

2017 ONTARIO HORSE RACING INDUSTRY SURVEY



Survey Highlights

BACKGROUND

The 2016 *Ontario Horse Racing Industry Survey* was developed and administered by Equine Guelph and made possible through funding from the Ontario Ministry of Agriculture, Food & Rural Affairs (OMAFRA).

Equine Guelph called upon grooms, trainers, owners and other stakeholders in the racing industry to complete a first-of-its-kind survey on racehorse health and well-being. The purpose of receiving input from the industry is to direct future research, education/training programs and outreach efforts to maintain and improve racehorse health and well-being in Ontario. It is our hope that the feedback will help shape the future of racing in Ontario and the programs of Equine Guelph.

The goal of this extensive industry survey was to learn more about the current challenges facing the Ontario horse racing industry in all three sectors (Quarter Horse, Standardbred, Thoroughbred). More specifically, the survey explored: current racehorse health concerns (injuries and diseases of most concern), horsemanship and racehorse well-being including post racing opportunities, communications and training.

The survey consisted of 66 questions and contained special customized questions/sections that reflected differences between the Thoroughbred, Standardbred and Quarter Horse Racing sectors. These questions covered seven primary sections: 1. Respondent demographic characteristics, 2. General industry concerns, 3. Injuries, 4. Disease/Sickness, 5. Horse well-being/welfare, 6. Fire prevention/emergency preparedness and 7. Communication & training.

The survey was administered online to trainers, grooms and other industry groups through Equine Guelph's database of 5,500+, respective association groups (SC, HBPA, OHHA, COSA and QROOI) and face-to-face administration of the survey at racing and training facilities. Before the survey was developed, focus groups from the industry were conducted and provided feedback for survey questions.

Overall, a total of up to **654** responses were received and analyzed further, with **381 (58.3%)** of responses being complete surveys. This report presents a condensed summary of the survey results.

TOPLINE SUMMARY

- ❖ There was proportional representation of the three racing sectors with 72%, 21% and 7% of respondents from the Standardbred, Thoroughbred and Quarter Horse sectors respectively
- ❖ Nearly 60% of respondents reported sickness as the number one most common reason their horses perform poorly in races
- ❖ Top three health issues of concern to the racehorse industry are: #1 – respiratory issues, #2 – injuries, #3 – gut issues
- ❖ Over 70% of respondents agreed that the industry would benefit from education/training opportunities for both grooms and trainers
- ❖ There is overall consensus that the industry needs to be better prepared for emergencies
- ❖ Over 2/3's of respondents would consider taking an online course to learn more about racehorse care and management
- ❖ 72% reported not having taken any formal training for their current role
- ❖ Lower legs and knees appear to be the most common locations of injuries across all three sectors
- ❖ Overall, track maintenance/conditioning, track surface and undetected lameness were viewed as some of the most important factors for increasing the risk of injuries
- ❖ Majority of respondents feel there should be more funding for options for retired racehorses (existing programs, retraining for second careers and adoption programs)

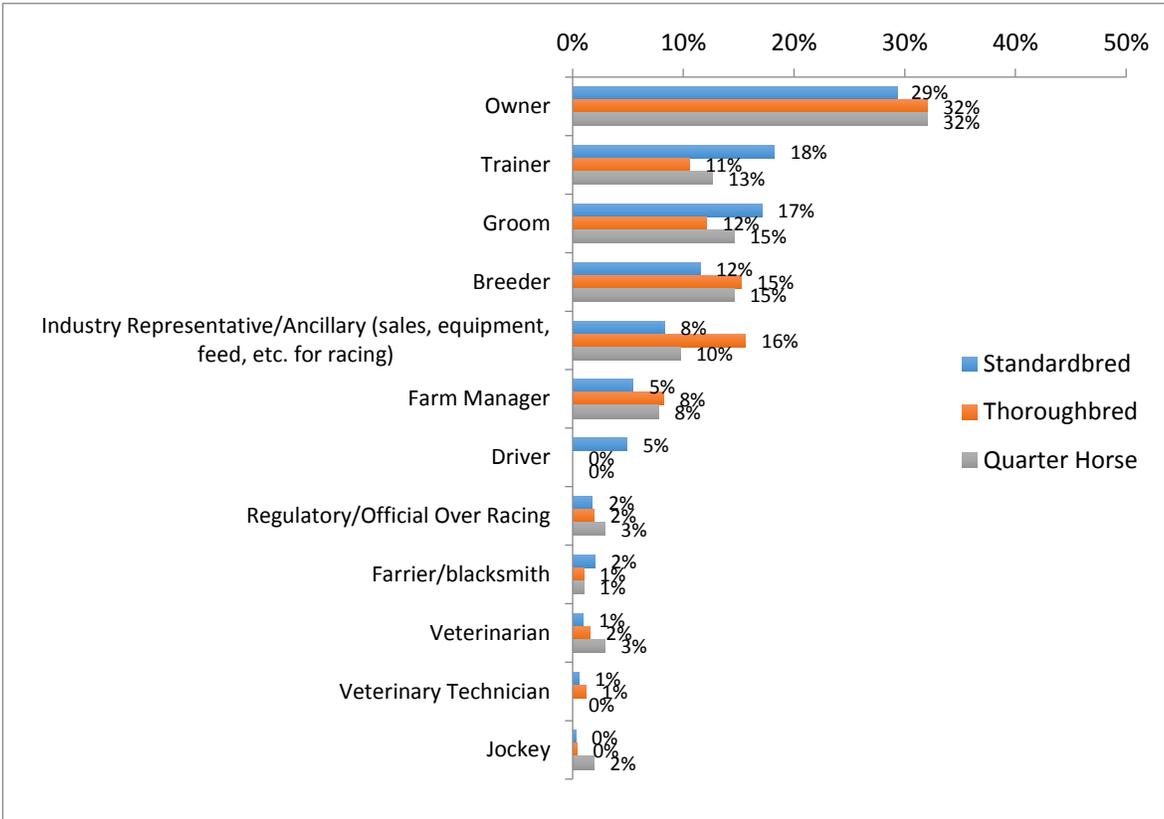
Section 1: Who responded to the survey?

❖ Primary Racing Sector:

Approximately **72%** of respondents reported being primarily involved in the Standardbred sector, while approximately **21%** were in the Thoroughbred sector and **7%** in the Quarter Horse sector.

Sector	# (%)
Standardbred	435 (66.5)
Thoroughbred	112 (17.1)
Standardbred & Thoroughbred	43 (6.6)
Quarter Horse	32 (4.9)
Standardbred & Quarter Horse	16 (2.4)
Standardbred, Thoroughbred, & Quarter Horse	12 (1.8)
Thoroughbred & Quarter Horse	4 (0.6)
Total	654

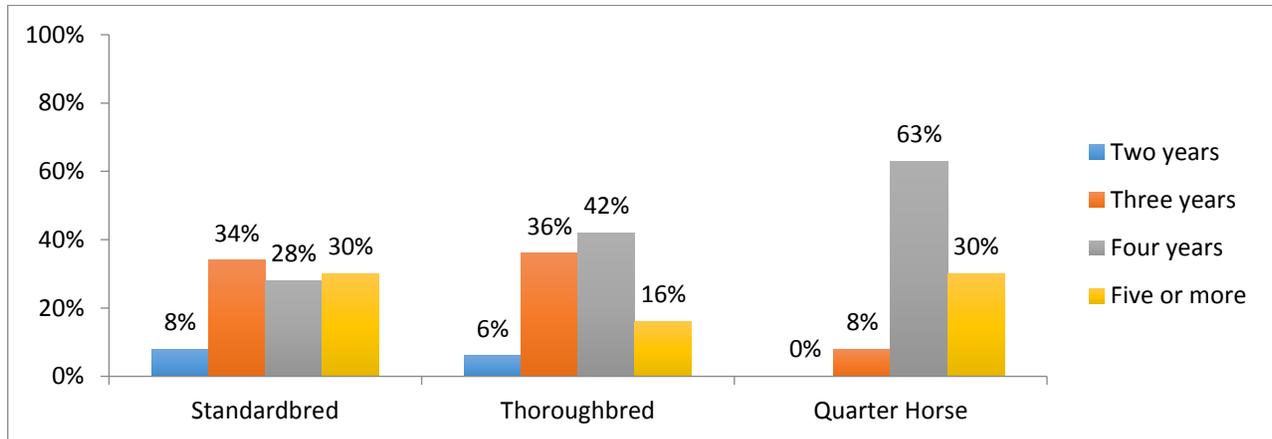
❖ Current Role in Industry:



❖ **Gender:**

Standardbred had more male respondents (59%), while Thoroughbred had more female respondents (58%). Interestingly, the vast majority (74%) of Quarter Horse respondents were female.

❖ **Average Age of Horses:**



Section 2: General Concerns

❖ **Top three most common issues causing racehorses to perform poorly:**

Nearly 60% of respondents reported sickness as the number one most common reason their horses perform poorly in races. This was followed by lameness/soundness issues and track surface/condition.

Issue	Frequency # (%)		
	STB	TB	QH
Sickness / virus / flu	136 (41.4)	75 (76.5)	18 (56.3)
Lameness / soundness	122 (37.1)	55 (56.1)	13 (40.6)
Track surface / condition	119 (36.2)	42 (42.9)	9 (28.1)

❖ **Top three health issues of concern to the racehorse industry:**

#1 – respiratory issues

#2 – injuries

#3 – gut issues

❖ ***“The industry would benefit from education/training opportunities for grooms.”***

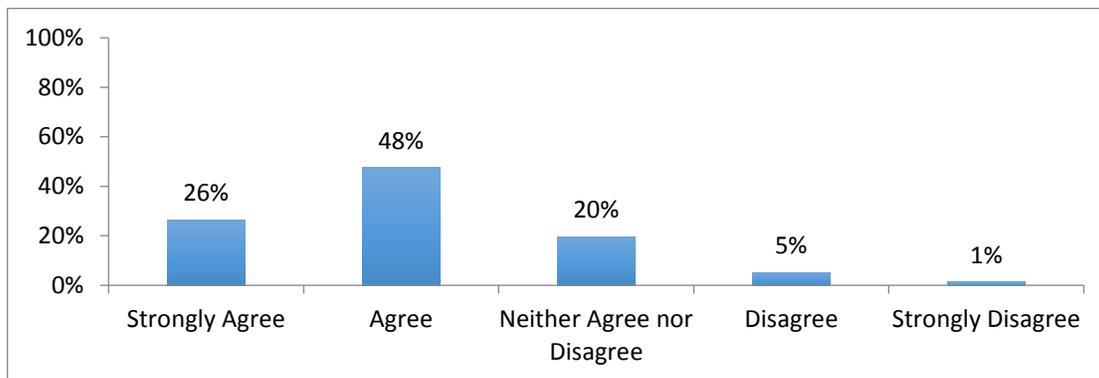
Nearly ¾ of respondents (73%) ‘agreed’ or ‘strongly agreed’ that the industry would benefit from education/training opportunities for grooms.

❖ ***“The general well-being of racehorses is excellent.”***

Overall **58%** of respondents ‘agreed’ or ‘strongly agreed’ with this statement, while another **26%** of respondents felt neutral. Importantly, this statement is particularly strong. Interestingly, responses to this question did not significantly differ by sector or other relevant demographic characteristics.

❖ ***“The industry would benefit from education/training opportunities for trainers.”***

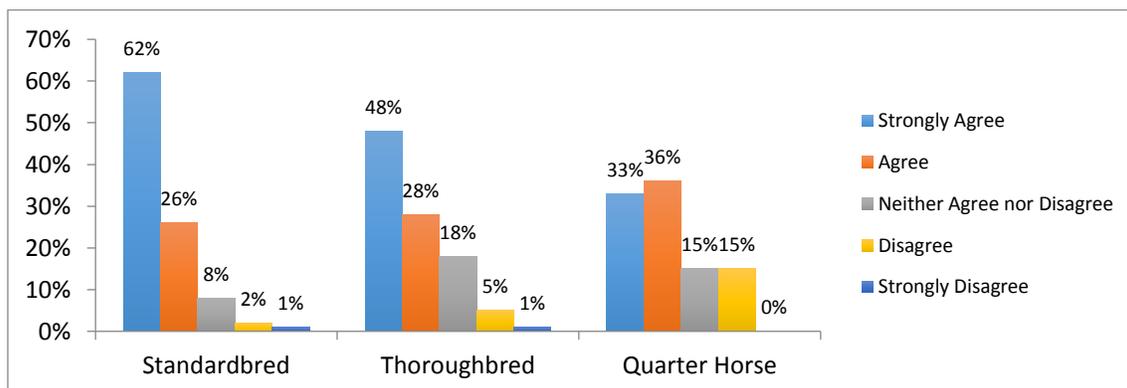
70% of respondents ‘agreed’ or ‘strongly agreed’ that the industry would benefit from education/training opportunities for trainers.



Nearly ¾ of respondents (73%) ‘agreed’ or ‘strongly agreed’ that the industry would benefit from education/training opportunities for grooms. Another 21% of respondents felt neutral about this, suggesting that while they may perhaps be content with the level of education/training opportunities that currently exist for grooms, they may not oppose and/or see the potential benefit in have more opportunities available. Interestingly, 73%, 72% and 65% of grooms, owners and trainers ‘agreed’ or ‘strongly’ agreed’ with this statement. Importantly, responses to this question did not significantly differ by sector or other relevant demographic characteristics.

❖ ***“The racing industry doesn’t do enough marketing/promotion.”***

Overall, while all sectors appear to agree with this statement, clearly the Standardbred industry has particularly strong feelings about the need for more marketing/promotion.



❖ ***“The industry needs to be better prepared for emergencies.”***

Overall, 57% of respondents agreed that the industry needs to be better prepared. Respondent answers to this statement significantly differed by sector. Interestingly, Standardbred respondents were in strong agreement with this statement, with **88%** ‘agreeing’ or ‘strongly agreeing’; with the majority of this ‘strongly agreeing’ (**62%** of all Standardbred respondents). This was significantly higher than that of the other two sectors where **76%** and **69%** of Thoroughbred and Quarter Horse respondents, respectively, ‘agreed’ or ‘strongly agreed’ with this statement.

Section 3: Injuries

❖ **Most common types of injuries:**

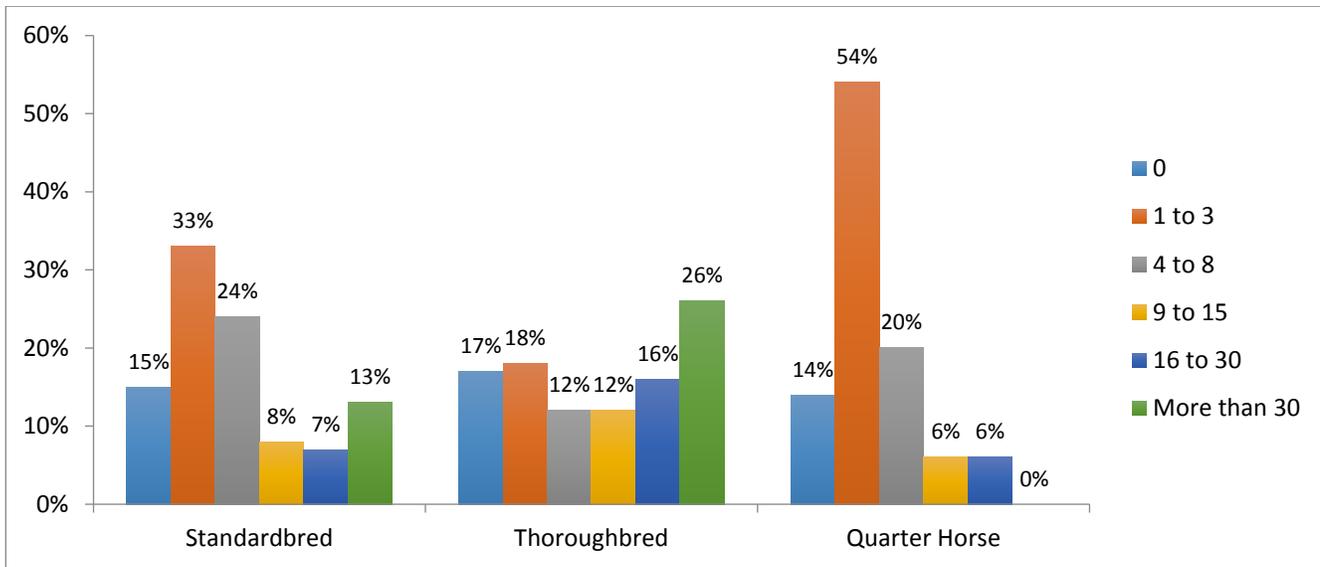
Generally, soft-tissue injuries appear to be most common form of injuries, with Standardbred and Thoroughbred sectors listing it as most common, and Quarter Horse respondents ranking it second overall.

Rank	Standardbred	Thoroughbred	Quarter Horse
1	Soft-tissue injuries (e.g. bowed tendons, suspensory ligaments)	Soft-tissue injuries (e.g. bowed tendons, suspensory ligaments)	Bone injuries (e.g. fractures, bucked shins, splints)
2	Hoof injuries (e.g. hoof/quarter cracks, abscesses, torn hoof wall)	Bone injuries (e.g. fractures, bucked shins, splints)	Soft-tissue injuries (e.g. bowed tendons, suspensory ligaments)
3	Bone injuries (e.g. fractures, bucked shins, splints)	Hoof injuries (e.g. hoof/quarter cracks, abscesses, torn hoof wall)	Joint issues (e.g. arthritis, sprains, bones out of joint (disarticulation))
4	Joint issues (e.g. arthritis, sprains, bones out of joint (disarticulation))	Joint issues (e.g. arthritis, sprains, bones out of joint (disarticulation))	Hoof injuries (e.g. hoof/quarter cracks, abscesses, torn hoof wall)
5	Muscle damage (e.g. cramps, tears)	Muscle damage (e.g. cramps, tears)	Muscle damage (e.g. cramps, tears)

❖ **Most common locations of injuries:**

Overall, lower legs and knees appear to be the most common locations of injuries across all three sectors. Lower leg injuries were seen as most common among Standardbred and Thoroughbred respondents, and second most common among Quarter Horse respondents.

❖ **Number of race days missed due to injuries:**



❖ **Importance of factors in increasing the risk of injuries:**

Overall, track maintenance/conditioning, track surface and undetected lameness were viewed as some of the most important factors for increasing the risk of injuries, with more than 90% of respondents viewing these as ‘important’ or ‘very important’. Response did not vary significantly by sector or demographic characteristics.

#1 – track maintenance/conditioning – **97%**

#2 – track surface (e.g., dirt, crushed stone, etc.) – **96%**

#3 – not recognizing lameness – **93%**

Section 4: Disease & Sickness

❖ **Top diseases/sicknesses most commonly encountered:**

Disease/Sickness	Frequency # (%)
Cold / virus / flu	284 (99.3)
Bleeding / EPM	92 (32.2)
Allergies	73 (25.5)
Tying up	51 (17.8)
Ulcers	50 (17.5)
Colic	48 (16.8)

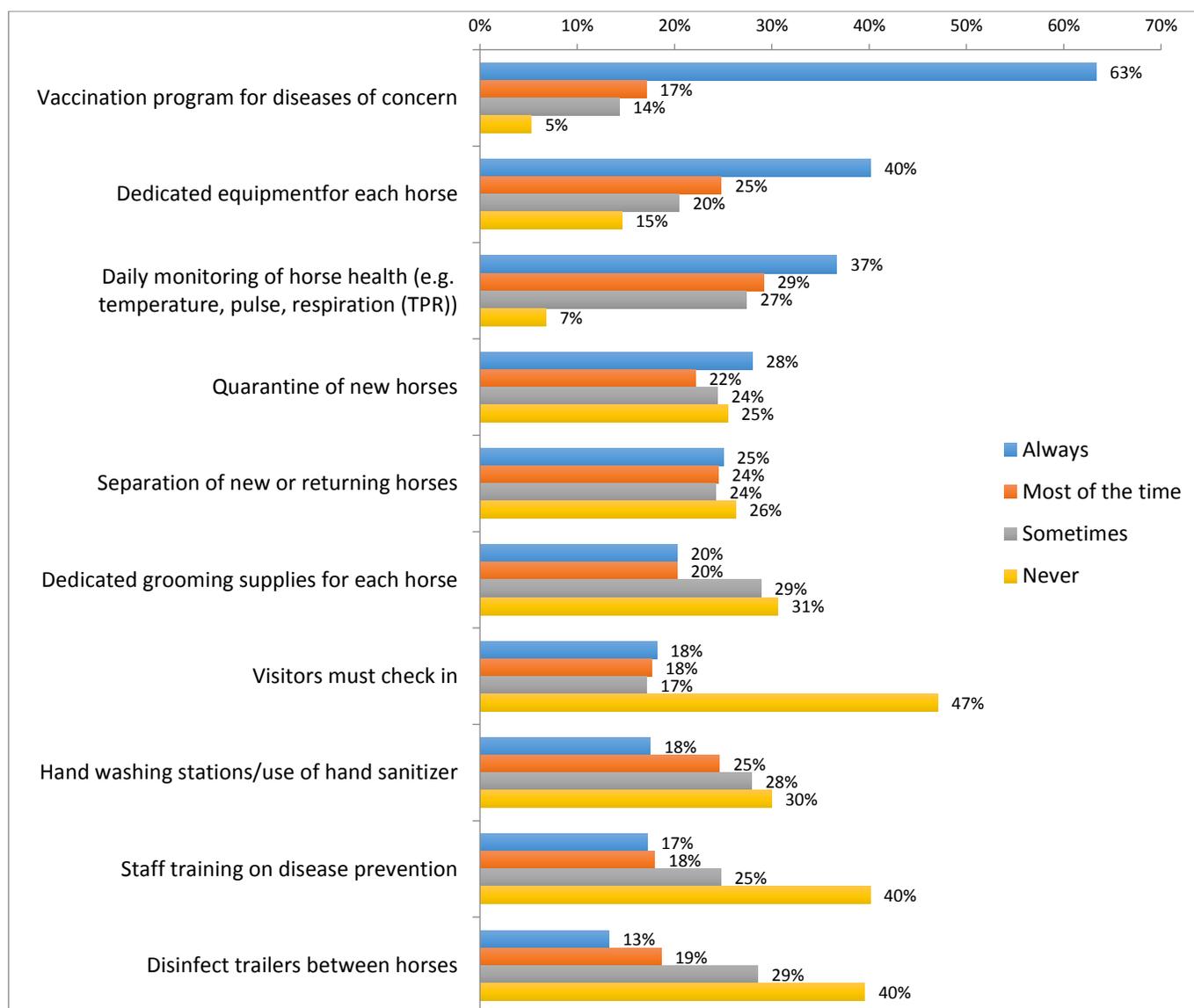
❖ **Frequency of performing management practices for disease prevention at at the racetrack:**

No sharing of grooming supplies with people from other stables was the most commonly performed management practice for disease prevention while at the racetrack, with **59%** of respondents reporting ‘always’ doing so, with another **16%** doing this ‘most of the time’. Importantly, disinfecting stalls before use and/or disinfecting cross ties before use were the two most infrequently performed management practices, with **47%** and **58%** of respondents indicating they ‘never’ perform this practice. This is particularly important given the potential risk that stalls and cross ties pose with respect to transmission of bacterial pathogens.

❖ **Race days missed due to disease/sickness:**

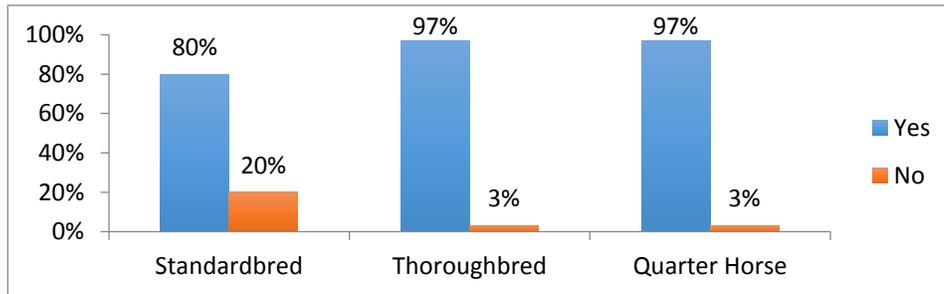
Interestingly, **84%** of Quarter Horse respondents reported having missed three or fewer race days in the past 12 months due to disease/sickness. This proportion was significantly higher than that of Standardbred and Thoroughbred respondents, **49%** and **46%** of which reported missing the same number of days, respectively.

❖ **Frequency of performing the following management practices for disease prevention at home stable:**

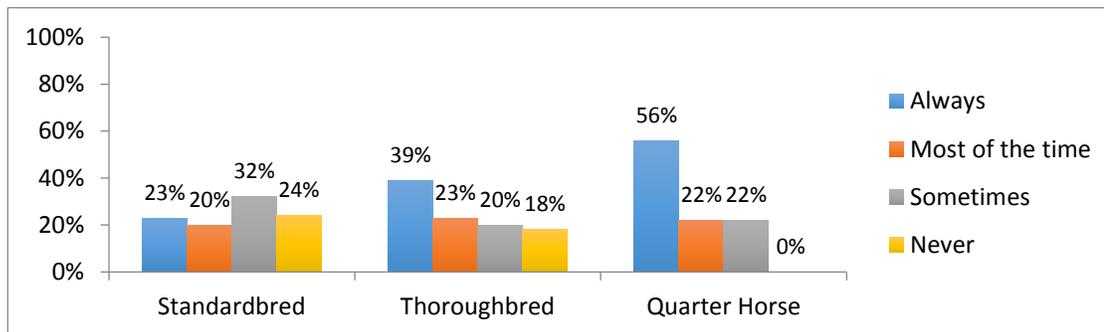


Having a vaccination program for diseases of concern was the most commonly performed management practice for disease prevention at respondents' home stables, with 63% reporting that they 'always' perform this practice. Having dedicated equipment for each horse, daily monitoring of horse health and quarantining new horses were also fairly commonly performed, with 65%, 66% and 50% of respondents reporting they perform these 'always' or 'most of the time'. Interestingly, some easy to implement practices, such as hand washing stations/use of hand sanitizer, staff training on disease prevention and disinfecting trailers were some of the most infrequently performed practices. No significant differences were observed by sector or relevant demographic characteristics.

❖ **% that vaccinate:**

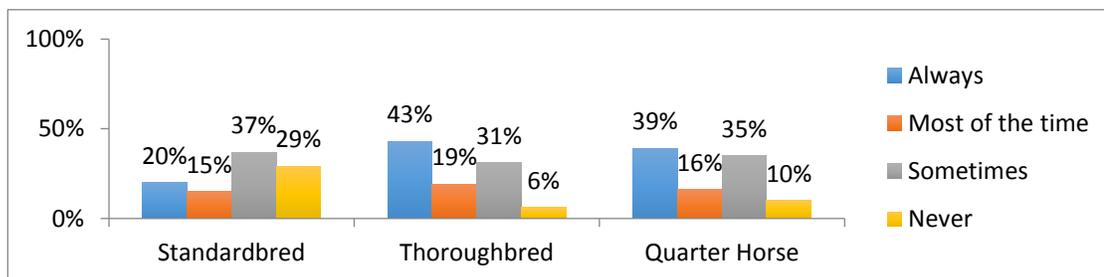


❖ **% that put new horses in stalls away from other horses for 48 hours:**



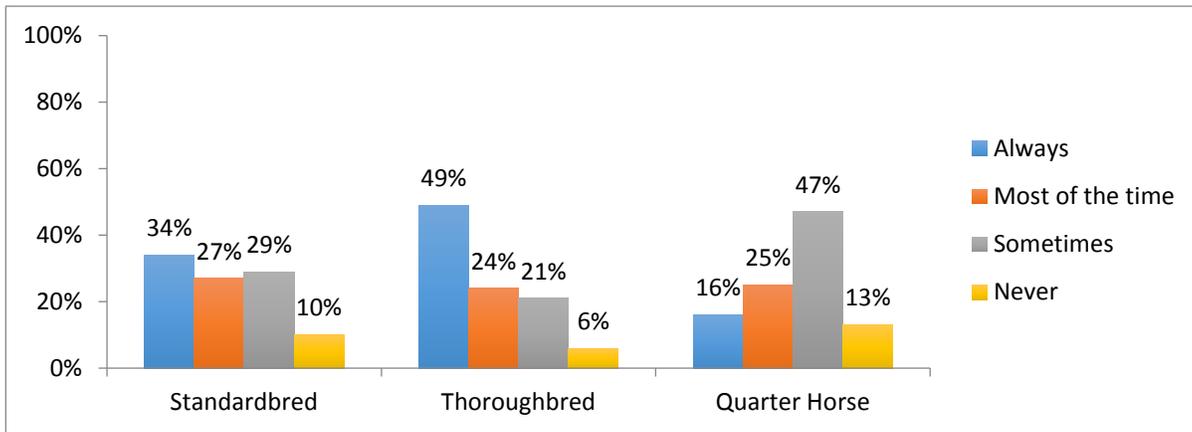
Significant differences were observed by sector for this question. Similar to previous questions, a significantly lower proportion of Standardbred respondents (20%) reported 'always' administering any vaccines to new horses, as compared to Thoroughbred (43%) and Quarter Horse respondents (39%).

❖ **% that administer any vaccines to the new horses:**



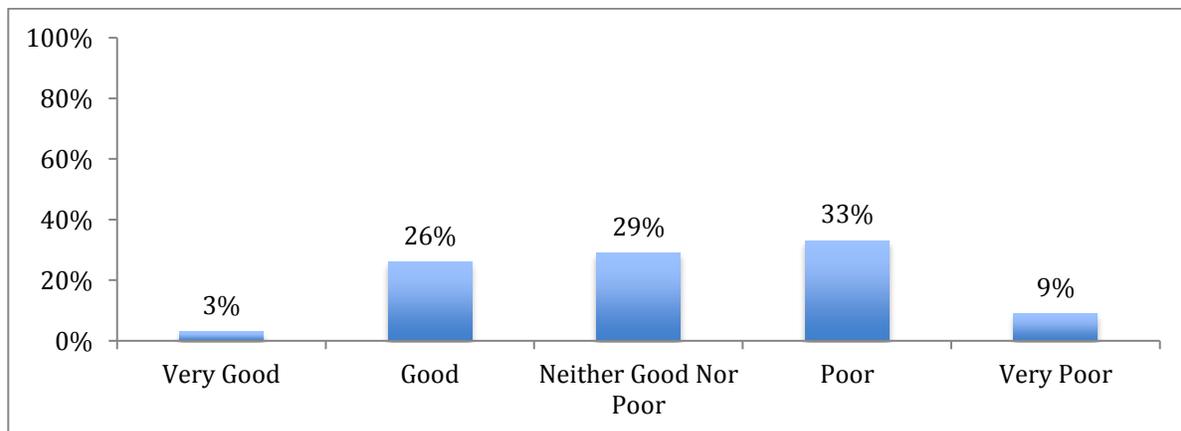
Significant differences were observed by sector for this question. Similar to previous questions, a significantly lower proportion of Standardbred respondents (20%) reported 'always' administering any vaccines to new horses, as compared to Thoroughbred (43%) and Quarter Horse respondents (39%).

❖ Perform daily health checks (e.g., take temperatures):



Section 5: Racehorse Well-Being

❖ Rating the perception of the general public about the well-being of racehorses:

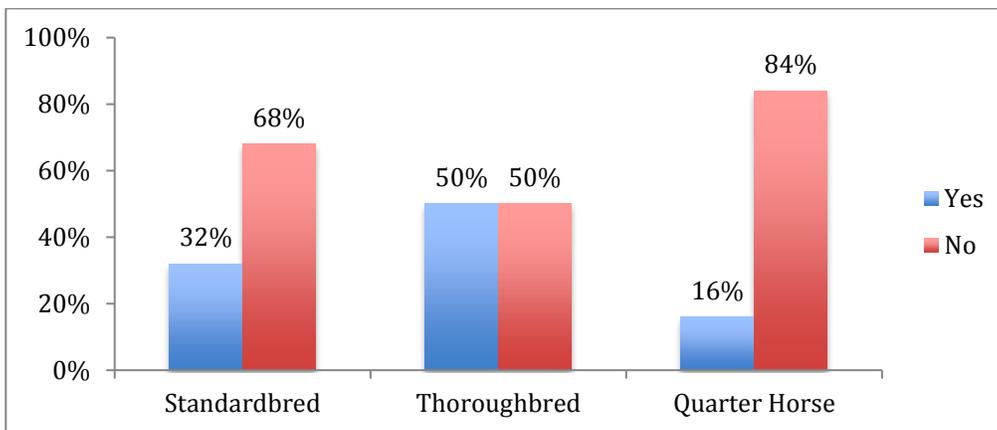


Overall, only 29% of respondents reported feeling that the public perception of the well-being of racehorses is 'good' or 'very good'. While 29% reported feeling the public perception might be neutral, 42% of respondents viewed the public perception as being 'poor' or 'very poor'. Importantly, responses to this question did not significantly differ by sector or other relevant demographic characteristics. Over 90% of respondents were concerned about the overall public perception of horse racing.

❖ Top options/programs that the Ontario racing industry should consider for retired racehorses:

- #1 – More funding for existing programs (32.3%)
- #2 – Retraining for pleasure riding (26.7%)
- #3 – Adoption / placement farm (26.7%)

❖ **Have donated a racehorse to a retirement/re-homing group in the past:**



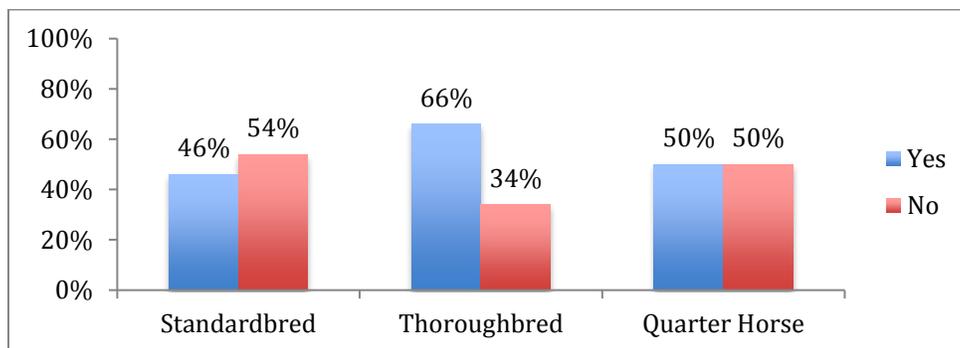
Approximately 96% of respondents agreed that a retirement/re-homing program is a good solution.

❖ **Top 3 areas of research which are deemed a priority by the respondents:**

Area	Frequency # (%)
Injury prevention	103 (34.8)
Training (conditioning for racing)	54 (18.2)
Nutrition	27 (9.1)

Section 6: Fire Prevention & Emergency Response

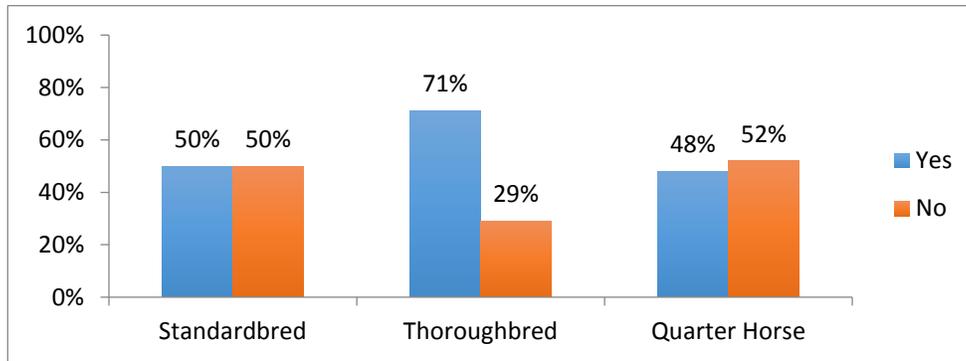
❖ **% that has an emergency response plan for stable/farm:**



❖ **% that has an emergency kit for stable/farm:**

Approximately **73%** of respondents reported having an emergency kit for their stable/farm. As a result, it appears that unlike having an emergency response plan, having an emergency kit for the stable/farm is relatively commonplace and not linked to prior training or sector.

❖ **% having an evacuation plan for stable/farm:**



❖ **Received training on Fire Safety/Prevention:**

Approximately **53%** of respondents reported having received fire safety/prevention training in the past. Those with training on emergency protocols were significantly more likely to have an emergency response plan and an evacuation plan, therefore prior training has an impact on emergency preparedness.

❖ **Emergency Protocols:**

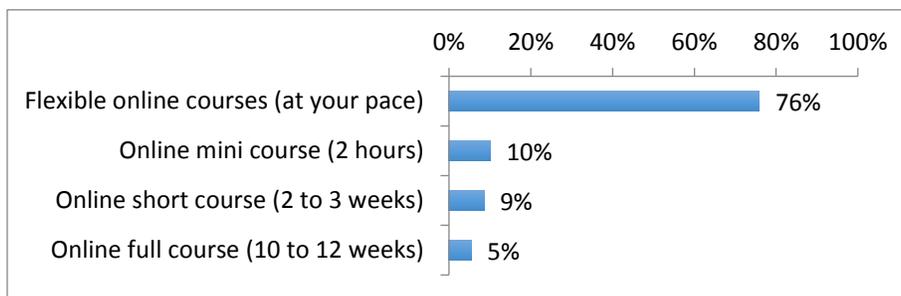
- ✓ Approximately **43%** of respondents reported having received training on emergency protocols in the past.
- ✓ Over **70%** have an emergency kit for their stable/farm.
- ✓ Only **26%** have made a change within the past year for fire safety/prevention.
- ✓ Over **90%** felt a fire prevention walk-through by fire department was useful for motivating changes for fire prevention, but a variety of approaches for training methods was needed.

Section 7: Communications & Training

❖ **Would you consider taking an online course to learn more about racehorse care and management?**

Approximately **70%** of respondents answered ‘yes’, indicating they would consider taking an online course to learn more about racehorse care and management. Importantly, responses to this question did not significantly differ by sector or by age.

❖ **Most appealing type of online course:**



❖ **Importance of racing-related courses/programs for success in the racing industry:**

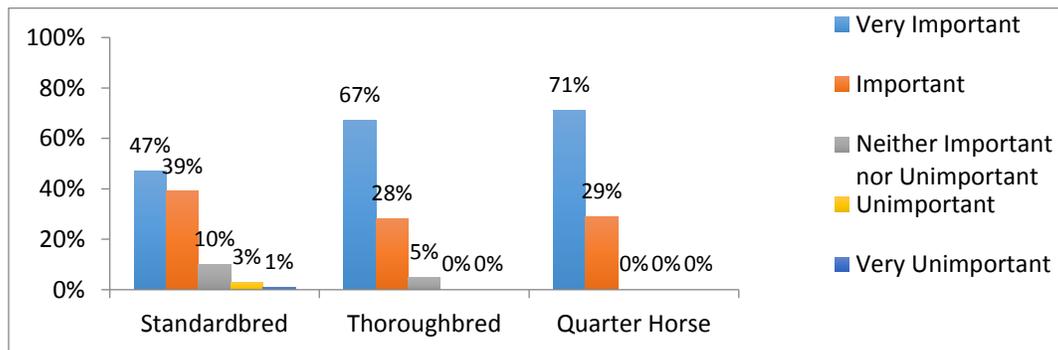
The majority of respondents acknowledged the importance of racing-related courses/programs with **60%** reporting they are ‘important’ or ‘very important’ in helping them succeed. Course flexibility is a critical factor.

❖ **Top topics respondents would like to learn more about with respect to racehorse health and management:**

Topic	Rank Order
Injury prevention	1
Genetics	2
Breeding management	3
Conditioning programs/exercise physiology	4
Equine nutrition	5
Fire prevention/risk reduction	6

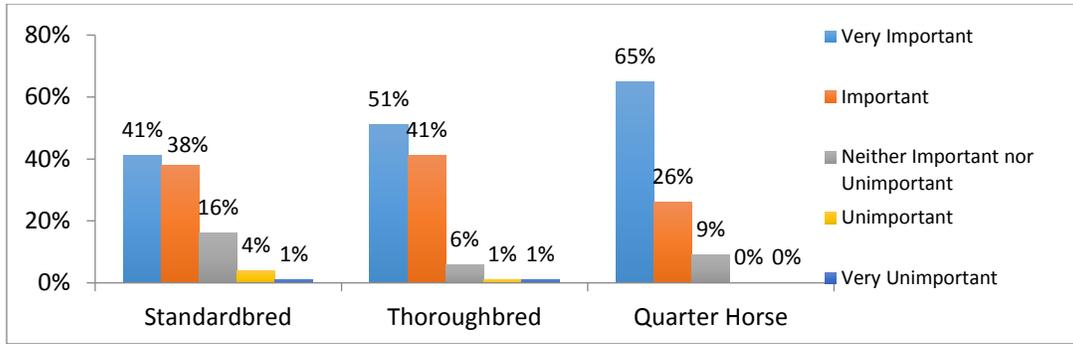
Other top responses included stable management, health & disease and business management.

❖ **Importance of grooms having training/educational opportunities available to them:**



Approximately 70% of respondents indicated they would favour a formal apprenticeship for grooms. Preferred months for courses were January and February.

❖ **Importance of trainers having training/educational opportunities available to them:**



The predominant feeling amount respondents is that it is important for trainers to have training/educational opportunities available.

❖ **Importance of industry training:**

Over **70%** of respondents support the concept of training programs linked to licensing for grooms and trainers.

Overall, **91%** of respondents reported that they have heard about Equine Guelph and 68% indicated interest in receiving e-mail newsletters from Equine Guelph specific to racing.