



**GREYHOUND
RACING
NSW**



STRATEGIC PLAN

FY2022-2024

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CHAIRPERSON'S MESSAGE

The landscape of greyhound racing in NSW has undergone tremendous transformation over the last three years to become a flourishing industry with a renewed focus on the welfare of greyhounds, integrity and close engagement between stakeholders.

As Chair of Greyhound Racing NSW (GRNSW), it has been my honour to have led and worked with a team which has delivered reform based on initiatives outlined in the 2018-2021 Strategic Plan.

GRNSW has been able to build incredible momentum and have realised significant key achievements in partnership with all our stakeholders. Among these are:

- More than \$14 million invested in the last three years into upgrading racetracks to improve safety and animal welfare standards with funding from the Government's Capital Grants Program (with more to come), and an additional \$2 million annually invested in tracks and infrastructure by GRNSW;
- Increased TAB racing with four new tracks upgraded from Non-TAB to TAB status (Gunnedah, Temora, Taree and Wauchope);
- Investment in safety and injury rebate schemes leading to a significant decline in on-track injuries statistics, with not only a drop in overall injuries, but specifically a significant reduction in catastrophic injuries;
- Growth in wagering turnover, which in the final year of the Strategic Plan surpassed \$2 billion, the highest wagering turnover in GRNSW's history; and
- Improvement in returns to participants through substantial increases in prizemoney with approximately \$34 million to be distributed in FY21, the largest prize pool to-date.

Most importantly, it is great to recognise the outstanding progress GRNSW has made in delivering world-leading programs for the care of greyhounds. These comprise of initiatives such as Greyhounds As Pets (GAP), the establishment of the race injury rebate scheme and homing assistance support. GRNSW will continue to work with our stakeholders to deliver further enhancements to the lifetime care of greyhounds including a new state-of-the-art facility in the Hunter Valley.

The Board of Directors, management and staff of GRNSW understand it is our combined duty to deliver the highest animal welfare standards, industry integrity, world-class tracks that host competitive racing, and opportunities that enhance local communities.

While remarkable achievements were accomplished across the past three years, we will provide continued commitment and contributions to future proof greyhound racing for the generations who follow. The Strategic Plan commencing 1 July 2021 to 30 June 2024 (FY2022-2024) has been developed to deliver upon our vision to be a world-leading and modern greyhound advocate generating experiences through responsible care, community and growth for a sustainable industry.



Hugh Armenis
Chairperson



CEO'S MESSAGE

Our state, national and global environments and audience have evolved considerably and, as a result, our strategy is adapting to ensure that we are able to develop a sustainable industry.

GRNSW's FY2022-2024 Strategic Plan is a framework for the next three years and builds upon the foundational objectives for a responsible, sustainable and competitive industry.

This new Strategic Plan has been developed with a focus on a thriving greyhound racing ecosystem in NSW, from the livelihoods of participants to whole-of-life-care for our greyhounds.

It has been built upon four strategic pillars - care, community, growth and engagement - all of which are bound by sustainable practices. The plan has also been devised against a backdrop of an increasingly digital post-pandemic world.

The strategy's framework supports GRNSW to be world leaders in "boots on the ground" animal welfare care and to implement innovative racing and wagering outcomes that have the potential to grow existing revenues and bring new income streams to sustain and future-proof the industry.

The focus of the strategy is to:

- Develop the best environment for all greyhounds in our industry by ensuring lifetime care, re-homing programs, track safety measures, education and other critical animal and participant welfare care programs;
- Provide support to clubs, participants and wider communities involved in greyhound racing, particularly in regional and rural areas where the majority of participants reside;
- Maximise wagering turnover on our racing content through optimised product portfolios, diversification, technological advancements and best practices that are integrity-based and compliant across any region, and to deliver increased revenue from these efforts;

- Be a responsible partner by collaborating with industry stakeholders, including NSW Government, Greyhound Welfare and Integrity Commission (GWIC), regulators and industry bodies; and
- Meet GRNSW's obligations under relevant Acts of NSW Parliament and the greater societal expectations of the industry.

A key strategic focus continues to be, and will always be, the safety and wellbeing for greyhounds, which is emphasised by:

- Greyhound track safety;
- Greyhound rehoming programs including the development of a greyhound lodge in the Hunter;
- Greyhound care schemes for injured animals;
- Greyhound population tracking and monitoring; and
- Education and training for all participants and new veterinarians.

GRNSW acknowledges that clubs, participants and their communities are central to success of the industry, particularly in regional and rural areas where more than 70% of our participants reside. GRNSW is also a fundamental part of the communities in which it operates as the industry generates employment, supports local business, encourages tourism and provides social opportunities. This will again be a key driver of actions that result from the FY2022-2024 Plan, and include substantial investment in clubs and tracks, and by extension many regional and rural communities.

The GRNSW team is committed and aligned to ensure that it monitors and evaluates its performance against this new Strategic Plan with the intent to establish the future growth of the industry, especially for its participants and greyhounds.



Tony Mestrov
Chief Executive Officer



CEO Tony Mestrov

OUR VISION



To be a world-leading
and modern greyhound
advocate generating
experiences through
responsible care,
community and
growth for a
sustainable industry.

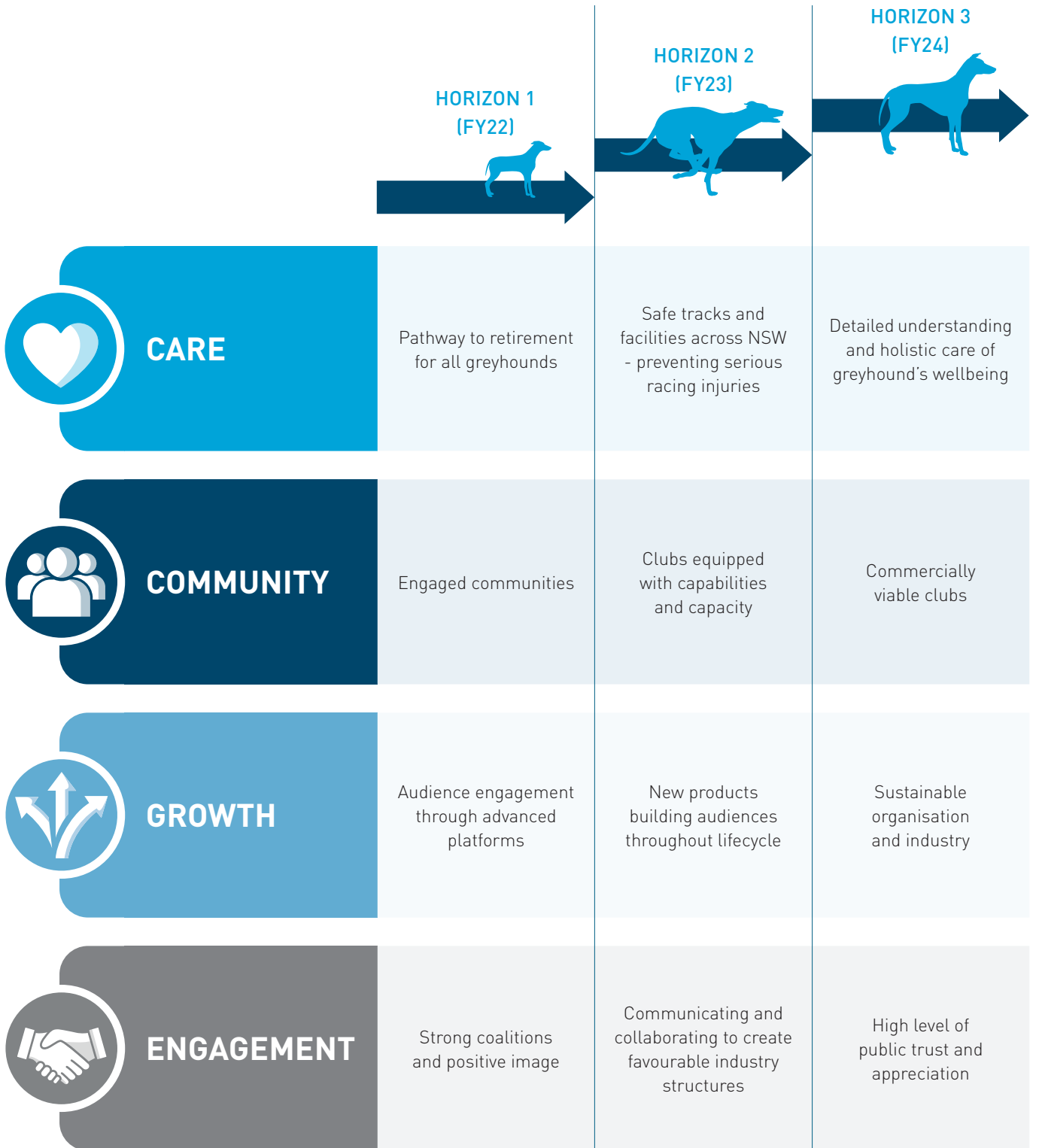
STRATEGIC PILLARS

GRNSW aims to achieve its vision through focusing on the four strategic pillars of care, community, growth and engagement, all of which deliver a sustainable industry. The progress and outcomes of each pillar will be measured by focused leading indicators.



OUR AMBITION

GRNSW has phased growth ambitions within each strategic pillar that assist it to strive towards the organisation’s vision over the next three years.



RESPONSIBILITIES

GRNSW is required to comply with objectives and responsibilities stipulated within Government regulations and charters. These are an integral part of the strategic plan. Furthermore, GRNSW is committed to work closely with GWIC through a consultative process particularly on matters relating to track safety, rehoming, education, integrity and breeding.

The current demarcation of key responsibilities and overlapping considerations are noted below:

GRNSW	GWIC
<p>OBJECTIVES (<i>Greyhound Racing Act 2017</i> (NSW))</p>	
<ol style="list-style-type: none"> 1. Be a commercially viable entity 2. Exhibit a sense of social responsibility by having regard to the welfare of greyhounds 3. Promote greyhound racing in the state as a competitive and sustainable industry, with a high level of public trust. 	<ol style="list-style-type: none"> 1. Promote and protect the welfare of greyhounds 2. Safeguard the integrity of greyhound racing and betting 3. Maintain public confidence in the greyhound racing industry.
<p>RESPONSIBILITIES</p>	
<p>1. Greyhound care</p>	
<ul style="list-style-type: none"> • Develop safety standards for licensed racecourses and race meetings ✓ • Fund costs of GWIC ✓ • Manage adoption (rehoming) program ✓ • Advocate for and develop initiatives to improve breeding controls and lifecycle ✓ • Continuous improvement in welfare outcomes ✓ • Advocate for participant integrity ✓ 	<ul style="list-style-type: none"> • Control, supervise and regulate racing ✓ • Develop and implement welfare policies, including Code of Practice ✓ • Research and investigate breeding and racing ✓ • Implement whole-of-lifecycle system ✓ • Enforce participant integrity and compliance ✓ • Report racing integrity matters to Government ✓ • Consult with animal welfare bodies for changes to legislation
<p>2. Education</p>	
<ul style="list-style-type: none"> • Educate industry participants on regulatory regime ✓ • Develop and deliver education/accreditation programs to meet registration requirements of GWIC ✓ 	<ul style="list-style-type: none"> • Assist the industry to develop education and training requirements for participants and approved programs ✓
<p>3. Race management</p>	
<ul style="list-style-type: none"> • Conduct/authorise race meetings to be conducted by clubs ✓ • Allocate dates and venues for race meetings ✓ 	<ul style="list-style-type: none"> • Enforce race day specific rules, policies and processes to ensure the efficient conduct of race meetings ✓ • Provide track officials (e.g. stewards, vets) at race meetings ✓
<p>4. Industry development</p>	
<ul style="list-style-type: none"> • Develop and implement policies for the promotion, development and commercial viability of the industry • Assist clubs to be well governed and efficient • Build industry goodwill ✓ • Increase prizemoney to be competitive • Encourage participation and enhance regional racing ✓ • Develop a metro racing strategy ✓ • Develop initiatives for clubs for revenue diversification and social and economic contributions to communities 	<ul style="list-style-type: none"> • Develop and enforce modern standards for industry participants (including integrity and welfare standards) ✓ • Develop competency for participant registration types ✓
<p>5. Administration</p>	
<ul style="list-style-type: none"> • Register greyhound racing clubs • Order periodic audit of club books and accounts • Approve club constitutions to ensure compliance and alignment with club and industry requirements • Manage wagering, race fields and other commercialisation 	<ul style="list-style-type: none"> • Registration of greyhounds, participants and trial tracks

Note: Items marked ✓ require consultation with GRNSW, and ✓ require consultation with GWIC.



OUR STRATEGY

| Felix & Ariel Ng
with the greyhound they
adopted from GAP

STRATEGIC INITIATIVES

GRNSW will achieve our vision through the successful delivery of key initiatives, which address the biggest priorities for the future of the industry. Outcomes for these initiatives will be enabled via embedded capabilities in integrity, insight and innovation.

 CARE	 COMMUNITY	 GROWTH	 ENGAGEMENT
<ul style="list-style-type: none"> 1. Greyhound track safety <ul style="list-style-type: none"> a. Safe infrastructure b. Track and facility upgrades to deliver minimum standards 2. Greyhound rehoming <ul style="list-style-type: none"> a. Greyhound lodge b. Regional rehoming c. Pet preparation d. Adopted greyhound support 3. Greyhound lifecycle sustainability <ul style="list-style-type: none"> a. Population equilibrium b. Greyhound care delivery 4. Education and training <ul style="list-style-type: none"> a. Apprenticeships and training b. Legislative compliance 5. Participant support 	<ul style="list-style-type: none"> 1. Regional economic and social benefit development 2. Club engagement program <ul style="list-style-type: none"> a. Well-structured governance b. Professional assisted services model including human resources, business and marketing support, templatised websites, communication, information technology and pro formas c. Attracting people to become involved in the industry 3. Club revenue and performance <ul style="list-style-type: none"> a. Revenue diversification b. Club incentivisation 	<ul style="list-style-type: none"> 1. Track portfolio viability <ul style="list-style-type: none"> a. Footprint optimisation b. Centres of Excellence and track investment 2. Racing optimisation 3. Commercial revenue optimisation <ul style="list-style-type: none"> a. Product development/ commercial revenue diversification b. Platform development c. New markets 4. Audience development <ul style="list-style-type: none"> a. Audience lifecycle management b. New participant products 5. Improve return on investment for participants 	<ul style="list-style-type: none"> 1. Industry development and advocacy to provide an effective operating model 2. Facilitate and incentivise participants to collaborate to develop a responsible and sustainable industry 3. Brand development and communication to enhance positive perceptions and consideration among stakeholders and public

————— **INTEGRITY** ————— **INSIGHT** ————— **INNOVATION** —————

CARE



GRNSW aims to deliver the best possible environment for the treatment of greyhounds throughout their life. This means proper care and environments for greyhound development, a reduction in injuries and a proper transition to retirement for the racing dogs within the industry.

Lead indicators:

1. Zero unnecessary euthanasia
2. Manage greyhound injuries on race tracks
3. GRNSW assisted greyhound rehoming

1. Greyhound track safety

The development of safe racing practices and tracks forms an important controllable environment in which race safety can be assured, and therefore greyhound injury can be minimised. GRNSW leads the world in the research and development of safety standards, monitoring and technological advancements to reduce track-related injuries including development of real-time applications for track auditing, and race preparation checks in the lead up to races. GRNSW plans to continue on this mission for a safe race environment and workplace on world class tracks utilising the latest research.

a. Safe infrastructure

GRNSW is required to adhere to a series of safety requirements within the legislative frameworks in which it operates. This includes baseline requirements requiring GRNSW to bring all tracks to a safe standard per its *Operating Licence, Greyhound Racing Act 2017* (NSW), and subsequent GRNSW Track Strategy 2021 – 2023. GRNSW has collaborated with industry partners and experts including UTS to develop the Minimum Standards for: i) Track Design and Construction, ii) Facilities and Amenities (including on-track greyhound veterinary care); and iii) Training Tracks that were approved under the Act by the Commissioner of GWIC in June 2020. GRNSW is scheduled to deploy at least \$30 million in funds from the Government to ensure tracks meet these minimum safety requirements by 30 June 2023. In addition, GRNSW provides clubs with approximately \$3 million per year in track safety maintenance, club projects and equipment.

An audit of the Minimum Standards was completed in 2021. In order to achieve GRNSW's ambitions in track safety the management has undertaken to complete minimum standards track and equipment upgrades utilising funds for projects including safety infrastructure upgrades. These include safety rail and padding improvements, track cameras for race monitoring, and other projects for tracks to meet minimum standards and care for greyhounds.

b. Track and facility upgrades

Clubs are to be provided with funding assistance to ensure that their facilities and tracks comply with the Minimum Standards. The Government has already committed to fund track safety, leaving all other facilities to be funded by the clubs, GRNSW or additional Government funding.

Upgrades include investment into global market-leading new technology such as:

1. The Safe Chase remote lure - a battery-operated remote-controlled safer lure system without wire cables or motors;
2. The Isolynx tracking and timing system - a world class system that provides advanced data on greyhound health, as well as timing and greyhound tracking in races and trials;
3. Volumetric Water Meters – metres that monitor the water content of tracks in addition to penetrometers to monitor the firmness or hardness of tracks; and
4. Drone track monitoring system - an agricultural style drone with track monitoring software to map track vitals including moisture mapping, irrigation scheduling and firmness of track.

Deployment has commenced at tracks such as Richmond, where GRNSW has also constructed the first straight track for TAB meetings in NSW, and Grafton where the first new build in more than 50 years has been constructed and completed - to be fully compliant to the new standards for track design and construction, facilities and amenities.

Related leading indicators:

Manage greyhound injuries on race tracks.



Richmond straight track

2. Greyhound rehoming

GRNSW is committed to supporting the successful rehoming of all greyhounds regardless of whether they have raced. GRNSW administers rehoming programs operationally through: facilitating regional coordination, engagement with kennel providers, educating participants on their obligations and the preparation of their greyhounds for the program, and the provision of GRNSW-owned facilities. Through the rehoming initiatives, GRNSW intends to broaden its ability to support rehoming by maximising the support provided to greyhounds and owners prior to and following adoption.

a. Greyhound lodge

A property in the Hunter Valley has been purchased to become a global best practice facility. The lodge is scheduled to be implemented in a staged approach over three years to ensure the success of the venture, which is the first of its kind for GRNSW and the greyhound industry nationally.

The essence of the facility is to provide a home for greyhounds that are not suitable for rehoming at the time of retirement and to rehabilitate and provide ongoing veterinary assistance and general care for greyhounds injured during racing, which is intended to assist meeting targets for zero unnecessary euthanasia. As a holding and training site, the lodge is designed to be a feeder for GAP adoption centres to rehome suitable greyhounds permanently.

Rehabilitation at the lodge, including behavioral and medical aspects, will be focused on progressing greyhounds to GAP centres for adoption. Greyhounds that are unsuitable for pet life, even after long-term care, can remain at the lodge and live comfortably for their natural lives, which is part of GRNSW's plans for zero unnecessary euthanasia. The welfare of greyhounds is to be regularly monitored and actively maintained through appropriate care and enrichment in the lodge environment.

b. Regional rehoming

GRNSW facilitates efficient regional rehoming pathways through direct placement. This occurs via a program managed by Regional Coordinators who work with participants and potential homes to match pet-ready greyhounds, thus alleviating the need to go via a kennel. Regional rehoming pathways are critical as more than 70% of the industry's participants are based outside the metropolitan area.

c. Pet preparation

Where direct placement is not possible, GRNSW undertakes to work with commercial and Government partners such as kennel operators, as well as foster carers, to improve the rehomeability of greyhounds leaving the racing industry by providing access to pet preparation on retirement. GRNSW provides specialised care by using a Greyhound Emotional Wellbeing Assessment to provide individualised support programs for each greyhound. Partner schemes include greyhounds participating in the GAP Prison Program, a jointly funded initiative by GRNSW and Corrective Services NSW that has been operational for more than 10 years.

d. Adopted greyhound support

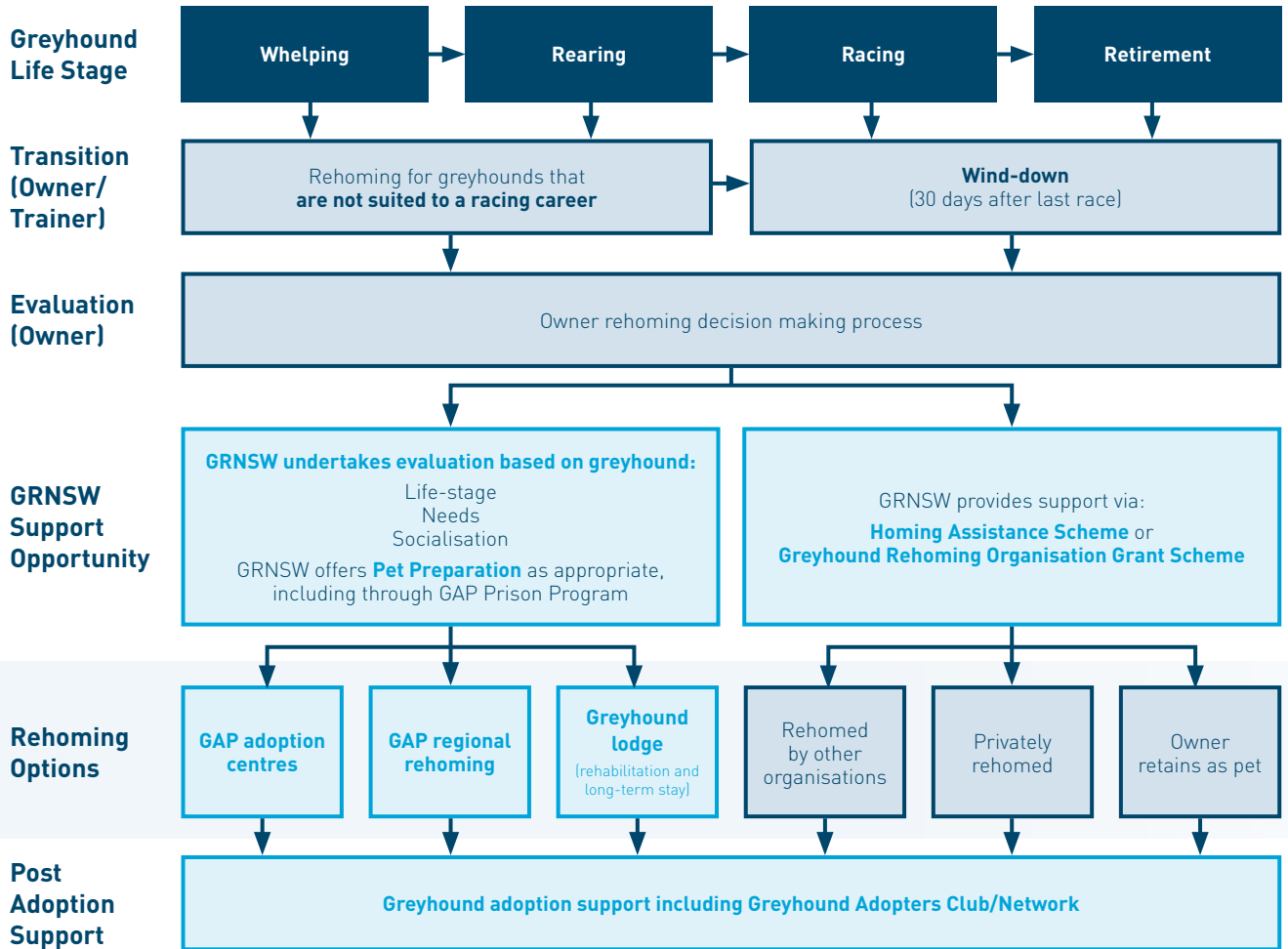
GRNSW seeks to assist adopters to care for their greyhounds to ensure the best lifetime outcomes and a reduction in the return rate. This can be achieved through a Greyhound Adopters Club/Network focusing on education, as well as the promotion of greyhounds as pets. Developing an adopter supporter program is expected to improve: adopter satisfaction, retention of greyhounds in new homes, welfare of retired greyhounds, and monitoring of a greyhound once it enters pet life.

Related leading indicators:

GRNSW assisted greyhound rehomings.



GREYHOUND REHOMING PATHWAYS



Represents GRNSW support

3. Greyhound lifecycle sustainability

The ability to track greyhounds throughout their lifetime is vital for planning and monitoring purposes, particularly around the assessment of greyhound breeding, behaviours and health. This information can improve GRNSW’s capabilities to deliver requirements for care and safe industry practices.

a. Population equilibrium

The development of population models are planned to provide detailed monitoring of the racing greyhound population from birth to retirement from GWIC tracking data. This provides GRNSW with the ability to develop:

- Future planning of welfare initiatives (GAP, rehoming, injury rebate scheme);
- Racing programs appropriate to greyhound racing life stages and abilities;
- GRNSW population and injury models to guide racing population management and highlight intervention points to reduce injuries; and
- Health insights (including diseases and genetic conditions) via GRNSW modelling to improve greyhound lives and outcomes beyond racing, and support breeding controls as defined by GWIC.

b. Greyhound care delivery

Providing a sustainable life for a greyhound in racing requires both monitoring and treatment. GRNSW launched the Race Injury Rebate Scheme in 2019 in recognition of the potential high costs to treat greyhounds with career ending injuries on track. This scheme provided further safeguards for greyhounds through better opportunities for diagnosis, treatment and care, and helped to prevent euthanasia from occurring due to prohibitive treatment costs. GRNSW plans to expand the current Race Injury Rebate Scheme to improve treatment and care of greyhounds injured during racing and trialing, and to include rehabilitation support to ensure a positive outcome for the greyhound.

Related leading indicators:

Reduce unnecessary euthanasia.

4. Education and training

GRNSW believes that education and training provide important opportunities for people to enter the industry, while also improving the awareness of current participants on best practices and welfare requirements. The intended outcome is improved compliance and performance in the sport.

a. Apprenticeships and training

GRNSW plans to establish greyhound focused apprenticeships and training through partnerships with tertiary education institutions and the training sector in areas such as veterinary sciences, greyhound racing, ground care, facility management and animal care to:

- Develop a pipeline to attract and retain best talent;
- Improve access and ongoing involvement for those who may be interested in the industry; and
- Drive better animal outcomes through access to more vets, optimally maintained tracks and facilities, and the development of world-class research/innovation on animal care.

b. Legislative compliance

Under the *Operating Licence*, GRNSW is responsible for:

- Educating participants on new regulatory regimes;
- Delivering education and accreditation to meet participant registration requirements for GWIC, which requires new participants to complete competency tests as part of the registration process; and
- Training and accreditation programs to also meet other compliance with all applicable laws and professional standards for greyhound racing industry participants.

To date, a National Education Working Group, led by Greyhounds Australasia, has been established to identify competency gaps and professional development opportunities within the greyhound racing industry, and to formulate a national industry education plan. This has included a comprehensive set of educational objectives for all participant types and those working with participants across the greyhound racing industry.

To deliver, GRNSW aims to:

- Provide access to training and educational materials to allow legislative compliance by participants and stakeholders, such as understanding licensing requirements and Code of Practice obligations;
- Collaborate with clubs and organisations to hold training events, such as Greyhound First Aid and Pet Prep courses; and
- Work with NSW Government vocational education providers to provide accredited training courses.

The provision of training by GRNSW is intended to lead to improvements in greyhound care in breeding, training and racing and in-turn reduce potential injury risk by ensuring that participants follow legislated requirements prior to, and while taking part in, racing.

Related leading indicators:

Reduce unnecessary euthanasia, manage greyhound injuries on track.

5. Participant support

GRNSW's focus on care also extends to industry participants, whose wellbeing is core to the industry. In recent times it has been recognised that there have been increasing challenges as a result of natural disasters, which have resulted in some cases of associated physical and mental issues. GRNSW has a history of supporting communities and vows to continue to provide support to its participants whether they are breeders, owners, trainers or clubs. In partnership with GWIC, the Greyhound Breeders, Owners and Trainers Association (GBOTA) and other stakeholders, GRNSW supports the wellbeing of industry participants with focused assistance initiatives for participants suffering significant mental and physical health issues, and those experiencing catastrophic events such as bushfires, droughts and floods. In collaboration with stakeholders, GRNSW aims to achieve this through:

- Wellbeing support infrastructure including contact points and response programs;
- Mental health training for key staff; and
- Events and awareness initiatives.



COMMUNITY



Communities in which we operate are fundamental to the sustainability of the industry. We aim to positively contribute to these communities in a manner that will build: the industry profile, engagement and goodwill with the community. To do so, we aim to support the development of high performing, efficient and well governed clubs that generate greater returns and therefore benefits to the community.

Lead indicators:

1. Economic benefits
2. Financially viable and profitable clubs
3. Diversified club revenue

1. Regional economic and social benefit development

The greyhound industry and regional clubs contribute social and economic benefits to the community in the form of:

- Community programs;
- Job creation (direct and indirect) including participants, club staff, hospitality and associated service industries;
- Commercial incentives through the purchase of local goods and services by the industry;
- Venues that can be utilised by the community beyond racing; and
- Tourism into the region.

Particular opportunities to increase benefits include:

- Funding of local programs to drive improved community outcomes including those focused on education and support;
- Additional marquee events being held in regional areas - with increased prizemoney and participation generating more tourism to communities, as occurred with the regional finals of the Million Dollar Chase; and
- Investment (including through the Government's committed grants program) into track safety and facilities - initially creating local employment and expenditure during construction, but also in the longer term as track development leads to increased prizemoney and attendance, for example Taree transitioning from a non-TAB to a TAB track.

Related leading indicators:

Economic benefits.

2. Club engagement program

We recognise that thriving clubs are important contributors to the vitality of the racing ecosystem. Consequently, there is a need for GRNSW to support clubs through the provision of best practices and services that enable them to perform effectively and efficiently, and remain viable.

a. Well-structured governance

Optimally structured clubs and networks provide a baseline operational structure that allows for efficient clubs and club management. GRNSW's role is to facilitate this outcome through the development of clear best practice guidelines and policies, including structured club governance charters, constitutions and club operating standards for conducting club affairs to ensure that these represent modern and professional organisations, as per requirements under the *Operating Licence*. Clear standards and compliance are fundamental to assist in the goal to draw quality candidates for club boards, and to attract and retain quality staff through benchmark management techniques.

b. Professional assisted services

GRNSW has undertaken to further facilitate efficiencies through optional assisted services, resources, best practice approaches and templates to better allow clubs to consistently optimise operations and enable self-sufficiency. GRNSW intends to pursue a phased approach and consider the following services:

- Better procurement opportunities;
- Sharing of key resource positions such as financial resource management (bookkeepers for example);
- Sharing of IT, social platforms, websites and intranet;
- Marketing approaches and sponsorship opportunities;
- Industry aligned and consistent messaging across clubs; and
- HR guidance to attract and retain quality staff.



Tracey and Frank Hurst
who owned and trained the
TAB Million Dollar Chase
winner Good Odds Harada



c. Attracting people to become involved in the industry

Developing sustainable clubs also requires attracting new participants. It is in the interests of GRNSW and clubs to continue to actively encourage community participation at the tracks through attendance, volunteering and employment. GRNSW plans to assist clubs by providing guidance on membership drives, participant forums, club events and marketing to increase the number of people involved in clubs and the industry (including participants). Driving membership has the added benefit of bringing new ideas and revitalising the industry, encouraging more community participation and a growth in revenue.

Related leading indicators:

Financially viable and profitable clubs.

3. Club revenue and performance

GRNSW plans to assist clubs to improve their self-sustainability through the development of practices that can generate revenue growth.

a. Revenue diversification

Assisting clubs to diversify revenue, including from new sources, has the potential to increase the viability of clubs and reduce their reliance on GRNSW distributions. This can be accomplished through:

- Diversified revenue from multi-use venues and events: Use of tracks as multi-purpose venues to host other events (such as soccer, athletics, concerts and fairs), which can also increase track utilisation;
- Revenue from additional race-day sources: Enlisting food and beverage vendors and others can also lead to improvements in attendance and exposure; and
- Government grants.

b. Club incentivisation

GRNSW intends to reward clubs based on performance and effort to drive positive behaviours leading to continuous improvement and growth. It is expected that this can also ultimately lead to improved: club focus, performance, attraction of patrons, membership and effective staff.

Clubs may be incentivised by the successful implementation of:

- Diversification strategies;
- Governance structures;
- Club engagement/outreach; and
- Management reviews and staff feedback.

Related leading indicators:

Diversified club revenue, financially viable and profitable clubs.

GROWTH



The ongoing sustainability of the industry as a whole, and GRNSW's ability to service the ecosystem, is contingent on the industry being competitive and growing from a participant, audience and wagering perspective, ultimately driving higher returns for industry participants and GRNSW.

Lead indicators:

1. Wagering turnover
2. Diversified commercial revenue (excluding wagering-related)
3. Prizemoney

1. Track portfolio viability

The industry currently operates racing at 11 non-TAB tracks and 18 TAB tracks across the state, with resources invested by GRNSW for funding shortfalls on non-TAB tracks to undertake operational improvements and capital upgrades. GRNSW has a clear focus to create a sustainable environment and improve tracks and facilities across registered racetracks in NSW through the efficient allocation of resources.

a. Footprint optimisation

GRNSW, in consultation with clubs, has made positive progress on optimising club footprints (for example Cowra club racing at Temora, Armidale racing out of Gunnedah). GRNSW plans to continue to evolve and optimise audience, participation and investment into safety and facilities through a more concentrated footprint of TAB racing tracks, including plans for the relocation of racing from Wentworth Park (with the lease ending in 2027) and the future of metropolitan racing. GRNSW has undertaken to ascertain the potential level of financial and operational support required to improve facilities and services, while recognising the limitations of some tracks (particularly non-TAB clubs run by volunteers) which may not have the resources required to maintain track standards or generate adequate returns. Developing a footprint plan is intended to better serve all clubs and participants through focused spending on an appropriate number of facilities and an enhancement of regional greyhound racing, thereby increasing the competitiveness and sustainability of the industry. GRNSW has committed to consult with all clubs during this process.

b. Centres of Excellence and track investment

In parallel, GRNSW plans to continue its program of work to significantly improve track facilities and amenities with a goal to deliver world-class and modern experiences for participants and the community.

Core to this program is the development of Centres of Excellence at new and existing race track sites. Centres of Excellence will be in-line with the new Minimum Standards and Track Strategy, and potentially also include: kennel facilities; straight and oval racetracks with LED lighting; straight and oval training tracks; veterinary facilities; therapeutic pools; and GAP facilities. These centres, such as Grafton (the largest project ever undertaken by GRNSW to date), Goulburn and Tweed Heads (each of which is proposed to be larger than Grafton), represent significant regional hubs and are intended to set benchmarks from a greyhound safety, amenity and technology perspective.

Related leading indicators:

Wagering turnover.

2. Racing optimisation

GRNSW has a plan to drive revenue generation via wagering uplift directly from streamlining and optimising its racing schedule, with a view to benefitting GRNSW, participants and wagering partners. This may include expanding the schedule via:

- An assessment of wagering outcomes and race meeting programming in the current schedule, and the implementation of a new programming strategy;
- Delivery of innovative content with stakeholders, including new racing concepts, events and feature racing; and
- An improvement in the utilisation rate (percentage of greyhounds that are bred that go on to race) with the intention that it sets a new benchmark across racing codes.

Through its racing innovation, GRNSW also expects to generate additional exposure and reach. A recent example is the successful launch of the Million Dollar Chase series, which has drawn record crowd attendances, wagering turnover and sponsorship, and live free-to-air coverage as well as significant media exposure in both metropolitan and regional media.

Related leading indicators:

Wagering turnover.

3. Commercial revenue optimisation

Greyhound racing is largely a content-generating business from which GRNSW derives revenues via wagering and distribution fees. GRNSW plans to increase the opportunities for, and effectiveness of, revenue generation from the diversification of revenue from its content and platforms from customers in Australia and abroad.

This can be achieved by:

- Product development;
- Advertising opportunities leveraging assets and platforms; and
- Partnerships.

a. Product development/commercial revenue diversification

Increased revenue diversification can be driven by advertising, partnerships, and utilising assets including streaming of vision and GRNSW archives. Beyond its owned platforms, GRNSW seeks to increase the distribution of racing vision, audio and data content to multiple external platforms and partners, including free-to-air broadcast operators, with a view to capitalise on, and grow, GRNSW's contractual agreements.

b. Platform development

The development of digital, media and information capabilities to deliver best practice services, features, broadcast capabilities and experiences to drive wagering outcomes on GRNSW-owned platforms, such as thedogs.com.au, are key to advancing this success. GRNSW plans to evolve its product suite of assets to maximise commercial outcomes through:

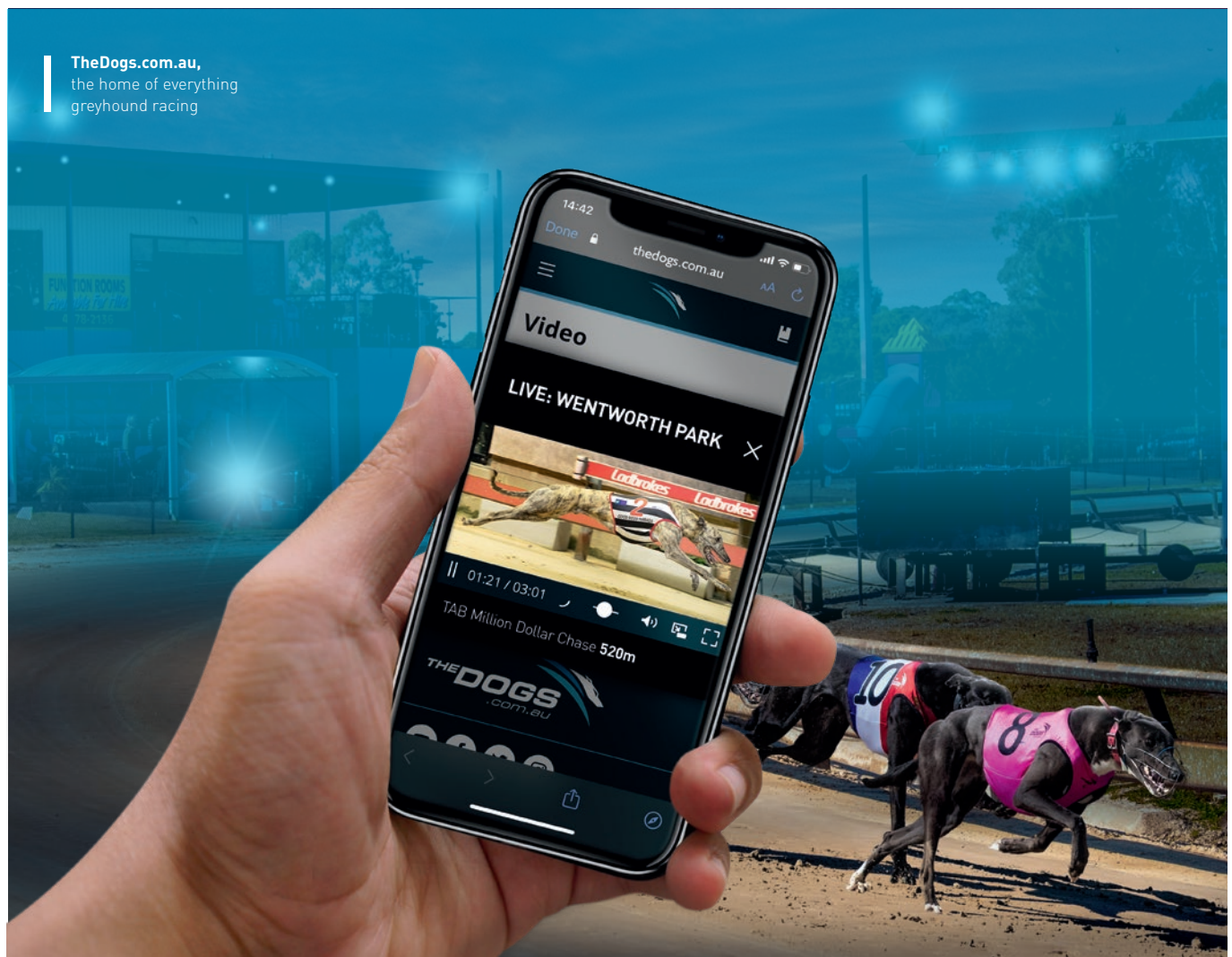
- The accurate assembly and delivery of information to partners and punters; and
- Improving the digital delivery of GRNSW products, which is critical to attract younger punters who are digital/mobile-centric and have a higher propensity to spend based on user-experience including vision and data.

c. New markets

GRNSW has ambitions to grow its addressable market through access to new audiences, including in overseas markets through the distribution of content (streaming and data) via media rights deals into geographies such as the United States, United Kingdom, Europe and Asia.

Related leading indicators:

Diversified commercial revenue.



TheDogs.com.au,
the home of everything
greyhound racing

4. Audience development

a. Audience lifecycle management

GRNSW seeks to develop stronger customer value propositions through marketing and product development aligned to the customer journey, thereby generating higher revenues by increasing customer reach, conversion, participation, expenditure and retention. These factors are critical to attract new audiences by building audience affiliation, consideration and acceptance. This can be achieved through brand marketing and leveraging mass communication strategies.

GRNSW can also convert new audiences through partnering with corporate bookmakers and leveraging their digital capabilities to upsell and cross-sell into greyhound racing (off and on platform). GRNSW intends to leverage the focus on investments into digital data capabilities.

b. New participant products

GRNSW plans to investigate new models to drive participation in terms of ownership and public sentiment. Increasing participation in greyhound racing is vital to the long-term sustainability and growth of the industry, which is in need of both new participants to refresh an ageing demographic, as well as more high-performing racing greyhounds.

Related leading indicators:

Wagering turnover, diversified commercial revenue.

5. Improve return on investment for participants

A sustainable industry requires satisfied existing participants and a flow of new participants who are, among other things, enticed, incentivised and rewarded by appropriate returns on investment.

Consequently, GRNSW aims to sustainably grow the industry by improving the returns for participants through:

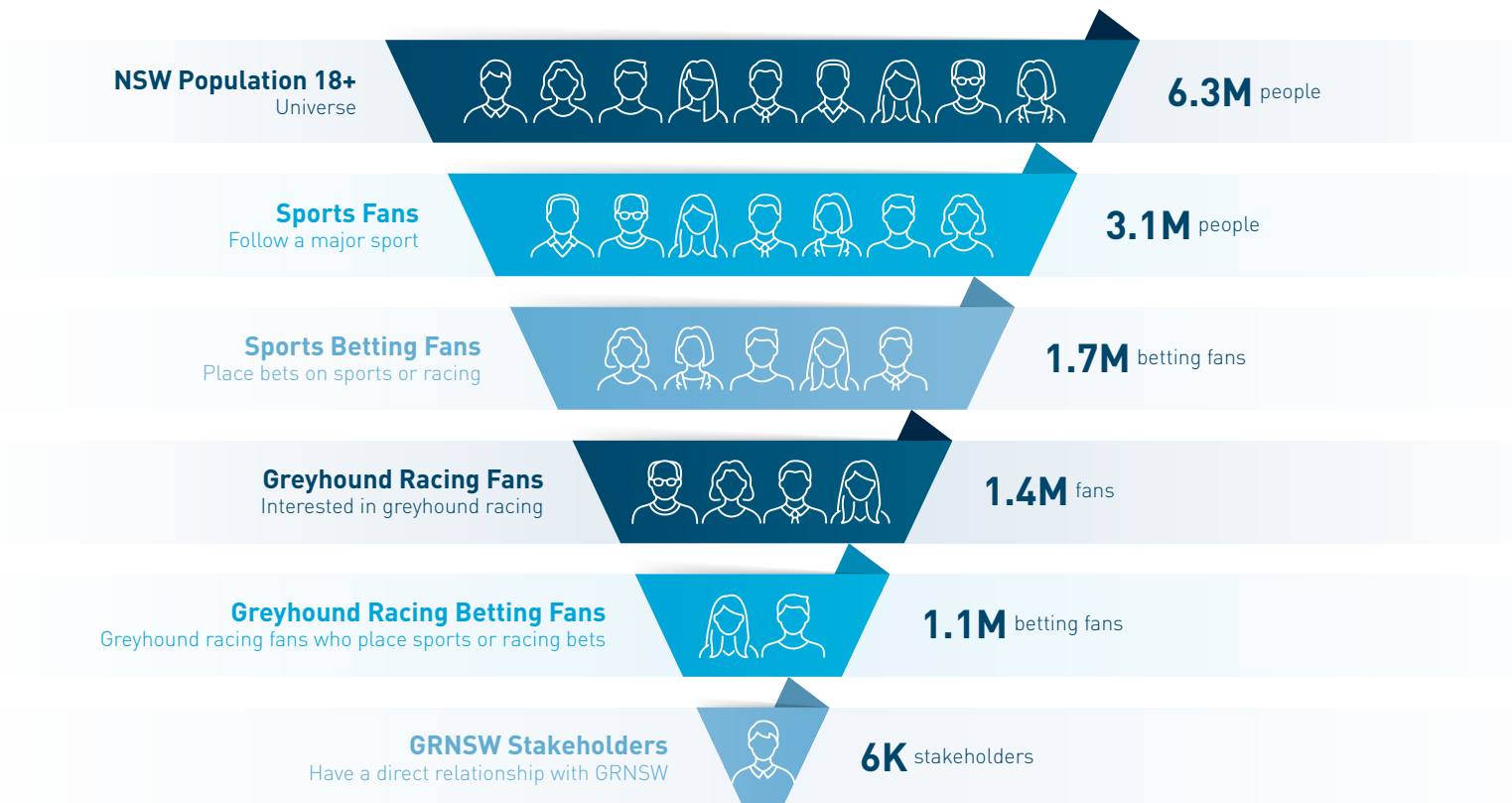
- Increased prizemoney (currently the highest on record) to be nationally competitive;
- Subsidies (such as travel);
- Distribution of streaming rights revenue; and
- Initiatives that help support industry participants.

The growth in prizemoney is a primary driver of returns and can be further achieved through top line improvements in wagering products, racing innovation, improved distribution returns and scheduling optimisation. Additionally, it can also be supported from savings made through efficiencies including track portfolio reviews.

Related leading indicators:

Prizemoney.

MARKET SNAPSHOT



Note: All figures are approximations based on market estimates.
Sources: Futures Australia Market Landscape Tracker, January - April 2021 waves; market reports.

ENGAGEMENT



GRNSW operates in a complex and highly regulated industry with myriad commercial and public stakeholders who are vital for the future success of the industry from a financial, operational, reputational and trust perspective. GRNSW is committed to continuing its collaboration with these stakeholders to drive the maximum outcomes for the industry for greyhound care and commercial viability.

Lead indicators:

1. Stakeholder sentiment
2. Audience perceptions monitor

1. Industry development and advocacy

Being the industry's representative, GRNSW engages and collaborates with Government stakeholders to inform, educate and promote the industry. GRNSW's focus is on an optimal sustainable future state for the industry through partnerships, engagement and forums.

Furthermore, GRNSW aims to focus on its interests being appropriately and effectively communicated to key stakeholders in Government to deliver greyhound care and economic viability for the industry and community benefits, particularly through optimal operating and fiscal structures that drive commercial outcomes.

This engagement and messaging within and from the Government should be enhanced through GRNSW's provision of up-to-date data and information to key stakeholders to provide context around the contribution of the industry to regional NSW and to correct misinformation around other preconceived aspects of the industry. This extends to the communication of safety initiatives such as track optimisation and minimum safety standards projects occurring across NSW.

Related leading indicators:

Stakeholder sentiment.



Michelle Sultana
who trained Unison to win a heat of the Group 1 Paws of Thunder in 2021

2. Facilitate and incentivise participants to collaborate

GRNSW undertakes to work with participants to collaboratively develop coherent/unified approaches through participant stakeholder forums and feedback opportunities, with a shared interest in creating a sustainable and healthy industry for all participants, including better care outcomes and higher returns. Additionally, aligning on public messaging can improve the industry's image and has the potential to attract more people to the sport. Co-ordination among participants is set to include, but extend beyond, the current annual participant conferences and courses organised by GRNSW. GRNSW plans to engage other state-based and federal bodies such as Greyhound Australasia to develop optimal safety, care and industry best practices for the industry.

Related leading indicators:

Wagering turnover.

3. Brand development and communication

Under all of its initiatives, GRNSW has a vision to grow the perception and level of public trust and goodwill in the community through socially responsible practices, particularly in relation to greyhound care, and marketing about the positive developments and impacts from the industry.

GRNSW can achieve this by:

- Promoting its world-class greyhound racing product, with a focus on celebrating the animal by utilising marketing calendars, brand ambassadors and media partnerships to enhance positive perceptions and considerations among stakeholders and public;
- Promoting its world-class greyhound welfare and rehoming programs, with a focus on education and commitment to rehoming. GRNSW's investment in the image of greyhounds as pets living in family homes and communities can increase acceptance. Ultimately, the plan is for rehoming all greyhounds; and
- Optimising brand marketing to build greater audience acceptance and engagement.

Related leading indicators:

Audience perceptions monitor.

OUR INDUSTRY ECOSYSTEM

GRNSW aims to further develop the industry and deliver better strategic outcomes for those within the greyhound ecosystem by engaging stakeholders including regulators, participants, public, commercial partners and associations.

GOVERNMENT

Legislation and governance by NSW Government, Minister for Better Regulation and Innovation, Office of Racing and local governments.

GWIC

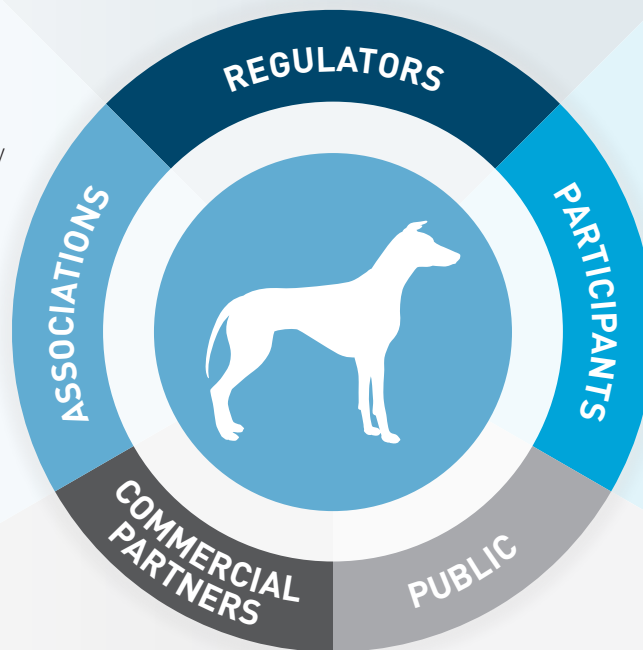
The independent regulator of the greyhound industry in NSW.

GREYHOUNDS AUSTRALASIA AND STATES

Align members across multiple jurisdictions to deliver a high performing greyhound racing industry that is respected and valued.

GBOTA

Providing professional membership and racing operational support for breeders, owners and trainers. Also, operating a number of greyhound tracks.



BREEDERS, OWNERS AND TRAINERS

People involved in the development of greyhounds within the racing industry.

CLUBS

Registered entities managed by members, that are licensed to run greyhound racing and trials.

BOOKMAKERS

Commercial entities including Tabcorp and Wagering Service Providers (WSPs).

RACING CORP

The company representing the three codes of racing in dealings with TAB Limited under various agreements.

COMMERCIAL SUPPLIERS

Sky Racing, broadcasters, media providers, event management and other partners.

GREYHOUND ADOPTERS

Organisations and individuals associated with greyhound rehoming including but not limited to GAP NSW.

ANIMAL WELFARE GROUPS AND VETERINARIANS

Organisations and individuals associated with greyhound well-being.

AUDIENCE & PUNTERS

Those people that accept greyhound racing and/or would consider or participate, in greyhound racing events and wagering.

KEY ENABLERS

Key enablers are required across all four pillars for the successful delivery of GRNSW's vision.

1. Integrity

Guided by regulatory requirements and oversight, GRNSW has a public obligation to uphold and promote the highest standards of ethics, transparency and adherence to codes. The stringent requirements, while applicable to GRNSW, also impacts the broader industry including participants. This can be achieved by:

- Strong governance, management and operating processes for GRNSW;
- Well-governed and duly constituted clubs that are compliant with policies;
- Transparency on reporting;
- Financial prudence;
- Enforcement of regulatory requirements; and
- Guiding and embedding the right behaviours within GRNSW and participants.

The industry's accountability to its animal welfare requirements is particularly important. The requirements are enforced by GWIC as the regulator, providing a further independent monitoring of integrity within the industry.

GRNSW is striving to create an inclusive and therefore more sustainable industry for all participants. Where appropriate, the initiatives will embed considerations for the attraction of diverse participants across age and gender demographics.

2. Insight

Data and insights increase the effectiveness of the organisation by enabling informed monitoring, evaluation and decision-making. This requires the collection of reliable, timely and accurate information from internal and external sources, such as GWIC for greyhound registrations and tracking, surveys on customer sentiment from third parties, and clubs' and GRNSW finance databases for financial information.

Enabling leading insights requires:

- An alignment on requirements/outcomes;
- Identification of data needs, governance and conditions to ensure accuracy;
- Development of data architecture (such as data lakes and data protection measures);
- Establishment of data audits;
- Embedding evaluation and monitoring processes, including automation, tools and data analysts; and
- Delivery management to ensure that insights are operationalised.

Undertaking the above can be beneficial for all initiatives, such as: driving regional social and economic impact (where GRNSW is required to gather new data such as community benefits); audience development (to provide detailed understanding of customer behaviours); and population modelling for greyhound lifecycle (to ascertain breeding trends, traits and treatment).

Through informed insights, GRNSW plans to establish itself further as a thought leader on global best practice for the racing industry and animal care.

3. Innovation

Building a sustainable and viable long-term future for the industry requires innovation through processes, tools and products. Innovation can create new opportunities and a marked improvement in the trajectory of current initiatives. Implementing industry-leading best practices can lead to greater efficiency and effectiveness. This may arise through partnerships with institutions such as universities.

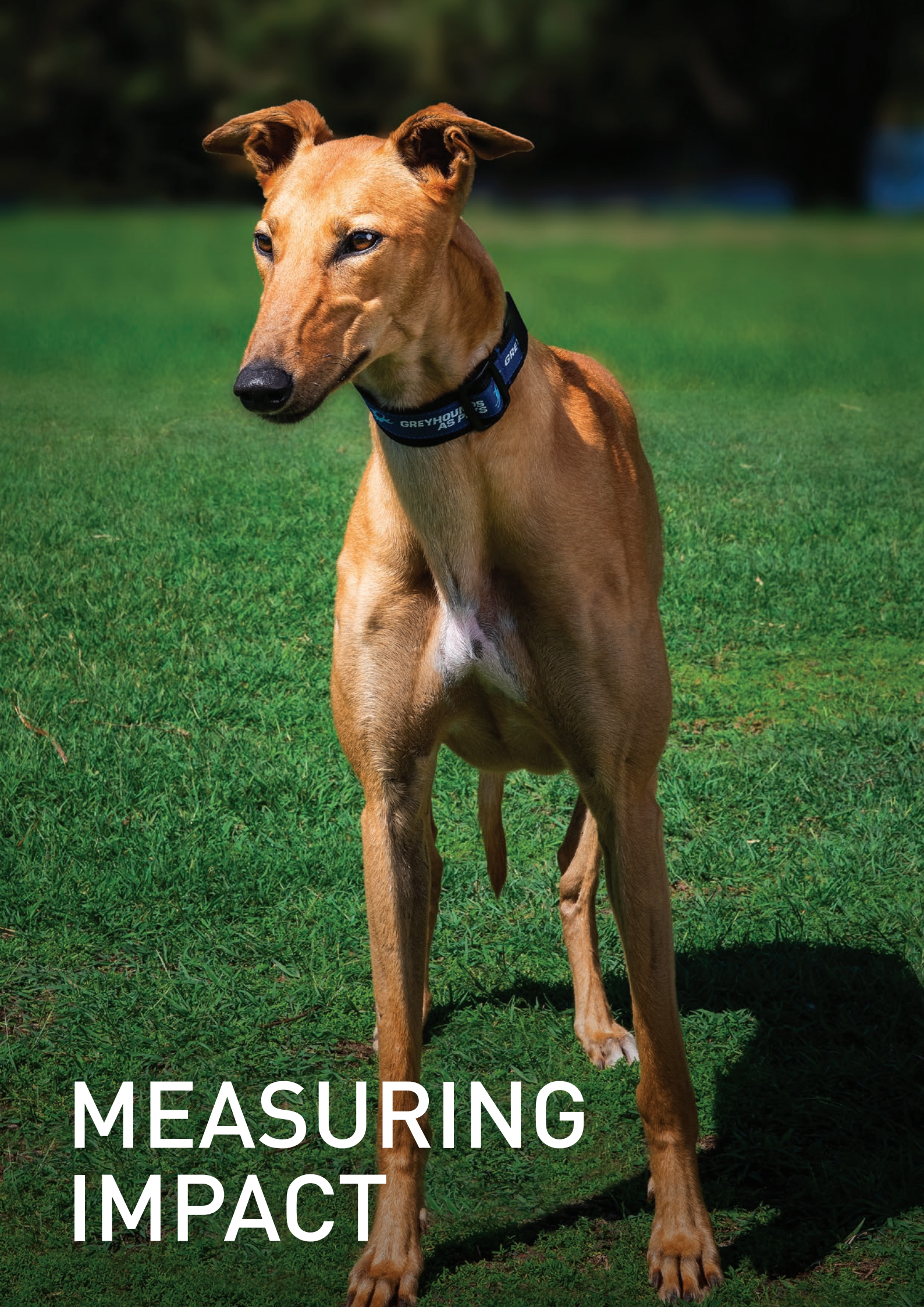
Some examples of how this may materialise include:

- New track design and monitoring tools that improve the safety of greyhounds while racing;
- Processes that increase the accuracy and efficiency of information received from external parties such as clubs;
- Technology that delivers new solutions such as platform improvements for the delivery of digital content and wagering solutions; or
- Opportunities through new wagering products.

GRNSW recognises that innovation is constantly evolving in the pursuit of continual improvement.



Kristy Sultana
the owner-trainer of Group 1
winning greyhound, Flying Ricciardo



MEASURING IMPACT

GRNSW has identified leading indicators to be monitored on an ongoing basis in an attempt to ensure that GRNSW is delivering against its objectives within each key pillar.

These indicators are to be embedded within the organisation through a governance and accountability process. GRNSW needs to ensure that data is accurately collected, assessed, reported and acted upon by the management team on a regular basis to track whether outcomes within the strategic plan are being met or on-track.

The plan also recognises that the industry is continually developing. Consequently, this plan and associated KPIs should be treated as a baseline, which can be adapted to meet future requirements.

	Lead Indicator	Definition
 CARE	Zero unnecessary euthanasia	Any euthanasia that is not considered necessary, incorporating both medical and behavioural euthanasia.
	Manage greyhound injuries on race tracks	Includes all race injuries (stand down periods) as defined by GWIC.
	Assisted greyhound rehoming	Greyhounds rehomed through GRNSW GAP facility/program or with GRNSW support.
 COMMUNITY	Economic benefits	The incremental spend and investment by GRNSW on: race club distributions, advertising, racing and club infrastructure.
	Financially viable/profitable clubs	Racing clubs incrementally improving profitability over time.
	Diversified club revenue	Club revenue received from non-racing related operations e.g. food and beverage, other events.
 GROWTH	Wagering turnover	Amount wagered on GRNSW content through non-NSW TAB WSPs.
	Diversified commercial revenue (excluding wagering-related)	All non-live racing/wagering related revenue generated through asset development, new products (including broadcast and data distribution), sponsorships and advertising. Excludes wagering turnover and RFIU.
	Prizemoney	Total money awarded by GRNSW to greyhound owners/trainers.
 ENGAGEMENT	Stakeholder sentiment	Ongoing measure of stakeholder sentiment that is robust, reliable and creates a benchmark to measuring improvement over time, as well as providing data for an evidence-based approach to stakeholder management.
	Audience perceptions monitor	<p>Net Promoter Score (NPS) is a standard metric for measuring customer relationships, increasingly being used in the sports industry. NPS for GRNSW is based on how likely sports fans are to recommend greyhound racing to colleagues, family or friends.</p> <p>Futures Affiliations Score determines perceptions and acceptance of greyhound racing among people who have an interest in the sport.</p>

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