



## Participant Cost Survey 2019 - Results Snapshot



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## Participant costs survey 2019 - who responded and what did we ask?



*Who we are: GOTBA Vic is a volunteer association that represents greyhound owners, trainers, breeders and other participants in all areas of the sport in Victoria.*

- ▶ More than 100 survey responses online by Victorian greyhound racing participants split evenly across participation size and role
- ▶ Content -
  - ▶ current costs of keeping greyhounds in (1) rearing/breeding and (2) training
  - ▶ costs change since 2017
  - ▶ future participation in the sport of greyhound racing in Victoria





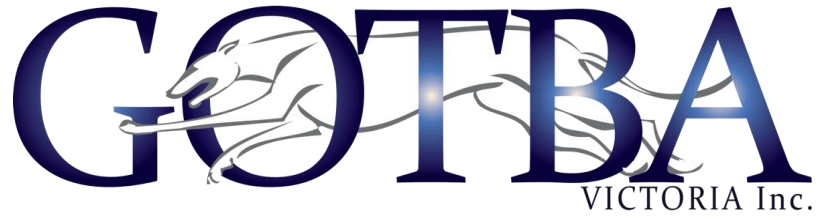
## ▶ What the survey results say: a summary

- ▶ Average weekly keeping cost is between \$70-\$80 pw.
- ▶ A third of respondents say average keeping costs exceed \$90 per week per dog.
- ▶ Keeping costs for most up at least 15-30% since 2017: a combination of increases in feeding, utilities and admin/compliance costs.
- ▶ Returns have fallen well behind cost increases.
- ▶ More than 50% of respondents plan to participate less on and from 2020 due to costs, rules and regulations and the the *Code of Practice for the Keeping of Racing Greyhounds* commencing 1 Jan 2020.

## ▶ What these results mean

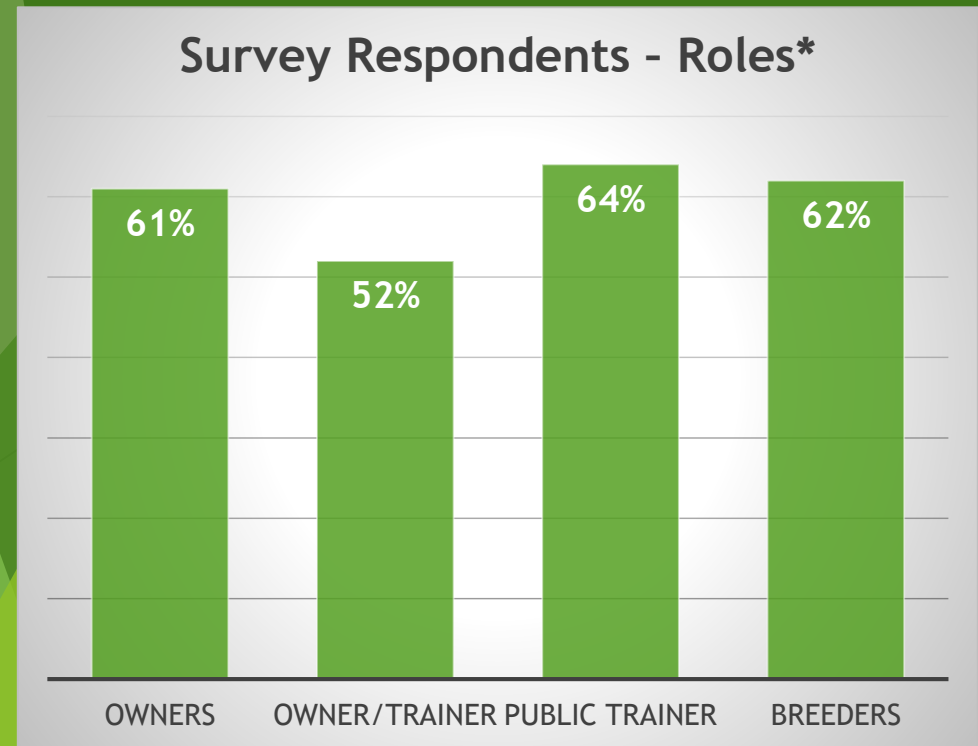
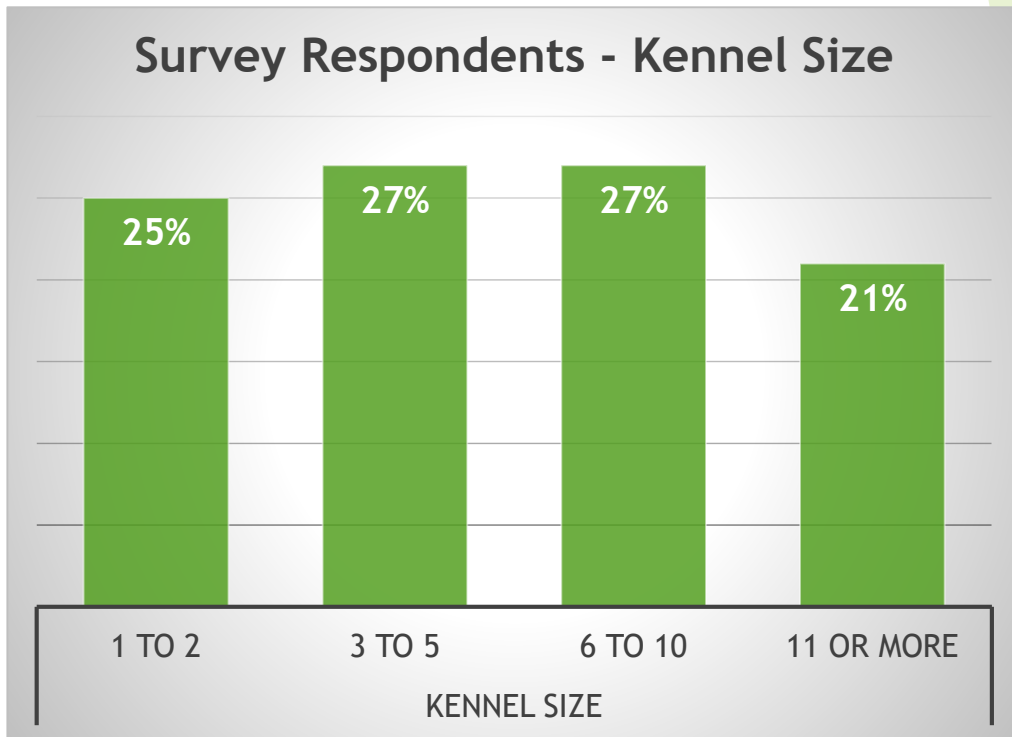
Costs and diminished return to participants are a serious risk to ongoing participation in greyhound racing in Victoria.





# The Survey - who responded

Survey responses right across kennel sizes and participant roles



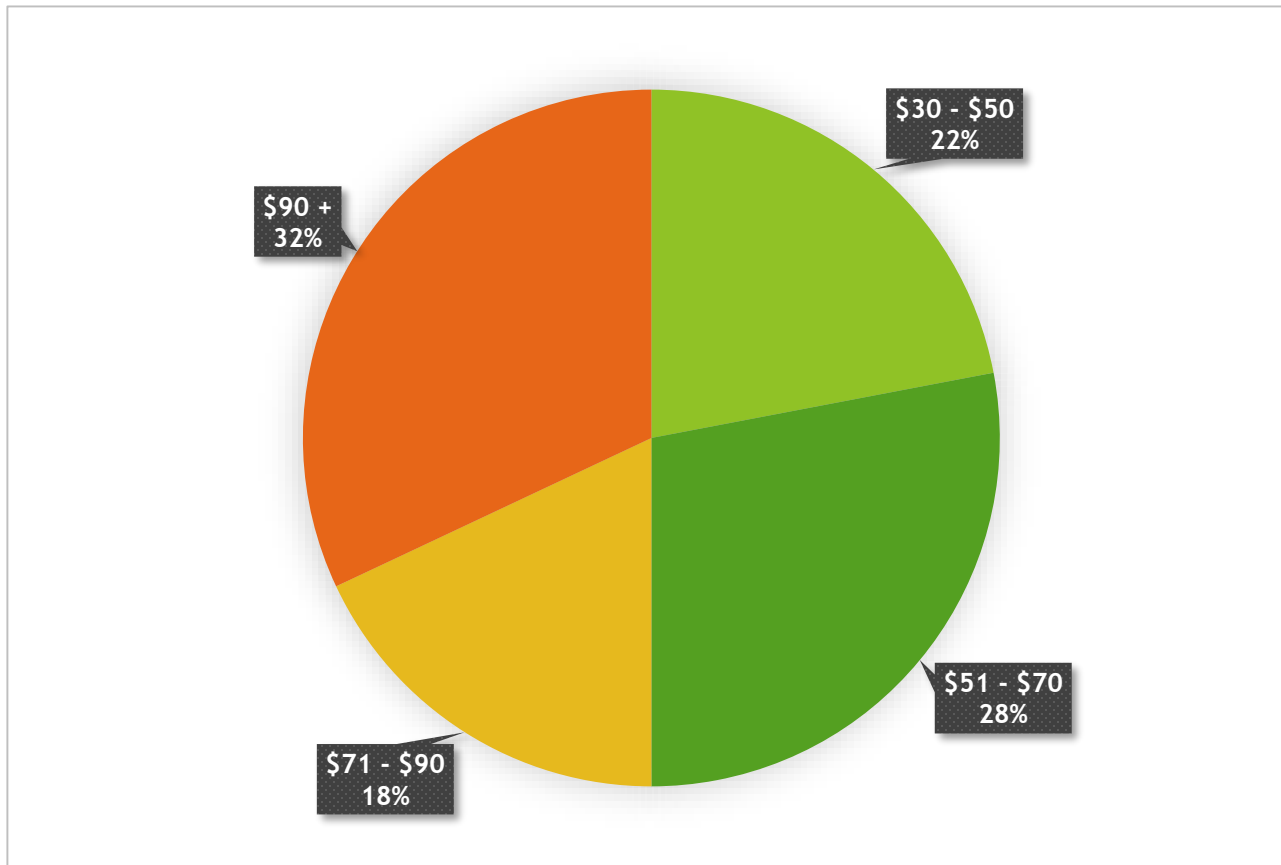
\* Respondents may have multiple roles.



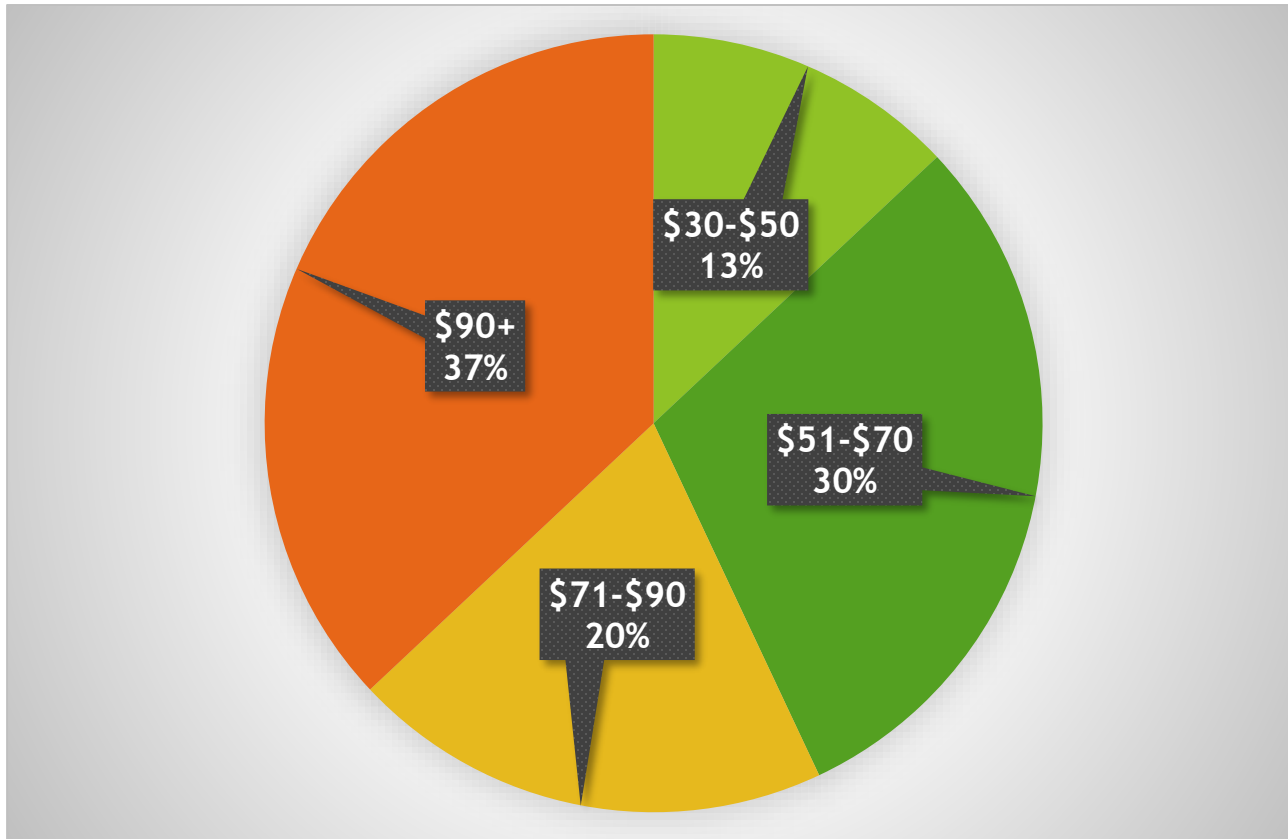
# Survey - Weekly keeping cost per greyhound being reared or bred - current

## Analysis

- Cost includes food, transport, staff, utilities, costed admin tasks etc.
- **Average cost (approx.): At least \$72 p/w per greyhound, but appreciably more for a third of respondents**



# Survey - Weekly keeping cost per greyhound in training - current

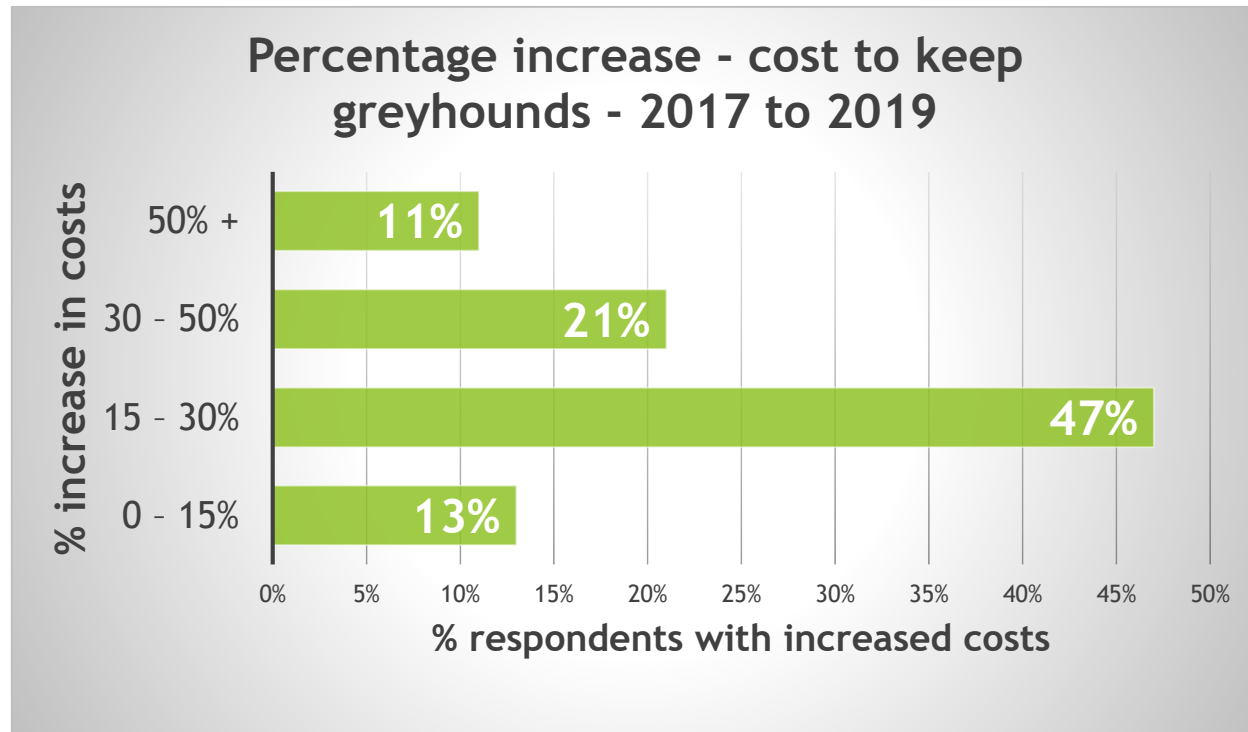


## Analysis

- Cost includes food, transport, staff, utilities, costed admin tasks etc.
- **Average weekly cost (approx.): At least \$76 p/w, but appreciably more for almost 40% of respondents**

# Survey - Change in costs - 2017 to 2019

- ▶ **94%** say keeping greyhounds 'more expensive' or 'much more expensive' than in 2017.
- ▶ Asked to quantify change: the response



\* NOTE: Not all respondents who answered 'more expensive' then gave a % increase. Accordingly, % total less than 100%.

## Analysis

- Most participants say increase of **15%-30%** since 2017
- Comments refer to significant increase in feed cost (eg kangaroo) and rule compliance costs



# Conclusion: Returns to participants fall behind increasing costs

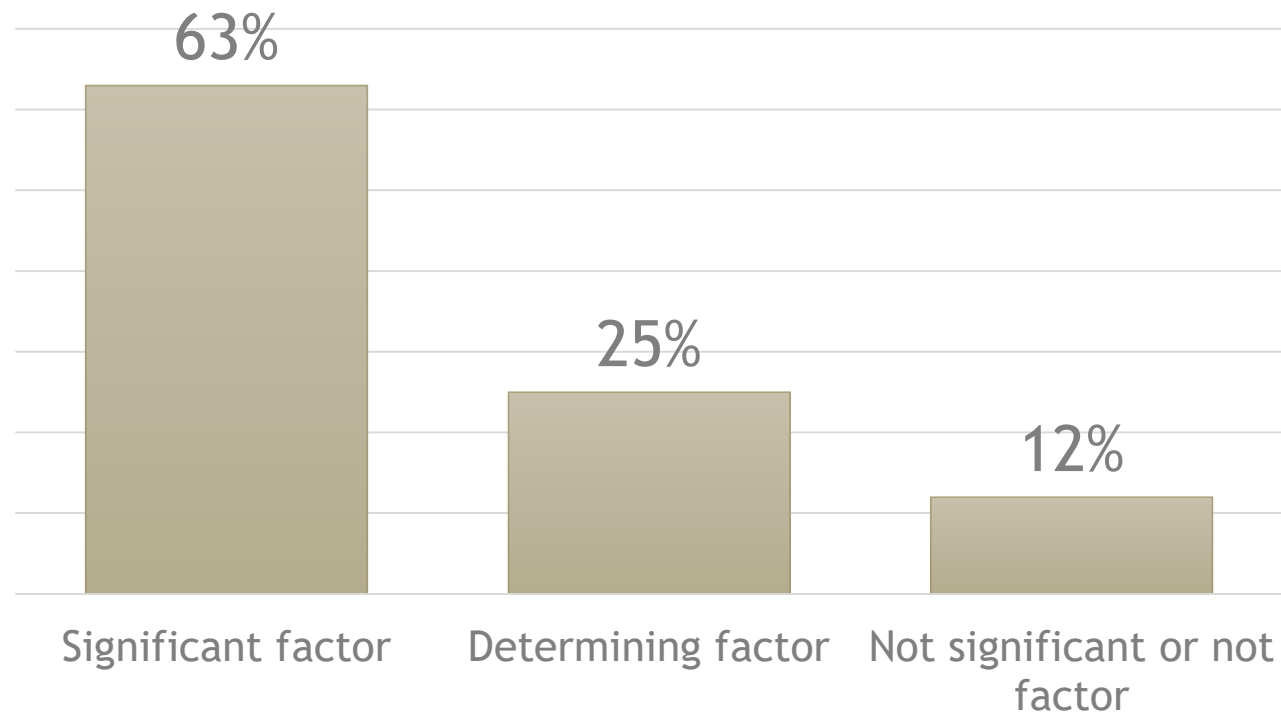
- ▶ **Returns fall as % of GRV revenue:** In 2013/14, GRV returned 56.4% of its wagering income to participants (as prizemoney, bonuses, starter fees). In 2017/18: 47.3%.
- ▶ **Participants now work harder for less:** In 2017/18 GRV returned less per race meeting held - \$37,804 - than it did in 2013/14 - \$39,029.
- ▶ **Prizemoney changes well below cost and additional work:** Between 2015/16 and 2017/18, participant returns increased by 2.96% (\$43.8m to \$45.1m), despite approx. 5% more race meetings being held in 2017/18 (1193) than 2015/16 (1141).
- ▶ **Summary:** Return to participants have fallen well behind increasing cost and workload. Compliance and other costs continue to increase.
- ▶ All figures sourced from GRV Annual Reports.





# Survey - Impact of cost pressures on future participation

Effect of costs - ongoing participation decisions

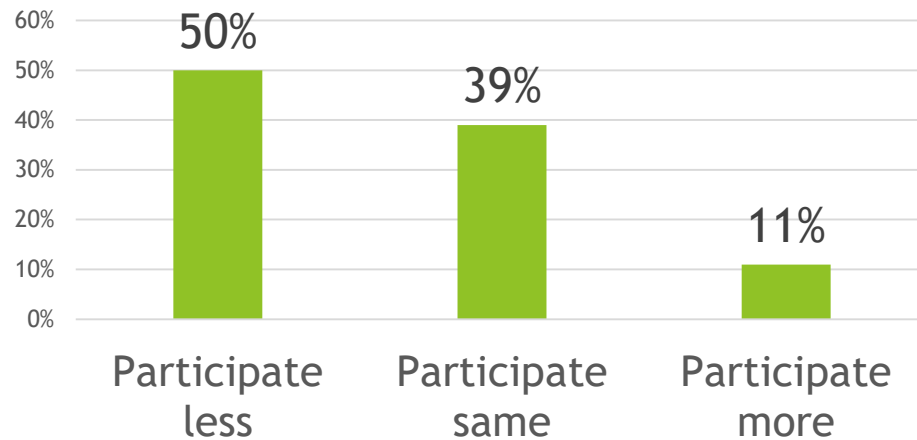


## Analysis

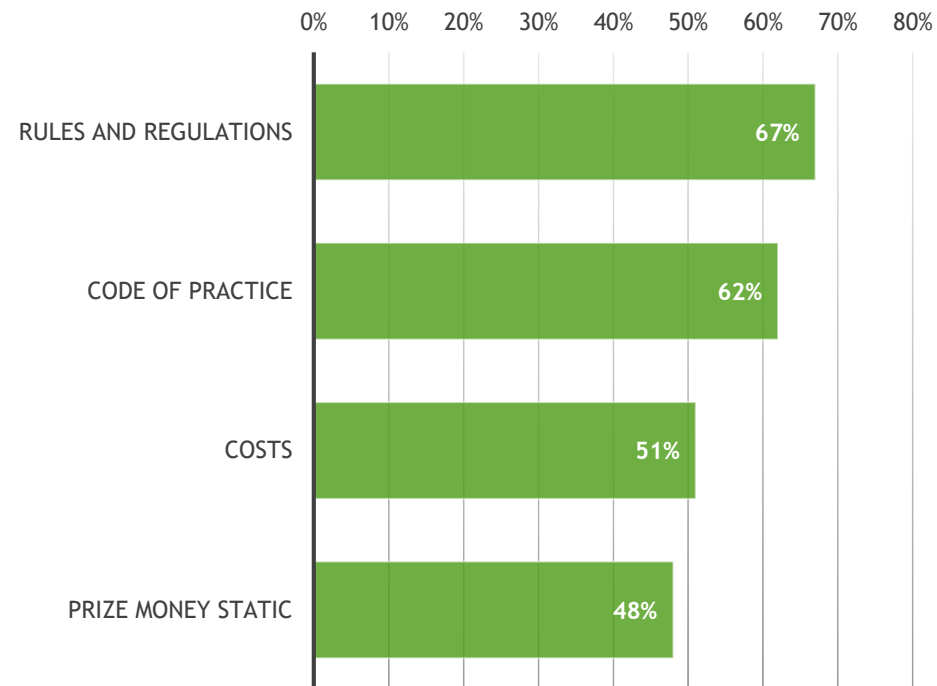
- **88%** of participants say cost is a significant or determining factor in ongoing participation

# Survey - Participation intentions: 2020 and beyond

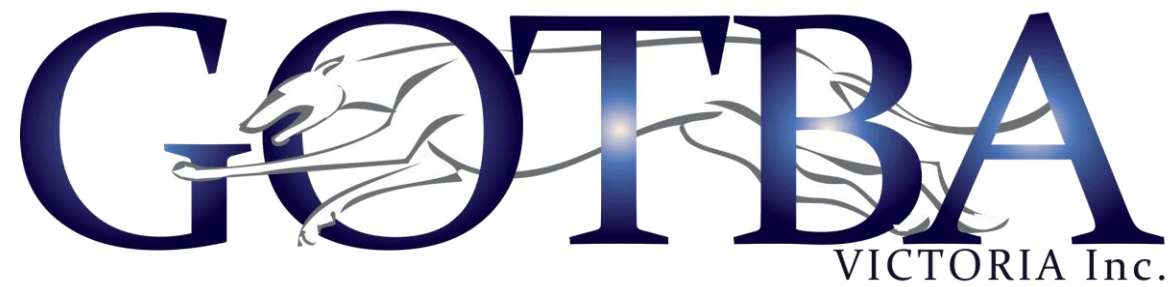
Participation intentions of respondents - 2020 and beyond



Reduced participation - why?\*



\* More than one response could be provided.



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