

# Decade of change - courage to change due to megatrends of the future



(1)

## Two years and many changes ago ...

horsefuturepanel.präsentation  
Uelzener Pferdeworkshop 2020

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### Dekade der Umbrüche



Mut zu Veränderungen

Dr. Christina Münch

HORSE  
FUTURE  
PANEL

# About the WBFSH

Welcome to the World of Sport Horse Breeding. Together we are Leading  
Breeding into the Future

into the Future

into the Future

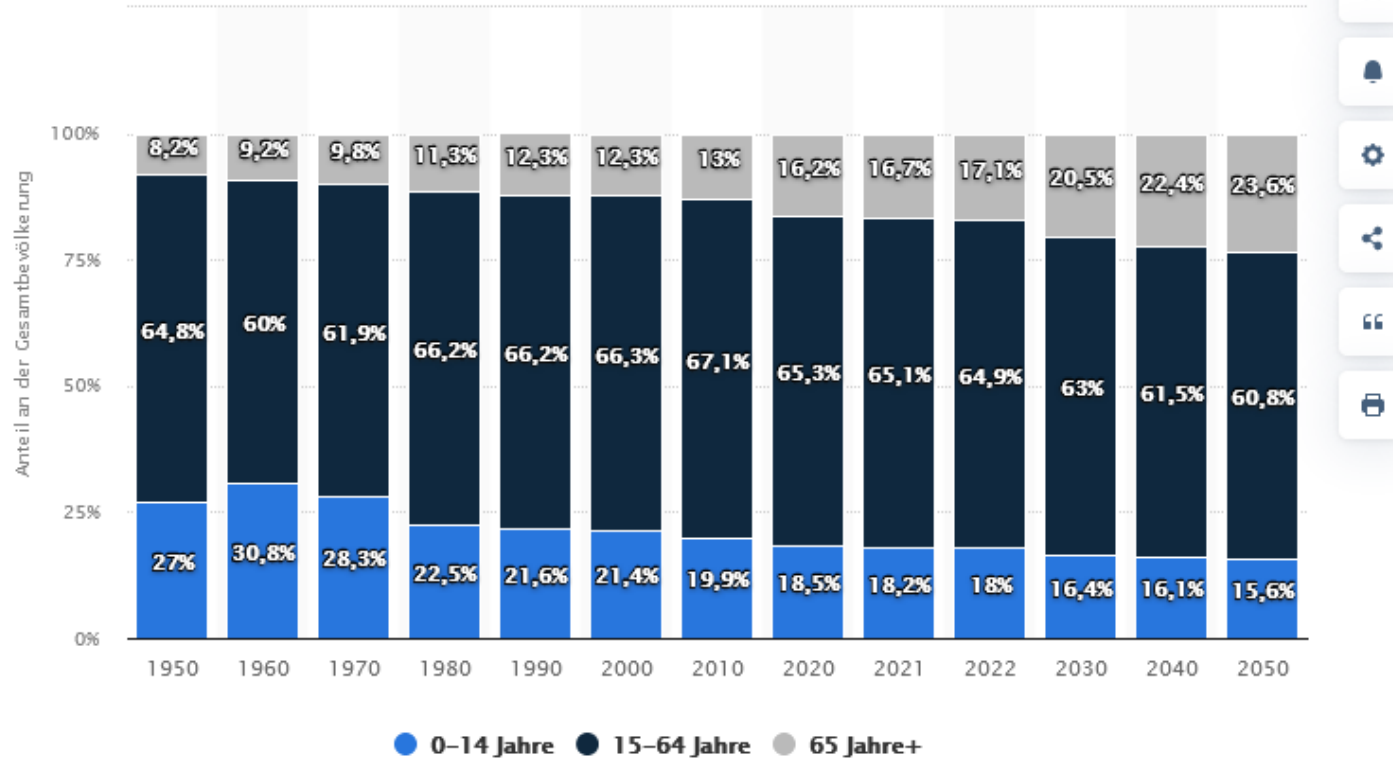
- What is the future?
- What kind of breeders will we face?
- What kind of riders will we face?
- What kind of society will we face?
- What will be accepted in terms of housing and (sportive) use of the horse?

## Decade of Change - Megatrends

- Gender Shift
- Health
- Globalization
- Connectivity
- Individualization
- New Work
- Mobility
- Safety
- Neo-Ecology
- Knowledge Culture
- Silver Society
- Urbanization

## Trend: Silver Society

- USA: Age structure from 1950 to 2021 and forecasts to 2050

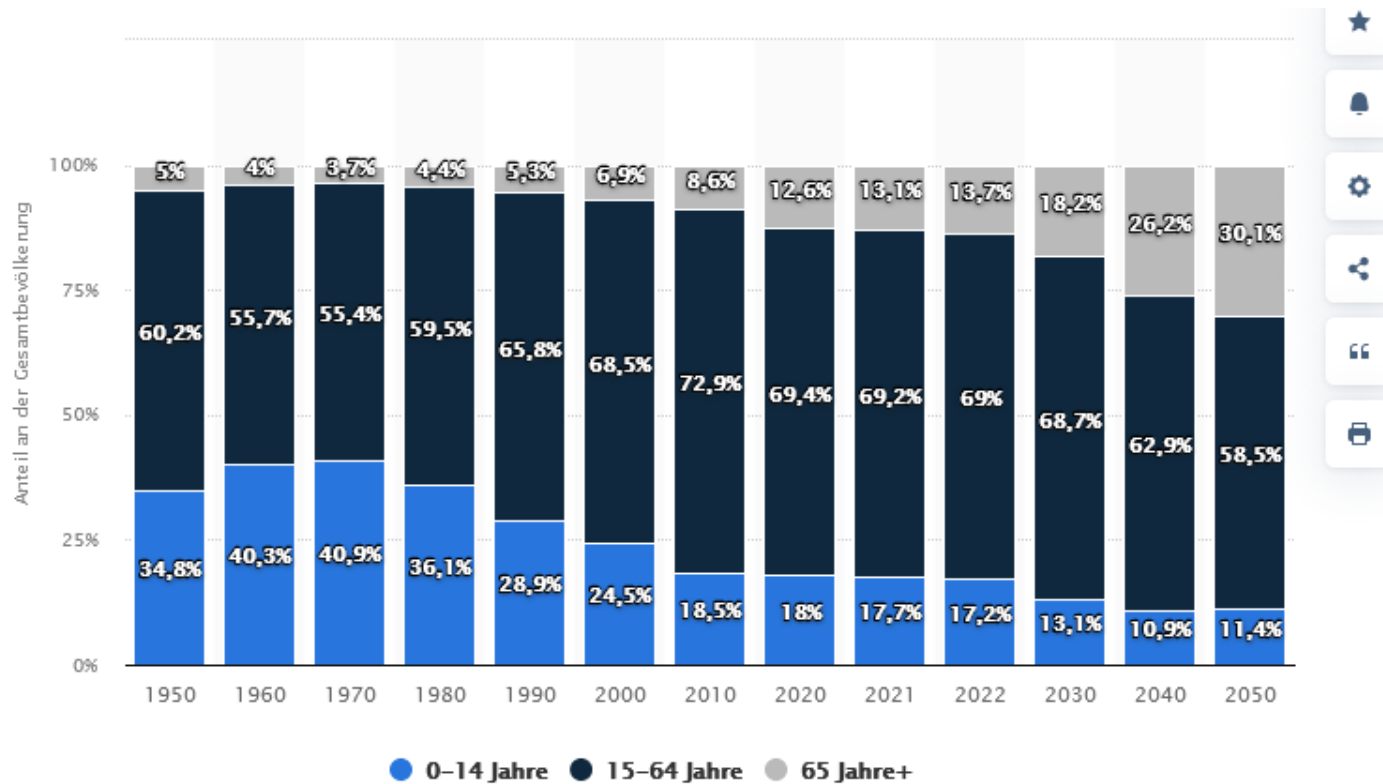


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## Trend: Silver Society

- China: Age structure from 1950 to 2021 and forecasts to 2050

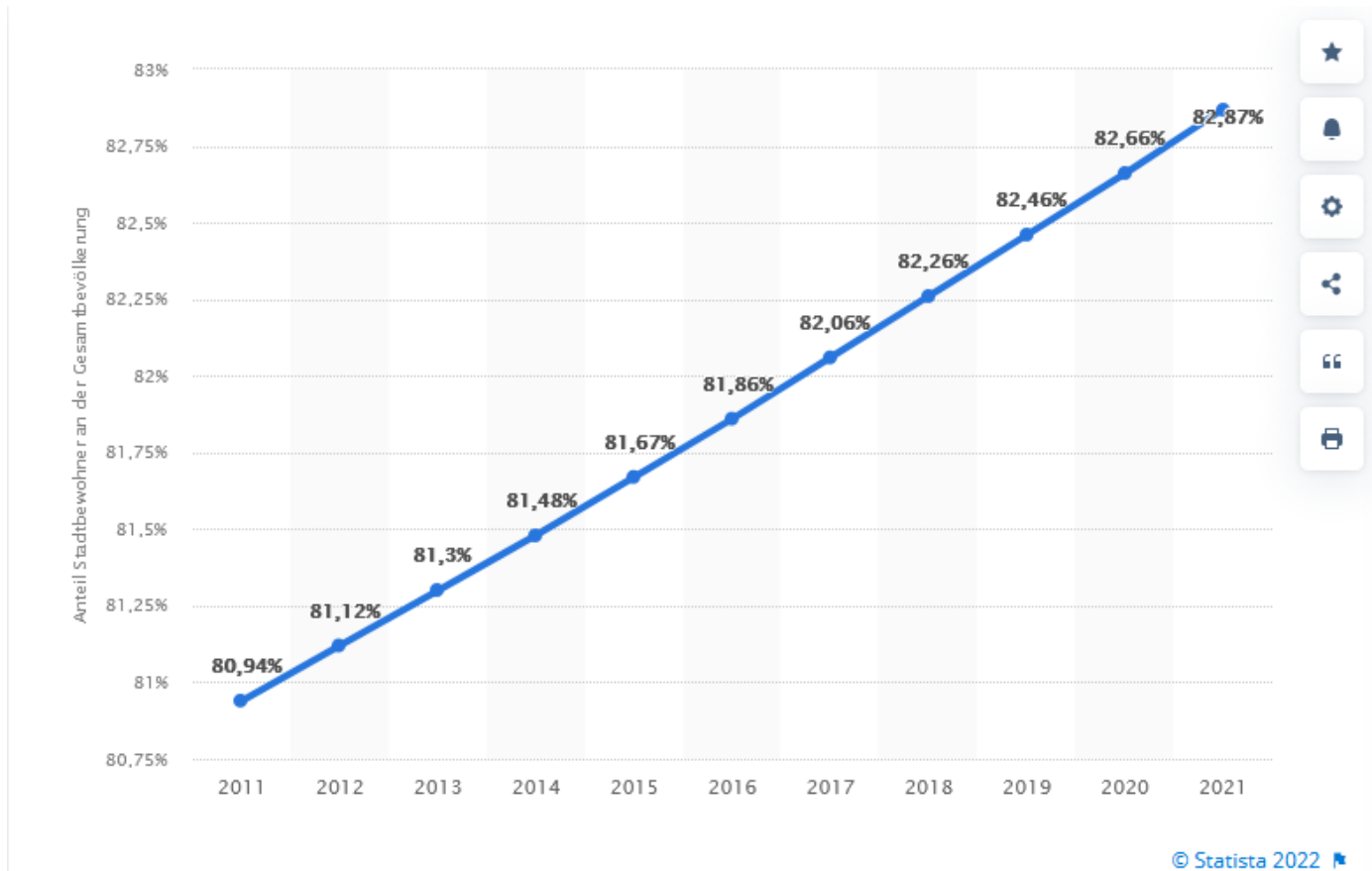


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# Trend: Urbanisation

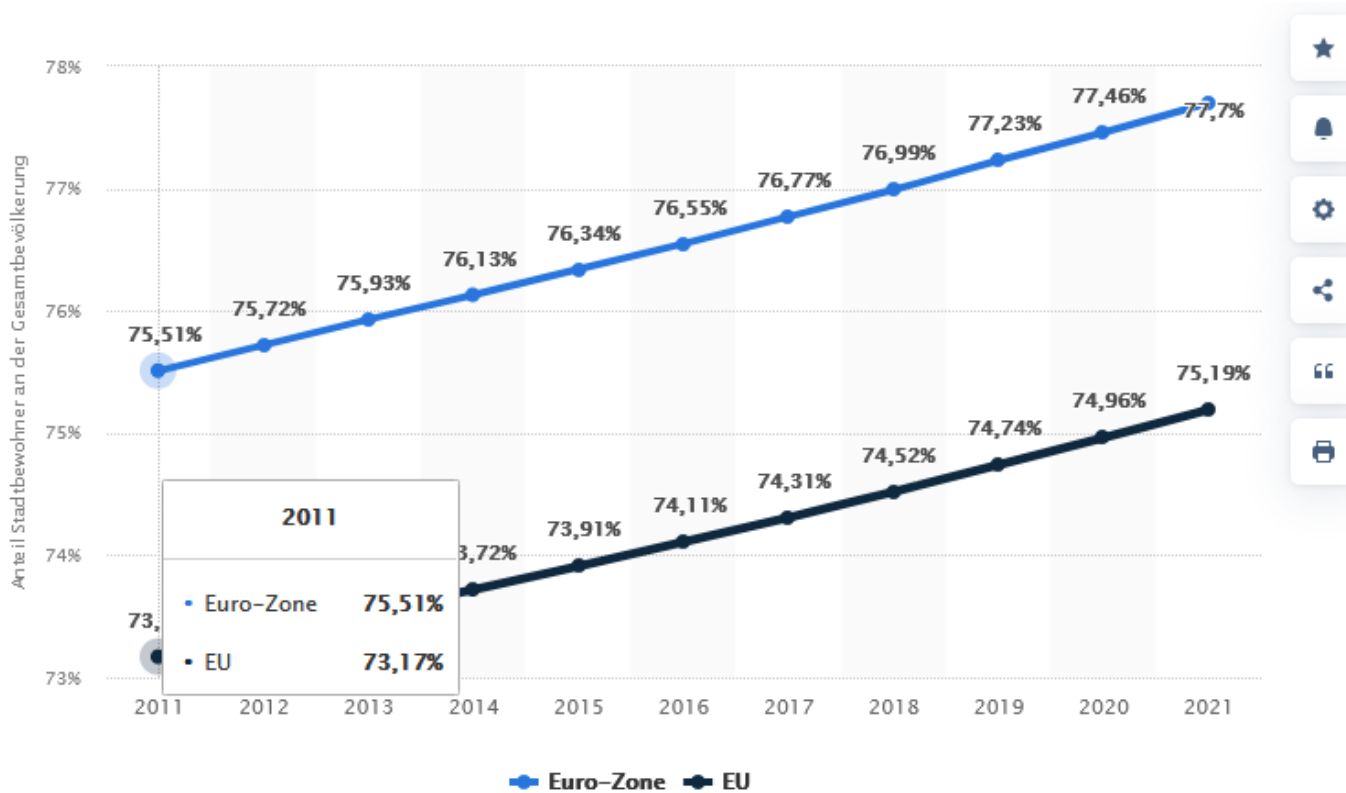
- USA: Degree of urbanisation from 2011 to 2021



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## Trend: Urbanisation

- European Union & Eurozone: Urbanisation rate from 2011 to 2021



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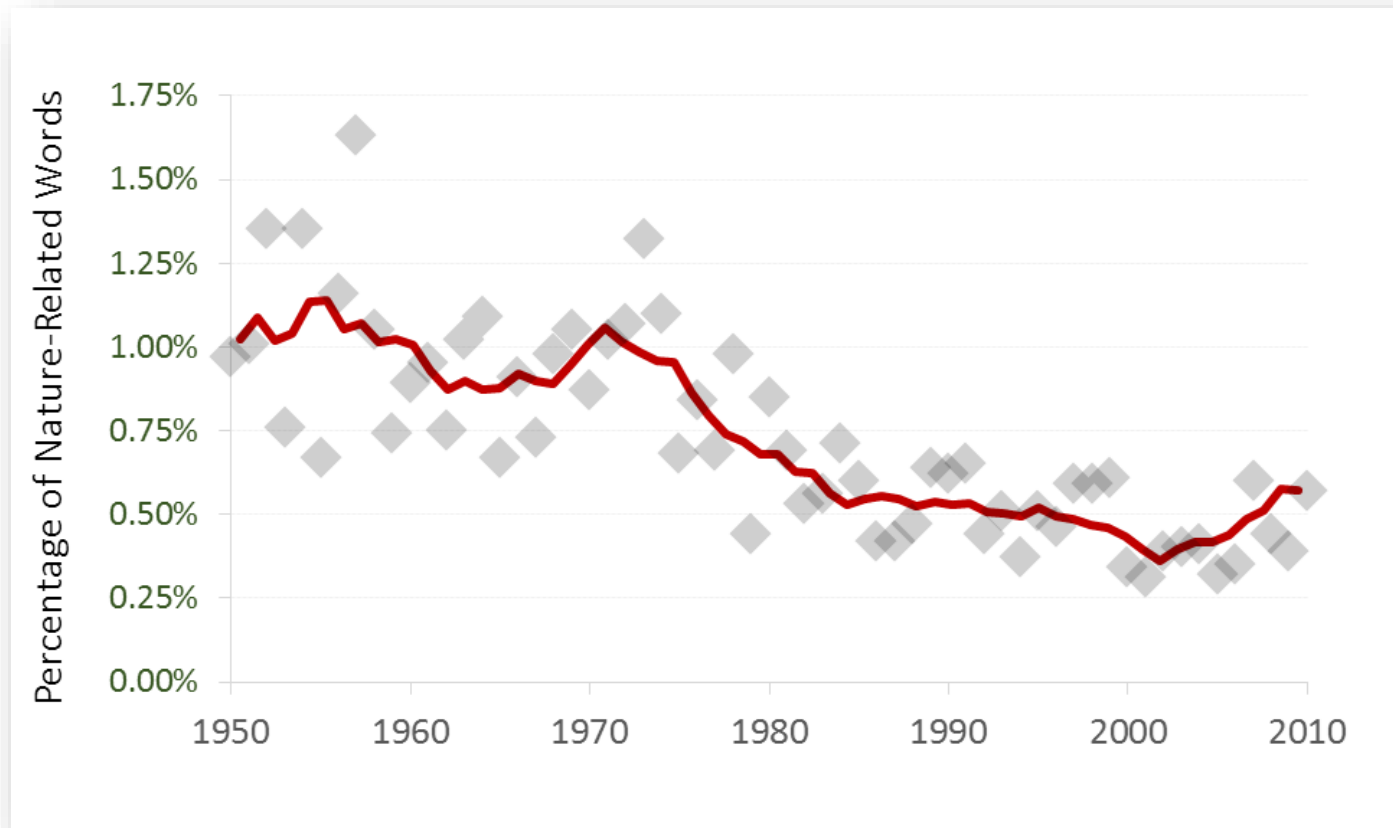
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## Trend: Urbanisation

- How Modern Life Became Disconnected from Nature

(Full article: [https://greatergood.berkeley.edu/article/item/how\\_modern\\_life\\_became\\_disconnected\\_from\\_nature](https://greatergood.berkeley.edu/article/item/how_modern_life_became_disconnected_from_nature))



(3)

## Today, children in germany ...

- ... mostly live an indoor childhood: only about ¼ of the children are outdoors after school
- ... own a smartphone and use the internet – these are important components of children's world
- ... meet their friends online several times a week (almost 50% of 10- to 11-year-olds)

# How does the horse fit in this frame?

## In future, the population ...

- ... will be older
- ... will be more sensitive to health and environmental issues
- ... will be more focused on personal needs and individuality
- ... lives more in cities, has less experience with nature, (large) animals and agriculture
- ... can easily acquire and assimilate knowledge
- ... is able to consume news, images and events almost in real-time at any time and place



## Trends: Silver Society and Urbanization

- Children and young people up to the age of 18 in German organised equestrian sport (members of the FN according to DOSB statistics)

**in the year 2001: 278.035**



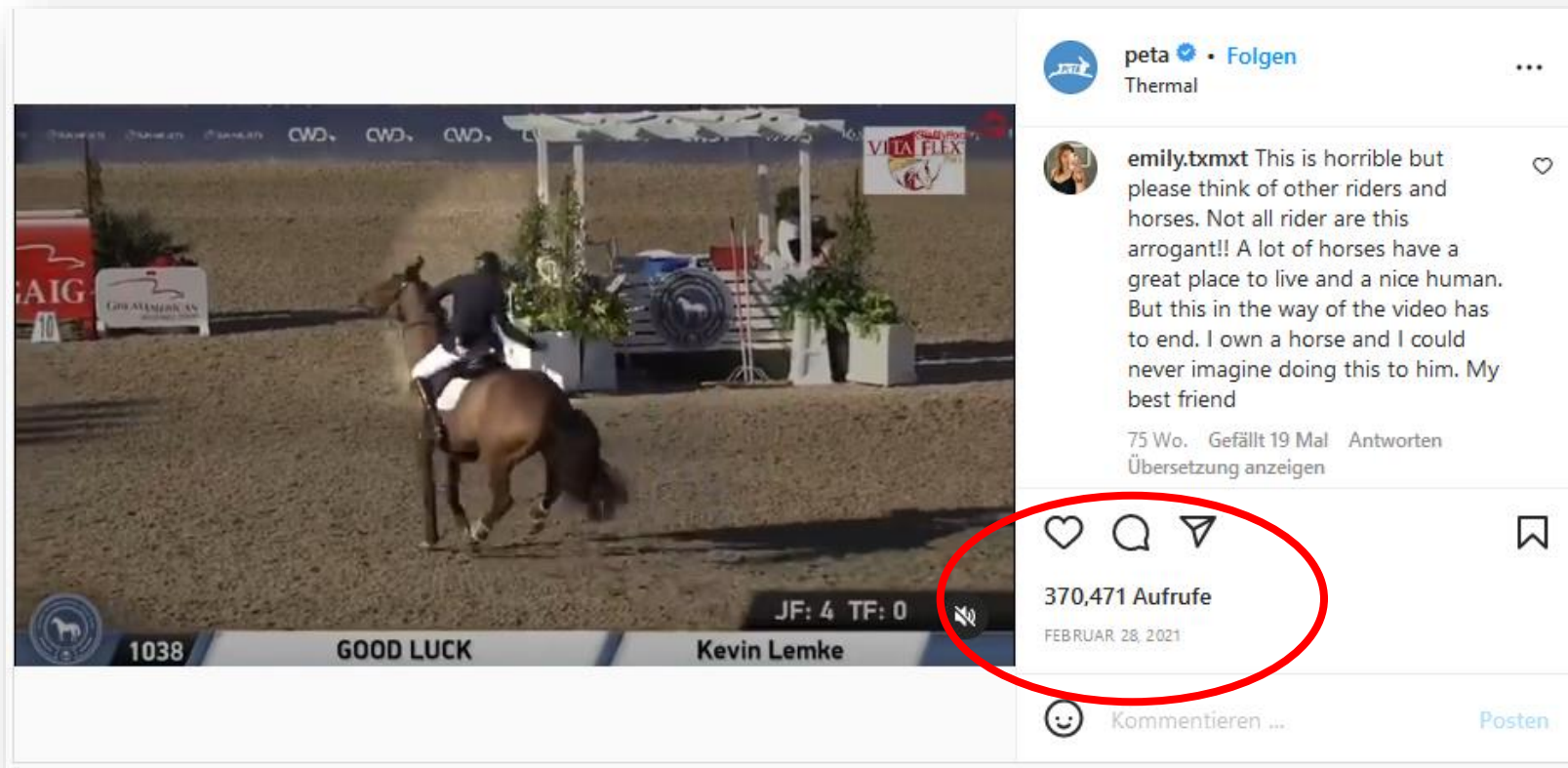
**in the year 2021: 150.365**



**54 %**

## Trend: Connectivity

- In a mobile, digital and connected world, every picture can be seen everywhere (within seconds)



## Trends: Individualization and health

- self-fulfillment, individuality and focus on one's own needs are in contrast to club life and the rules and regulations of organized sports



(6)



(7)

## Trend: Neo Ecology

- Sustainability and the understanding of humans as part of nature also influence attitudes towards the treatment of animals



(8)



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## Trend: Knowledge Culture

- Knowledge is easily accessible, but at the same time almost anyone can present themselves as an expert. Who decides what is right and wrong?

The screenshot shows a Quora page with the following elements:

- Quora Logo:** Located at the top left.
- Search Bar:** Contains the text "Search for questions, people, and topics".
- Sign In Button:** A red button with white text "Sign In" at the top right.
- Question:** "Why aren't sports or hobbies like horseback riding banned due to animal abuse?"
- Sort:** "All related (42)" and "Sort Recommended".
- Answer by Blaise Semenya:** A profile picture of a person, the name "Blaise Semenya", and the text "D.Jur in Law, Suffolk University Law School · 1y". The answer text reads: "horses are part of the beasts of burden group of animals. They will never be abused because we have categorized them as our quadruped slaves for millenia. Other animals such as those used in animal fighting can be abused because other than fighting, they have no value to humans. It is pure entertainment. Horses provide humans value and have been one of the major species integral to our own success. Horses are why things like cars, and all automobiles outside of boats exists. Horses are the direct ancestor mentally of bicycles, motorized bikes, cars, trucks, trains, and yes planes. Birds are the surface level influence, but horses are the engine behind the idea of planes. They are the big bang of automobiles outside of boats. Therefore riding them isn't abusive, that's how we always used them. People have used them for food too. They are an all purpose species for us humans. Hobbies like horseback riding/dressage, included."
- Related questions:** A list of questions on the right side, including "Why do people think that horseback riding is not a sport?", "Is horse riding animal abuse?", "Why is keeping horses in horses and riding them not considered animal abuse?", "Where is it illegal to ride a horse?", "Do horses suffer when we ride them?", "Is horse riding a sport?", "Why does my horse only buck me off. Everyone else can ride her but when I ge...", "Is horseback riding unethical?", and "How do I prove animal abuse?".

<https://www.quora.com/Why-aren-t-sports-or-hobbies-like-horseback-riding-banned-due-to-animal-abuse>



## Some examples



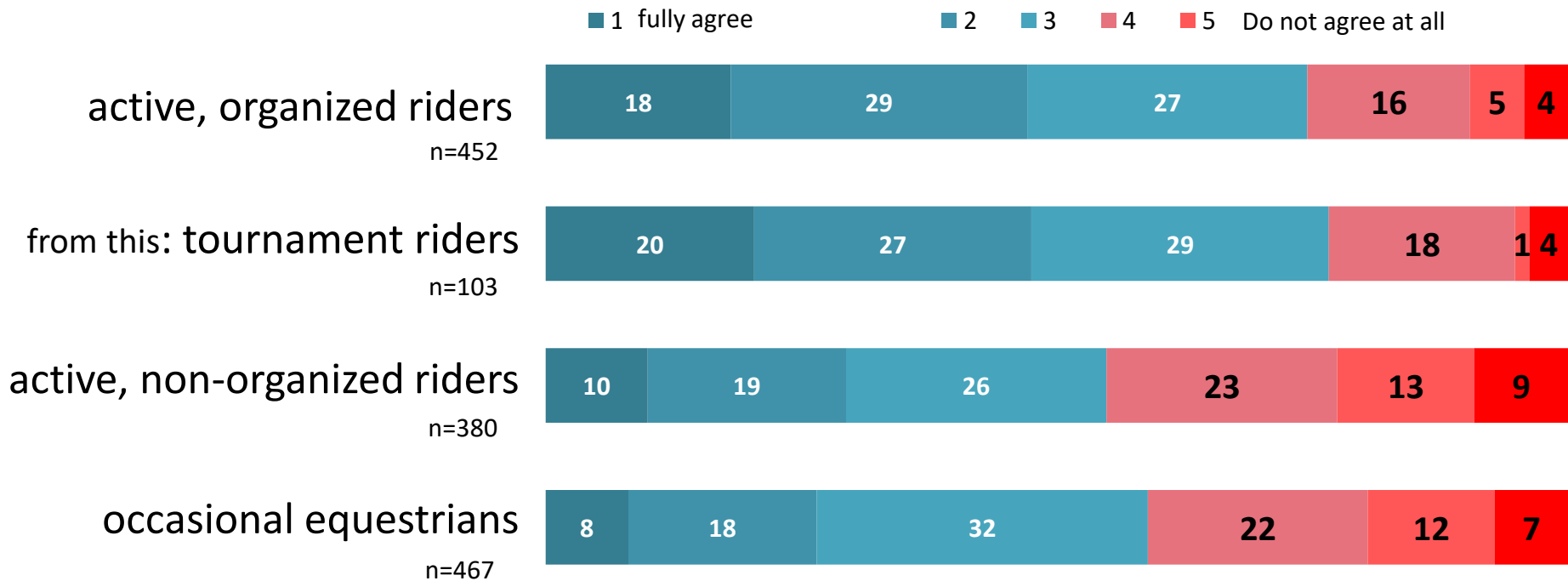
491.000 follower



1.400.000 follower

## The opinion of riders on the tournament sport

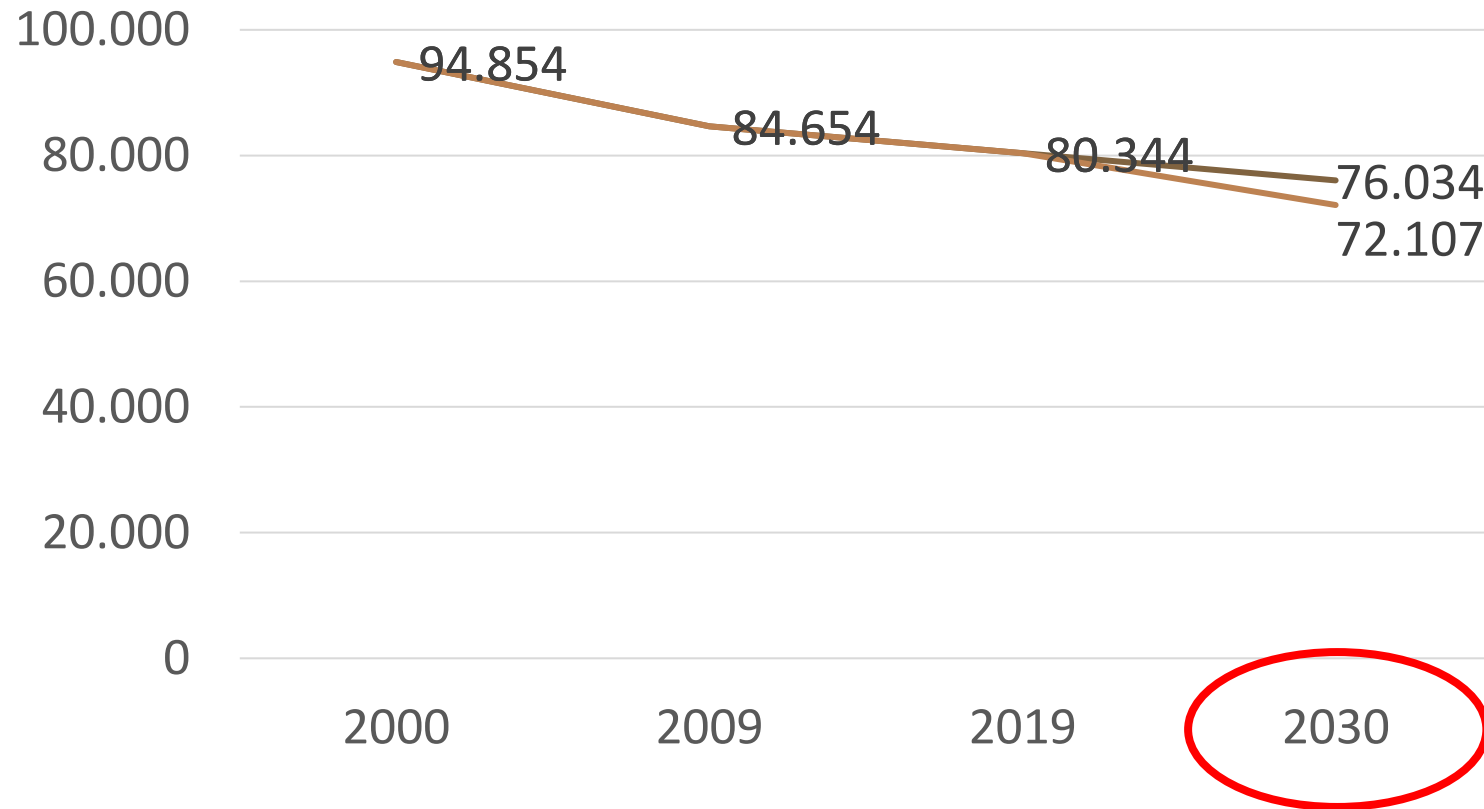
***“Competition sport with horses according to the rules of the federations is appropriate for horses ...”***



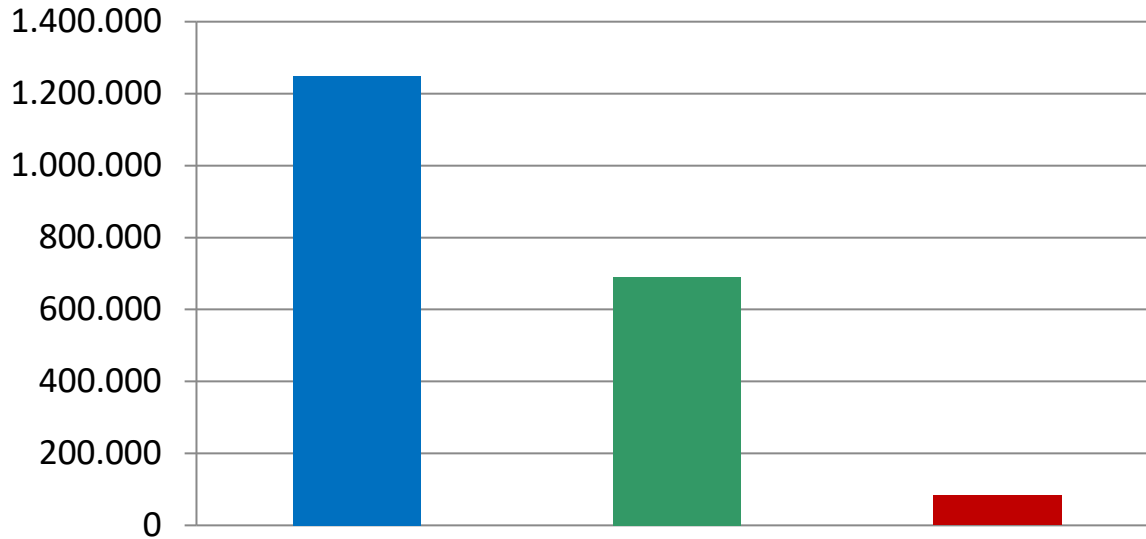
Ipsos-Study by the German FN 2019

## Some examples - competition riders in germany

- tournament licenses 2000 – 2030?



## Some examples - competition riders in germany



1.19 million riders "I ride often" (AWA 2019)

682.380 FN members (DOSB 2019)

80.342 tournament licenses (FN 2019)

100 %

57 %

7 %

## Expert assessment (journalist in sports reporting)

*The horse has two sides in the perception of German society.*

*One side is the **brutal decline of equestrian sports** (e.g. harness racing, which has been completely replaced by soccer).*

*The other side is the **growing importance of the motive leisure and horses**.  
The horse is recognized as an important leisure partner and equestrian sports represent an important hobby in society.*

Expert Interview, own study, HorseFuturePanel

## Some examples - Member survey Hanoverian Association 2021

- Statistically provable different breeder types with different demands on the association and its service
  - different personal breeding goals
  - especially different importance of the breeding goal sport performance
  - different levels of involvement in the association's activities
  - different opinions on selection and performance testing

## Some examples - Member survey Hanoverian Association 2021

### ■ Long-term members

- Wish for support in sale of horses
- Give more importance to the suitability of a horse for top sport
- Want to preserve their mare line for generations and sell horses profitably
- take part in broodmare tests with their horses
- Go to breeders meetings

### ■ New members

- Want to breed a horse for themselves or their family
- Want to realize a childhood dream
- Breed with former riding horses of the family or purchased breeding horses
- attend broodmare tests less
- go less to meetings and gatherings

## Equestrian Sport 2030: If we don't start to make changes ...



the living horse has disappeared out of the awareness of more than 85 % of the population



organized equestrian sport is a model that is being phased out



top sport is becoming more and more distant from the base



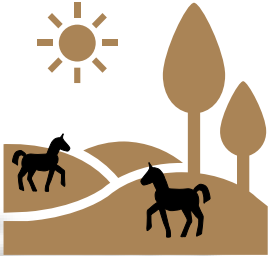
those outside the sector decide what is animal-friendly and what is not



the shortage of skilled workers has speeded up structural change in the equine industry



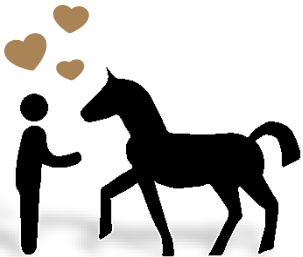
## The people of Saxony have a positive attitude towards the horse!



83 % think that horses on pasture enrich the landscape



81 % think that horses are beautiful animals



78 % think that horses have a positive influence on people

results from the Saxony Study done by the HorseFuturePanel

## Looking to the future: What is needed?



Unity among the stakeholders in the equine industry



Creation of easily consumable (occasional) offers for the entry level



Strengthening the breeds and breeding goals for the newer uses



Target group-oriented information supply and marketing



Stronger animal welfare orientation and communication about it



Knowledge transfer in theory and practice



Taking the communicative lead in the discussion with society - establish ourselves as experts in the communication with the non-riding population

The screenshot shows a Change.org petition page. At the top, the Change.org logo and navigation links are visible. The main heading is "Ban equestrian sports from the Olympics". Below the heading is a progress bar showing 63,351 signatures out of a goal of 75,000. A green badge indicates that the petition is one of the most signed on the platform. There are two user avatars listed as signatories: Melania Furtado and Anika Patel. Below the signatories is a section titled "Petition unterschreiben" with input fields for "Vorname", "Nachname", and "E-Mail". At the bottom, there is a location field showing "Bremen, 28359 Deutschland".

<https://www.change.org/p/international-olympic-committee-ban-equestrian-sports-from-the-olympics>

## PETA calls once again on IOC to ban equestrian sport from the Olympic Games

SPORT NEWS 15-01-2022



*The animal rights organisation PETA (People for the Ethical Treatment of Animals) has once again asked the International Olympic Committee (IOC) to ban all equestrian sports and events from the Olympic Games.*

<https://equine.com/sport-news/peta-calls-once-again-on-ioc-to-ban-equestrian-sport-from-the-olympic-games>

# Change before you have to. - Jack Welch

## Contact

- Presentation given by Dr. Katharina Wiegand, email: [katha.wiegand@gmail.com](mailto:katha.wiegand@gmail.com)
- **HorseFuturePanel:** Market research für the equine industry since 2011  
<https://www.horsefuturepanel.de/>

Managing Director: Dr. Christina Münch, email: [cmu@horsefuturepanel.de](mailto:cmu@horsefuturepanel.de)



<https://www.pferde-fuer-unsere-kinder.de/>

*Fewer and fewer children in our German society have the opportunity to experience horses directly and to learn through them. For this reason, we have set ourselves the task of bringing children and young people back into contact with horses.*

## Picture credits

- (1) <https://www.naikan-zentrum.de/angst-vor-veraenderung/>
- (2) <https://de.statista.com/themen/3274/megatrends/>
- (3) [https://greatergood.berkeley.edu/article/item/how\\_modern\\_life\\_became\\_disconnected\\_from\\_nature](https://greatergood.berkeley.edu/article/item/how_modern_life_became_disconnected_from_nature)
- (4) [https://de.freepik.com/fotos-premium/aelterer-hippie-mann-der-smartphone-app-fuer-die-schaffung-der-wiedergabeliste-mit-rockmusik-verwendet\\_6406173.htm](https://de.freepik.com/fotos-premium/aelterer-hippie-mann-der-smartphone-app-fuer-die-schaffung-der-wiedergabeliste-mit-rockmusik-verwendet_6406173.htm)
- (5) <https://www.thienemann-esslinger.de/produkt/100-kinder-isbn-978-3-522-30537-2>
- (6) <https://fi.pinterest.com/pin/618330223826972703/>
- (7) <https://pferdetrends.com/index.php/magazin/1161-pferdetrendsmagazinblog/1511-gemeinsam-sind-wir-stark-mannschaftsreiten>
- (8) <https://www.aktiontier.org/tierschutz-kampagnen/rinder-wahnsinn-wie-kuehe-kaelber-und-mastrinder-leiden>
- (9) <https://holger-braaf.de/kuhbuerste/>