NEW ZEALAND THOROUGHBRED RACING

PUREI HŌIHO NĀTI O AOTEAROA

THOROUGHBRED WELFARE STRATEGY 2026-2030

Industry Welfare Knowledge and Attitudes Baseline Survey

Full Report

August 2026

Field	Detail
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Executive summary

Between 2 July and 25 July 2026, 548 people from across the New Zealand thoroughbred industry answered a 20-question survey about horse welfare. The baseline survey was administered to record the current status of the TB industry in relation to welfare knowledge and attitudes, so that progress under the Thoroughbred Welfare Strategy 2026-2030 can be measured over time.

Anyone working within the industry could take part and people chose whether to respond. The results therefore describe responses provided by the 548 people who answered. They are a useful and substantial picture of industry views, but they are not a precise measurement of every person in the industry. Figures for small subgroups are included because they are informative, but they should be viewed as indicative.

The overall message shows that commitment to horse welfare is high among respondents. The gaps are in welfare knowledge, how systems work, how supported people feel, and in the pressure felt at times by people working closest to horses.

Commitment to horse welfare is high

Respondents rated their personal responsibility for the horses in their care at 4.64 out of 5, the highest score in the survey. 88% said the industry needs to make meaningful progress on horse welfare over the next five years, and 9.5% said standards are already as good as they need to be.

People were also willing to give their time to support welfare initiatives. All 548 respondents answered the open question on what welfare means to them, 254 commented on what they felt was missing from the strategy, and 228 volunteered to take part in follow-up interviews.

This suggests the task is not persuading respondents that welfare matters, it's making it easier and safer for them to act on that commitment.

Four disparities stand out

> **1. Knowledge:** the Five Domains model is not yet common language
>
> Respondents rated their familiarity with the Five Domains at 3.33 out of 5. When asked in their own words what welfare means, 30% used language about how a horse feels or behaves, and only seven people named the Five Domains directly.
>
> Owners gave the lowest ratings of any group for understanding their own welfare responsibilities (3.87) and for familiarity with the Five Domains (2.97). Since owners are about half of the industry staekholders and made up about half of the survey respondents, their responses have a large influence on the overall outcome.

2. Systems: people are clearer about their values than about processes

The three highest rated statements were all about personal values: feeling personally responsible for horses in their care (4.64), feeling confident they know what good welfare looks like (4.44), and agreeing that care after racing matters as much as care during racing (4.36).

Statements about how things work were rated lower. Knowing how to report a welfare concern scored 3.61 and understanding what is expected of participants scored 3.70. The lowest rating in the survey was familiarity with NZTR's approach to end-of-life planning, at 2.76, with 42% of respondents rating themselves 1 or 2 out of 5.

3. Support: many respondents do not feel well supported

Asked how well supported they feel by NZTR in meeting their welfare responsibilities, respondents gave an average score of 54.6 out of 100. One in four scored 40 or below.

Trainers (45.5) and retrainers (38.5) gave the lowest average scores. Which is of concern since both groups regularly make welfare decisions that directly impact horses.

4. Pressure: is reported most by people closest to the horse

People who handle and care for horses every day reported more pressure to put performance ahead of welfare than the owners and breeders reported. On a scale where 5 is the most perceived pressure, jockeys and riders averaged 3.86, retrainers 3.70, vets, farriers and allied workers 3.65, and stable staff 3.59. Owners averaged 2.94 and breeders 2.93.

Welfare knowledge is not uniform

Stakeholder 'role' was the characteristic most consistently linked to welfare knowledge. Trainers and retrainers generally gave themselves higher ratings, and owners gave lower ratings on most knowledge measures. Although the size of each difference varies and some groups are small, this result is a reliable reflection of the situation.

The owner welfare knowledge gap is the largest single influence, but it may also be the easiest to address since owners are the subgroup most likely to engage with NZTR communications as an information source (72%), so there is already a knowledge dissemination channel that reaches them.

Welfare is described mainly in physical terms

Asked to rank six indicators of good welfare, respondents put freedom from pain, injury and disease first and good performance last (75% ranked good performance last). Only 28% put a mental state indicator in their top two, as compared with 98% who used a physical welfare indicator.

The case study provided a different picture. Asked to assess indicators from a scenario involving a specific mare, respondents rated a 'change in behaviour' as the most reliable

indicator of her welfare status (4.35) and racing performance as the least reliable (2.86). Applied judgement in relation to a case study was therefore better at extracting information about welfare assessment than use of the abstract ranking. Education built around realistic situations may work better for engagement and understanding than use of abstract information about a framework.

Personal capability and confidence in the industry are separate items

The answers point to two separate elements. The first is personal welfare capability: understanding of responsibilities, familiarity with frameworks, confidence in recognising good welfare, and personal responsibility. The second is confidence in the industry: whether welfare is seen as a priority, whether New Zealand standards are perceived as high, confidence that the industry can improve, and feeling supported by NZTR.

The two appear largely independent of each other. In practice this means welfare education and NZTR trust building are separate work programmes with different measures. Improving welfare knowledge is unlikely, on its own, to improve perception of how supported people feel, and better communication is unlikely on its own to improve welfare knowledge.

What respondents asked for

Clear, simple written guidelines were selected by 73% of respondents, well ahead of every other option. A dedicated welfare helpline (49%), recognition for good welfare practice (48%), transparency about welfare fund spending (47%), improved traceability tools (47%) and regular welfare updates (46%) formed a second group. Demand for workshops, online modules and mentoring was higher among retrainers, administrators and stable staff than among trainers or owners.

On ‘life after racing’, 80% of respondents rated traceability as important or critically important, and 68% said primary responsibility for a neglected former racehorse sits with the current owner. Life after racing, rehoming and traceability was also the most common theme in comments made about what the strategy is missing (raised by 31% of those who commented).

Priorities arising from the survey

1. Build owner focused welfare education, since owners are the largest group and gave the lowest ratings on most welfare knowledge measures.
2. Publish clear, simple written guidance covering the Five Domains, notification obligations and end of life planning.
3. Make reporting a welfare concern visible, simple and safe, and say plainly what happens after a report is made.
4. Address end of life planning directly. It was the lowest rated familiarity item in the survey and was raised in open comments.
5. Follow up the higher pressure reported by stable staff, riders and retrainers, and give people working closest to horses a clear and safe route to raise concerns.
6. Report back to the industry on what the survey found and what NZTR will do about it.

1. Purpose and scope

1.1 Why this survey was administered

The Thoroughbred Welfare Strategy 2026-2030, **Together for the Thoroughbred**, commits NZTR to a whole of industry approach to thoroughbred welfare based on the Five Domains model. It is organised around four goals: Thriving Thoroughbreds, Excellence in Safety, Public Confidence and Responsible Care.

Two of the strategy's key performance indicators required baseline information to enable progress to be assessed:

KPI	Measure
KPI 1	Improvement in industry understanding of welfare best practice based on the Five Domains model
KPI 2	Improvement in industry welfare knowledge and attitudes, measured by survey

This survey provides that starting point. It was administered before the strategy's investment, programmes and communications had reached the industry, so future surveys can be compared against the results.

1.2 Objectives

The survey was designed to provide a clear baseline for welfare knowledge, attitudes and practice across the thoroughbred industry. Specifically, it aimed to:

- Assess current awareness, knowledge and attitudes relating to welfare responsibilities and the Five Domains model.
- Identify how understanding varies across participant groups, roles and regions.
- Understand the barriers, norms and gaps that participants say influence welfare practice on the ground.
- Establish a repeatable survey protocol so future changes can be measured reliably.
- Provide NZTR with evidence to guide education, communication and welfare initiatives during the early phases of the strategy.

1.3 What this survey represents

The survey establishes respondents' baseline welfare knowledge, judgement and attitudes at the start of the strategy, while also giving them a way to inform how the strategy is delivered.

Response and engagement. The survey drew a substantial response: 548 people completed all 20 questions. Every respondent answered the open question on what welfare means to them, 254 commented on what may be missing from the strategy, and 228 volunteered for follow-up interviews.

What this level of engagement shows. Engagement at this level is a finding in its own right. It shows that respondents were willing to spend time reflecting on welfare and contributing their views. It also creates an expectation that their input will be acknowledged and used.

1.4 How to read this report

Report structure. Sections 3 to 7 present the respondent findings question by question. Section 8 compares results between groups. Section 9 identifies the main challenges and opportunities, section 10 lists measures that could be repeated in the next survey, and section 11 draws together the implications of the findings.

Interpreting the figures. The figures in the body of the report are descriptive: averages, percentages and counts based on respondent answers. Section 2 describes the methods, and Appendix A provides the full statistical test results.

2. Methods

2.1 Survey design

The survey comprised 20 questions and took a median of 16 minutes to complete. It included a mix of rating scales, ranking questions, single- and multiple-choice questions, a 0 to 100 slider, and four open-text questions.

Two case studies were included to assess applied judgement rather than stated knowledge. One described a former racehorse found in poor condition several years after retirement. The other described a trainer deciding whether to run a mare showing mild soreness ten days before a race.

The case studies were used deliberately. Direct knowledge questions can encourage respondents to give the answer they think is expected, whereas scenarios ask them to apply judgement to a specific situation. The difference between what people say they know and how they respond to a practical welfare problem provides useful information.

2.2 Fieldwork

The survey was prepared and piloted, then hosted on SurveyMonkey. It was distributed through NZTR's participant database, social media and a newsletter, and promoted through racing clubs, trainer associations and partner organisations. Responses were collected between 2 July and 25 July 2026. A prize incentive was offered and 451 respondents supplied an email address for the draw.

2.3 Data handling

Role coding

Respondents were asked to select one of 12 industry roles. Seventy-nine selected "Other" and described their role in free text. These descriptions were reviewed and assigned to a named role where possible, using consistent coding rules. Where more than one role was mentioned, the first role listed was treated as the main role.

For example, track riders and trackwork riders were grouped with jockeys. Allied services such as transport, equine therapy, bloodstock insurance and agistment were grouped with vets and farriers. Nine responses describing followers, punters or enthusiasts, or providing no usable answer, remained coded as "Other" and were excluded from comparisons between roles.

For analysis, the 12 role options were combined into eight comparison groups. Industry administrators, racing club and racecourse staff, regulatory and integrity staff, and media were combined into an "Administration and officials" group because each subgroup was too small to analyse separately and they share an organisational, off-horse perspective.

Response quality

SurveyMonkey quality flags identified 30 responses, or 5.5% of the total, as potentially lower quality. These flags were mainly due to fast completion times and repeated identical answers in matrix questions. No responses were flagged for gibberish or copied answers.

All 30 responses were retained. Removing them did not change any headline figure by more than 0.02 scale points, or by more than 0.1 points on the 0 to 100 support score. The comparison is provided in Appendix A, Table A11.

Missing answers

Each question is reported using the number of respondents who answered it, shown throughout as n. Where fewer than all 548 respondents answered a question, the number of responses is stated alongside the result. The largest difference was for the question on confidence in the industry's ability to improve, which was answered by 493 respondents.

2.4 How the data were analysed

Descriptive results are reported for every question. Categorical answers are summarised as counts and percentages. Rating questions are summarised using the mean, the standard deviation, the median and the proportion giving the top two or bottom two ratings. Confidence intervals were calculated for the main measures using Wilson intervals for percentages and t based intervals for means, and are reported in Appendix A, Table A12.

Rating scales were treated as ordered categories rather than as numbers on an equal interval scale, and group sizes were uneven, so non parametric methods were used for comparisons between groups. The tests used for analyses were as follows.

Test	Used for
Kruskal-Wallis H	Differences in ratings across the eight role groups, regions and age bands. Epsilon squared is reported as the effect size.
Mann-Whitney U	Comparisons between two groups. Rank biserial correlation is reported as the effect size.
Chi-square with Cramér's V	Association between categorical answers and role, tenure, age and gender.
Wilcoxon signed rank	Comparisons between two items rated by the same person.
Friedman	Comparisons across all six ranked or rated items in a set, within the same person.
Spearman rank correlation	Association between ordered measures, including tenure and age treated as ordered categories.
Ordinary least squares and logistic regression	Whether a difference remains once role, age, tenure and gender are accounted for at the same time. Results are associations, not causes.

Where a set of related tests was run together, the p values were adjusted using the Benjamini-Hochberg procedure. The Holm correction was used for pairwise comparisons following an overall test. All p values reported in Appendix A are adjusted values unless stated otherwise. The threshold used is $p < 0.05$. Effect sizes are reported alongside p values.

Two combined scores were checked for internal consistency. A welfare framework familiarity score, averaging the five familiarity items, had a Cronbach's alpha of 0.83. A behavioural indicator score, averaging the four behavioural case study items, had an alpha of 0.89. Both are suitable for comparing groups.

A post stratification weighting check was run for the six role groups covered by the industry population figures, weighting each group to its share of the industry. This was used as a check on whether the mix of respondents distorted the headline results. Unweighted figures are used throughout the report. Both sets are shown in Appendix A, Table A10.

2.5 How to read the numbers in this report

- Ratings are on a 1 to 5 scale unless stated otherwise, where 1 is the lowest and 5 the highest. The feeling supported question used a 0 to 100 slider.
- Percentages are of the people who answered that question, not of all 548, unless stated.
- Open text questions could contain more than one theme, so those percentages add to more than 100.
- Results for groups with fewer than 25 respondents are marked as indicative. They are reported because they are useful and indicative.
- Words such as "higher" or "lower" are used only where the difference was statistically significant. The test results are in Appendix A.

2.6 Limitations

- Participation was voluntary, so people with an existing interest in welfare were probably more likely to respond. The results describe respondents, not the whole industry, and should not be treated as precise population estimates. For that reason, no conventional margin of error can be quoted. This limitation is most important when interpreting the overall levels of commitment.
- Questions about familiarity and understanding relied on self-ratings. They measure how confident respondents feel about their own knowledge, which is related to knowledge but is not the same as knowledge itself. The case study questions partly offset this limitation by asking respondents to apply judgement to specific situations.
- Group sizes were uneven. Owners formed the largest group (263 respondents), while jockeys and riders (14), retrainers (20), and allied professionals (20) were small groups. Results for these smaller groups should therefore be read as indicative.
- The two case studies could not cover the full range of welfare decisions made across the industry. They provide insight into judgement in two specific situations only.
- Open-text answers were coded using consistent keyword rules. This makes the approach repeatable for future measurement, but it may undercount themes expressed in unusual

wording. Theme percentages should therefore be read as indicators of relative prominence, not exact counts.

- The survey captured views at one point in time. It can show which responses are associated with each other, but it cannot show cause and effect.

3. Who responded

3.1 Number of responses and who they represent

548 people completed the full survey. These provide is a substantial and usable baseline, with precision varying by role subgroup size.

Comparison group	n	Sample %	Industry n	Industry %	Status for analysis
Owner	263	48.0%	12,081	52.3%	Largest group
Stable staff and grooms	63	11.5%	4,542	19.7%	Reportable, under-represented
Breeder	59	10.8%	2,859	12.4%	Reportable
Trainer	57	10.4%	845	3.7%	Reportable, over-represented
Administration and officials	43	7.8%	2,729	11.8%	Reportable
Retrainer or OTTB professional	20	3.6%	NA	-	Indicative only
Vet, farrier or allied health	20	3.6%	NA	-	Indicative only
Jockey or track rider	14	2.6%	218	0.9%	Indicative only
Other	9	1.6%	not counted	-	Excluded from role tests
Total	548	100%	23,088	100%	

Table 1. Respondents compared with the industry stakeholder population. Industry counts for administrators and racing club staff are combined in the source data, as are the jockey figures, which cover licensed jockeys only while the survey category also includes track riders.

The respondent mix broadly reflects the industry stakeholder population proportion for owners and breeders. Trainers are well represented, which is useful for analysis because they make many day-to-day welfare decisions. Stable staff and grooms are the most clearly under-represented group, making up 11.5% of respondents compared with 19.7% of the industry.

3.2 Experience, age, region and gender

Years in the industry	n	%	Age group	n	%
Less than 2 years	13	2.4%	Under 25	20	3.6%
2 to 5 years	50	9.1%	25 to 34	48	8.8%
6 to 10 years	69	12.6%	35 to 44	68	12.4%
11 to 20 years	113	20.6%	45 to 54	84	15.3%

Years in the industry	n	%	Age group	n	%
More than 20 years	303	55.3%	55 to 64	132	24.1%
			65 or over	184	33.6%
			Prefer not to say	12	2.2%

Table 2. Tenure and age profile of respondents (n = 548).

The respondent profile is skewed towards people with longer experience working within the industry. Three quarters of respondents have more than ten years' involvement, and 73% are aged 45 or over. Younger voices are less visible in the baseline, with only 20 respondents aged under 25.

This should shape how the findings are interpreted. The baseline primarily reflects the views of an established industry group and is likely to under-represent newer and younger participants. Section 8.3 explains how age and tenure relate to several measures, and the small number of younger respondents should be kept in mind when drawing conclusions from the results.

Region	n	%	Gender	n	%
Waikato / Bay of Plenty	167	30.5%	Female	311	56.8%
Canterbury / West Coast	103	18.8%	Male	230	42.0%
Northland / Auckland	93	17.0%	Prefer not to say	7	1.3%
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%			

Table 3. Region and gender of respondents.South Island respondents total 134, or 24.5% of the sample, including three based in Marlborough who are counted within 'Other, multiple or overseas'.

All the main thoroughbred regions are represented and the South Island contributed a quarter of responses. Gender is broadly balanced overall, but not within roles: stable staff respondents are 89% female and riders 86% female, while owners are 59% male. Section 8.2 sets out a consistent pattern of differences by gender that remains after role, age and tenure are taken into account.

3.3 How much respondents engaged with the survey

Respondents provided substantial detail in the free-text answers. All 548 answered the open question on what welfare means to them. In addition, 450 described what would help trainers make good welfare decisions, 379 identified a welfare red flag, and 254 commented on gaps in the strategy. Together, the four open questions generated more than 30,000 words.

Follow-up engagement was also strong: 228 respondents, or 41.6%, agreed to be contacted for interviews. This gives NZTR a substantial pool of participants for the next phase of the work.

4. What welfare means to the industry

4.1 How respondents describe horse welfare

All 548 respondents answered the open question about what the term ‘horse welfare’ means to them, generating around 8,500 words. Answers were coded against recurring themes using consistent rules. The median response was 12 words, so most respondents provided a short definition rather than an extended explanation. The words they chose first are therefore especially informative.

	Themes	n	%	Character of responses
1	Good general care, looking after the horse	273	49.8%	Broad duty language without specific content
2	Physical health, soundness, veterinary attention	168	30.7%	Health, soundness, freedom from injury
3	Mental and emotional state, happiness, low stress	150	27.4%	Happiness, contentment, absence of stress
4	Nutrition, feed and water	78	14.2%	Feeding, grazing, condition
5	Whole of life responsibility, retirement, rehoming	77	14.1%	Birth to death framing, life after racing
6	Duty of care, horse first, advocacy	62	11.3%	Horse before profit, best interests
7	Housing, environment, shelter, cleanliness	52	9.5%	Stabling, shelter, turnout conditions
8	Natural behaviour, turnout, company	33	6.0%	Space, socialisation, natural behaviour
9	Freedom from harm, abuse or exploitation	9	1.6%	Neglect, cruelty, mistreatment
10	Five Domains named explicitly	7	1.3%	Direct reference to the model

Table 4. Themes in unprompted definitions of horse welfare (n = 548). Answers may contain more than one theme, so percentages add to more than 100.

Two broad patterns stand out. First, many respondents used broad general-care language. Around half described welfare as looking after horses well, without specifying what good care involves. This shows genuine commitment, but also points to the need for a shared, more precise vocabulary for describing welfare needs.

Physical, mental and behavioural language varied. Respondents differed in whether their definitions referred to physical welfare, mental or behavioural welfare, both, or neither. The pattern was:

- 19.3% used physical language only, such as health, soundness, feed and shelter.
- 11.7% used mental or behavioural language only, such as happiness, contentment and natural behaviour.
- 18.2% included both physical and mental or behavioural elements, which is closest to the Five Domains approach.
- 50.7% used neither, relying instead on general-care language.

The Five Domains was rarely named directly. Only seven respondents specifically named the Five Domains model in their definition. This suggests the model is not yet part of how most respondents describe welfare in their own words, even though about half rated themselves as familiar with it when asked directly.

What Five Domains familiarity tells us

Respondents who use mental or behavioural language in their free-text definition rate their familiarity with the Five Domains higher than those who do not: 3.76 out of 5, compared with 3.14. They also rate their understanding of their own welfare responsibilities more highly, at 4.39 compared with 4.05.

This makes the familiarity question a useful baseline measure. It appears to capture more than confidence: it's linked to meaningful differences in how respondents describe welfare without prompting. For that reason, it should be retained as a repeat measure in future surveys.

Role differences in welfare language. Mental or behavioural language/terms are not used evenly across different stakeholder roles. They appear to used most often among retrainers (50%) and among stable staff and riders (43%), and least often among owners (23%) and allied professionals (15%). In practical terms, the groups working most closely with horses day to day are the most likely to describe welfare in terms of how a horse feels and behaves.

Examples of role-specific definitions

A good life, lived in line with the Five Domains, from birth through to a dignified end. (Owner)

Enabling physical, mental and emotional wellbeing. (Trainer)

Looking after a horse for its whole life and making sure it has a purpose after racing. (Breeder)

The care, safety and happiness of our equines. (Stable staff)

4.2 What is the most important indicator of good welfare

Respondents ranked six indicators in order of importance for judging **good** horse welfare.

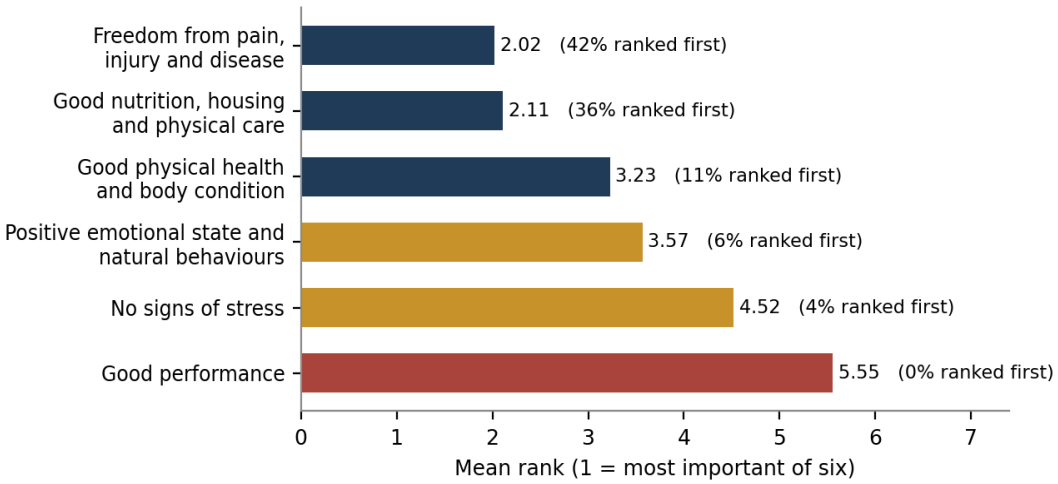


Figure 1. Mean rank of six indicators of good welfare (1 = most important of six, n = 548).

Freedom from pain, injury and disease was the highest-ranked indicator, with 42% of respondents placing it first overall. Good performance ranked last by a wide margin, with 75% placing it sixth. Respondents therefore made a clear distinction between a horse running well and a horse doing well.

The main distinction appears in the middle of the ranking. Positive emotional state and the ability to express natural behaviours both sat fourth out of six, behind the three physical indicator categories. 'No signs of stress' ranked fifth. Taken together, 28.3% of respondents placed one of the two mental-state items in their top two, compared with 98.2% who placed at least one physical indicator in their top two.

> **Starting point for socialising the Five Domains**
>
> Respondents currently give more weight to physical welfare than to mental state and behaviour. Physical health, freedom from pain and good husbandry are readily recognised as welfare requirements. Mental state and natural behaviour are also seen as relevant, but they are ranked lower.
>
> At baseline, only 28.3% of respondents placed a mental-state indicator in the top two indicators of good welfare. Because the Five Domains model treats mental state as the final welfare outcome, education will need to address this gap directly.
>
> There were no differences between 'role' subgroups for any of the six ranking items. The stronger emphasis on physical indicators is therefore shared across respondents rather than concentrated in one role group. This suggests that education about the Five Domains can begin with a common industry message, while still using examples that feel relevant to different stakeholder groups.

5. Awareness, knowledge and welfare assessment

5.1 Awareness of the new NZ Thoroughbred Welfare Strategy

Respondents were asked how aware they were of the new strategy before receiving the survey. Because the survey was administered as the strategy was being launched, this question provides an early measure of reach and engagement at the start of the communications programme.

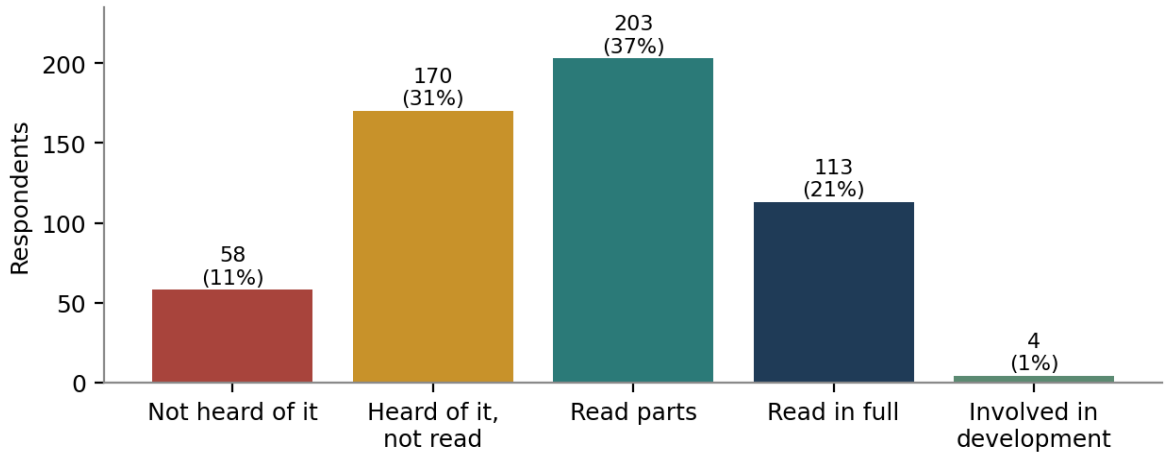


Figure 2. Awareness of the Thoroughbred Welfare Strategy 2026-2030 before the survey (n = 548).

Most respondents had at least some awareness of the strategy. In total, 58.4% had read all or part of it, 31.0% had heard of it but had not read it, and 10.6% had not heard of it at all. This suggests reasonable reach among people already engaged enough to complete the survey. However, because participation was voluntary, awareness across the wider industry is likely to be lower.

Awareness varied by role and by length of time in the industry.

Group	Read all or part	Heard only	Not heard	n
Trainer	75.4%	17.5%	7.0%	57
Administration and officials	69.8%	25.6%	4.7%	43
Breeder	67.8%	25.4%	6.8%	59
Owner	56.7%	33.8%	9.5%	263
Vet, farrier or allied health	55.0%	45.0%	0.0%	20
Retrainer or OTTB professional	55.0%	25.0%	20.0%	20
Stable staff	42.9%	36.5%	20.6%	63
Jockey or track rider	42.9%	35.7%	21.4%	14

Table 5. Strategy awareness by role group. Groups below 25 respondents are indicative.

Awareness is uneven across roles. The pattern is practical and actionable. Licensed and organisationally connected groups appear to have been reached. Employed and contracted people working with horses day to day were reached less well: around one in five stable staff and one in five riders had not heard of the strategy at all, and fewer than half had read any of it. The rider figure is indicative, based on 14 respondents.

Newer participants are also less likely to have heard of the strategy. Among respondents with less than two years in the industry, 38.5% had not heard of the strategy, compared with 6.9% of those with more than twenty years' experience. Among respondents under 25, 20% had not heard of it.

Current distribution channels are not reaching everyone equally. Communications appear to run mainly through licence-holder and owner channels. These reach people who hold a direct relationship with NZTR more effectively than they reach the people who handle horses day to day.

5.2 Understanding of welfare responsibilities

Respondents rated how well they understand the equine welfare responsibilities that apply to their role. The average rating was 4.16 out of 5. Most respondents rated themselves highly: 76.1% selected 4 or 5, while 4.9% selected 1 or 2.

Overall, respondents showed strong confidence in their understanding of the welfare responsibilities that apply to their role. That confidence was not evenly shared, however: clear and statistically significant differences were evident between role groups.

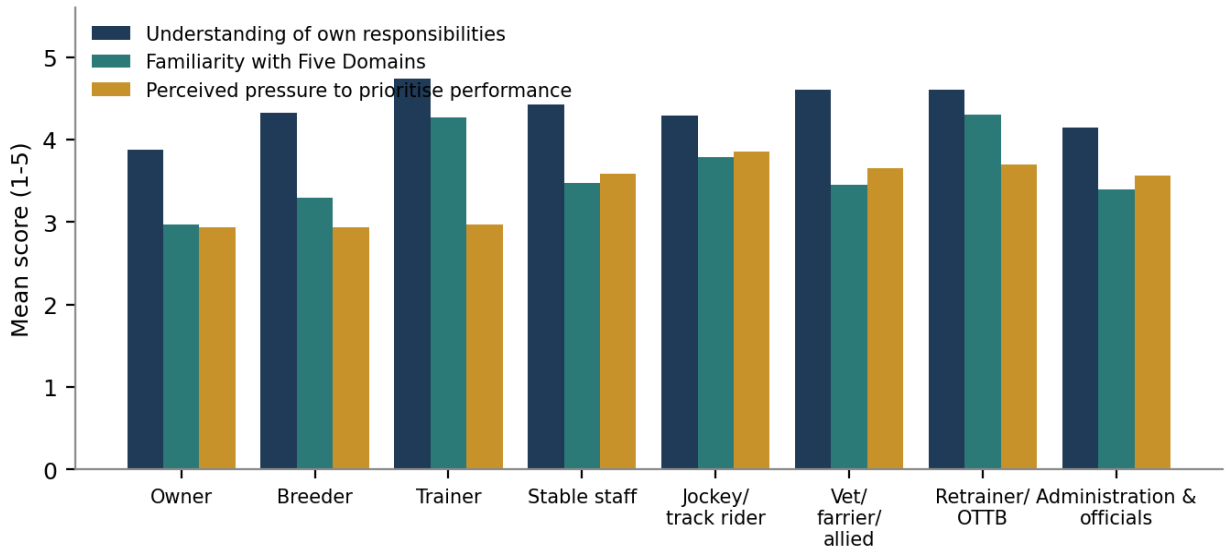


Figure 3. Understanding of responsibilities, Five Domains familiarity and perceived performance pressure by role group.

The clearest pattern was by role. Trainers gave the highest rating for understanding their responsibilities, at 4.74. Retrainers and allied professionals also rated themselves highly, both at 4.60. Owners gave the lowest rating, at 3.87. Pairwise comparisons show that owners rated themselves lower than trainers, stable staff, allied professionals and retrainers, while trainers rated themselves higher than administrators and breeders. Because some role groups are small, these comparisons should be considered alongside the group sizes.

5.3 Familiarity with welfare frameworks and NZTR systems

Respondents rated their familiarity with five welfare concepts and NZTR systems. The results show a clear pattern: practical compliance obligations are more familiar than broader welfare frameworks and guidance.

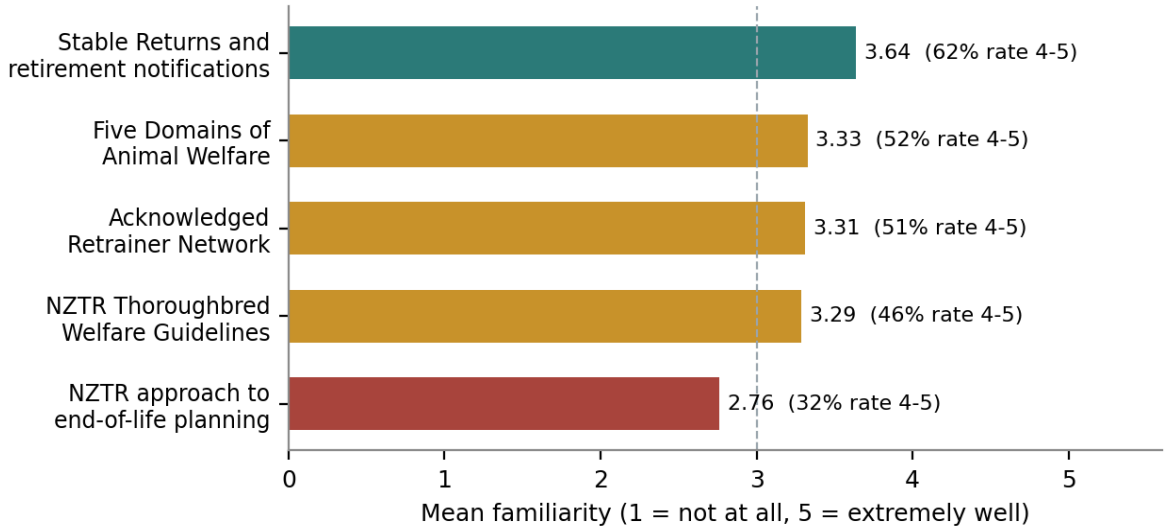


Figure 4. Familiarity with welfare concepts and NZTR systems (1 = not at all, 5 = extremely well, n = 548).

Item	Mean	SD	% rating 4 or 5	% rating 1 or 2
Stable Returns and retirement notification obligations	3.64	1.36	62.2%	20.1%
The Five Domains of Animal Welfare	3.33	1.40	51.6%	26.1%
NZTR's Acknowledged Retrainer Network	3.31	1.33	51.3%	26.5%
NZTR's Thoroughbred Welfare Guidelines	3.29	1.21	46.0%	23.9%
NZTR's approach to end-of-life planning	2.76	1.31	32.5%	42.2%

Table 6. Familiarity with welfare frameworks and NZTR systems (n = 548).

Three findings stand out.

1. End-of-life planning is the least familiar area

End-of-life planning was the lowest-rated familiarity item in the survey, averaging 2.76 out of 5. It was the only item below the midpoint of the scale, and 42% of respondents rated themselves 1 or 2. No role group averaged above 3.2. This is the stage of a horse's life where decisions are often most difficult and public scrutiny is strongest, yet it is also where respondents reported the least familiarity with what NZTR expects or offers.

2. Five Domains familiarity is mixed

Familiarity with the Five Domains averaged 3.33 out of 5, but responses were widely spread: about a quarter of respondents rated themselves 1 or 2, while about half rated themselves 4 or 5. Familiarity also differed by role. Trainers averaged 4.26 and retrainers 4.30, compared with 2.97 for owners. Read alongside section 4.1, where only seven respondents named the model unprompted, this suggests that many people recognise the term but do not yet use the framework in their own welfare language.

3. Compliance obligations are more familiar than welfare guidance

Stable Returns and retirement notification obligations scored 3.64, compared with 3.29 for NZTR's Thoroughbred Welfare Guidelines. This indicates that compliance requirements are better understood than the wider guidance that supports them. In practice, welfare information and guidance may not be reaching people when they need to understand or apply it.

Role patterns reinforce this finding. Trainers rated four of the five items highest, while owners gave the lowest ratings for Five Domains familiarity and the Welfare Guidelines. Because owners make up about half of both respondents and the in-scope industry, their lower familiarity strongly influences the overall results. Owner-focused education is therefore the most direct way to shift the baseline.

5.4 Welfare judgement in a real-world situation

A case study followed by question 19 described a five-year-old mare who had begun weaving in her box, was eating less hay, was restless and difficult to handle, but was still running well. Respondents rated how reliable six possible indicators are for assessing her welfare. The question tested applied judgement rather than recall of a welfare framework.

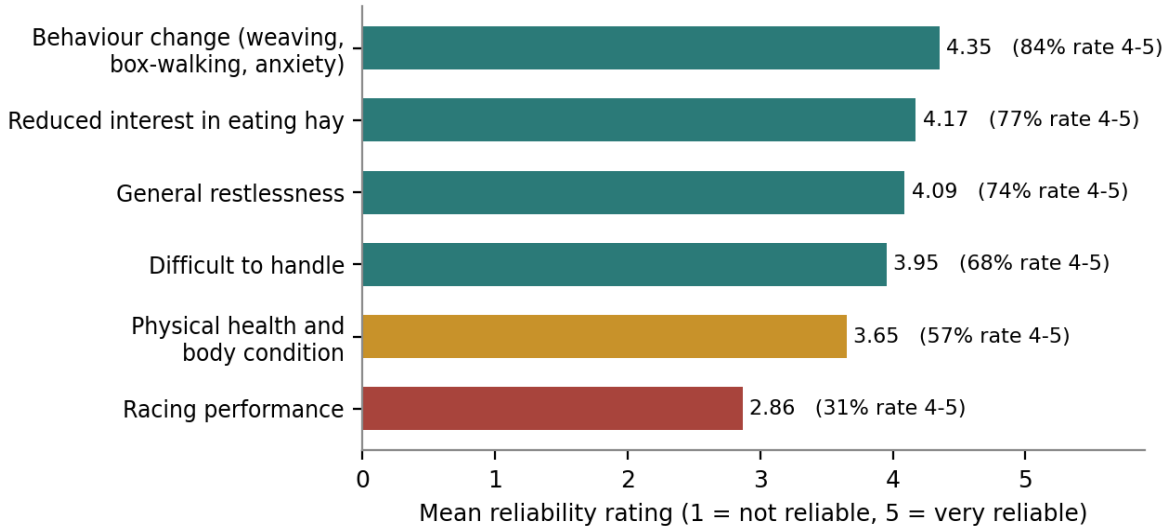


Figure 5. Perceived reliability of six welfare indicators in the case study (1 = not reliable, 5 = very reliable, n = 548).

Respondents read the scenario consistently. Change in behaviour was seen as the strongest welfare indicator, with a mean rating of 4.35 and 85% rating it 4 or 5. Racing performance was seen as the weakest or least useful, with a mean of 2.86 and 32% rating it 4 or 5. The difference between these indicators was large and consistent within respondents, and the overall ranking of the six indicators appeared systematic rather than random.

Abstract welfare ranking compared with an applied judgement task

In the abstract ranking task, mental state and natural behaviour were given lower priority. Both ranked fourth out of six, and only 28% of respondents placed a mental-state item in their top two indicators of good welfare.

In the case study, the pattern changed. When respondents assessed a specific mare, behavioural and emotional signs were rated as the four most reliable indicators of her welfare, ahead of physical condition and well ahead of racing performance.

Implication for education. Applied judgement appears stronger than the abstract ranking suggests. Education is therefore likely to work best when it starts with realistic scenarios, then uses the Five Domains to name and organise the assessments people are already making.

5.5 Red flags regardless of performance

In total, 382 respondents answered this question. Of these, 375 described a specific behaviour or change they would treat as a welfare ‘red flag’, regardless of how well the horse was performing. The percentages below are based on those 375 responses. Because this was a free-text question, the answers provide a practical working vocabulary for recognising welfare concerns.

Red flag theme	n	%	Typical wording
Not eating, loss of appetite, going off feed	126	33.6%	Off feed, not finishing hay
Aggression, anxiety or difficulty handling	51	13.6%	Grumpy, biting, agitated, nervous
Dullness, depression, withdrawal, attitude change	46	12.3%	Switched off, flat, not themselves

Red flag theme	n	%	Typical wording
Stereotypies: weaving, box walking, crib biting	41	10.9%	Weaving, box walking, wind sucking
Weight loss or poor body condition	28	7.5%	Dropping off, losing topline
Reluctance to work or go on the track	24	6.4%	Refusing, hanging, reluctant to load
Lameness, soreness or gait change	15	4.0%	Short striding, stiff, uneven
Sweating, temperature or recovery problems	15	4.0%	Sweating up, slow to recover
Coat, eyes and general appearance	14	3.7%	Dull coat, dull eye

Table 7. Themes in described welfare red flags (n = 375 respondents who described a red flag).

Appetite was the most common red flag, named by one third of respondents, followed by changes in temperament and demeanour. Behavioural and emotional signals together accounted for most of the red flags described. Only 4% named lameness or soreness first, suggesting that respondents understood the question as being about the horse's overall state rather than visible injury alone.

Attitude and appetite changes are the biggest red flags for me. Trainer

Any sudden change in behaviour or appetite, especially anxiety, weaving, restlessness or reduced eating, would be a red flag regardless of performance. Administration and officials

Every horse is different. Some show behaviours like weaving or anxiety, while others do the opposite and become dull, flat or withdrawn. Breeder

One trainer captured the practical difficulty nicely: reduced hay intake can be common in race-fit horses, and horses that weave or box walk can still win races. That observation illustrates why a shared understanding of the application of a welfare framework matters. Without one, decisions about when a behavioural signal is normal, manageable or concerning are left to individual judgement.

6. Attitudes, culture and confidence

6.1 Attitudes to welfare and the welfare environment

Respondents rated their agreement with eight welfare statements. The results show a clear pattern: personal value statements received the strongest support, while statements about the systems that enable those values sat closer to the middle of the scale.

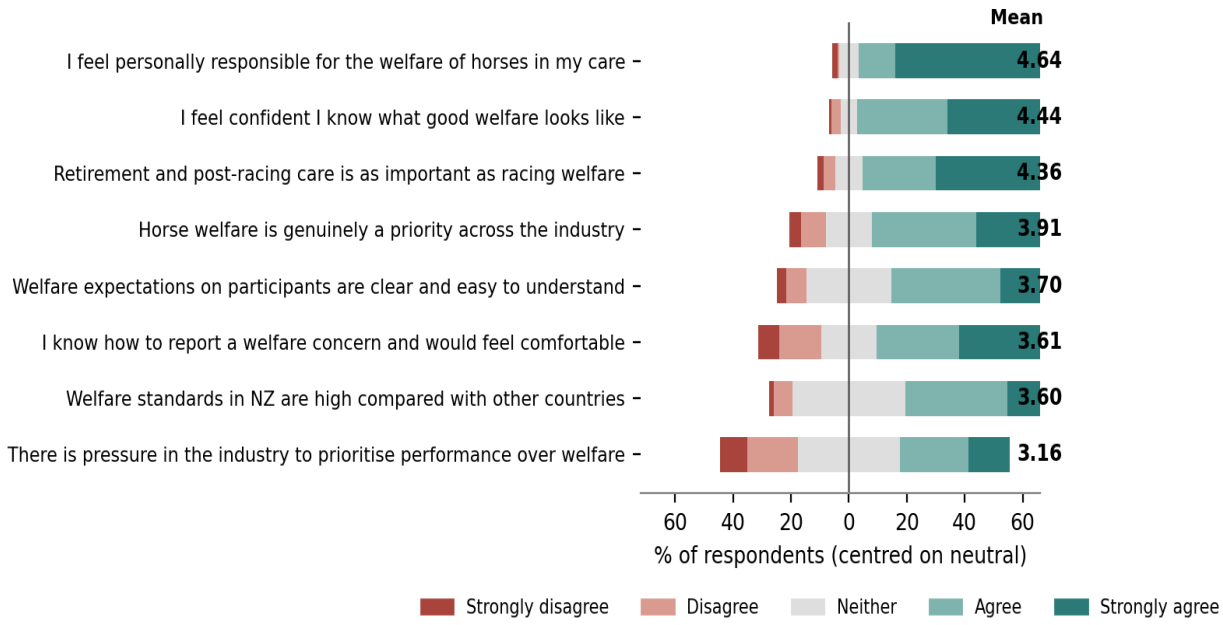


Figure 6. Agreement with eight welfare statements (n = 548), ordered by mean score.

Statement	Mean	SD	% agree (4-5)	% disagree (1-2)
I feel personally responsible for the welfare of horses in my care	4.64	0.80	90.9%	2.6%
I feel confident I know what good welfare looks like in practice	4.44	0.81	90.3%	4.2%
Retirement and post-racing care is as important as racing welfare	4.36	0.96	84.5%	6.0%
Horse welfare is genuinely a priority across the industry	3.91	1.09	71.5%	12.4%
Welfare expectations on participants are clear and easy to understand	3.70	1.00	60.6%	10.2%
I know how to report a welfare concern and would feel comfortable doing so	3.61	1.26	59.1%	21.9%
Welfare standards in NZ are high compared with other countries	3.60	0.91	52.9%	8.2%
There is pressure in the industry to prioritise performance over welfare	3.16	1.15	37.8%	26.8%

Table 8. Agreement with welfare statements, 1 = strongly disagree to 5 = strongly agree (n = 548).

Three themes stand out:

Strong personal commitment to welfare

Respondents expressed strong personal commitment to horse welfare. Personal responsibility received the highest score in the survey, at 4.64. Confidence in recognising good welfare in practice was also high, at 4.44, and support for post-racing care being as important as racing welfare scored 4.36. With 85% agreement, this is clearly a mainstream industry view.

Systems and reporting are less clear

The weaker area is the system that helps people act on their welfare values. Knowing how to report a welfare concern scored 3.61 and produced the widest spread of responses. One in five respondents disagreed that they know how to report a concern and would feel comfortable doing so. Given that 91% feel personally responsible for horses in their care, this points to a systems issue rather than an attitude issue: people may want to act but may not always know how, or may not feel safe doing so.

The result for clarity of expectations reinforces this point. Although 90% of respondents said they know what good welfare looks like in practice, only 61% agreed that welfare expectations are clear and easy to understand. Respondents therefore appear more confident in their own judgement than in the clarity of the industry requirements around them.

Performance pressure varies by role

Perceived pressure to prioritise performance over welfare sat close to the midpoint of the scale, at 3.16. Overall, 38% agreed and 27% disagreed that this pressure exists. However, the average masks a clearer pattern, described in section 8.1: perceived pressure varies by role and is most closely linked to how closely people work with horses day to day, rather than to seniority or length of experience.

6.2 Appetite for progress and confidence in delivery

Appetite for welfare progress is very high. Overall, 88.0% of respondents, or 482 of 548, said the industry needs to make meaningful progress on horse welfare over the next five years. A further 9.5% said standards are already as good as they need to be, 2.0% did not know, and 0.5% said progress is not important.

Support for progress was high across every role group, ranging from 80% of allied professionals to 100% of riders and retrainers. A clear difference was related to gender: 93.2% of female respondents supported meaningful progress, compared with 81.7% of male respondents. This difference remained after role, age, tenure and perceived pressure were taken into account.

Confidence in delivery was more moderate. Among the 493 respondents who answered this question, the average confidence rating was 3.39 out of 5. Half of respondents, 50.3%, rated confidence at 4 or 5, while 17.2% rated it 1 or 2.

The gap between appetite and confidence

Strong appetite for change. The results show a clear tension: 88% of respondents said the industry needs to make meaningful welfare progress, but only about half were confident that the industry can deliver it.

What confidence depends on. Confidence in delivery is most closely linked to feeling supported by NZTR and believing that welfare is genuinely an industry priority. It is not strongly linked to how respondents rate their own welfare knowledge.

Implication for the strategy. Building confidence is therefore likely to depend more on visible delivery, credible reporting and practical support than on education alone. This should be tracked in the next survey. If appetite for change grows without a matching increase in confidence, it would suggest that the strategy is raising expectations faster than it is meeting them.

6.3 Where respondents get welfare information

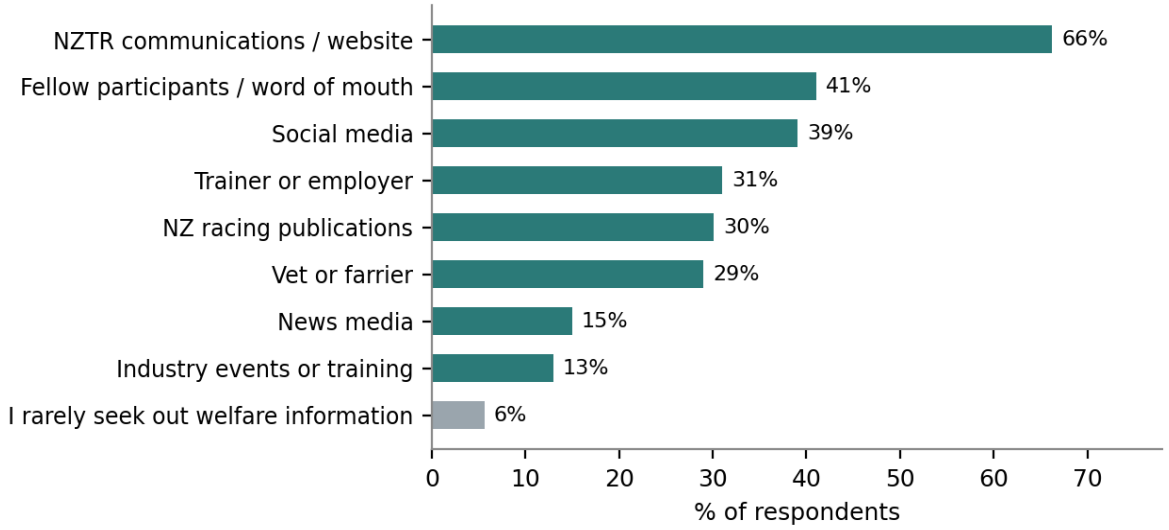


Figure 7. Sources used for thoroughbred welfare information, multiple selection (n = 548).

NZTR communications and the NZTR website were the most frequently used sources of welfare information, selected by 66% of respondents. Word of mouth was selected by 41%, and social media by 39%. Only 31 respondents, or 5.7%, said they rarely seek out welfare information at all.

This is a useful starting point: NZTR already holds the main information channel for many respondents. However, information sources differ by role, which matters for how welfare education and updates are delivered across the whole industry.

Source	Owners	Trainers	Stable staff	Riders
NZTR communications or website	72%	67%	49%	36%
Fellow participants or word of mouth	35%	42%	46%	57%
Social media	37%	33%	52%	57%
Trainer or employer	36%	9%	46%	36%
Vet or farrier	22%	37%	27%	36%

Source	Owners	Trainers	Stable staff	Riders
Industry events or training	8%	12%	17%	14%

Table 9. Information sources used, by selected role groups. Riders n = 14, indicative only.

Owners and trainers are more likely to use official channels. Stable staff and riders rely more heavily on social media, word of mouth and their employer. This helps explain the awareness gap described in section 5.1: the role groups least likely to have heard of the strategy are also the groups least likely to use the channels through which it was communicated. Reaching them will require communication through employers, named by 46% of stable staff as a welfare information source, as well as targeted use of social media.

Industry events and specific training were the least-used information source in every group, at 13% overall. This should be considered alongside the demand for workshops reported in section 7.3, which suggests that respondents may want practical learning opportunities even if formal events are not currently a common welfare information source.

7. Life after racing, feeling supported and what the industry wants

7.1 Responsibility and traceability after racing

The first case study described a former racehorse found in poor condition several years after retirement, after passing through several owners. Respondents were asked who held primary responsibility for his welfare.

Response	n	%
The current owner, who purchased him and is legally responsible	371	67.7%
Responsibility is shared across all previous connections	69	12.6%
NZTR, as the governing body responsible for lifecycle traceability and welfare	59	10.8%
The breeding or racing connections who profited from the horse	20	3.6%
The welfare organisation that was notified	14	2.6%
I am not sure	15	2.7%

Table 10. Where respondents placed primary responsibility for a former racehorse found in poor condition (n = 548).

More than two thirds of respondents placed primary responsibility with the current owner, which is the legally accurate answer. A further 16% either extended responsibility to previous connections or shared it across the ownership chain, while 11% placed it with NZTR. Views did not differ by role group, suggesting this is a broadly settled position among respondents rather than a contested one.

That position is legally correct, but it also shows the current limit of thinking about lifetime responsibility. If the strategy intends to promote shared or continuing responsibility beyond the point of sale, it will be working against a widely held default view. The proportion selecting shared responsibility, currently 12.6%, provides a clean measure to track in the next survey.

Support for traceability is high and appears to sit largely separately from views about legal responsibility. Respondents rated the importance of traceability for preventing situations like

the case study at 4.23 out of 5, with 79.7% rating it 4 or 5. Retrainers rated it highest at 4.75, followed by stable staff at 4.43 and administrators at 4.40. Trainers rated it lower, at 3.93, and allied professionals lowest, at 3.74. These differences were significant.

Respondents support lifetime traceability while also seeing day-to-day responsibility for care as sitting with the current owner. Traceability can therefore be progressed as an information and welfare safety system without first needing to resolve a broader debate about who owes what to a horse after it leaves racing.

7.2 How supported respondents feel

Respondents used a 0 to 100 slider to rate how well supported they feel by NZTR in meeting their welfare responsibilities. The average score was 54.6, with a median of 54.5.

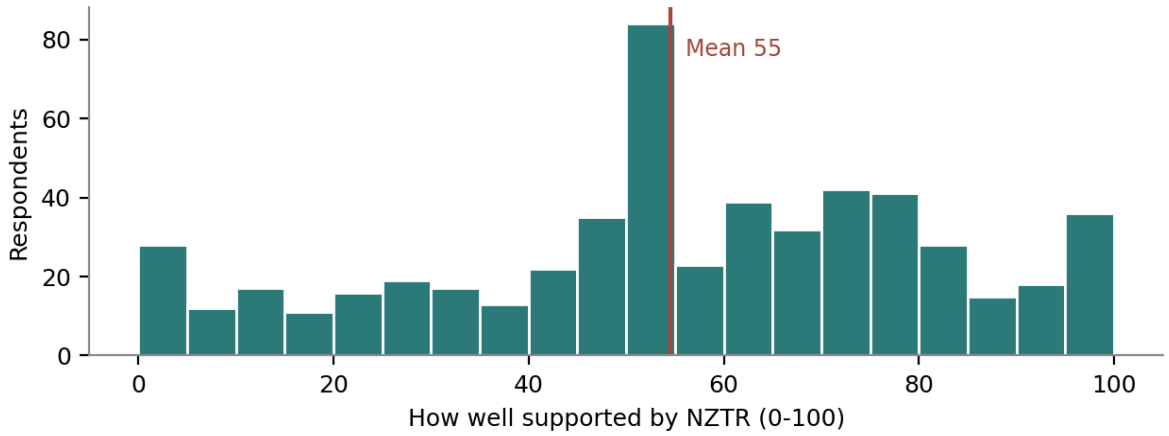


Figure 8. Distribution of felt support from NZTR, 0 to 100 (n = 548).

Responses covered the full scale, with a slight concentration around the middle. A substantial minority reported low support: 25.7% scored 40 or below, and 13.0% scored 20 or below. By contrast, 32.8% scored 70 or above. These results show a divided picture: some respondents feel well supported, while a sizeable group feel poorly supported.

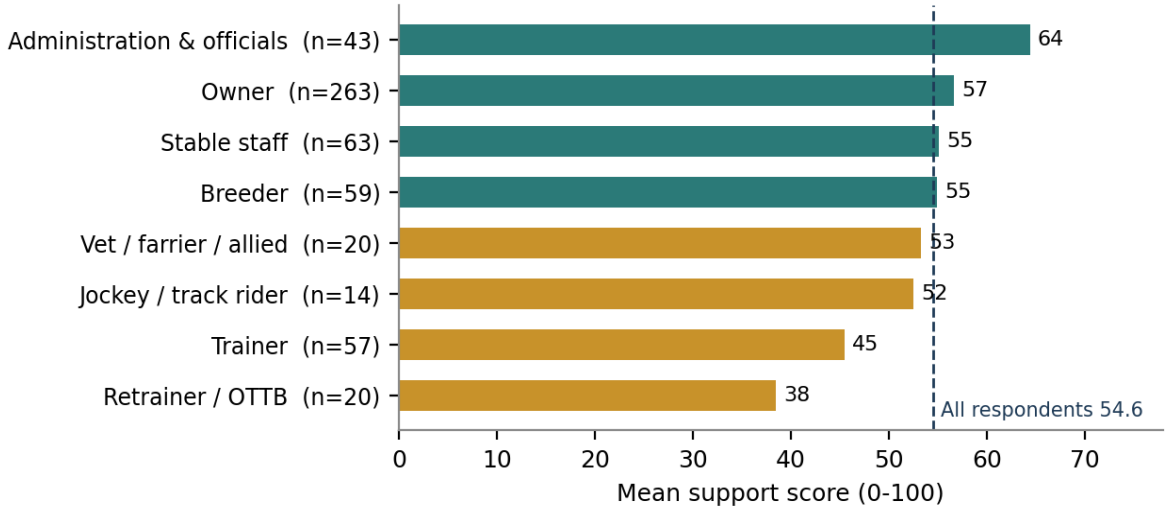


Figure 9. Mean support score by role group. Group sizes shown; groups below 25 respondents are indicative.

Support scores varied by role. Administrators and officials, the group closest to NZTR, felt most supported, with an average score of 64.4. Trainers and retrainers felt least supported, averaging 45.5 and 38.5 respectively.

Key welfare delivery groups report the lowest support

Why this matters. The lowest support scores came from groups that play a central role in welfare delivery. Trainers make many day-to-day welfare decisions, including when to run, rest or retire a horse. Although they gave themselves the highest welfare knowledge ratings in the survey, they reported the second-lowest level of support from NZTR.

Retrainers are also close to welfare delivery, especially as horses transition beyond racing. They reported the highest familiarity with the Five Domains (4.30) and placed the greatest importance on traceability (4.75), but gave the lowest support score (38.5) and the lowest confidence in the industry's ability to improve (2.85). Because this group included 20 respondents, these figures should be read as indicative.

This finding has practical implications. Trainers and retrainers are small groups, but they are central to welfare delivery and are unlikely to be reached effectively through general communications alone. If the strategy is to influence daily welfare practice, these groups will need targeted support and direct engagement.

Communication channels and feeling supported

Respondents who used NZTR information channels reported higher support from NZTR, with an average score of 59.2 compared with 45.4 among those who did not use these channels.

7.3 What support respondents say they want

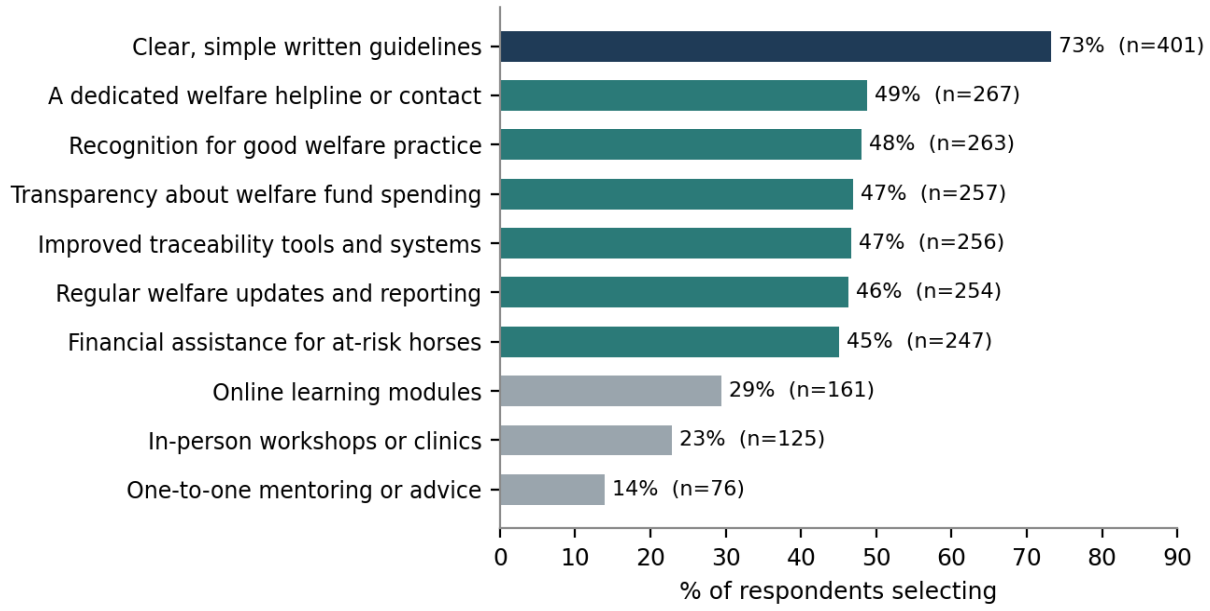


Figure 10. Types of welfare information or support most valued, multiple selection (n = 548, mean 4.2 selections per respondent).

Clear, simple written guidelines were the strongest preference, selected by 73.2% of respondents. No other option exceeded 49%. A second, closely grouped set of priorities included a dedicated welfare helpline (48.7%), recognition for good welfare practice (48.0%),

transparency about welfare fund spending (46.9%), improved traceability tools (46.7%), regular welfare updates (46.4%), and financial assistance for at-risk horses (45.1%).

Delivery formats attracted lower support: online learning modules were selected by 29.4%, in-person workshops by 22.8%, and one-to-one mentoring by 13.9%. Read alongside the finding that industry events are the least-used information source, this suggests respondents want welfare guidance they can access when needed, rather than formats that require in-person attendance. However, demand for training formats varies by role.

Support option	Owners	Trainers	Stable staff	Retrainers	Admin
Clear, simple written guidelines	77%	65%	68%	60%	72%
In-person workshops or clinics	18%	9%	33%	55%	40%
Online learning modules	27%	16%	33%	55%	47%
One-to-one mentoring or advice	13%	4%	13%	30%	28%
Financial assistance for at-risk horses	39%	35%	54%	70%	63%
Improved traceability tools	40%	37%	59%	65%	65%
Recognition for good welfare practice	43%	47%	59%	75%	56%
Transparency about welfare fund spending	40%	53%	48%	80%	60%

Table 11. Support preferences by role group. Retrainers n = 20 are indicative only.

Written guidelines were the most widely requested form of support. Preferences for other options, however, differed by role. Trainers showed the lowest demand for training formats: only 9% wanted workshops and just 4% wanted mentoring. By contrast, stable staff, retrainers and administrators showed much stronger interest in these forms of support.

Recognition for good welfare practice should be treated as a separate finding. It was selected by 48% of respondents overall, including 75% of retrainers and 59% of stable staff. Rather than pointing to an information gap, this suggests a desire for the industry to make good welfare practice more visible. It may also be one of the lowest-cost actions to implement.

7.4 What respondents say is missing from the new Welfare Strategy

254 respondents commented on what they felt was missing or under-represented in the 2026-2030 strategy, producing around 10,000 words. This was the most substantial free text response question in the survey and comments were detailed and specific.

Theme	n	%	Focus of comments
Life after racing, rehoming, retraining, traceability	72	30.6%	Tracing beyond first rehoming, support for owners keeping their own retirees
Stable staff welfare, workforce and people wellbeing	41	17.4%	Staff conditions, safety of reporting, workforce sustainability
Funding, cost of care and financial support	38	16.2%	Who pays for welfare, support for rehomers and at-risk horses

Theme	n	%	Focus of comments
Enforcement, accountability, auditing and inspections	35	14.9%	Stable inspections, consequences, consistency of rules
Transparency, communication and public confidence	30	12.8%	Publicising good practice, social licence, whip rules
Education, training and licensing of participants	22	9.4%	Compulsory education, upskilling, licensing standards
Breeding volume, overbreeding and wastage	20	8.5%	Numbers bred, unsaleable broodmares, surplus horses
Racing practices: whip, two-year-old racing, tracks, jumps	15	6.4%	Age at first racing, track surfaces, whip use
End of life, euthanasia and slaughter	8	3.4%	Honest discussion of euthanasia for unsuitable horses
Small trainers and grassroots participants overlooked	8	3.4%	Provincial and hobby participants

Table 12. Themes in comments on gaps in the 2026-2030 strategy (n = 235 substantive comments).

Common Themes include:

1. Life after racing was the most common theme

Nearly one-third of comments focus on what happens to thoroughbreds after racing. Concerns are practical ones including; traceability often ends after the first rehoming, owners who keep retired horses need support, broodmares can be difficult to place once breeding ends, and some horses are rehomed with people who are not equipped to care for them.

> *More accountability for tracing horses post racing. A better system for recording horse location past the first re-home post racing.* Owner
>
> *Although the retrainers provide a great service and many horses can be rehomed, there could be more support for owners and trainers who keep their retired horses themselves.* Owner
>
> *The real problem is now the inability to rehome or sell broodmares, even young ones under twelve, who are a commercial drain on the owner*. Breeder

2. Human welfare was raised alongside horse welfare

A less common theme, but a key one concerned the people in the industry: staff conditions, workforce sustainability, and repeatedly the safety of speaking up. Several comments link the two directly, arguing that staff who fear for their position cannot be relied on to report welfare concerns. This connects to the reporting finding in section 6.1 and the pressure findings in section 8.1.

> *Staff are afraid to report horses being mistreated.* Breeder
>
> *Anonymous reporting by track riders or stable hands who are closest to the horses.* Administration and officials

3. Accountability and enforcement

15% of respondents comments requested stronger enforcement: stable inspections, clearer consequences, consistency of rules between participants, and clarity about when a welfare breach becomes a matter for external authorities rather than an internal process. This is a

request from industry stakeholders, for industry to be able to demonstrate that welfare standards are authentic.

> *I am not sure if there is a clause that says when someone breaching welfare standards should be prosecuted by Police, MPI or the SPCA, instead of being dealt with internally by racing people.* Owner

4. Transparency about end of life

A smaller group argued that the strategy appears to avoid the hardest subject. Their point is that not every horse can be rehomed, that pretending otherwise puts horses and handlers at risk, and that planned humane euthanasia is preferable to an unsuitable placement. This connects directly to the lowest rated familiarity item in the survey, and it suggests there is a proportion of industry stakeholders who would welcome NZTR speaking plainly on the subject.

> *There are a number of horses that are completely unsuitable to be rehomed and should be humanely euthanised rather than putting people at risk.* Owner

Five comments across the whole dataset described the strategy as presentational. Criticism was directed mainly at specific gaps in content rather than at the strategy itself.

7.5 Helping trainers make the right call

450 respondents answered the free text question regarding what would help trainers make the right decision for a horse showing mild soreness before a race.

Theme	n	%	Focus
Better or fuller veterinary assessment and diagnostics	98	21.8%	Thorough examination rather than a brief check
Relieving financial and owner pressure	83	18.4%	Costs, prize money, compensation for scratching
Education, guidance and clear decision protocols	56	12.4%	Criteria, standards, knowing what good looks like
Culture, conscience and experience of the trainer	46	10.2%	Integrity, common sense, putting the horse first
Second opinion, bodywork, physiotherapy or chiropractic input	34	7.6%	Additional professional assessment
Listening to riders and stable staff who know the horse	32	7.1%	Track rider feedback treated as evidence
More racing opportunities and flexible scratching rules	32	7.1%	Another race, no penalty for scratching
Support or oversight from NZTR, stewards or independent vets	21	4.7%	Pre-race checks, independent assessment
Put the horse first, err on the side of caution	21	4.7%	If in doubt, turn them out

Table 13. What respondents said would help trainers make the right call (n = 450 respondents who answered).

Financial pressure was named directly as an influencer by nearly one in five respondents, and by owners, trainers, stable staff and riders alike. The suggestions to address this included: compensation or refunds for scratching on veterinary advice, less emphasis on two-year-old

racing, and cost structures that make waiting affordable. Several respondents argued that scratching the horse is less financially costly in the long run than aggravating an injury, and that owners do not always understand this.

> *Financial stress and pressure from owners. If they scratch, do they get refunded? Owners need to understand that avoiding running when the horse is not 100% will actually cost them less in the long run*. Owner
>
> *Set aside a pool of money, and if a trainer scratches the horse with a veterinary certificate there should be compensation for both owner and trainer. Administration and officials*

The second consistent theme was the depth of veterinary input, described as needing to go beyond a brief assessment. The third was the role of the people who ride the horse daily, raised by 32 respondents who argued that track rider observations should carry formal weight in the decision.

> *We employ riders to give their opinion. Get a second veterinary opinion. Common sense.* Trainer
>
> *Listen to the staff who ride the horse mostly.* Stable staff

7.6 The 'fit to race' case study decision

Question 17, asked about what the fictitious trainer who was described in the scenario should have done about the situation. 44.2% of respondents said scratch the horse and address the soreness, 29.2% said modify the training programme and reassess closer to race day, 11.3% said seek a second veterinary opinion, 4.0% were unsure and 1.6% said continue as planned. A further 9.5% (52 respondents) wrote about their own approach.

The free text answers are most informative. Almost all describe a staged process including: bringing in a body worker, physiotherapist, chiropractor or farrier, modifying the work, reassessing closer to the day, and scratching if the horse has not come right. Several respondents, particularly trainers, said the multiple-choice options were not nuanced enough for a decision that depends on the horse's history, age, the track surface and who was riding.

> *Ten days out is time to modify and observe closely, with feedback from the rider. If sufficient improvement is not realised, then scratch and seek more detailed veterinary input.* Trainer

Role differences in decision-making

Responses varied by role. Owners and breeders were most likely to choose an outright scratch, with 51% of each group selecting this option. Trainers were less likely to do so, at 30%, and were much more likely to suggest a staged alternative in their written response: 26% of trainers did this, compared with 5% of owners. Across the full survey sample, only nine respondents said they would continue as planned.

This should not be interpreted as trainers placing less emphasis on welfare. Rather, it reflects their clinical and practical familiarity with these decisions. Those who manage fit-to-race decisions regularly tend to describe a graduated process, while those who commission or oversee those decisions tend to favour the most cautious option.

Both responses point in the same direction: welfare concerns should change the plan. The practical implication is that guidance on fit-to-race decisions will be credible only if it reflects

the staged decision-making process trainers actually use, rather than presenting the choice as simply “run” or “scratch.”

8. Differences between groups

This section examines how responses varied across respondent groups and how different answers were related. The discussion summarises the direction and approximate size of each difference. Full statistical test results are provided in Appendix A.

8.1 Differences by role

Twenty-nine rating measures were compared across the eight role groups. Ten showed differences that were large and consistent enough to be considered statistically reliable. The remaining nineteen did not show reliable role-based differences. These included all six welfare importance rankings, all six case study reliability ratings, clarity of expectations, importance of post-racing care, and confidence in the industry.

These areas of agreement matter as much as the differences. They show where views are broadly shared across the industry and can provide a common foundation for the strategy.

Measure	Highest group	Lowest group	Size of difference
Understanding of own responsibilities	Trainers 4.74	Owners 3.87	Moderate
Familiarity with the Five Domains	Retrainers 4.30	Owners 2.97	Moderate
Personal responsibility for horses in care	Allied 5.00	Owners 4.44	Moderate
Familiarity with notification obligations	Trainers 4.60	Retrainers 3.35	Moderate
Familiarity with NZTR Welfare Guidelines	Trainers 4.14	Owners 3.06	Moderate
Pressure to prioritise performance	Riders 3.86	Breeders 2.93	Moderate
Confidence in recognising good welfare	Trainers 4.84	Owners 4.25	Moderate
Felt support from NZTR (0 to 100)	Admin 64.4	Retrainers 38.5	Small
NZ standards high compared with other countries	Admin 3.72	Retrainers 3.10	Small
Importance of traceability	Retrainers 4.75	Allied 3.74	Small

Table 14. The ten measures where differences between role groups held up in testing. Retrainers, allied professionals and riders each had 20 or fewer respondents, so those figures are indicative only. Full test results are in Appendix A, Table A1.

The owner knowledge gap

Owners gave the lowest ratings of all eight role groups for:

- understanding their welfare responsibilities
- familiarity with the Five Domains model
- familiarity with the NZTR Welfare Guidelines
- confidence in recognising good welfare
- personal responsibility

Pairwise comparisons confirm that owners rated themselves below trainers on all five measures. They also rated themselves below stable staff, allied professionals and retrainers for understanding their responsibilities.

The largest gap was in familiarity with the Five Domains model. Owners averaged 2.97, compared with 4.26 for trainers. Because owners make up about half of both the survey sample and the in-scope industry, this single gap has the greatest impact on the overall KPI 1 result.

This gap should not be read as indifference. Owners gave the highest average rating of all role groups for the belief that welfare is genuinely a priority across the industry, at 4.03, although this difference was not statistically reliable. They were also the group most likely to use NZTR communications, at 72%.

Owners are therefore reachable, engaged and under-informed. That makes them a strong starting point for a targeted education programme.

Perceived pressure follows how close people work to the horse

> **The clearest pattern in the survey**
>
> Perceived pressure to prioritise performance over welfare shows one of the clearest patterns in the survey. The dividing line is not seniority, experience or region, but how closely respondents work with horses.
>
> Groups reporting lower pressure were:
>
> - owners: 2.94
> - breeders: 2.93
> - trainers: 2.96
>
> Groups reporting higher pressure were:
>
> - riders: 3.86
> - retrainers: 3.70
> - allied professionals: 3.65
> - stable staff: 3.59
> - administrators: 3.56
>
> After accounting for age and length of service, every group except breeders and trainers still reported more pressure than owners. This means the pattern cannot be explained simply by those respondents being younger or newer to the industry.

People who commission or license racing reported less pressure than those who handle, ride, treat or receive horses. The survey cannot determine whether employed and contracted people experience more pressure, or whether they are simply more willing to name it. Either way, the strategic implication is the same: decisions made at owner and trainer level are experienced as pressure further down the chain.

This finding also matters for the reporting system. The groups reporting the highest pressure were also among the least confident about how to report a welfare concern. Stable staff scored 3.32 and riders 3.29, compared with 3.88 for breeders and 3.95 for administrators. In other words, the people most likely to see welfare concerns appear to have the least clear route to raise them.

The analysis also tested whether the relationship between perceived pressure and felt support differed by role. It did not. The relationship was consistent across all role groups.

8.2 Differences by gender

Gender showed the most consistent pattern of differences in the data. Every measure tested differed between female and male respondents, and the results formed a coherent pattern rather than a set of isolated differences.

Measure	Female	Male	Direction
Felt support from NZTR (0 to 100)	49.1	63.0	Men higher
Welfare is genuinely a priority across the industry	3.72	4.17	Men higher
NZ standards high compared with other countries	3.43	3.87	Men higher
Confidence in the industry's ability to improve	3.31	3.56	Men higher
Understanding of own responsibilities	4.38	3.86	Women higher
Familiarity with the Five Domains	3.63	2.94	Women higher
Personal responsibility for horses in care	4.76	4.49	Women higher
Pressure to prioritise performance over welfare	3.40	2.83	Women higher
Importance of traceability	4.39	4.02	Women higher
Post-racing care as important as racing welfare	4.48	4.22	Women higher
Believes the industry needs to make progress	93.2%	81.7%	Women higher

Table 15. Differences by gender. Female n = 311, male n = 230. Full test results are in Appendix A, Table A3.

Gender-related differences showed a consistent pattern. Female respondents reported higher personal welfare knowledge, stronger personal responsibility, and greater appetite for change. Male respondents, by contrast, expressed more confidence in the industry as it currently operates and felt substantially better supported by NZTR. The 14-point gap in felt support was the largest difference on that measure anywhere in the data, exceeding all role-based differences.

Gender also overlaps with role and age in this sample. Stable staff respondents were 89% female and riders 86% female, while owners were 59% male. In addition, 60% of male respondents were aged 65 or over. Each measure was therefore re-tested while accounting for role, age band and tenure at the same time. The gender differences remained across all measures.

This is a robust finding, but the survey cannot explain why it occurs. It should therefore be explored further in an interview phase rather than interpreted too firmly here. The practical implication is that a communications programme that appears successful on average may still be reaching men and women differently.

8.3 Differences by age and experience

Age and length of service in the industry move in different directions on several measures, so they need to be looked at separately rather than treated as one thing.

Measure	Longer service	Older age	Reading
Awareness of the strategy	Higher	Higher	Both raise awareness
Familiarity with NZTR Welfare Guidelines	Higher	No difference	Driven by service length, not age
Understanding of own responsibilities	Higher	Lower	Service raises it, older age lowers it
Familiarity with the Five Domains	No difference	Lower	Younger respondents more familiar
Pressure to prioritise performance	Lower	Lower	Younger and newer respondents report more
Confidence in the industry's ability to improve	No difference	Higher	Older respondents more confident
Felt support from NZTR	No difference	Higher	Older respondents feel better supported

Table 16. Direction of association with tenure and age. Correlation values and test results are in Appendix A, Table A4.

Time in the industry builds familiarity with NZTR systems, which is expected. Age works differently. Older respondents were more aware of the strategy and felt better supported, but rated their own understanding and Five Domains familiarity lower and reported less pressure. Respondents under 35 rated their welfare understanding at 4.5 and their Five Domains familiarity at 3.6, compared with 3.96 and 3.09 for those aged 65 or over.

Two things follow from this. First, newer people entering the industry appear to arrive with a more current welfare vocabulary, probably from equestrian and veterinary education outside racing. That's something the strategy can build on. Second, with only 20 respondents under 25 and 48 aged 25 to 34, this result relies on small numbers and demonstrates the importance of capturing this role group through a structured and targeted approach in the next survey.

Feeling supported was lowest among respondents in the middle age groups. Those aged 35 to 44 averaged 44.6 out of 100, and those aged 45 to 54 averaged 48.2. By comparison, respondents under 25 averaged 61.3, while those aged 65 or over averaged 62.2.

This matters because the 35 to 54 age range represents much of the industry's working core, including those most likely to rely on racing for their livelihood.

8.4 Differences by region

Six regions with at least 25 respondents were compared. Statistically reliable differences were found for feeling supported, understanding of responsibilities, Five Domains familiarity, perceived pressure, and belief that welfare is a priority. However, the differences were generally small.

Wellington/Wairarapa stood out on the attitude measures. Respondents from this region reported higher felt support (69.3), lower perceived pressure (2.56), and stronger belief that

welfare is a priority (4.42), compared with overall averages of 54.6, 3.16, and 3.91 respectively. Because this result is based on 36 respondents, with a mix weighted toward administrators and owners, it is more likely to reflect the respondent profile than a distinct regional culture. It should therefore be treated cautiously until tested further.

8.5 How the survey responses relate to each other

The way the measures relate to one another is more informative than any single comparison. It shows that respondents' personal welfare capability and their confidence in the industry operate as separate dimensions.

Pair of measures	Relationship	Reading
Felt support and confidence in the industry	Relate strongly	Feeling supported and believing the industry can improve go together
Framework familiarity and strategy awareness	Relate strongly	Reading the strategy goes with framework knowledge
Welfare is a priority and NZ standards are high	Relate strongly	Part of a single view about the industry
Confidence and belief that welfare is a priority	Relate strongly	Confidence rests on perceived industry commitment
Understanding and Five Domains familiarity	relate strongly	Part of a single view about personal capability
Post-racing care importance and traceability	Relate together moderately	A consistent view about life after racing
Perceived pressure and welfare is a priority	Move in opposite directions	Pressure goes with weaker belief in industry commitment
Perceived pressure and confidence	Move in opposite directions	Pressure goes with weaker belief in delivery
Understanding and felt support	No relationship	Knowledge and feeling supported are unrelated
Personal responsibility and felt support	No relationship	Commitment and feeling supported are unrelated

Table 17. How key measures relate to each other. Correlation values are in Appendix A, Table A5.

Two separate issues

Personal welfare capability and confidence in the industry are two distinct dimensions.

Personal welfare capability includes respondents' understanding of their responsibilities, familiarity with welfare frameworks, confidence in recognising good welfare, and sense of personal responsibility.

Confidence in the industry covers whether respondents believe welfare is genuinely prioritised, New Zealand standards are high, the industry can improve, and NZTR provides sufficient support.

These two dimensions are largely unrelated. Someone may be knowledgeable but feel poorly supported, as seen among trainers and retrainers. Conversely, some owners may feel well supported despite having lower familiarity with welfare frameworks.

For the strategy, this means education and trust-building need to be treated as separate workstreams, with separate measures.

8.6 What is associated with feeling supported

A model was used to identify which factors were associated with the 0–100 support score, after accounting for role, age and tenure at the same time. The model explained just over one fifth of the variation between respondents, which means much of what shapes the support score was not captured by the survey and might be worth investigating further during an interview phase.

What was tested	Effect on the support score
Believing welfare is genuinely a priority across the industry	Strongest single factor, associated with a higher score
Believing welfare expectations are clear and easy to understand	Associated with a higher score
Welfare framework familiarity	Associated with a modestly higher score
Being a trainer rather than an owner	Associated with a substantially lower score
Being a retrainer rather than an owner	Associated with a substantially lower score
Being in administration rather than an owner	Associated with a higher score
Longer time in the industry	Associated with a slightly lower score
Having read the strategy	No separate effect once knowledge was accounted for

Table 18. What is associated with feeling supported by NZTR. Coefficients and test results are in Appendix A, Table A6.

The strongest factor was not something NZTR communicates directly. It was whether respondents believed welfare is genuinely treated as a priority across the industry. This suggests that feeling supported by NZTR is shaped less by perceptions of NZTR's service level alone, and more by respondents' judgement of the industry's collective seriousness about welfare.

Clarity of expectations was the next most important factor, and this is an area NZTR can influence directly through the clear written guidance respondents asked for.

Having read the strategy had no separate effect once welfare framework knowledge was included in the model. This suggests that the strategy matters mainly through the knowledge it conveys, rather than as a signal of inclusion. Publishing more documents is therefore unlikely to shift the support score on its own. Making expectations clearer is more likely to do so.

8.7 What relates to confidence in welfare delivery

The same approach was used to examine confidence in the industry's ability to improve welfare over the next five years. This was the strongest model in the analysis, explaining just over one third of the variation between respondents.

The main factors associated with confidence in delivery were:

- feeling supported by NZTR, which was the strongest factor
- believing welfare is genuinely a priority across the industry
- believing welfare expectations are clear and easy to understand

Role, age, tenure and welfare framework familiarity did not add a separate effect once these factors were included.

This means confidence in delivery is built through support, visible collective commitment and clarity. It is not just driven by having welfare knowledge. This distinction is useful for informing the strategy: the two KPIs rely on different work programmes and shouldn't be expected to automatically move together. Full results are provided in Appendix A, Table A7.

8.8 What is associated with having welfare framework knowledge

The model for Five Domains familiarity explained about one fifth of the variation between respondents.

The strongest factor was having read all or part of the strategy. Familiarity was also higher among retrainers and trainers than among owners, and younger respondents reported higher familiarity. Using NZTR communications and attending industry events did not have a separate effect once other factors were included.

This suggests that reading the strategy is associated with noticeably higher welfare framework knowledge, even after role and age are taken into account. It supports further investment in making the strategy, and the welfare framework behind it, easy to read and apply. It also highlights the need to reach the 41% of respondents who said they had not read any of it. Full results are provided in Appendix A, Table A8.

9. Challenges and opportunities

9.1 Four challenges

Challenge 1: the owner knowledge gap

Owners make up about half of respondents and about half of the in-scope industry. They gave the lowest ratings on almost every welfare knowledge measure, including Five Domains familiarity, where they averaged 2.97 compared with 4.26 for trainers. This group is the main reason the overall knowledge figure is lower. Any programme designed to lift the overall average must reach owners.

Challenge 2: end of life planning

Familiarity with NZTR's approach to end-of-life planning was the lowest-rated item in the survey, at 2.76 out of 5. In total, 42% of respondents rated themselves 1 or 2, and no role group averaged clearly above the midpoint of the scale. This is both the subject respondents said the strategy avoids, and the area with the most serious public consequences.

Challenge 3: the welfare reporting route

One in five respondents disagreed that they know how to report a welfare concern and would feel comfortable doing so. Confidence was lowest among stable staff and riders, the groups working closest to horses and reporting the most pressure. Several open-text comments also stated that staff fear consequences for speaking up. A welfare strategy that depends on people raising concerns must address this first; otherwise, reporting numbers will be hard to interpret.

Challenge 4: the confidence gap

While 88% of respondents want progress, only about half believe the industry can deliver it. Confidence was lowest among retrainers (2.85) and allied professionals (3.12), the groups that often receive horses after racing. Both groups had 20 respondents, so these figures should be read as indicative. Even so, the gap matters: people who want change but doubt delivery are likely to see slow progress as confirmation of their concerns.

9.2 Five opportunities

Opportunity 1: personal commitment is already high

Personal responsibility for welfare scored 4.64 out of 5, with 91% agreement. The strategy does not need to convince this audience that welfare matters. It can move directly to building capability and improving systems.

Opportunity 2: applied judgement is already sound

Respondents rated changes in behaviour as the most reliable welfare indicator and racing performance as the least reliable, by a wide margin. This suggests respondents already make sound practical welfare judgements. The Five Domains model can therefore be introduced as a way to name and structure judgements people are already making, rather than as a new or unfamiliar framework.

Opportunity 3: NZTR already holds the main channel

Two thirds of respondents use NZTR communications for welfare information, more than any other source. Only 6% said they rarely seek welfare information at all. The task is therefore not to build a new channel from scratch, but to extend the existing one to employed and contracted people who currently rely more on employers and social media.

Opportunity 4: a single clear request

Clear, simple written guidelines were selected by 73% of respondents, more than 24 points ahead of any other option. Demand was consistent across every role group. This is an unusually clear request and the most direct route to improving both framework familiarity and clarity of expectations, both of which are linked to how supported people feel.

Opportunity 5: an engaged group ready to help

Respondents showed a strong willingness to contribute: 228 volunteered for interviews, 254 wrote detailed comments on gaps in the strategy, and 450 offered views on how to support better decision-making. Recognition for good welfare practice, requested by 48%, is a low-cost programme with a clear audience. The industry has offered its participation; the risk now is not making use of it.

10. Baseline measures for re-measurement in the next survey

Baseline measures

The measures below form the baseline. Each measure is drawn from a question that can be repeated unchanged in future surveys. Each has also been checked for differences between roles, so any change can be tracked both by group and overall.

Interpreting change

Confidence intervals for each measure are provided in Appendix A, Table A12. A difference in the next survey should be treated as real only when the confidence intervals do not overlap, or when a formal test confirms the difference.

Baseline measure	Value (% or /5)	Why it matters
KPI 1: Five Domains and welfare understanding		
Familiarity with the Five Domains (1 to 5)	3.33	Primary KPI 1 measure
% rating Five Domains familiarity 4 or 5	51.6%	Primary KPI 1 measure
Mean rank of positive emotional state item (1 to 6)	3.57	Significance given to mental state
% placing a mental state item in top two of six	28.3%	Significance given to mental state
% defining welfare in mental or behavioural terms, unprompted	30.0%	Unprompted welfare vocabulary
Understanding of own welfare responsibilities (1 to 5)	4.16	Self-assessed capability

Baseline measure	Value (% or /5)	Why it matters
KPI 2: knowledge, attitudes and systems		
Familiarity with NZTR Welfare Guidelines (1 to 5)	3.29	Reach of guidance
Familiarity with notification obligations (1 to 5)	3.64	Traceability compliance knowledge
Familiarity with the Acknowledged Retrainer Network (1 to 5)	3.31	Awareness of post-racing pathway
Familiarity with end-of-life planning approach (1 to 5)	2.76	Lowest baseline measure
% aware of the strategy, having read all or part	58.4%	Strategy reach
% who had not heard of the strategy	10.6%	Strategy reach
Attitudes and culture		
Personal responsibility for horses in care (1 to 5)	4.64	Commitment (little room to rise but could go down)
Welfare is genuinely a priority across the industry (1 to 5)	3.91	Collective commitment
Welfare expectations are clear and easy to understand (1 to 5)	3.70	Clarity of systems
Know how to report a concern and would feel comfortable (1 to 5)	3.61	Reporting culture
Pressure to prioritise performance over welfare (1 to 5)	3.16	Note: Lower is better
% saying the industry needs meaningful welfare progress	88.0%	Appetite for positive change
Confidence in the industry's ability to improve (1 to 5)	3.39	Belief in delivery
Support and life after racing		
Felt support from NZTR (0 to 100)	54.6	Headline relationship measure
% scoring felt support 40 or below	25.7%	Poorly supported minority
Importance of traceability (1 to 5)	4.23	Attitude to life after racing
% placing responsibility with current owner in case study	67.7%	View of lifetime responsibility
Behaviour change rated a reliable indicator (1 to 5)	4.35	Applied welfare judgement
Racing performance rated a reliable indicator (1 to 5)	2.86	Note: Lower is better

Table 19. Baseline measures, July 2026 (n = 548 unless otherwise noted; the confidence measure is based on 493 respondents).

10.1 How to repeat the survey in 2027/28

To preserve comparability with the 2026 baseline, the next survey should repeat the core design, sampling approach and reporting structure as closely as possible.

Keep the survey instrument mostly unchanged

- Ask the questions as in the 2026 survey without changing the wording, scale labels or order of answer options. Any wording change would weaken comparability and reduce the value of the baseline. If adding new questions recognise that these are not comparable with baseline.
- Keep the case-study approach and retain the same broad themes. The case studies provide measures of applied judgement that self-rating alone cannot capture.

Repeat the coding and comparison approach

- Apply the same role-coding rules described in section 2.3 so that role groups are constructed consistently.
- Use the same eight comparison groups in the analysis.
- Set recruitment targets in advance for stable staff, riders, allied professionals and participants under 25, as each of these groups was under-represented in the baseline survey.

Match the timing and reporting frame

- Run the survey at the same time of year and preferably over a similar fieldwork period. The racing calendar likely affects who is available to respond and may also influence responses.
- Report overall changes alongside movement within specific roles.

11. Implications of the findings

The following actions are drawn directly from the survey findings and are ordered by the strength of the supporting evidence. Each action identifies the measures it is intended to shift, so progress in relation to the Strategy KPIs can be tested in the next survey.

11.1 Close the owner knowledge gap

What the survey found:

Owners gave the lowest ratings across eight groups for familiarity with the Five Domains (2.97), understanding of welfare responsibilities (3.87), and familiarity with guidelines (3.06). Their ratings were also around half those of industry participants.

Recommended actions:

• Develop a short, owner-specific welfare orientation delivered through the channels where owners already interact with NZTR, including registration, syndicate onboarding, and ownership transfer.

• Focus the material on what owners can observe and ask for, rather than on the framework itself. Because owners commission decisions, the guidance should help them ask better questions of trainers.

• Use NZTR communications and the NZTR website as the main channels, as 72% of owners already use them.

Measures to watch:

- Owner familiarity with the Five Domains, owner understanding of welfare responsibilities, and the overall KPI 1 results.

11.2 Publish the written guidance respondents asked for

What the survey found:

Clear, simple written guidelines were selected by 73% of respondents, 24 percentage points ahead of the next option. Clarity of expectations is also one of the factors linked to feeling supported.

Recommended actions:

- Produce a single plain-language welfare guide covering the Five Domains in practical terms, notification obligations, the retrainer pathway, and end-of-life planning.
- Structure the guide for use at the point of need rather than as a document to be read from start to finish and ensure it works well on a mobile phone.
- Create short role-specific versions for owners, stable staff, and trainers, rather than relying on one document for all audiences.

Measures to watch:

- Clarity of expectations, familiarity with guidelines, familiarity with end-of-life planning, and felt support.

11.3 Make reporting a welfare concern visible, simple, and safe

What the survey found:

One in five respondents disagreed that they know how to report a concern and would feel comfortable doing so. Confidence was lowest among stable staff (3.32) and riders (3.29), the groups that also reported the most pressure. Open comments stated directly that staff fear consequences for speaking up.

Recommended actions:

- Publish one clearly named route for raising a welfare concern, including an anonymous option. Place it where employed people will see it, not only on the participant portal.
- Explain plainly what happens after a report is made and what protections are available to the person raising it. The key gap is confidence in what follows, not awareness that an inbox exists.
- Use the dedicated welfare helpline requested by 49% of respondents as the main vehicle, provided it is positioned as support rather than enforcement.

Measures to watch:

- Reporting confidence and perceived pressure among stable staff and riders.

11.4 Address end-of-life planning openly

What the survey found:

Familiarity with NZTR's approach to end-of-life planning scored 2.76, the lowest measure in the survey, with 42% of respondents rating themselves 1 or 2. A consistent minority of open comments also suggested the subject is being avoided.

Recommended actions:

• Publish NZTR's position on end-of-life planning in plain language, including when humane euthanasia is the right welfare decision and what support is available.

• Provide practical guidance on planning ahead rather than making decisions in a crisis, including for horses that are unsuitable for rehoming, a concern respondents raised repeatedly.

• Communicate carefully and align this work with the public confidence programme, but do not defer it. At present, respondents do not know what NZTR expects, and that uncertainty is the more damaging position.

Measure to watch:

➢ Familiarity with end-of-life planning.

11.5 Reach employed and contracted people through their workplaces

What the survey found:

One in five stable staff and riders had not heard of the strategy. NZTR communications are used by 49% of stable staff and 36% of riders, compared with 72% of owners. In contrast, 46% of stable staff identify their employer as an information source. Stable staff, riders, and allied professionals also reported higher pressure than owners and trainers.

Recommended actions:

• Distribute welfare information through employers and stables as well as through licence-holder channels, recognising that stable staff are most effectively reached at work.

• Use social media deliberately for this audience, as 52% of stable staff and 57% of riders use it for welfare information.

• Respond to the higher demand for workshops, online modules, and mentoring among stable staff, retrainers, and administrators, rather than designing training primarily for trainers, who showed the lowest demand.

Measures to watch:

➢ Strategy awareness among stable staff and riders, less perceived pressure, and greater reporting confidence.

11.6 Support trainers and retrainers directly

What the survey found

Trainers and retrainers are central to welfare delivery, but they reported perceiving some of the lowest levels of support in the survey. Trainers scored 45.5 and retrainers 38.5 for 'felt support', compared with the overall average of 54.6. Both groups scored below the administrators subgroup.

Retrainers also reported the lowest confidence in the industry's ability to improve welfare, at 2.85, while giving the highest ratings for Five Domains familiarity (4.30) and the importance of traceability (4.75). These retrainer findings are indicative because they are based on 20 respondents.

What this means

These two groups make, and often absorb, some of the hardest welfare decisions. They are knowledgeable and closely involved in day-to-day welfare delivery, but they do not feel well supported. General communication is unlikely to be enough to address this gap.

Recommended actions

• For trainers, respond to the specific practical issues raised in open comments. These include compensation or fee relief when a horse is scratched on veterinary advice, and decision guidance that reflects the staged process trainers use in practice.

• For retrainers, focus on the areas they identified most clearly: transparency about welfare fund spending (80%), recognition for good practice (75%), and financial assistance for at-risk horses (70%).

• Engage both groups directly, rather than relying only on broad industry messaging.

Measures to watch

- Felt support among trainers and retrainers and Confidence in the industry's ability to deliver welfare improvement.

11.7 Teach welfare through case based scenarios, not abstract frameworks

What the survey found

Respondents showed stronger applied judgement in case studies than in abstract framework questions. Behaviour change was rated the most reliable welfare indicator (4.35), while racing performance was rated the least reliable (2.86). In the abstract ranking, positive emotional state ranked only fourth of six.

Recommended actions

- Build education around realistic decisions like those used in this survey, with the Five Domains presented as the structure behind judgements participants already make.
- Use the warning signs respondents identified most often, especially appetite and demeanour changes, as the entry point for discussing mental state.
- Address the risk that behavioural signals in race-fit horses are treated as normal. One trainer described this clearly: reduced hay intake and weaving can be common enough to be dismissed.

Measures to watch

Mental state ranking; unprompted welfare definitions; Five Domains familiarity.

11.8 Report back and make good practice visible

What the survey found

The strongest factor linked to feeling supported was the belief that welfare is genuinely a priority across the industry. It was also strongly linked to confidence. Recognition for good welfare practice was selected by 48% of respondents, and 254 respondents provided substantive comments with the expectation that they would be used.

Recommended actions

- Publish a summary of these findings for the industry, alongside the actions NZTR intends to take.
- Establish a simple way to recognise good welfare practice. It is inexpensive, was requested by about half of respondents, and would make collective commitment visible.
- Report welfare fund spending openly, a measure requested by 47% of respondents overall and 80% of retrainers.

Measures to watch

➢ Belief that welfare is a priority; felt support; confidence in delivery.

11.9 Use another approach (targeted interviews) to explain what the survey could not answer

Four findings need explanation rather than further measurement, and 228 respondents have volunteered to be contacted further if required.

Interview priorities

- Explore why people closest to the horse report more pressure than owners and trainers, and whether this reflects greater exposure or greater willingness to name the issue.
- Examine why female respondents reported higher welfare knowledge but lower felt support than male respondents, consistently and after accounting for role and age.
- Identify what stops people from reporting welfare concerns and what would change that.
- Clarify what trainers and retrainers need from NZTR to feel supported, since both groups are knowledgeable but feel unsupported.

Selection focus

➢ Prioritise stable staff, riders, participants under 35, and retrainers. These groups are under-represented in the survey and central to the questions above.

APPENDICES

Appendix A. Statistical methods and results

This appendix contains more information about the statistical analysis and comparison information related to the statements made in the body of the report. The methods are described in section 2.4. The full data, data analysis and statistical reports are also available in separate documents.

A.1 How the tests were applied

All rating scales were treated as ordered categories. Comparisons across three or more groups used the Kruskal-Wallis H test, with epsilon squared as the effect size. Comparisons between two groups used the Mann-Whitney U test, with rank biserial correlation as the effect size. Associations between categorical answers used the chi-square test of independence with Cramér's V. Expected cell counts were checked in every case, and where cells fell below 5 the categories were combined before testing, as noted below. Comparisons within the same respondent used the Wilcoxon signed rank test for pairs and the Friedman test for sets. Associations between ordered measures used Spearman rank correlation.

Multiple comparison control used the Benjamini-Hochberg false discovery rate procedure within each family of exploratory tests, and the Holm correction for pairwise comparisons following a significant overall test. Both unadjusted and adjusted p values are shown in Table A1; elsewhere only the adjusted value is shown.

For the welfare awareness analyses the five point awareness scale was collapsed into three categories (not heard, heard but not read, read all or part, the last including the four respondents involved in developing the strategy) to keep expected cell counts adequate. For the progress in welfare question the four options were collapsed into yes against all other answers. For the case study responsibility question the six options were collapsed into current owner, shared, and NZTR or other.

Effect size guidance used in this report: for epsilon squared, 0.01 is small, 0.06 is moderate and 0.14 is large. For rank biserial correlation and Cramér's V, 0.1 is small, 0.3 is moderate and 0.5 is large.

A.2 Differences between role groups

Measure	H (df 7)	Unadjusted p	Adjusted p	Epsilon^2	Significant
Understanding of responsibilities	61.29	< 0.001	< 0.001	0.102	Yes
Familiarity: Five Domains	55.24	< 0.001	< 0.001	0.091	Yes
Personal responsibility	50.86	< 0.001	< 0.001	0.083	Yes
Familiarity: notification obligations	44.73	< 0.001	< 0.001	0.071	Yes
Familiarity: NZTR Welfare Guidelines	41.65	< 0.001	< 0.001	0.065	Yes
Pressure to prioritise performance	41.15	< 0.001	< 0.001	0.064	Yes
Confidence in recognising good welfare	39.15	< 0.001	< 0.001	0.061	Yes

Measure	H (df 7)	Unadjusted p	Adjusted p	Epsilon²	Significant
Felt support from NZTR	18.40	0.010	0.037	0.021	Yes
NZ standards high vs other countries	18.07	0.012	0.038	0.021	Yes
Importance of traceability	17.45	0.015	0.043	0.020	Yes
Welfare is a priority across the industry	16.26	0.023	0.057		No
Reliability: behaviour change	16.19	0.023	0.057		No
Know how to report a concern	14.20	0.048	0.107		No
Ranking: good performance	13.87	0.054	0.111		No
Reliability: reduced interest in eating	13.32	0.065	0.125		No
Familiarity: end of life planning	12.68	0.080	0.142		No
Reliability: physical health	12.58	0.083	0.142		No
Confidence in industry ability to improve	12.07	0.098	0.159		No
Reliability: racing performance	11.09	0.135	0.206		No
Reliability: general restlessness	10.44	0.165	0.238		No
Familiarity: Acknowledged Retrainer Network	10.30	0.172	0.238		No
Ranking: physical health and body condition	9.13	0.244	0.321		No
Reliability: difficult to handle	7.22	0.407	0.496		No
Welfare expectations are clear	7.18	0.411	0.496		No
Post-racing care as important as racing welfare	6.46	0.487	0.565		No
Ranking: freedom from pain, injury, disease	6.06	0.533	0.594		No
Ranking: positive emotional state	4.63	0.705	0.742		No
Ranking: no signs of stress	4.54	0.716	0.742		No
Ranking: good nutrition, housing, physical care	3.27	0.859	0.859		No

Table A1. Complete Kruskal-Wallis results across the eight role groups, ordered by test statistic. Benjamini-Hochberg adjustment was applied across all 29 tests. Effect sizes are shown for significant results only.

Pairwise comparisons following a significant overall test

Measure	Comparison	Result
Understanding of responsibilities	Owners vs trainers	Owners lower, Holm-adjusted $p < 0.05$
Understanding of responsibilities	Owners vs stable staff	Owners lower, Holm-adjusted $p < 0.05$
Understanding of responsibilities	Owners vs allied professionals	Owners lower, Holm-adjusted $p < 0.05$
Understanding of responsibilities	Owners vs retrainers	Owners lower, Holm-adjusted $p < 0.05$
Understanding of responsibilities	Trainers vs administrators	Trainers higher, Holm-adjusted $p < 0.05$

Measure	Comparison	Result
Understanding of responsibilities	Trainers vs breeders	Trainers higher, Holm-adjusted p < 0.05
Familiarity: Five Domains	Owners vs trainers	Owners lower, rank biserial 0.52 (large)
Familiarity: NZTR Welfare Guidelines	Owners vs trainers	Owners lower, Holm-adjusted p < 0.05
Confidence in recognising good welfare	Owners vs trainers	Owners lower, Holm-adjusted p < 0.05
Personal responsibility	Owners vs trainers	Owners lower, Holm-adjusted p < 0.05
Felt support from NZTR	Trainers vs administrators	Trainers lower, Holm-adjusted p < 0.05
Felt support from NZTR	Retrainers vs administrators	Retrainers lower, Holm-adjusted p < 0.05

Table A2. Pairwise comparisons that remained significant after Holm correction. Comparisons involving retrainers, allied professionals and riders rest on 20 or fewer respondents.

A.3 Differences by gender

Measure	Female (n = 311)	Male (n = 230)	Adjusted p	Direction
Feeling support from NZTR (0 to 100)	49.1	63.0	< 0.001	Men higher
Welfare is genuinely a priority across the industry	3.72	4.17	< 0.001	Men higher
NZ standards high vs other countries	3.43	3.87	< 0.001	Men higher
Confidence in industry's ability to improve	3.31	3.56	0.002	Men higher
Understanding of own responsibilities	4.38	3.86	< 0.001	Women higher
Familiarity with Five Domains	3.63	2.94	< 0.001	Women higher
Personal responsibility for horses in care	4.76	4.49	< 0.001	Women higher
Pressure to prioritise performance over welfare	3.40	2.83	< 0.001	Women higher
Importance of traceability	4.39	4.02	< 0.001	Women higher
Post-racing care as important as racing welfare	4.48	4.22	< 0.001	Women higher
Believes industry needs to make progress	93.2%	81.7%	< 0.001	Women higher

Table A3. Mann-Whitney U comparisons by gender with Benjamini-Hochberg correction. Seven respondents who preferred not to state gender are excluded.

Each measure was re-tested in a regression adjusting for role group, age band and tenure at the same time. Every difference survived adjustment. Examples: felt support, coefficient -15.1 points, $p < 0.001$; perceived pressure, +0.46, $p < 0.001$; Five Domains familiarity, +0.43, $p = 0.001$ (coefficients shown for female relative to male).

A.4 Associations with tenure and age

Measure	Tenure (rho)	Age (rho)	Interpretation
Awareness of the strategy	+0.205 ***	+0.185 ***	Both longer service and older age raise awareness
Familiarity with NZTR Welfare Guidelines	+0.165 ***	-0.017 ns	Driven by service length, not age
Understanding of own responsibilities	+0.122 **	-0.156 ***	Longer service raises it, older age lowers it
Familiarity with Five Domains	+0.077 ns	-0.133 **	Younger respondents more familiar
Pressure to prioritise performance	-0.138 **	-0.187 ***	Younger and newer respondents perceive more
Confidence in industry's ability to improve	+0.061 ns	+0.199 ***	Older respondents more confident
Felt support from NZTR	+0.028 ns	+0.153 ***	Older respondents feel better supported

*Table A4. Spearman correlations with tenure and age treated as ordered categories. *** $p < 0.001$, ** $p < 0.01$, ns not significant.*

A.5 Associations between measures

Pair of measures	Spearman rho	Reading
Felt support and confidence in the industry	+0.50	Feeling supported and believing the industry can improve are associated
Familiarity score and strategy awareness	+0.52	Reading the strategy is associated with framework knowledge
Welfare is a priority and NZ standards are high	+0.49	A single institutional confidence dimension
Confidence and belief welfare is a priority	+0.49	Confidence relates to perceived industry commitment
Understanding and Five Domains familiarity	+0.49	A single personal capability dimension
Post-racing care importance and traceability	+0.39	Consistent view of life after racing
Perceived pressure and welfare is a priority	-0.32	Pressure associated with a weaker belief in industry commitment
Perceived pressure and confidence in delivery	-0.22	Pressure associated with a weaker belief in welfare progress delivery
Understanding and feeling supported	-0.08	No meaningful relationship
Personal responsibility and feeling supported	-0.09	No meaningful relationship
Five Domains familiarity and confidence in delivery	-0.02	No meaningful relationship

Table A5. Selected Spearman correlations between key measures (n = 493 to 548 depending on the item).

A.6 Model of feeling supported from NZTR

Predictor	Coefficient	p	Interpretation
Welfare is genuinely a priority across the industry	+6.47	< 0.001	Strongest single predictor
Welfare expectations are clear and easy to understand	+3.02	0.015	Clarity builds felt support
Welfare framework familiarity score	+3.28	0.010	Knowledge contributes modestly
Being a trainer (against owner)	-13.04	< 0.001	Trainers feel less supported
Being a retrainer (against owner)	-11.67	0.040	Retrainers feel less supported
Being in administration (against owner)	+8.81	0.031	Administrators feel better supported
Years in the industry	-2.25	0.034	Longer service, slightly less supported
Having read the strategy	-0.97	0.684	No independent effect once knowledge is controlled

Table A6. Ordinary least squares model predicting felt support from NZTR (n = 527, R^2 = 0.223). Coefficients are points on the 0 to 100 scale. Results are associations, not causal effects.

A.7 Model of confidence in the industry's ability to improve

Predictor	Coefficient	p	Interpretation
Felt support from NZTR (per point, 0 to 100)	+0.012	< 0.001	Strongest predictor,about +1.2 scale points across the full 0 to 100 range
Welfare is genuinely a priority across the industry	+0.24	< 0.001	Second strongest predictor
Welfare expectations are clear and easy to understand	+0.15	< 0.001	Contributes independently
Role, age, tenure and framework familiarity	not significant	-	No independent effect once the above are included

Table A7. Ordinary least squares model predicting confidence in the industry's ability to improve welfare over five years (R^2 = 0.38). This was the best fitting model in the analysis.

A.8 Model of Five Domains familiarity

Predictor	Coefficient	p	Interpretation
Having read all or part of the strategy	+0.88	< 0.001	Strongest predictor
Being a retrainer (against owner)	+1.25	< 0.05	Higher familiarity, based on 20 respondents
Being a trainer (against owner)	+1.01	< 0.05	Higher familiarity
Age band (per band older)	-0.14	0.004	Younger respondents report higher familiarity
Using NZTR communications	not significant	-	No independent effect
Attending industry events	not significant	-	No independent effect

Table A8. Ordinary least squares model predicting Five Domains familiarity ($R^2 = 0.21$). Coefficients are in scale points on the 1 to 5 measure.

A.9 Categorical associations and within-respondent tests

Test	Statistic	p	Effect size
Strategy awareness by role group	chi-square = 30.3, df = 14	0.007	Cramér's V = 0.17
Strategy awareness by tenure	chi-square = 35.9, df = 8	< 0.001	Cramér's V = 0.18
Belief that progress is needed, by gender	chi-square = 22.0	< 0.001	Cramér's V = 0.20
Case study responsibility choice by role	chi-square = 12.9	0.535	No association
Fit to race action choice by role	chi-square = 40.6, df = 21	0.006	Small to moderate
Ranking of six welfare indicators (Friedman)	chi-square = 1481.7	< 0.001	Systematic ordering
Case study reliability of six indicators (Friedman)	chi-square = 573.1	< 0.001	Systematic ordering
Behaviour change vs racing performance (Wilcoxon)	mean difference 1.49 points	< 0.001	Large
Five Domains familiarity by whether the unprompted definition used mental or behavioural language (Mann-Whitney)	3.76 vs 3.14	< 0.001	Moderate

Table A9. Categorical associations and within-respondent comparisons.

Logistic regression for the belief that the industry needs to make meaningful progress, adjusting for role, age, tenure and perceived pressure: female respondents remained about twice as likely to say progress is needed (odds ratio 2.21, p = 0.016), and each additional point of perceived pressure raised the odds by about half (odds ratio 1.47, p = 0.003).

Support preference options differed by role group after adjustment for in-person workshops (p < 0.001), online learning modules, one-to-one mentoring, financial assistance for at-risk horses, improved traceability tools, recognition for good welfare practice and transparency about welfare fund spending (all adjusted p < 0.05). Clear, simple written guidelines did not differ by role.

Regional comparisons across the six regions with 25 or more respondents were significant after correction for felt support, understanding of responsibilities, Five Domains familiarity, perceived pressure and belief that welfare is a priority. All effect sizes were small.

A.10 Post-stratification weighting check

Weights were calculated for the six role groups covered by the industry population frame, weighting each group to its share of the 23,088 person in scope population. Retrainers, allied professionals and unclassified respondents fall outside the frame and are excluded from the weighted estimates. Weighting adjusts for the mix of roles; it does not correct for people choosing whether to take part.

Measure	Unweighted	Weighted	Difference
Understanding of responsibilities	4.16	4.10	-0.06
Familiarity: Five Domains	3.33	3.21	-0.12

Measure	Unweighted	Weighted	Difference
Familiarity: NZTR Welfare Guidelines	3.29	3.24	-0.05
Familiarity: end of life planning	2.76	2.74	-0.02
Personal responsibility	4.64	4.60	-0.04
Pressure to prioritise performance	3.16	3.15	-0.01
Welfare expectations are clear	3.70	3.71	+0.01
Know how to report a concern	3.61	3.60	-0.01
Confidence in industry ability to improve	3.39	3.42	+0.03
Importance of traceability	4.23	4.26	+0.03
Felt support from NZTR (0 to 100)	54.6	56.6	+2.0
% saying progress is needed	88.0%	87.9%	-0.1
% who had read all or part of the strategy	58.4%	57.4%	-1.0

Table A10. Unweighted compared with post-stratified estimates.No difference exceeds 0.12 scale points or 2.0 points on the support scale.

Weighting raises the estimate of 'feeling supported' slightly, because the under-represented stable staff group scores above the trainer group, and lowers Five Domains familiarity slightly, because owners carry more weight when adjusted to industry proportions. Neither of these shifts changes any conclusion. **Unweighted figures** are used throughout the report for transparency and comparability at re-measurement.

A.11 Response quality sensitivity check

30 responses (5.5%) carried a quality flag, driven by completion speed (24) and matrix straight-lining (14). Four carried a profanity flag and three a not-a-full-word flag. None were flagged for gibberish or copied answers.

Measure	All (n = 548)	Excluding flagged (n = 518)	Difference
Understanding of responsibilities	4.16	4.15	-0.01
Familiarity: Five Domains	3.33	3.33	0.00
Personal responsibility	4.64	4.64	0.00
Pressure to prioritise performance	3.16	3.14	-0.02
Know how to report a concern	3.61	3.60	-0.01
Confidence in industry ability to improve	3.39	3.41	+0.02
Felt support from NZTR (0 to 100)	54.6	54.6	+0.1

Table A11. Sensitivity of headline measures to excluding quality-flagged responses.

All 30 were reviewed and decided that they did not impact the final question results so all 548 responses are retained in the analysis reported here.

A.12 Baseline measures with confidence intervals

Confidence intervals are Wilson intervals for percentages and t based intervals for means. They describe the precision of the estimate for this group of respondents. Because participation was voluntary, they should not be read as a margin of error for the whole industry.

Baseline measure	Value	95% confidence interval
Familiarity with the Five Domains (1 to 5)	3.33	3.21 to 3.45
% rating Five Domains familiarity 4 or 5	51.6%	47.5 to 55.8
Mean rank of positive emotional state item (1 to 6)	3.57	3.46 to 3.67
% placing a mental state item in top two of six	28.3%	24.7 to 32.2
% defining welfare in mental or behavioural terms	30.0%	26.2 to 33.9
Understanding of own welfare responsibilities (1 to 5)	4.16	4.07 to 4.24
Familiarity with NZTR Welfare Guidelines (1 to 5)	3.29	3.19 to 3.39
Familiarity with notification obligations (1 to 5)	3.64	3.52 to 3.75
Familiarity with the Acknowledged Retrainer Network (1 to 5)	3.31	3.20 to 3.42
Familiarity with end of life planning approach (1 to 5)	2.76	2.65 to 2.87
% aware of the strategy, having read all or part	58.4%	54.2 to 62.4
% who had not heard of the strategy	10.6%	8.3 to 13.4
Personal responsibility for horses in care (1 to 5)	4.64	4.58 to 4.71
Welfare is genuinely a priority across the industry (1 to 5)	3.91	3.82 to 4.00
Welfare expectations are clear and easy to understand (1 to 5)	3.70	3.62 to 3.78
Know how to report a concern and feel comfortable (1 to 5)	3.61	3.50 to 3.71
Pressure to prioritise performance over welfare (1 to 5)	3.16	3.06 to 3.25
% saying the industry needs meaningful welfare progress	88.0%	85.0 to 90.4
Confidence in the industry's ability to improve (1 to 5)	3.39	3.30 to 3.48
Felt support from NZTR (0 to 100)	54.6	52.4 to 56.8
% scoring felt support 40 or below	25.7%	22.2 to 29.6
Importance of traceability (1 to 5)	4.23	4.14 to 4.31
% placing responsibility with current owner in case study	67.7%	63.7 to 71.5
Behaviour change rated a reliable indicator (1 to 5)	4.35	4.27 to 4.43
Racing performance rated a reliable indicator (1 to 5)	2.86	2.75 to 2.97

Table A12. Baseline measures with 95% confidence intervals (n = 548 unless otherwise noted; the confidence in delivery measure is based on 493 respondents). A change of about 0.17 scale points or about 4.5 percentage points would be needed at re-measurement before a difference could be treated as reliable.

A.13 Scale reliability

Two combined scores were built and tested for internal consistency using Cronbach's alpha.

- Welfare framework familiarity, averaging the five familiarity items: alpha = 0.83, mean 3.27, SD 1.02. Good internal consistency, suitable for use as a single knowledge index at re-measurement.

- Behavioural indicator reliability, averaging behaviour change, restlessness, reduced eating and difficulty handling from the case study: alpha = 0.73. Acceptable for comparing groups.

Internal consistency shows that items behave similarly

A.14 Interaction tests

Two interaction hypotheses were tested and neither was supported.

- Whether perceived pressure relates to felt support differently across role groups. Adding the interaction did not improve model fit ($F = 1.39$, $df = 7$, $p = 0.209$). Pressure and support are related in the same way for every group.
- Whether framework familiarity relates to understanding of responsibilities differently across role groups. The interaction was not significant ($F = 1.57$, $df = 7$, $p = 0.141$).

The absence of interaction is useful for the strategy. It means group differences are differences in level rather than in the underlying relationships, so a single work programme design can work across groups provided it is pitched at the right starting level for each.

Appendix B. Free-text coding framework

Four ‘free text’ questions were coded using systematic keyword rules applied uniformly to all responses. Rules were developed by reading a random sample of responses for each question, then applied to the full set. A response can carry more than one theme. Percentages are of respondents who gave a substantive answer to that question, not of all 548.

This approach was chosen because it is fully repeatable: the same rules can be applied to the re-measurement dataset without coder drift, which manual coding cannot guarantee across a two year gap. Its limitation is that it under counts themes expressed in unusual wording, so theme percentages should be read as measures of relative prominence rather than as precise counts.

Question	Answered	Coding basis
What horse welfare means to you	548	Eleven themes, plus a classification of each definition as physical, mental or behavioural, both or neither
What would help trainers make the right call	450	Nine themes covering veterinary input, financial pressure, guidance, culture, second opinions, rider voice, programming, oversight and precaution
Welfare red flags regardless of performance	379	Nine themes covering appetite, temperament, demeanour, stereotypies, condition, work refusal, gait, physiological signs and appearance
What is missing from the 2026-2030 strategy	254	Eleven themes covering life after racing, people welfare, funding, enforcement, transparency, education, breeding, racing practice, end of life, grassroots participants and strategy credibility

Table B1. Open-text questions and coding coverage.

Full theme frequencies are reported in Tables 4, 7, 12 and 13 in the body of the report. Quotations used in this report are reproduced with minor spelling and punctuation correction, without altering meaning, and are attributed by role group only. No respondent is identifiable from any quotation.

Appendix C. Response profile summary

Characteristic	n	%	Note
Completed all closed questions	548	100%	
Answered open question on what welfare means	548	100%	
Answered open question on trainer decisions	450	82.1%	Optional questions
Described a welfare red flag	379	69.2%	Free text answer
Commented on strategy gaps	254	46.4%	Indepth analysis sent to NZTR Welfare Team
Volunteered for a follow up interview	228	41.6%	Recruitment pool for the qualitative phase
Provided an email address for the prize draw	451	82.3%	Randomised selection of winner. Winner has been notified.
Quality-flagged responses, retained	30	5.5%	Sensitivity checked, Appendix A.11
Median completion time	15.7 min		Mean 22.0 minutes

Table C1. Response and engagement summary (n = 548).

C.1 Data and materials (additional documentation)

- Cleaned response dataset with derived role groupings, combined scores and open-text theme codes.
- Role reassignment log recording the treatment of all 79 free-text role descriptions.
- Full statistical output for all tests reported, including results that were not significant.
- SurveyMonkey Survey Questions and Responses.
- Contact details of the 228 respondents who agreed to follow up, held separately from response data in line with the project's privacy commitments.

All data are held in accordance with the Privacy Act 2020 and the ethical commitments set out in the project proposal. Survey data are fully anonymised in all reporting, no individual participant is identifiable in any output, and responses are to be used only for strategy and evaluation purposes.