

A decade of industry change due to future megatrends

BY ADRIANA VAN TILBURG (FROM A PRESENTATION BY DR. KATHARINA WIEGAND)

PHOTOGRAPHY:

During the WBFSH General Assembly in Dresden there were several presentations. There was also a very interesting presentation given by Dr. Katharina Wiegand of the Hanoverian Verband, and on behalf of Christina Münch of the HorseFuturePanel.

Dr. Wiegand wrote her doctoral thesis on marketing in Göttingen, specifically targeting equestrian sports. “During my doctoral thesis I worked part-time for the HorseFuturePanel for Christina Münch, who conducts market research, including surveys among riders, etc. She is still doing this and we continue to be friends and exchange our ideas. She does a lot of presentations and was supposed to be in Dresden, but was unable to attend so asked if I could come in her place. I know this presentation well, because I’ve done it before on behalf of the HorseFuturePanel, although I actually work for the Hanoverian Verband.

The presentation

With regard to the changes we are all facing in the equestrian world, breeding questions that need to be asked are:

- 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?

This is being reflected by the following megatrends:

- Gender shift
- Health
- Globalization
- Connectivity
- Individualization
- New work
- Mobility
- Safety
- Neo-ecology
- Knowledge culture
- Silver society
- Urbanization

The ‘silver society’ is a very important megatrend as the age structure is shifting and the 65+ age-group is growing – explosively so in China where large-group needs will require future care.

Another very important trend is ‘urbanization’.

Currently, 75% of the EU population is living in or around cities, which has effected a disconnect between a modern lifestyle and nature. As Ingmar de Vos, president of the FEI later stated: “If you ask children in New York what a chicken is they will point one out in a freezer in the supermarket. They don’t actually know how a living chicken looks.”

Today, 25% of all German children are outdoors after school – which means that 75% remain inside. A smartphone and internet use are important components of the children’s world. They meet their friends several times a week online (50% of 10- to 11-year-olds). When I was about that age I was at a farm outside the town where I grew up. We brushed horses, playfully started mucking out, played where the straw was stored, saw how the cows were milked, etc. Children nowadays have less contact with (large) animals. Over the past 20 years, organized equestrian sport in Germany has lost 46% of memberships among children and young people up to the age of 18.

Managing an older generation

In future the population will be older, will become more sensitive to health and environmental issues, will be more focused on personal needs and individuality, can easily acquire and assimilate knowledge, and is able to consume news, images, and events almost in real-time anytime and anywhere. This poses a serious threat for equestrian sport.

Groups of animal activists are protesting the use of horses in sport. It’s a small group but, unfortunately, with a wide reach because of trending connectivity. One bad photo or video of an adverse certain situation will fast global through social media and so on. Sustainability and the understanding of humans as part of nature also influence attitudes towards the treatment of animals. Through the internet and especially social media knowledge is easily accessible, and at the same time almost anyone can present themselves as an expert. Who decides what is right and wrong?

The FEI has on their account, fei_global, on Instagram 492,000 followers, while PETA has 1,400,000 followers. Certainly, the opinion of riders on tournament sport is shifting towards a more negative trend, with active, non-organized riders and occasional equestrians divided almost

50/50, saying sport is 'appropriate' and 'not appropriate'.

As far as German society is concerned, the horse has two sides: 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 role of the horse away from competitive sports. The horse is recognized as an important leisure partner and spending time with horses still represents an important hobby in society. While we have declining numbers in the classic show and club sport, this does not apply to all segments or the number of horses kept in total.

There is also a difference between long-term breeders and new breeders. According to a member survey of the Hanoverian Association, the new breeders are less interested in sport and they also go to fewer breeding 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 within the equine industry.

Looking to the future: What is needed?

- Unity among the stakeholders in the equine industry;
- The 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 in this regard;
- Knowledge transfer in theory and in practice;
- Taking the communicative lead in the discussion with society – establish ourselves as experts in the communication with the non-riding population.

Do these 12 megatrends also have a positive outcome for breeding horses in Germany?

It can have a very positive effect but only if something changes. If you adjust to what kind of society, what kind of people, what kind of breeders horse breeding will have in the future, I believe that a part of the market that is now smaller can become bigger.

Sport will change too, not simply classic competitive sport. Maybe competitive sport will be banned, or it will no longer be affordable, or it will become a completely isolated group like horse racing. A real spectator sport for a few

specialists. I don't think it's too late to stop it getting that far.

The FN has now set up a social licence working group, and in England an Animal Welfare Social License working group has also been set up. So I believe we have all acknowledged that there is a problem. So I hope our sport will not be forbidden. We have to know first what we are facing.

- What is the opinion of spectators, breeders and riders?
- How do we get people excited about equestrian sport?
- How do we create access routes?
- How do you see the future of foal auctions and embryo auctions?

Embryo auctions are difficult to assess because so far they are only for professionals and very rich hobbyists. I think it will take off, and I also think that foal auctions will continue to be popular. More and more private auctions are coming onto the market. That is the next problem. The prices are less than transparent. In the case of official associations the accounts have to go through their books. These are associations, but we don't know what goes on behind the scenes at a stallion market, while at other formal auctions the prices are settled in real time.

How can we introduce new clients to breeding?

Older breeders are having a hard time finding a successor for fars/breeding. One suggestion could be a cooperation with a young breeder or someone interested in breeding, who can lease a mare or choose the stallion. But they don't have to do the foaling themselves because they that's represents learned knowledge.

One must consciously grasp access routes as it doesn't work to leave things to chance. When you see the requests we receive, knowledge is no longer passed down from generation to generation. We now have people in their mid-forties asking us what kind of feed they should give their mares in order to have a healthy birth for their foals. This will be their first foal, and then they read something and become desperate. They want to know from us what's good and what's bad. You simply have to help them and not laugh about it as it's extremely important to continue the transfer of knowledge.

For example, breeders who are now too old and can no longer keep up with the work due to age, should work together with young, motivated breeders with insufficient knowledge and no mares. In that situation we can offer support in the form of advice or webinars. It already starts with 'what is a stud certificate?' Or 'what is a foaling certificate?' 'When do I have to become a member of a studbook?' Etc.

We started webinars for new breeders during the Covid-19 pandemic, and they went so well that we continued with them. How well are these webinars visited? Well, they were completely booked up every time and, for now, are only



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presented in the German language.

The webinar about ‘how do I breed a foal’, or ‘what should I do’, is completely free, including for people who are not a member of our studbook. The webinar about ‘what stallion for my mare’ is also popular, because the people who attend are asked to send photos of their mare, write to us about her characteristics, tell us what they wish to see in the foal they want to breed. So every mare is being discussed in a round of 20 attendees, alongside our breeding director Ulrich Hahne, plus two colleagues who are presenting stallions for each mare. This is also always booked up. For this the mega trend of ‘connectivity’ works really well. This is better than having to travel from everywhere around Germany to one place.

Q&A with Katharina Wiegand

◆ How can we connect children with horses?

I believe you should start really early. For example; children at a daycare center should go to a farm so they learn to understand about a farm with all its animals. I also think that riding would be suitable as a school sport. In Hanover I have somebody in my riding club who works at the university and educates sport teachers. She always conducted a project week with her students at a farm with horses so they learned about riding. They were very enthusiastic and these students will be less hesitant in introducing riding as a school sport when they become teachers themselves.

We should start systematically at these levels – daycare center, schools, teacher education, and so on. Children will ask their parents about riding horses when they learn about them and the type of feeling they give. There are many children who never leaving the city for an afternoon, and not even leaving their house.

◆ How will you reach these families?

Horses are fascinating, so when

you once you’ve reached them they will start thinking about it. If they sit on a horse at a farm, they then tell their parents that they want to learn to ride. But they need to be triggered to say something like that.

◆ What is the biggest threat that the equestrian world is facing?

That the people outside the equestrian world are going to decide what we have to do. That is the basic threat, along with a lot of associated risks that are connected to the equestrian world as we know it.

◆ What can we do?

We have to present our horses properly, whether they are young horses, stallions, or mares, performance horses, or leisure horses. We are leaving the discussion too much in the hands of the people who don’t really know horses, and they criticize everything we do. We are the people with knowledge but we are too shy to come forward, and this is not good. We could make an image campaign, but that is something for the German Federation. It will also only work if we all work together.

If I may explain it in the extreme, the ‘classic riders’ and the ‘rope halter’ people should work together. It’s the same if we talk about a jumping rider or a western rider. It should simply be a ‘rider’ as they are all connected to horses. For that it would need an image campaign, but that is of course expensive. We would not see immediate results, but at least we would be doing something, and we should start as soon as possible.

Of fundamental importance is not fighting against each other, but working together. We need to set aside our egos and differences and embrace the horse. Alongside an image campaign we could also communicate with politicians, but this will only have an impact if we work together. We need to highlight the positive function of the horse in our society, for example, as therapy for children or traumatized soldiers, among other things. ■

