THOROUGHBRED WELFARE STRATEGY 2026 to 2030

Industry Welfare Knowledge and Attitudes Baseline Survey

Prepared for NZTR by Prof Nat Waran, NavigateWelfare



BACKGROUND

About the survey

The strategy commits NZTR to raising welfare knowledge and attitudes across the industry.

WHY	To record the current status, so that progress under the Thoroughbred Welfare Strategy 2026 to 2030 can be measured over time.
WHO	548 people responded from across the New Zealand thoroughbred industry, which has about 23,000 people in scope.
HOW	A 20-question online survey, distributed through the NZTR database, social media, newsletters, clubs and partners. Median completion time 16 minutes.
WHEN	Responses collected between 2 July and 25 July 2026, as the new strategy was being launched.
WHAT	Welfare knowledge, applied welfare assessment in two case studies, attitudes, perceptions and the support people say they need.

PURPOSE

What the survey set out to do

Five objectives were set for the study.

1
Measure what people know

Awareness, knowledge and attitudes on welfare and the Five Domains

2
Find where views differ

Variation across roles, groups, regions and experience

3
Surface the barriers

The barriers, norms and gaps that shape practice on the ground

4
Set a benchmark

Questions that can be repeated so change is measured reliably

5
Support what comes next

Evidence to shape education, communication and welfare work

The survey addresses both strategy KPIs: advance understanding of welfare best practice based on the Five Domains, and enhance industry welfare knowledge and attitudes.

THE SAMPLE

Who answered

Every main stakeholder group responded.

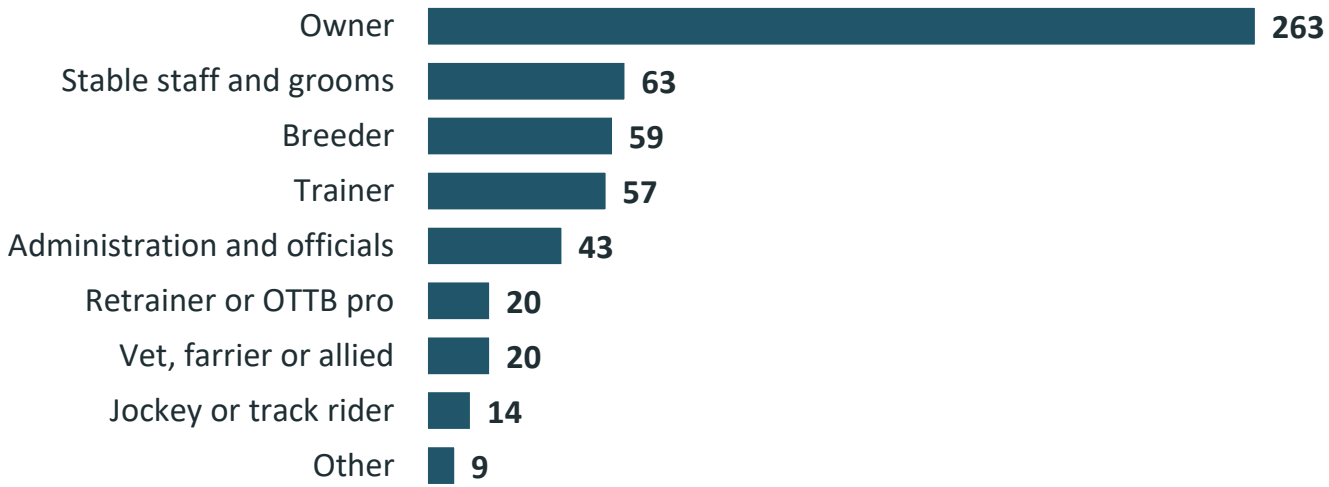
548
people took part

56.8%
were women, and 42.0 % were men

76%
have more than 10 years in the industry

20 (only)
were under 25, a clear information gap in the sample

Respondents by role group (n = 548)



How to read the results

- Owners are about half of respondents and about half of the industry, so their answers carry the most weight.
- Owners, breeders, trainers, stable staff and administrators can be used to compare.
- Retrainers, allied workers and riders each had 20 or fewer respondents, so those figures are a guide only.

THE SAMPLE

Who answered

Every area represented.

548
people took part

56.8%
were women, and **42.0 %** were men

76%
have more than 10 years in the industry

20 (only)
were under 25, a clear information gap in the sample

Respondents by area (n = 548)

Region	n	%
Waikato / Bay of Plenty	167	30.5%
Canterbury / West Coast	103	18.8%
Northland / Auckland	93	17.0%
Manawatu / Whanganui	79	14.4%
Wellington / Wairarapa	36	6.6%
Otago / Southland	28	5.1%
Hawke's Bay / Gisborne	16	2.9%
Taranaki	13	2.4%
Other, multiple or overseas	13	2.4%

How to read the results

All the main thoroughbred regions are represented and the South Island contributed a quarter of responses.

OVERVIEW

The big picture

Commitment to horse welfare is high. The knowledge, systems and support needed to underpin that commitment are the gaps.

What is already strong

- Personal responsibility averages 4.64 out of 5, the highest score in the survey.
- 88 per cent want the industry to keep making welfare progress.
- 75 per cent ranked good performance last of the six welfare indicators.
- In a case study, behaviour change was rated the most reliable signal at 4.35, performance the least at 2.86.

Where the gaps are

- Five Domains familiarity sits at 3.33/5, and only seven people named the model unprompted.
- One in five do not know how to report a welfare concern or would not feel comfortable doing so.
- ‘Feeling supported’ averages 54.6 out of 100, lowest for trainers at 45.5 and retrainers at 38.5.
- Pressure to put performance first, is reported most by the people working closest to the horse.

88% of respondents want welfare progress, only about half are confident the industry can deliver it.

WHAT THE RESULTS SHOW

Four gaps stand out

Commitment doesn't appear to be the problem. The gaps/barriers are welfare knowledge, how systems work, in how supported people feel, and in the pressure to put performance first felt closest to the horse.

1. KNOWLEDGE

Concentrated in owners

3.33/5
Five Domains familiarity

30%
Described welfare in mental or behavioural terms

2.97/5
Owner familiarity, lowest of eight groups

2. SYSTEMS

Values high, processes middling

3.61/5
Knowing how to report a concern

3.70/5
Clarity of welfare expectations

2.76/5
End of life planning, 42 per cent rate themselves 1 or 2

3. SUPPORT

Lowest where decisions are made

54.6/100
Overall felt support from NZTR

25.7%
Scored 40 or below out of 100

45.5/100
Trainers, retrainers lowest at 38.5

4. PRESSURE

It follows proximity to the horse

3.86/5
Jockeys and riders, highest of any group

3.59/5
Stable staff, against 2.94 for owners

3.16/5
Overall, with 38 per cent agreeing

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OBJECTIVE 1

What the industry knows and believes about welfare

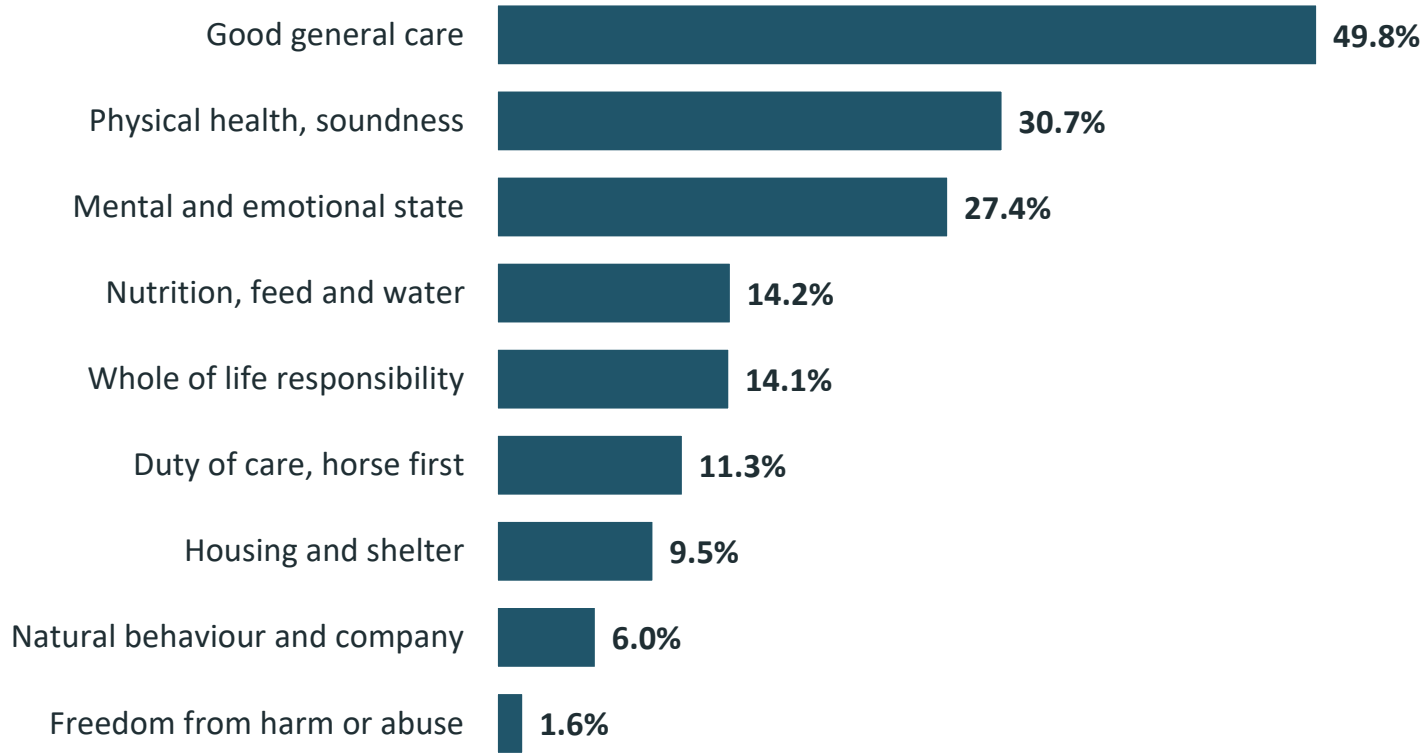
Awareness, knowledge and attitudes on welfare responsibilities and the Five Domains model



OBJECTIVE 1

What people say welfare means

All 548 respondents answered in their own words (the median answer was 12 words long)



Answers could contain more than one theme.

30%

described welfare in terms of how a horse feels or behaves.

Only 7 people

out of 548 named the Five Domains directly. It is not yet the industry's own language.

People whose 'free' definition used mental or behavioural language rated Five Domains familiarity at 3.76, against 3.14 for those who did not.

OBJECTIVE 1

How those answers map to the Five Domains

Mapping unprompted definitions onto the model shows where the industry's focus sits today, and what is needed to cover all Five Domains.

FOUR FUNCTIONAL DOMAINS | all are essential to achieve good welfare

ONE MENTAL DOMAIN

1 NUTRITION

Adequate and appropriate nutrition

14.2%

Low to moderate focus

2 PHYSICAL HEALTH

Good health, freedom from injury and pain

30.7%

Strong focus

3 ENVIRONMENT

A safe and appropriate environment

9.5%

Low focus

4 BEHAVIOURAL INTERACTIONS

Chances to express natural behaviour

6.0%

Lowest focus

5 MENTAL STATE

Positive experiences, freedom from distress

27.4%

Moderate focus

The four functional domains are the foundations. When all are in place, they enable the fifth, a positive mental state. Percentages are the share of respondents whose own definition touched on each domain.

OBJECTIVE 1

What people count as good welfare

Respondents ranked six indicators of good welfare from most important to least important. This is the order they placed them in.

RANK	INDICATOR OF GOOD WELFARE	TYPE	MEAN RANK
1	**Free from pain, injury and disease**	Physical	**2.02**
2	**Good feed, housing and physical care**	Physical	**2.11**
3	**Good physical health and condition**	Physical	**3.23**
4	**Positive mood and natural behaviour**	Mental state	**3.57**
5	**No signs of stress**	Mental state	**4.52**
6	**Good performance**	Performance	**5.55**

What works well

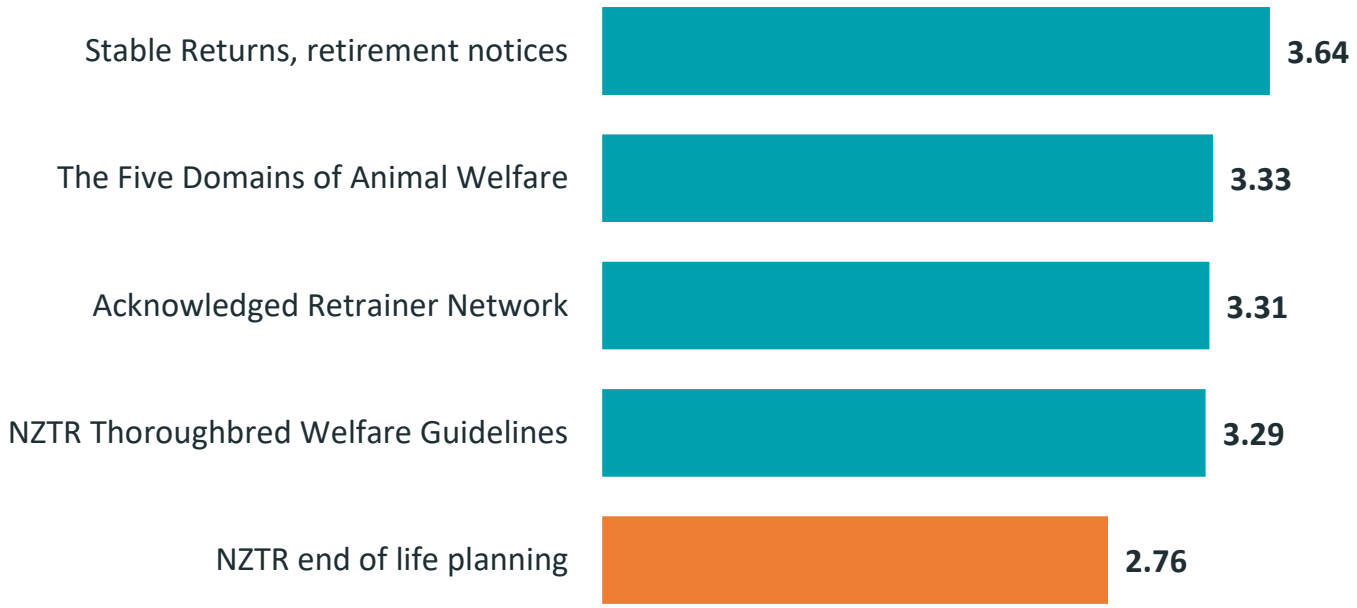
- Freedom from pain, injury and disease ranks first, with **42 per cent placing it top.**
- Good performance ranks last. 75 per cent put it last, and only two of 548 ranked it first.

Where the gap is

- The two mental state items rank fourth and fifth, behind all three physical ones.
- **Only 28.3 per cent put a mental state item** in their top two, against 98.2% for a physical one.

***Ranked from 1, most important, to 6**. There were no differences between role groups on any of the six items.*

How well people know the frameworks, guidelines and systems



51.6%
rate themselves 4 or 5 on the Five Domains.

42%
rate themselves 1 or 2 on end of life planning.

What this tells us

Compliance rules reach further than guidance information: 3.64 against 3.29.

Guidance information is not reaching as far as it should

Trainers gave the highest ratings on four of the five items, owners the lowest on two.

OBJECTIVE 1

Had people heard of the NZTR welfare strategy?

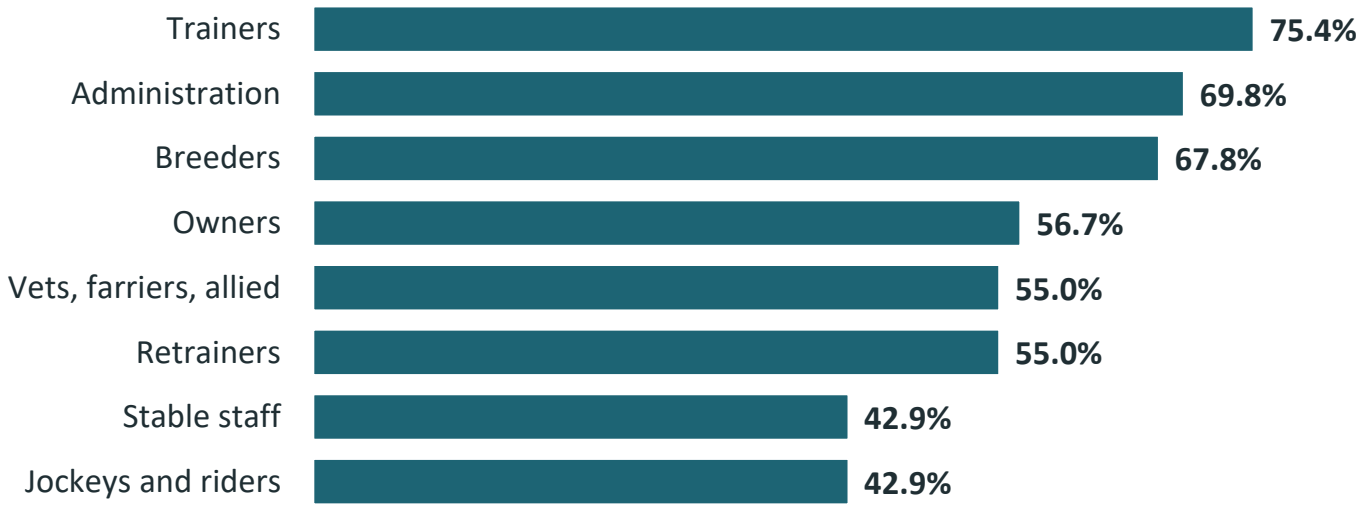
The survey went out as the strategy was being launched, so this records reach at the start.

58.4%
had read all or part of it

31.0%
had heard of it but not read it

10.6%
had not heard of it at all

Read all or part of the strategy, by role



1 in 5
stable staff and riders had not heard of the strategy at all.

Why this matters

Better reach to Licensed and NZTR connected groups. People working daily with horses have not yet seen it.

38.5 per cent of those with under two years experience in the industry had not heard of it.

OBJECTIVE 1

People assess welfare more confidently when considering real-life cases

Two case studies tested applied judgement rather than recall of a framework.

SCENARIO 1

A former racehorse is found in poor condition years after retirement, having passed through several owners. Who is responsible for his welfare?

Where respondents placed primary responsibility

The current owner, legally responsible	**67.7%**
Shared across previous connections	**12.6%**
NZTR, as the governing body	**10.8%**
Breeding or racing connections	**3.6%**

More than two thirds gave the legally accurate answer, and views did not differ by role. Traceability was rated 4.23 out of 5 for preventing situations like this.

SCENARIO 2

A five year old mare has begun weaving, is eating less hay, is restless and harder to handle, but is still running well. How reliable is each signal?

Reliability of each signal, out of 5

A change in behaviour	**4.35**
Eating less hay	**4.17**
General restlessness	**4.09**
Harder to handle	**3.95**
Physical health and condition	**3.65**
Racing performance	**2.86**

Behavioural signals were the four most reliable indicators. Asked what the trainer should do, 44.2 per cent said scratch and treat, and only 1.6 per cent would continue as planned.

Applied judgement is stronger than the abstract ranking approach. Education built around real situations is likely to work better than education built around the model.

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OBJECTIVE 2

Where views differ across the industry

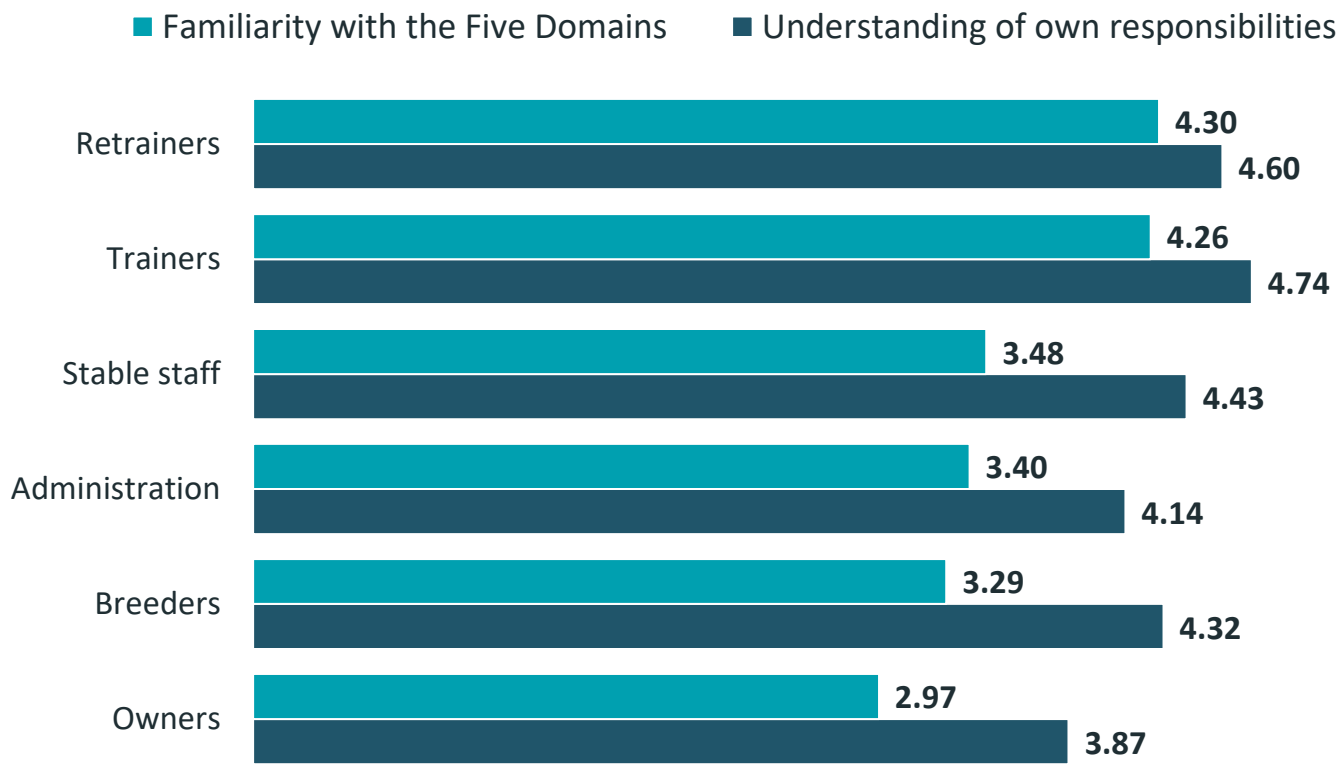
Variation in understanding across participant groups, roles, regions and levels of experience



OBJECTIVE 2

Owners score lowest on knowledge about welfare assessment

Role was the characteristic most consistently linked to welfare knowledge. Trainers and retrainers rate themselves highest, owners lowest.



Retrainer figures on 20 respondents and are indicative.

Why this matters

- Owners are about half of the industry, so their scores reduce the overall figure.
- The gap between owners at 2.97 and trainers at 4.26 has a large influence on the baseline.
- It is also an opportunity to engage with people who are already engaged and influential

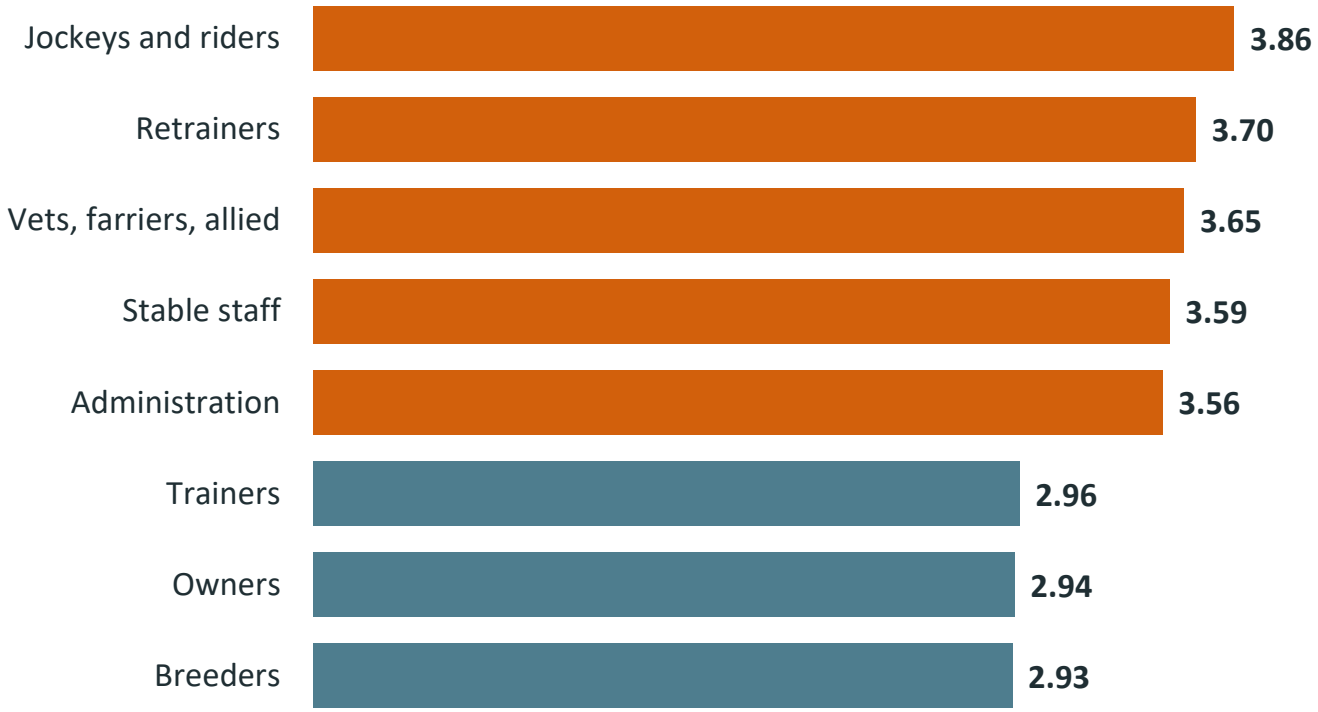
Owners are an opportunity

Owners rated welfare a priority at 4.03, the highest of eight groups, though this did not hold up in testing. 72% already use NZTR communications.

OBJECTIVE 2

The closer people work to the horse, the more pressure they report

Perceived pressure to put performance ahead of welfare divides respondents



What this tells us

People who ride, handle and treat horses report more pressure to put performance first, than those who own, breed and train them.

Decisions made at one level appear to be perceived as pressure further down the chain.

And least sure how to speak up

The same groups are least confident about reporting a concern: stable staff 3.32 and riders 3.29, against 3.95 for administration.

The people who may see the most are the least confident about speaking out

This difference remains when both age and years in the industry are accounted for.

OBJECTIVE 2

The most consistent difference in perception and attitudes relates to gender

Every measure tested differed between female and male respondents, forming a coherent theme

Measure	Female (n = 311)	Male (n = 230)
Felt support from NZTR (0 to 100)	49.1	**63.0**
Welfare is a priority across the industry	3.72	**4.17**
New Zealand standards are high	3.43	**3.87**
Confidence the industry can improve	3.31	**3.56**
Understanding of own responsibilities	**4.38**	3.86
Familiarity with the Five Domains	**3.63**	2.94
Personal responsibility for horses	**4.76**	4.49
Pressure to prioritise performance	**3.40**	2.83
Importance of traceability	**4.39**	4.02
Believes the industry needs to progress	**93.2%**	81.7%

The theme

Women in the industry report higher personal welfare knowledge, higher responsibility and more appetite for change.

Men report feeling more confidence in the industry as it stands and feel better supported by NZTR.

14 points

is the gap in ‘feeling supported’ between men and women.

Every difference remained when role, age and tenure were accounted for.

OBJECTIVE 2

Knowing more does not mean feeling better supported

The answers suggest that there are two aspects that behave independently of each other.

What I can do

Personal welfare capability

- Understanding my responsibilities
- Familiarity with frameworks and NZTR systems
- Confidence I can recognise good welfare
- Feeling personally responsible for my horses

Improved through education and clear guidance

What I think of the industry

Confidence in the industry

- Welfare is a priority across the industry
- New Zealand standards are high
- The industry can improve
- Feeling supported by NZTR

Improved through visible action and honest reporting

The two are not the same. A person can know a great deal and still feel unsupported, which is what trainers and retrainers seem to report. Education and Trust are separate work programmes for the Industry.

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OBJECTIVE 3

Barriers, support and what the industry stakeholders want

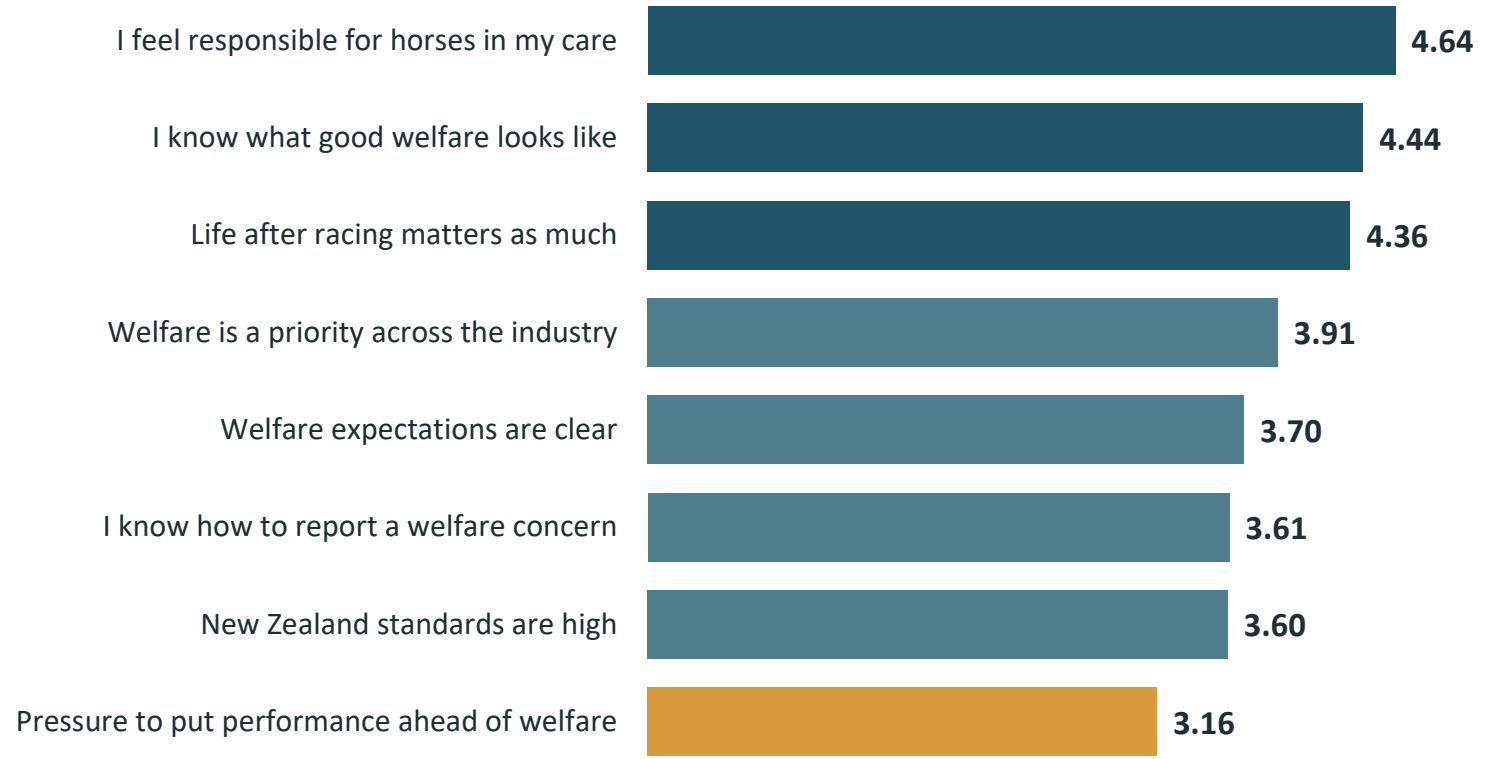
The norms and gaps that people say influence welfare practice on the ground



OBJECTIVE 3

People are committed, but the systems are less clear

Respondents rated their agreement with eight statements. Statements about personal values score well. Statements about how things work score less well



1 = strongly disagree, 5 = strongly agree (n = 548).

1 in 5 (20%)

disagree that they know how to report a concern and would feel comfortable doing so.

What this indicates

- 91% of people feel responsible for their horses, so poor confidence in reporting welfare is a system problem, not an attitude one.
- 90% of respondents know what good welfare looks like, but only 61 per cent say welfare expectations are clear.

OBJECTIVE 3

How supported do people feel by NZTR

Respondents scored this question from 0 to 100. The average response is 54.6, and the answers are spread across a wide range

54.6

out of 100

is the average score for ‘feeling supported’ with a median of 54.5

25.7%

of respondents

scored 40/100 or below, and 13.0% scored 20 or below

32.8%

of respondents

scored 70/100 or above, so there is a group who feel well supported too

Support is felt as highest by those enforcing the rules and lowest among those making the welfare decisions



What this indicates

- Trainers make the daily welfare calls. They gave the **highest knowledge** ratings in the survey and the **second lowest support** score.
- Retrainers rated Five Domains familiarity highest of any group at 4.30 yet gave the lowest support score of all.
- Neither group will be well reached via general NZTR communications.

OBJECTIVE 3

Life after racing

One case study described a former racehorse found in poor condition several years after retirement having passed through several owners.

84.5%
agree post racing care matters as much as racing welfare

79.7%
rate traceability important, averaging 4.23 out of 5

67.7%
say the current owner holds responsibility, not earlier connections

What this means

- Respondents support lifetime traceability while maintaining that care sits with whoever owns the horse.
- Traceability can be progressed as a ‘welfare safety’ system
- Only 12.6% chose ‘shared’ responsibility (*worth looking at again in next survey)*

The gap raised most often

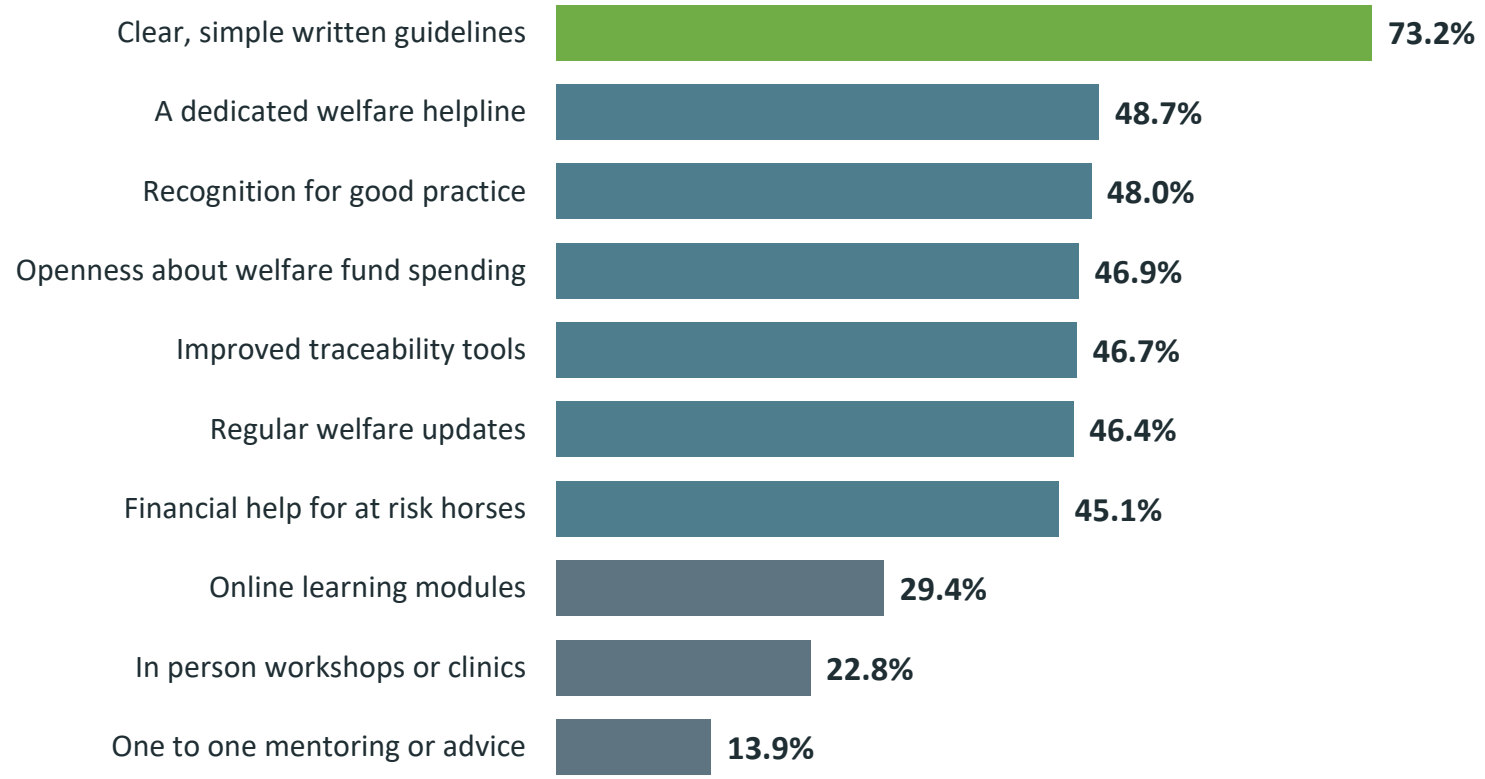
- Of the 208 comments naming a gap in the strategy, **life after racing was raised most often**, in 43% of them.
- The concerns are practical ones: tracing that stops at the first rehoming, no support for owners keeping their own retirees, and broodmares that cannot be placed.

Views on life after racing responsibility did not differ by role

OBJECTIVE 3

What the industry wants

One request came out well ahead of every other option and was wanted by every role group.



Multiple selection, mean 4.2 selections per respondent.

73.2%

asked for clear, simple written guidelines

48.7%

asked for a welfare helpline

Welfare Training –mixed response

Demand splits significantly by role group. Stable staff, retrainers and administrators want workshops. Trainers do not (only 9%).

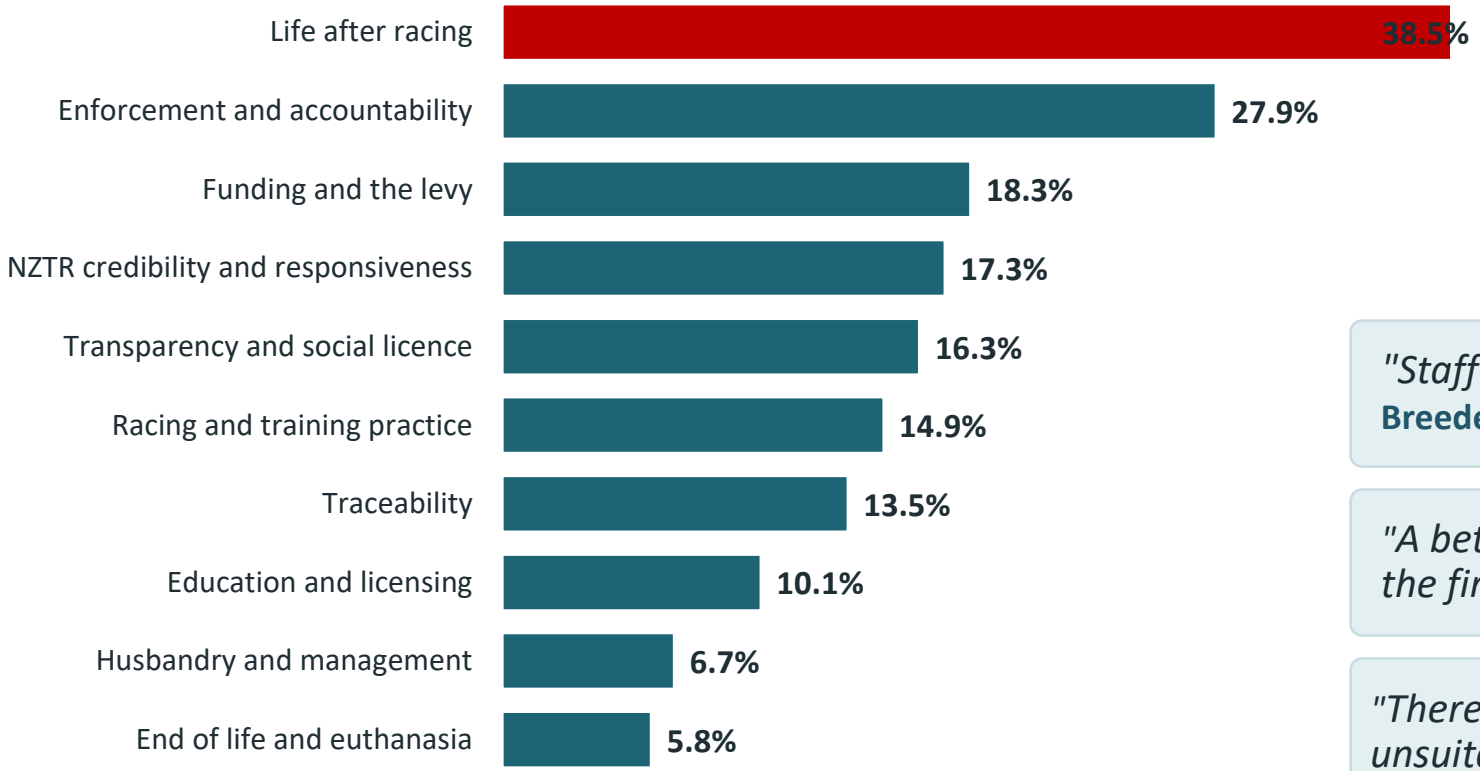
Recognition for good practice

Chosen by 48% overall, and by 75% of retrainers. Incentivisation by making good practice more visible.

OBJECTIVE 3

What respondents said is missing from the strategy

256 people commented. 208 named a specific gap, and the percentages below are of those 208.



Staff welfare was also raised

There were some comments regarding staff conditions or the safety of staff in speaking up.

"Staff are afraid to report horses being beaten." **Breeder**

"A better system for recording horse location past the first rehome." **Owner**

"There are a number of horses that are completely unsuitable to be rehomed and should be euthanized." **Owner**

*Percentages are of the **208 comments who named a gap**. A comment can carry more than one theme.*

OBJECTIVE 3

What respondents say is missing from the new Welfare Strategy

A supplementary analysis considered all 256 open comments.

43%
raised life after racing or traceability, by far the largest theme

28%
asked for stronger enforcement, raised by every role group

17%
commented on NZTR itself rather than on welfare content

Rehoming

- 27 comments named the first rehoming point: the paperwork is done, the horse leaves, the record ends.
- 12 said funding goes only to recognised retrainers, not to those who rehome or retrain their own horses.
- 16 questioned the rehoming network's own capacity.

Not the welfare standards, it’s the follow through

- Few respondents disputed what the strategy says. But they doubt that anything happens when standards are broken.
- Requests were specific: unannounced inspection of training and agistment properties, penalties that deter, and clarity on when a breach stops being an internal racing matter.

35 respondents said nothing was missing. The criticism is about deliverability, not intent.

04

OBJECTIVES 4 AND 5

The benchmark, and what the findings point to

Measures that can be repeated to track change, and the evidence for what to do next



HEADLINE MEASURES

The survey at a glance

Eight measures that summarise the baseline situation.

4.64
out of 5
Personal responsibility for horses in their care (the highest score)

88%
of respondents
say the industry needs to keep making **welfare progress**

3.39
out of 5
Confidence the industry can deliver that progress

3.33
out of 5
Familiarity with the **Five Domains**

2.76
out of 5
Familiarity with **end-of- life planning,** the lowest measure

54.6
out of 100
How supported people feel by NZTR, with one in four at 40 or below

58.4%
of respondents
had **read all or part of the welfare strategy**

73%
of respondents
asked for **clear, simple written guidelines**

All figures are for the 548 respondents unless stated, except confidence in delivery, which 493 people answered.

OBJECTIVE 4

The benchmark for assessing against next time

25 measures were recorded with confidence intervals, ready to ask again in 2027 or 2028. These are the headline ones.

Familiarity with the Five Domains	3.33 / 5 KPI 1	Mental state item in their top two	28.3% KPI 1	Welfare described in mental terms	30.0% KPI 1
Understanding of own responsibilities	4.16 / 5 KPI 1	NZTR Welfare Guidelines	3.29 / 5 KPI 2	End of life planning	2.76 / 5 KPI 2
Read all or part of the strategy	58.4% KPI 2	Welfare expectations are clear	3.70 / 5 KPI 2	Know how to report a welfare concern	3.61 / 5 System/ Culture
Pressure to put performance first	3.16 / 5 Culture	Felt support from NZTR	54.6 / 100 Support	Confidence the industry can improve	3.39 / 5 Support

OBJECTIVE 5

Five opportunities the baseline identifies

The survey found there is as much to build upon as there is to address.

Commitment is already high	The highest scoring measure in the survey, with 91 per cent. The strategy need not make a further case that welfare matters.	**4.64** out of 5
In assessing real situations, welfare judgement appears sound	Horse behaviour change was rated the most reliable welfare signal and performance the least.	**4.35** against 2.86
NZTR already has an accessible education channel	Two thirds use NZTR communications for welfare information, more than any other source. This suggests the challenge is in extending that channel	**66%** use NZTR channels
There is a single, clear request for information	Written guidelines were wanted by every role group. The most direct approach for increasing familiarity, confidence and clarity of expectation.	**73%** asked for guidelines
An engaged group is ready to help	228 volunteered for interviews and 256 wrote detailed comments on strategy gaps.	**228** volunteers

Industry stakeholders can help shape the delivery of the welfare strategy

OBJECTIVE 5

Where to start

Six priorities follow directly from the findings, in order related to the strength of the evidence behind them. Each provides a measure to change.

1 Close the owner knowledge gap

Owners are half the industry, score lowest on knowledge and already read NZTR material. Build a short owner orientation pack/video re welfare expectations, registration, after racing and transfer.

2 Publish clear welfare guidance material

73% asked for it. Plain language guidance covering the Five Domains, obligations, the retrainer pathway and end of life. Built to be relevant, real and accessible for all.

3 Make reporting visible, simple and safe

One in five do not know how to raise a welfare concern. Publish a single route with an anonymous option and be clear about what happens next.

4 Address end of life planning openly

The lowest measure in the survey at 2.76. Publish NZTR's position in plain terms, including when humane euthanasia is the right welfare decision.

5 Support trainers and retrainers directly

They know the most and feel the least supported, at 45.5 and 38.5 out of 100. General communication methods will not reach them.

6 Report back and make good practice visible

548 gave their time and 256 wrote detailed comments. Publish what the survey found and what NZTR will do about it.

NEXT STEPS

What happens next

NOW	Share the findings with the internal NZTR welfare team, the Board and then the industry, alongside what NZTR intends to do about them.
Possible	Potential to carry out targeted interviews to understand what the survey could not explain or hear from those groups that weren't reached but are highly influential
Priority immediate areas	Develop and Publish the welfare guidelines, start the owner education stream and clarify the welfare reporting route.
Late 2027 OR 2028	Ask the same or similar questions again and measure change against the 25 benchmarks.

The four key questions for the interview phase

- **Why those closest to the horse report feeling more pressure**
- **Why women report more knowledge, less support**
- **What stops people reporting welfare concerns**
- **What trainers and retrainers need to feel backed**

SUMMARY

The commitment is there.

The systems to support this is what needs to be addressed.

Respondents are committed to the horses in their care and want to see real progress in equine welfare. What holds that commitment back is systemic: how well supported people feel by NZTR, whether clear and accessible information and guidance exists at the moment it is needed, whether there is a route to raise a concern that people trust, and whether the industry's collective effort is visible. Those are the challenges to address.

