



# Status of Equine Veterinary Practices Involved in the Horse Racing Segment of the New Jersey Equine Industry

Prepared By:  
Dr. Karyn Malinowski & Ellen M. Rankins

## **Status of Equine Veterinary Practices Involved in Horseracing**

In the fall of 2018, the New Jersey Association of Equine Practitioners (NJAEPP) conducted a survey of its membership to assess the impact of recent changes in the horseracing segment of the equine industry on veterinary practices involved with horseracing and the breeding of racehorses. Fifty-one of the 105 licensed equine veterinarians in the state of New Jersey responded to the survey for a response rate of 49%. Of those who responded, 55% indicated they are not involved in the New Jersey horseracing industry as a veterinarian.

The remaining respondents were involved in the Thoroughbred (6%), Standardbred (18%), or both the Thoroughbred and Standardbred (21%) racing segments of the New Jersey equine industry (Figure 1). The percentage of the veterinary practice which involves clients from the horseracing segment of the horse industry ranged from 0-10% (4%) to 81-100% (52%) (Figure 2). Seventy-four percent of those practices involved in horseracing responded that horseracing clients were responsible for 61-100 % of their business. Displayed in Figure 3 are changes in staff number and total revenue for the veterinary practice as impacted by the racehorse segment of the equine industry over the past five years. Forty-four percent of veterinary practices decreased staff number over the past five years because of changes in the horseracing industry. Seventeen percent had no change in staff and the remaining 39% had an increase in staff over the past five years because of the horseracing industry.

Regarding revenue, forty-eight percent of veterinary practices saw a decrease in revenue over the past five years because of the horseracing industry. Twenty-two percent saw no change in revenue and the remaining 30% had an increase in revenue over the past five years because of the horseracing industry. Of the veterinary practices experiencing a decrease in total practice revenue over the past five years, 9% reported a 0-10% decrease in total revenue, 13% reported a 11-20% decrease in total revenue, and 22% reported a 21-30% decrease in total revenue (Figure 4). Practices reporting an increase in total veterinary practice revenue over the past five years indicated the percent increase ranged from 0-10% (9%) to 21-30% (4%) (Figure 5).

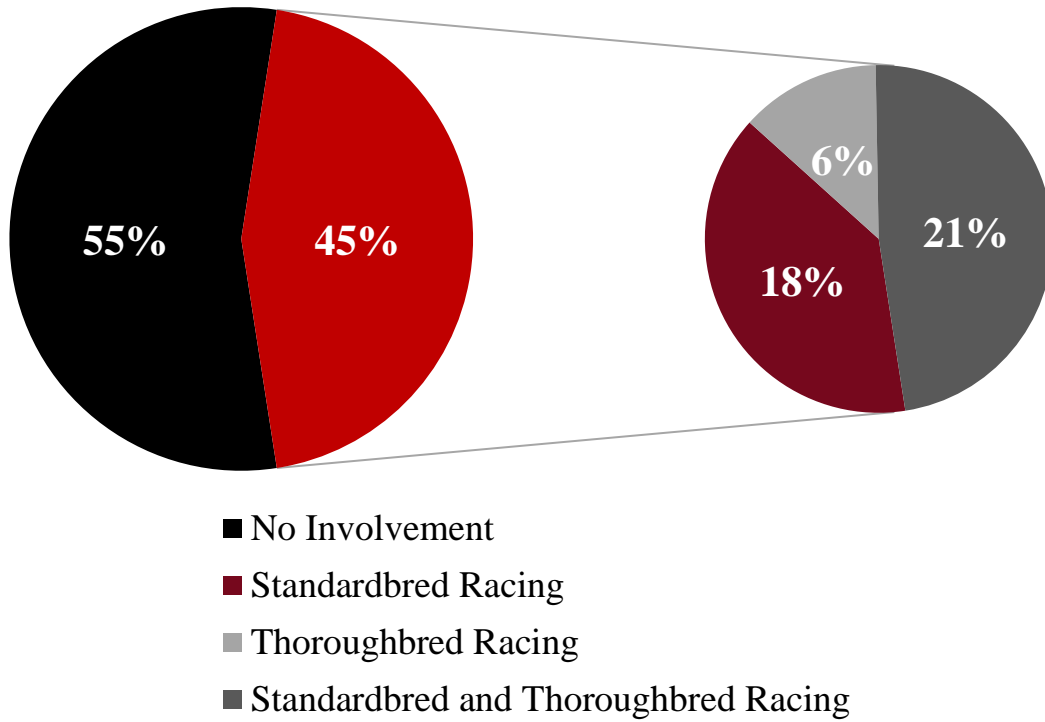
Taken together these results may suggest veterinary practices supporting the racehorse segment of the New Jersey equine industry have not been negatively impacted by the decline in

the racehorse segment of the industry. This impression quickly changes as the veterinary practices involved in the breeding of racehorses and its associated components are investigated. Fifty-two percent of the veterinarians involved in the racehorse segment of the equine industry were not involved in the breeding of racehorses and its associated components in their respective practices; while 48% indicated they were involved (Figure 6). Those involved in racehorse breeding and its associated components indicated veterinary practice revenue had either not changed (9%) or decreased (91%) due to changes in the racehorse sector of the New Jersey equine industry over the past five years (Figure 7). The degree to which practice revenue derived from racehorse breeding and its associated components decreased ranged from 0-10% (18%) to 81-90% (9%) (Figure 8). These data suggest veterinary practices involved in racehorse breeding and its associated components have been negatively impacted by the decline in the racehorse segment of the New Jersey equine industry.

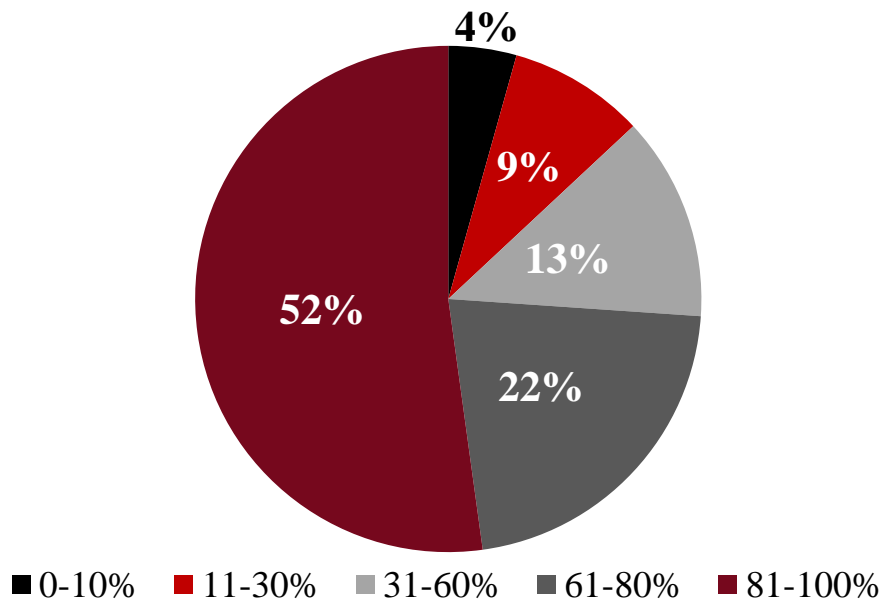
The white paper published by the Rutgers Equine Science Center in 2014 demonstrated that New Jersey racehorse owners, trainers and breeders had been hit hard by the cessation of the purse enhancement awards in 2010 and by competition from breeder incentive structures that exist in neighboring states where racing is supported by alternative gaming. A sustainable horse racing industry provides adequate breeder incentive awards and races restricted for horses bred in-state that then result in increased numbers of stallions standing, mares bred, foals born, and yearlings registered. This assurance results in increased willingness of horse and horse farm owners to invest in land, facilities, animals and other agriculturally-related products.

In 2014, the Rutgers Equine Science Center reported that equine operations represent a small and declining share of New Jersey's preserved farms, which means that their acres cannot be protected by deed restriction alone. In addition, racehorse breeding operations in the state's preservation program were being sold at a disproportionately high rate. While changes in New Jersey's racehorse population has not yet negatively impacted equine practitioners who treat horses that are actively racing, the results of this survey clearly demonstrate that equine practitioners involved in the breeding of racehorses and its associated components have been negatively impacted by the reduction of numbers of racehorse foals being produced in New Jersey.

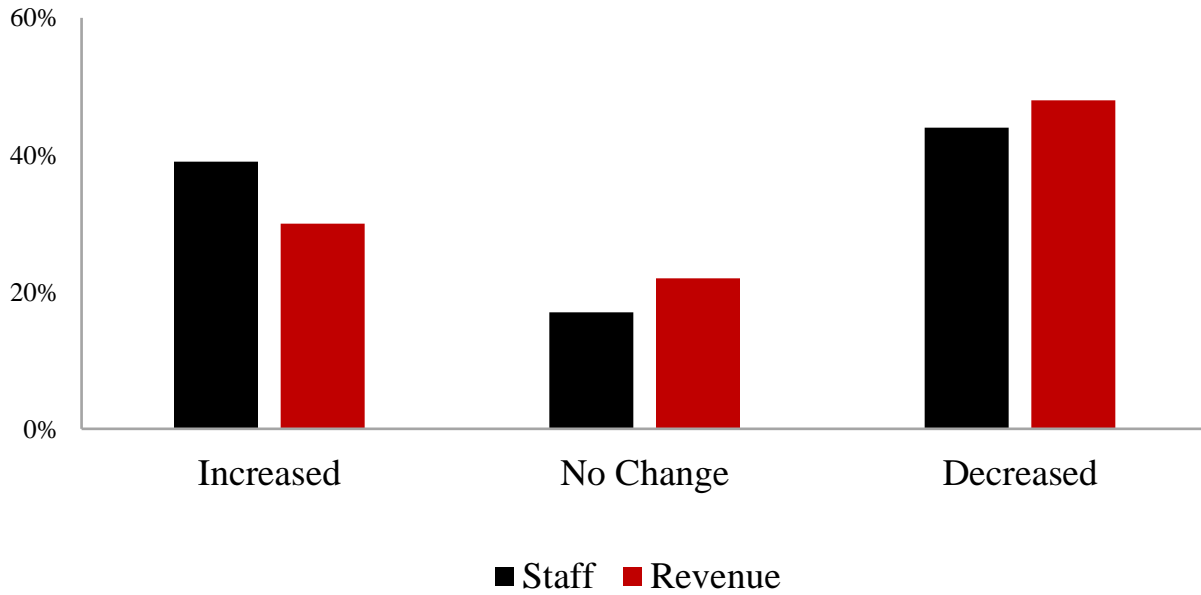
**Figure 1. Percentage of veterinarians in New Jersey who are involved in the horseracing segment of the New Jersey horse industry as a veterinarian.**



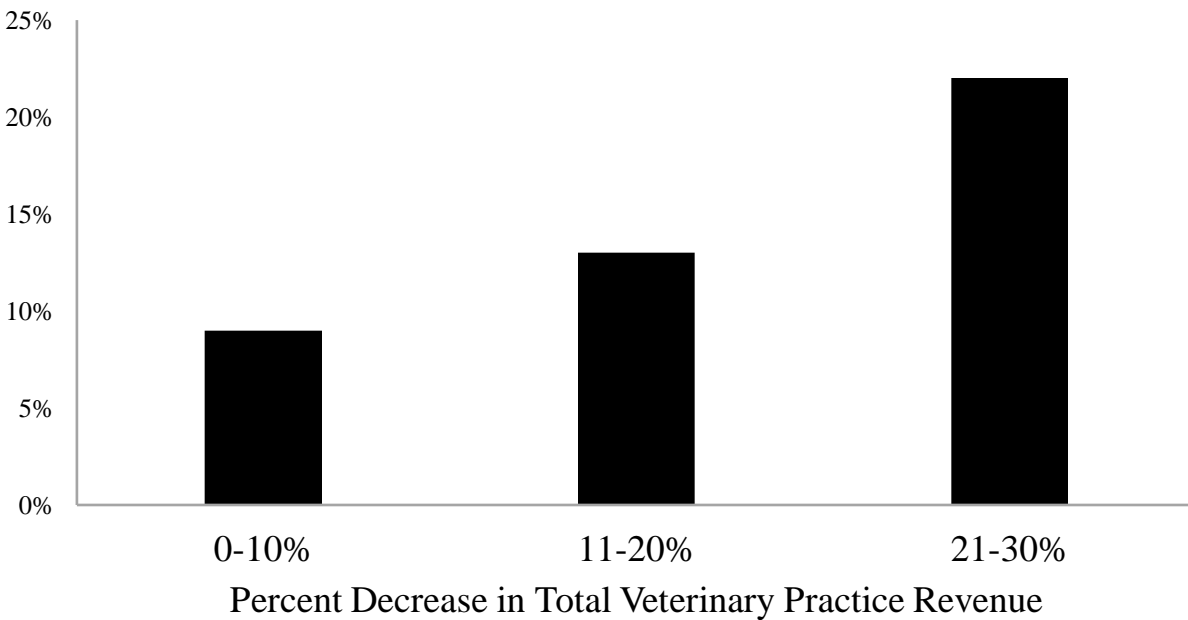
**Figure 2. Percentage of the veterinary practice which involves clients from the horseracing segment of the New Jersey equine industry.**



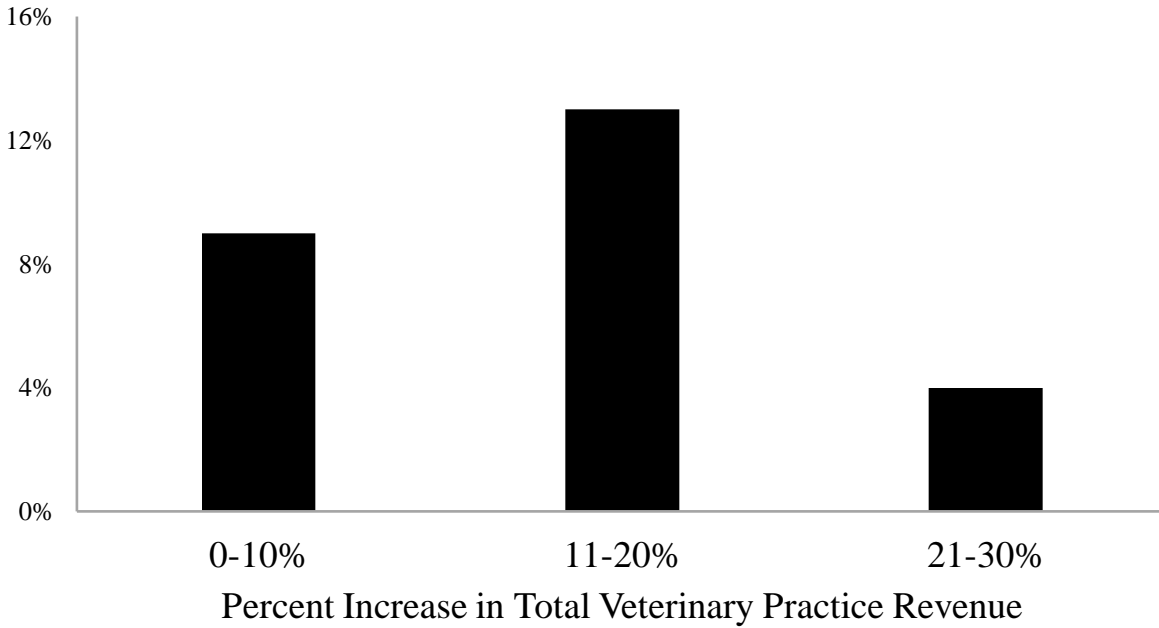
**Figure 3. Impact of changes on veterinary practice staff and total revenue over the past five years within the horseracing segment of the New Jersey equine industry.**



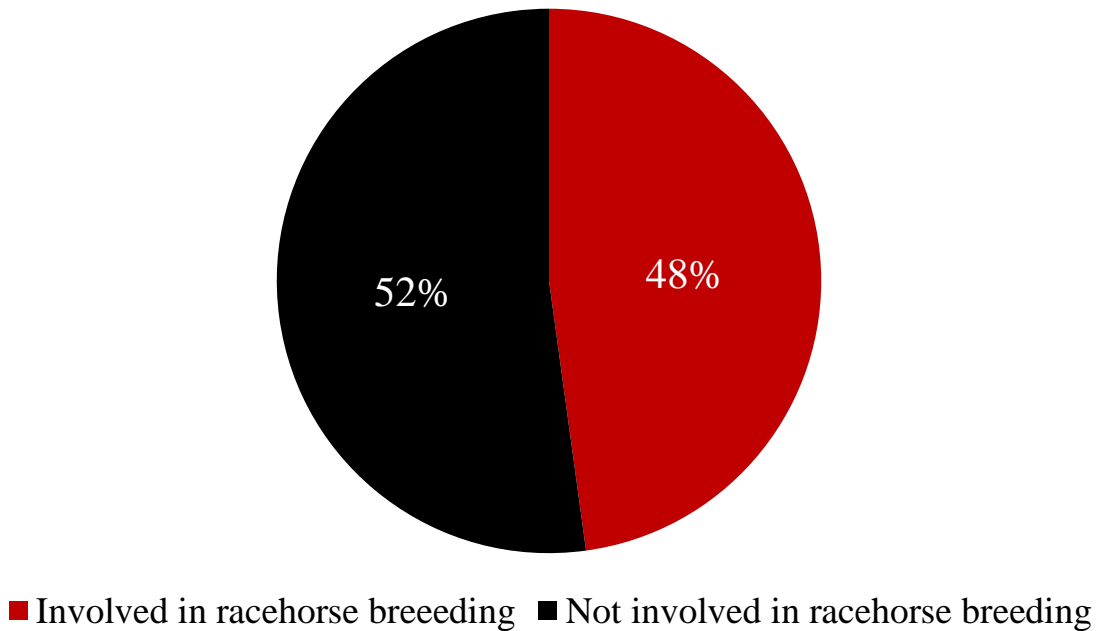
**Figure 4. Percentage of veterinary practices experiencing a decrease in total veterinary practice revenue due to changes in the horseracing segment of the New Jersey equine industry over the past five years.**



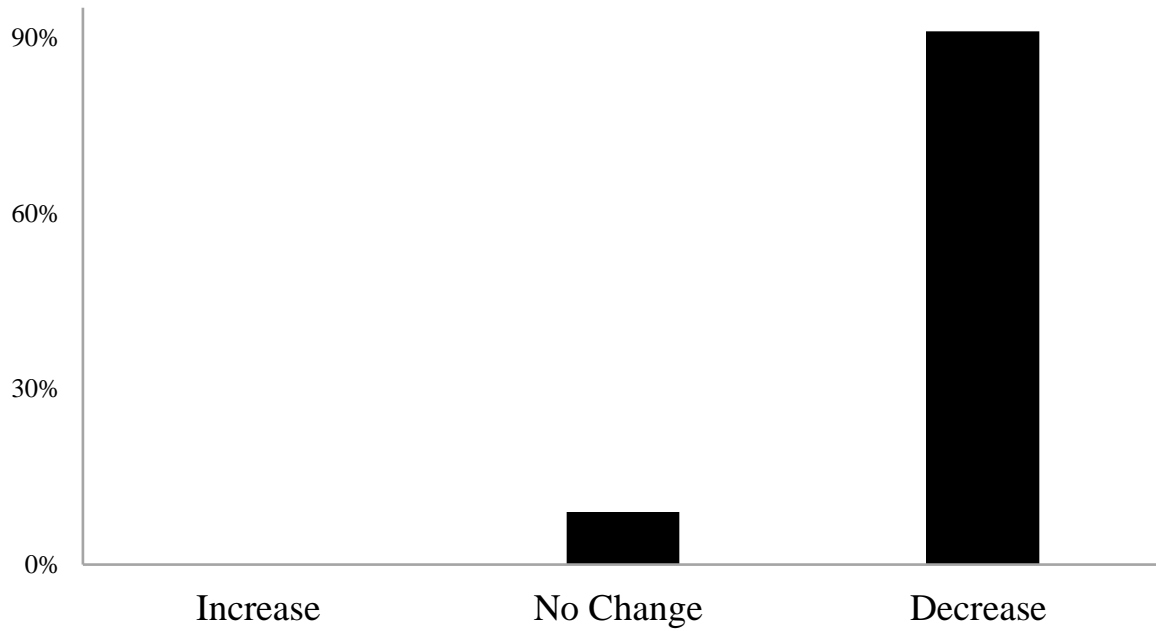
**Figure 5. Percentage of veterinary practices experiencing an increase in total veterinary practice revenue due to changes in the horseracing segment of the New Jersey equine industry over the past five years.**



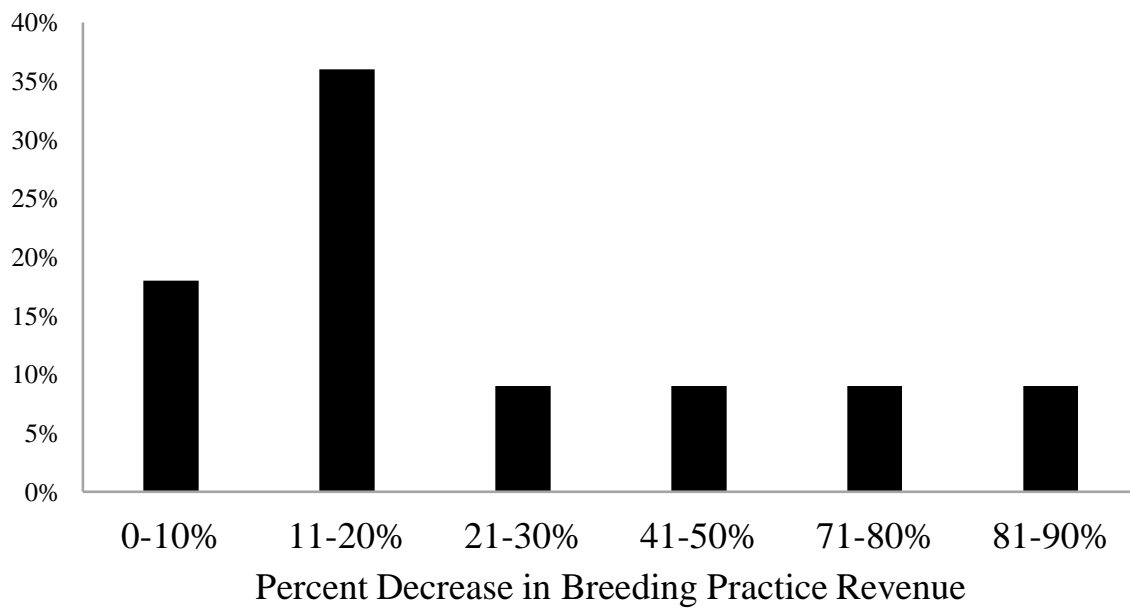
**Figure 6. Percentage of veterinarians involved in the racehorse segment of the New Jersey equine industry who are engaged in racehorse breeding and its associated components.**



**Figure 7. Impact of changes on veterinary practice revenue from New Jersey racehorse breeding and its associated components.**



**Figure 8. Percentage of veterinary practices experiencing a decrease in veterinary practice revenue from racehorse breeding and its associated components over the past 5 years due to changes in the horseracing segment of the New Jersey equine industry.**



### **About Rutgers Equine Science Center**

The Equine Science Center is a unit of the New Jersey Agricultural Experiment Station at Rutgers, The State University of New Jersey. Its mission is “Better Horse Care through Research and Education” in order to advance the well-being and performance of horses and the equine industry. Its vision is to be recognized throughout New Jersey as well as nationally and internationally for its achievements in identifying issues in the horse industry, finding solutions through science-based inquiry, providing answers to the horse industry and to horse owners, and influencing public policy to ensure the viability of the horse industry.