan sets out a road map for change over the period 2018-2022. Detailed actions and proposals are presented over seven strategic pillars which can achieve a transformational impact on the industry and all those engaged in or with the greyhound sector.

The removal of the burden of debt has created the platform to focus on the developmental needs of the industry. The financial assessment underpinning this Plan allows for critical reinvestment in stadia, product and people over the plan period.

Successful implementation of the plan will result in a reinvigoration of the industry and a greater contribution to the economic, social and cultural life of the entire community.



# APPENDIX 1: CAPITAL EXPENDITURE PROGRAMME 2018-2022

Proposed Cap Exp Plan 2018 to 2022	Proposed investments	2018	2019	2020	2021	2022
	€000	€000	€000	€000	€000	€000
Perfection of marketable title at regional stadia	€125	€25	€25	€25	€25	€25
Replacements/Improvements at stadia	€1,200	€300	€300	€200	€200	€200
<b>DEVELOPMENT OF INDUSTRY CORE:</b>						
Information technology	€475	€275	€50	€50	€50	€50
Development of ownership portal	€200	€100	€100			
WIFI network	€200		€100	€100		
Epos/Fully Integrated IT system including Tote/F&B and CRM	€200		€100	€100		
<b>STADIUM INFRASTRUCTURE REGENERATION</b>						
Shelbourne stadium renovations	€3,000	€1,750	€750	€250	€250	
Cork stadium renovations	€200	€200				
Other stadium renovations including Kilkenny	€2,800	€1,000	€500	€450	€600	€250
Catering equipment for stadia	€625	€125	€125	€125	€125	€125
CCTV	€175	€175				
Broadcast of racing content	€157	€49	€49	€59		
BMS Systems (Building management systems)	€320		€80	€80	€80	€80
<b>RACING INFRASTRUCTURE REGENERATION</b>						
Lab equipment and upgrades	€400	€30	€25	€25	€105	€215
Traps replacements	€500	€100	€100	€100	€100	€100
Centre of Excellence Academy	€1,250	€50	€50	€250	€475	€425
Race operating systems	€350	€350				
Mechanical systems	€250	€250				
<b>TOTAL INCENTIVES AND CAP EXP PLAN</b>	<b>€12,427</b>	<b>€4,779</b>	<b>€2,354</b>	<b>€1,814</b>	<b>€2,010</b>	<b>€1,470</b>

# APPENDIX 2: SCHEDULE & COSTING OF ACTIONS 2018 - 2022

Pillar One	Goal: Incentivise dog ownership, breeding and training to ensure a continuous supply of high quality Greyhounds	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
Increased Syndication	Additional supports are proposed with an additional annual allocation of €50k per annum resulting in total direct support to syndication efforts of €150k per annum. Success of KPIs will influence these allocations.	(€250)	(€50)	(€50)	(€50)	(€50)	(€50)
Breeding apprentices	Annual allowance for 10 apprenticeships at €2.50 p.w. has been allocated from years 2 to 5 resulting in an annual allowance of €130k being planned for this goal	(€520)	€0	(€130)	(€130)	(€130)	(€130)
Breeding Incentive	In addition to the current breeding incentives of €300k per annum the plan forecasts an additional contribution of €100k to the scheme from 2020 onwards	(€300)			(€100)	(€100)	(€100)
Contract Trainers	Funding proposed for one year trial to assess model	(€275)		(€275)			
Export potential	No additional costs anticipated.						
Greyhound grading	No additional costs anticipated. Should there be an increase, the implied contingency in prize money is deemed sufficient to accommodate.						
Prize money increase	The increase of 25% results in additional prize money of circa €1.2m. This forecast is based on the 2016 race schedule that will result in ordinary racing grants reaching €7.3m. Further increases of €250k are forecast from Year 2 onwards of this plan	(€8,500)	(€1,200)	(€1,450)	(€1,700)	(€1,950)	(€2,200)
Communication	Provision made for increased communication as detailed within the plan	(€250)	(€50)	(€50)	(€50)	(€50)	(€50)
Research & Training	To assist with goals as detailed within the plan additional financial resources are being forecast to assist in their achievement	(€200)		(€50)	(€50)	(€50)	(€50)
Information technology	In addition to the projected capital expenditure of €200k envisaged for development of the ownership portal, the content on this platform will require consistent updating to maintain relevancy requiring operating costs as forecast.	(€320)		(€80)	(€80)	(€80)	(€80)
Centre of Excellence	Forecast costs for the Centre of Excellence have been captured in the accompanying capital expenditure plan						
<b>Projected (costs) for pillar one including additional prize money</b>		<b>(€10,615)</b>	<b>(€1,300)</b>	<b>(€2,085)</b>	<b>(€2,160)</b>	<b>(€2,410)</b>	<b>(€2,660)</b>
<b>Projected (costs) for pillar one Excluding additional prize money</b>		<b>(€2,115)</b>	<b>(€100)</b>	<b>(€635)</b>	<b>(€460)</b>	<b>(€460)</b>	<b>(€460)</b>

Pillar Two	Promote a focused Racing centric and Betting Model for the industry	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
Tote Income:	A KPI was set at increasing turnover at €1.00 per spectator. Based on a mean attendance of 650,000 it would result in additional turnover of €650,000 and Tote retention of €162,500. 75% considered achievable in year 1.	€1,178	€122	€203	€244	€284	€325
Increase no. of betting partners	Currently IGB have 6 active co-mingling customers that is forecast to generate turnover of €950k in 2017 generating retention of €80k. Addition of two new customers is forecast to generate additional turnover of €285k and retention of €20k forecast to arise in 2019.	€80		€20	€20	€20	€20
Integrate Tote with EPOS Loyalty & CRM	Capital outlay has been forecast for development of the EPOS						
Deploy a digital marketing approach to recruit/retain/reinvest	Replacement of internet customers is a key challenge in this market. A KPI is proposed to increase on-line wagering to €1.0m which would be expected to generate €64k in retention. This is forecast to arise over 2018 and 2019.	€190		€48	€48	€48	€48
Top 5 tracks shall all to be capable of "protocol" racing	This would not be considered a new product. No extra funds provided.						
Widen the product range available on-line	Subject to development and delivery of additional products no additional income has been forecast						
Embrace technology							
Competitive and compelling racing	No additional costs are anticipated from these initiatives.						
Create efficiencies at tracks	The adoption of technology will result in synergies on operating costs that will be developed with the progression of the plan	€1,448	€122	€271	€312	€352	€393

<b>Pillar Three</b>	<b>Improve customer experience and deliver increase in Attendance</b>	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
Majority of goals under Pillar 3 will not require additional financial assistance or result in immediate additional financial gain. Therefore goals with direct financial implications have been considered below							
Stadia infrastructure	The larger projects to be undertaken in the next 5 years will be a development of SPK and CRK. By their very nature and value will be subject to their own separate financial due diligence specific to plans. The timing of the development would also be of significance to the plan.						
Eight greyhound racing	While offering significant benefits the process of due diligence and possible outlays on new traps would need to be considered.						
Marketing	Additional funding is provided to promote and brand the greyhound industry generally. Provision also includes the brand envisaged under the Greyhound Industry Bill of Greyhound Racing Ireland	(€75)	(€75)	(€75)	(€75)	(€75)	(€75)
<b>Projected income/(costs) for pillar three</b>		<b>(€375)</b>	<b>(€75)</b>	<b>(€75)</b>	<b>(€75)</b>	<b>(€75)</b>	<b>(€75)</b>

<b>Pillar Four</b>	<b>Ensure the highest standards of Integrity and Regulation in the sport</b>	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
Majority of goals under Pillar 4 again are not forecast to require significant additional financial resources. Extra training and internal resources are forecast to be a requirement.							
Contingency	To achieve goals as set under Pillar 4.	(€425)	(€85)	(€85)	(€85)	(€85)	(€85)
<b>Projected (costs) for pillar four</b>		<b>(€425)</b>	<b>(€85)</b>	<b>(€85)</b>	<b>(€85)</b>	<b>(€85)</b>	<b>(€85)</b>

<b>Pillar Five</b>	<b>Maintain animal welfare at the centre of our industry</b>	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
A number of the goals being proposed are monetary neutral, the exceptions being noted below							
Traceability	In addition to the proposed development of the RMS through capital investment of €200k, additional resources are forecast to assist with the goals outlined in the plan.	(€250)	(€50)	(€50)	(€50)	(€50)	(€50)
Racing for "seniors"	Contingency already exists in the totals.						
Welfare officer	Additional welfare officer proposed	(€290)	(€30)	(€65)	(€65)	(€65)	(€65)
Card rebalancing	It is not foreseen that additional prize money will be required to achieve this goal						
Rehoming	Additional funds of €100k was provided in 2017 and a further €250k per annum proposed from 2018.	(€1,250)	(€250)	(€250)	(€250)	(€250)	(€250)
<b>Projected (costs) for pillar five</b>		<b>(€1,790)</b>	<b>(€330)</b>	<b>(€365)</b>	<b>(€365)</b>	<b>(€365)</b>	<b>(€365)</b>

<b>Pillar Six</b>	<b>Developing our People and creating an organisation structure that reflects the needs of the industry</b>					
	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
The most significant proposals under Pillar six are the possibility of outsourcing and amalgamation of track management.	(€250)	(€50)	(€50)	(€50)	(€50)	(€50)
Contingency for training and personnel development	(€250)	(€50)	(€50)	(€50)	(€50)	(€50)
<b>Projected (costs) for pillar six</b>						

<b>Pillar Seven</b>	<b>Maximise use of information and communications technology</b>					
	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
The principal matter of financial consequence in Pillar 7 is the proposed capital outlay on Information Technology.						
<b>Projected (costs) for pillar seven</b>						

<b>Projected income/[costs] for all seven pillars</b>						
	Cumulative Total €000	Proposed provision 2018 €000	Proposed provision 2019 €000	Proposed provision 2020 €000	Proposed provision 2021 €000	Proposed provision 2022 €000
Total with prize money	(€12,007)	(€1,718)	(€2,390)	(€2,424)	(€2,634)	(€2,843)
Total without prize money	(€3,507)	(€518)	(€940)	(€724)	(€684)	(€643)

# APPENDIX 3: PROFIT & LOSS ACCOUNT 2018 - 2022

	2016 Actual € 000	2017 Forecast € 000	2018 Budget € 000	2019 Forecast € 000	2020 Forecast € 000	2021 Forecast € 000	2022 Forecast € 000
<b>Income</b>							
Bord na gCon Tote turnover incl sale of Media rights	19,475	15,981	18,721	19,622	20,552	21,218	21,903
Tote retention & sale of media rights	4,995	4,127	4,658	4,879	5,316	5,480	5,650
Track Income to include Gross Profits from sales of food and beverages	8,624	6,612	7,770	8,078	8,272	8,489	8,641
Total income from track activities	13,619	10,739	12,428	12,957	13,588	13,970	14,291
Allocation from Horse and Greyhound Racing Fund	14,800	16,000	16,000	17,000	18,000	19,000	20,000
Other income to include race entry fees and sponsorships	2,007	1,957	2,024	2,020	2,017	2,014	2,011
<b>Total income</b>	<b>30,426</b>	<b>28,696</b>	<b>30,451</b>	<b>31,977</b>	<b>33,605</b>	<b>34,983</b>	<b>36,302</b>
<b>Expenditure</b>							
Prize money	7,658	7,513	9,087	9,337	9,587	9,837	10,087
Race participation incentives	371	480	651	1,136	1,136	1,136	1,136
Racing governance and integrity	1,616	1,639	1,900	1,941	1,969	1,997	2,026
Grants to private tracks and Veterinary services	461	456	467	471	474	477	480
Support to greyhound welfare	217	248	551	783	821	860	867
Track and tote operating costs	12,233	11,251	11,334	11,538	11,670	11,823	11,979
Information technology	648	694	705	740	751	762	773
Administration and legal costs	2,474	2,782	2,094	1,964	1,984	2,048	2,031
Marketing and promotional activities	1,538	1,780	1,819	1,921	1,949	1,977	2,005
Contributions to address pension arrears	709	978	1,078	1,078	1,078	1,078	1,078
<b>Total expenditure</b>	<b>27,926</b>	<b>27,822</b>	<b>29,686</b>	<b>30,909</b>	<b>31,418</b>	<b>31,995</b>	<b>32,463</b>
<b>Operating Surplus</b>	<b>2,501</b>	<b>875</b>	<b>766</b>	<b>1,069</b>	<b>2,186</b>	<b>2,989</b>	<b>3,839</b>



**Irish Greyhound Board**