



The future of Equestrian Sports NZ

A REPORT FOR EQUESTRIAN SPORTS NZ

Why explore the future?

Equestrian Sports NZ (ESNZ) is interested in how it might best position itself to be fit for purpose and sustainable into the future. Its Board and senior management are conscious of the rapid speed of change occurring across society, and how this will impact the environment in which it works.

Therefore, it agreed to partner with Sport NZ to explore possible and plausible futures that may play out, to enable it to shape its strategy and strategic thinking through understanding the issues and challenges shaping the future.

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Topics covered included:

- The future as predicted, versus the future as a learning journey (identifying and testing the assumptions held by ESNZ that are influencing how its strategic issues are being considered)
- The 'used future' examining what traditional practices need to be challenged to create new futures
- Emerging disruptions and transformations ahead
- Scenarios to illustrate alternative futures to consider a much wider range of contexts in which ESNZ may be operating and to generate new insights into possible future developments
- Consideration of novel ideas and risk reduction to enable a level of anticipation, and therefore preparation, for the inevitable surprises that ESNZ will encounter.

These topics underpin a new approach to having conversations about the future and identifying narratives to underpin a period of rapid change. To do this, it is important to imagine a range of alternative scenarios for the future. This can give us greater confidence that we are taking the right actions today – fit for a future we want, and adaptive for the changes and disruptions we will experience in the coming decade.

This document summarises the ESNZ strategic foresight conversation from the development of an initial baseline perspective to the elaboration of four potential scenarios.

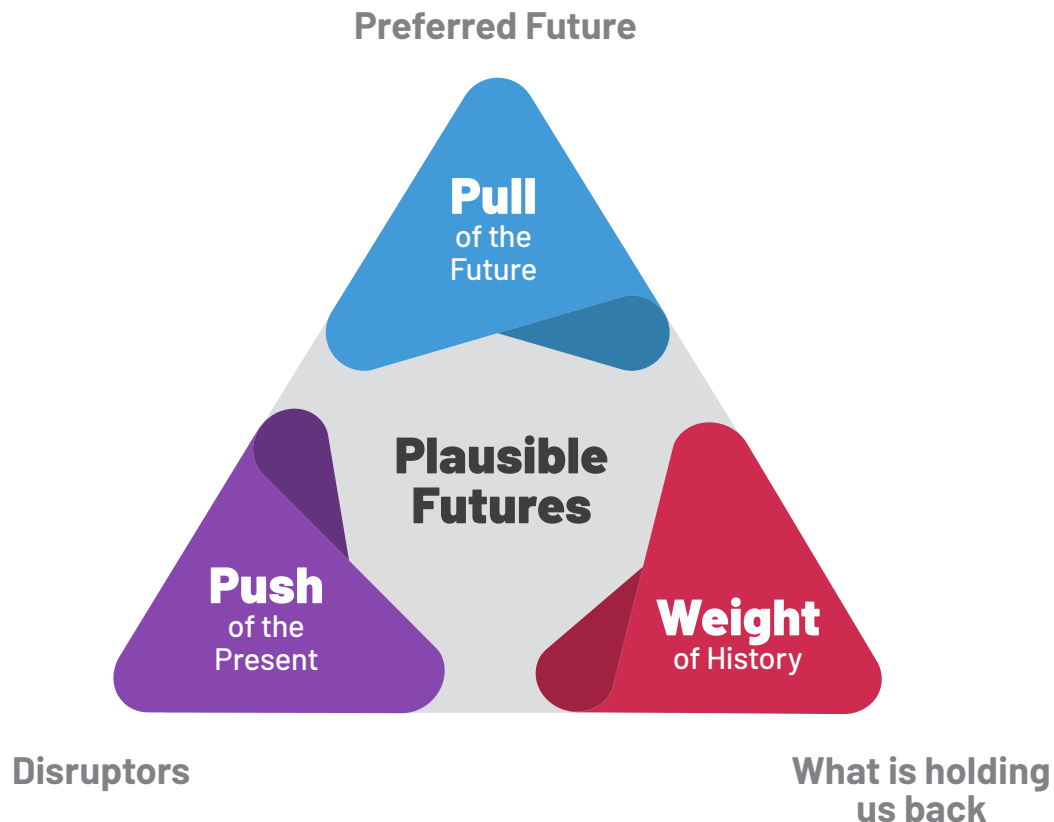
This involved two facilitated workshops involving the ESNZ Board, Associations, senior management and stakeholders.

A five to 10-year time horizon was used.



Underpinning approach – futures triangle

The workshops used the *Futures Triangle* developed by Sohail Inayatullah to map the past, present and future to help explore the space of plausible futures.



The basic idea is that there are three dimensions that shape plausible futures: the weight of the past; the push of the present; and the pull of the future. The tension and interaction between these three forces creates a possible future space, inside the triangle. The workshops used the triangle to explore the following questions:

Weight of history

- What is holding us back, or getting in our way?
- What are the barriers to change?
- What are the deep structures that resist change?

Pull of the future

- What is pulling us towards particular futures?

Push of the present

- What trends and disruptors are pushing us towards particular futures?
- What quantitative drivers and trends are changing the future?

Four possible and plausible future scenarios for ESNZ were created from the disruptors viewed as the most impactful and uncertain for equestrian.

What ESNZ thinks will happen in the future

One of the challenges with foresight is becoming overwhelmed with what's changing and struggling to make sense of the implications. It is easy to get misled by extrapolating from obvious trends and developments. A common approach is to develop scenarios that explore plausible future states. The baseline future is one possible future. This is the future the equestrian community assume will occur.

The basis of ESNZ's baseline future was identified via a survey completed ahead of the first workshop by a cross-section of the equestrian community. The survey questions are designed to draw out a common understanding of perceived opportunities, threats and aspirations for the future of equestrian sports in New Zealand. This provided the basis for the baseline future – the future participants assume will occur. (Survey responses are provided in Appendix 1).

The purpose of the "baseline future" is not to predict what the future of equestrian will look like in 5-10 years, but to help identify the obvious issues, and stimulate conversations around how the equestrian community could respond.

In ESNZ's baseline future, it is assumed there will be:

- changing levels of activity and demand through greater competition for leisure time, disruption to traditional ways of working and virtual sports becoming more popular
- a plateauing in the number of competitors particularly in the higher levels, due to the cost of living creating a further divide based on wealth and between grassroots and high performance
- a heightened focus on horse and rider wellbeing, in part a consequence of increased public scrutiny driven by social media and pressure to remain aligned to government priorities
- improved inclusivity of athletes, volunteers, officials based on gender, sexuality, race, religion and socio-economic states
- a heightened role for well-run community sports clubs to build social cohesion given an environment of decreasing trust in institutions and government, and increasing polarization of opinion
- greater use of technology to analyse and deliver information and results
- an increased challenge to attract and retain talent given continued workforce supply issues and an increased desire from people to use their time differently
- a continued importance placed on elite success for the ongoing profile and financial sustainability of equestrian
- a continued growing demand to engage in sport and recreation but in less structured and formal formats
- alignment with other groups which currently sit 'outside' the formal equestrian family
- A national body that is financially secure and able to fully embrace the interests of everyone from casual riders to world class athletes in all equestrian disciplines.



The equestrian community recognised the following issues could disrupt the future they assume will occur:

- There may be a decline in interest in sport and recreation as other leisure pursuits emerge to engage attention. E-sports could capture some of this attention.
- In the face of seemingly more pressing issues (e.g. global conflict, climate) sport and recreation will no longer be considered as important to the support of physical and mental wellbeing or elite success.
- Ongoing economic challenges could restrain funding for the Sport and Recreation sector. Even without such an external shock, funding models could change and alter present revenue streams.
- The impacts of the pandemic may continue to impact equestrian over a long period of time with at present unforeseen implications.
- The response to climate change may alter previous international travel freedoms, with cost and public backlash an increasing impediment.
- Younger generations may view volunteering in a different way than their parents, impacting the traditional expectations of volunteering.
- The connection between elite success and participation may come under greater challenge, resulting in increased scrutiny on where ESNZ places its focus.

There are probably no surprises to those within the equestrian community in this baseline future scenario. It reflects what many people and organisations in the sector are contemplating now – how do they compete with virtual sports, how are they going to deal with climate change, how are they going to ensure they have adequate participants and funding levels going forward, how do they address current inequities in the system, and what the long-term effects of COVID-19 will be.

A baseline future is what we generally think will happen if there is no change. It is not radically different from today and is derived from what we see in the world around us. Creating a baseline future is a good way of emptying the mind of the most pressing worries. Only then can we step back and think of alternatives. Getting those concerns and fears out in the open can help identify not only what you want to avoid but some of the characteristics that you want to work towards.

Moving beyond baseline future

The baseline future is a collection of predictions of the future context within which the ESNZ strategy will be pursued. The quick discussion within the workshop immediately highlighted the potential alternatives that could emerge to influence the strategic environment. This underlines the need for the move away from prediction to instead consider the most useful questions. A few emerged in the baseline future discussion including:

- To what extent do plans assume the current delivery structure is appropriate?
- Given the importance of volunteers to equestrian's delivery, is it safe to assume younger generations view volunteering in the same way as their parents or grandparents?
- To what extent do plans assume most New Zealanders can access equestrian?

These questions are unlikely to surprise those engaged within ESNZ and are likely to form the basis of current strategic discussions. The variety of perception or response to these questions emphasises that no single future can be assumed. An exploration of how respective scenarios may challenge these questions leads to more robust strategic dialogue. It is easy to get misled by extrapolating from obvious trends and developments.

To avoid this, a common approach is to develop scenarios that explore plausible future states. Developing these scenario narratives can be achieved through the combination of uncertain disruptors to form stories of the future.

Sport NZ has identified 31 phenomenon as causing the most disruption to the future of sport and recreation in New Zealand - [Disruptors](#). Of these, equestrian identified the following as potentially most disruptive to equestrian.



Most impactful disruptors to equestrian

The following future disruptors were highlighted as potentially the most impactful for ESNZ. Each are linked to reports.

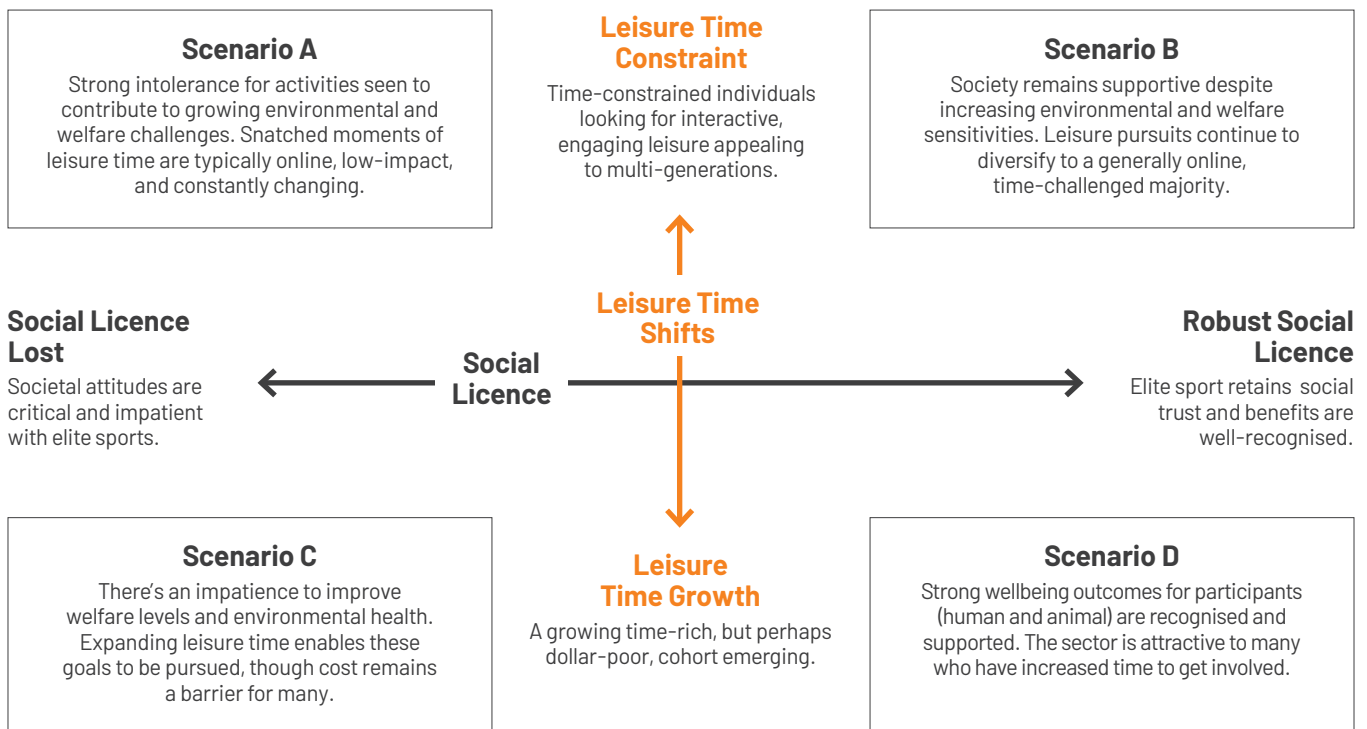
<u>Changing demographics</u>	The NZ population continues to age, with rural communities facing acute changes that have implications for Local and Central Government finance and wider employment.
<u>Disposable income</u>	Focused on the economic position for NZ households given the wider economic context. Levels of income and trends of indebtedness are key factors in New Zealander's ability to participate in equestrian
<u>Status of public funding</u>	Managing the government's finances will be challenged by a multitude of global and domestic challenges arising from the pandemic aftermath, geo-political tensions and climate demands. Potential moves between orthodox and heterodox economic policies will determine future funding status.
<u>Active transport</u>	Trends in chronic morbidities that rising physical health issues associated with lifestyle patterns and financial stress.
<u>Workforce changes</u>	The play, active recreation, and sport sector will be subject to the same forces (e.g. demographic) shaping other workplaces. Challenging for the paid sector, these will prove particularly challenging for the key volunteer support groups.
<u>Gaming, augmented and virtual reality</u>	Online, virtual and augmented reality sports will grow as both participant and spectator activities. Will it complement or detract from equestrian activity?
<u>Automation</u>	Automation uses self-operating physical machines, computer software, and other technologies to perform tasks usually done by people. Depending on the extent of its adoption, it has the potential to determine levels of employment and leisure time. Robotics is the design, creation, and use of robots to perform these tasks.
<u>Space and place dynamics</u>	Trends in urban land use may change, either positively or negatively, the availability of suitable sport and recreation venues. Urban and rural development impact community resilience through climate change mitigation, transport access and housing availability.
<u>Athlete participation and wellbeing</u>	The pressures on athletes continue to intensify with implications for both physical and mental health. It will remain a critical dimension to the future competition environment with psychological awareness, changing social context, and appropriate use of technologies (e.g. biometric data) all part of the mix.
<u>Climate change response</u>	Energy transition and political action are required to mitigate climate change, and includes the need to address climate change within equestrian activities
<u>Sustainable business models</u>	Future funding models will be heavily influenced by changes to broadcasting and sponsorship agreements that continue to reflect evolving consumer preferences, participants' ability to pay, and changes to gambling proceed distributions.

Following a group discussion and ranking exercise, changing leisure patterns and social licence were the drivers chosen to develop several future scenarios. They were chosen based on potentially high impact and uncertainty.

<u>Changing leisure patterns</u>	The influences which will shape the future of leisure in New Zealand. Including disruption in adjacent sectors that start to obscure the boundary between leisure activities. The range of leisure experiences will diversify as individuals are enabled to tailor their activities to suit their preferences and available time.
<u>Social licence</u>	Pressures on the Government to change priorities to address key issues may result in spending on the sector becoming more discretionary if sport is no longer regarded as a universal good. Athlete activism, opposition to travel and emergent social issues all contribute to the creation of an increasingly complex environment that the sector will need to navigate. Advocacy of animal welfare will further draw attention to social licence for equestrian sports.

Alternative futures

To identify possible and plausible alternative futures for ESNZ, four scenarios were created based on the opposite of two uncertainties playing out – shifts in leisure patterns and changes in social licence. It should be noted these scenarios will likely not happen exactly as described. They provide an opportunity to explore a plausible strategic context that could be encountered. The aim is to use them as prompts to highlight what may need to be considered over the coming period.



The full narratives for each scenario are provided in Appendix 2.

Thinking in scenarios enabled ESNZ to consider different strategic contexts and anticipate some of the elements to be considered if the future evolves in different ways.

To do this, the group was split into groups with each assigned a scenario to address with the following questions:

- What are the key implications for ESNZ if this eventuates?
- What is the biggest risk / opportunity this presents?
- What capabilities would ESNZ need to mitigate / take advantage?
- Do you regard the scenario as more or less plausible? What assumption supports your view?

The teams also gave each scenario a name to reflect what they perceived as the key essence of the narrative.

In exploring these scenarios, it is also worth considering how the other drivers noted may play out in these contexts. For example, "how would ESNZ athletes' ability to travel be impacted in the given scenario?"

Overall, the aim is not to judge whether the scenario will occur, but to consider what ESNZ would do if it did.

Scenario A: Digital Warriors

Strong intolerance for activities seen to contribute to growing environmental and welfare challenges. Snatched moments of leisure time are typically online, low-impact, and constantly changing.

Key Implications

- Raise need to adapt and use other forms of delivery
- Significant impact on current domestic and international competition model
- Greater emphasis with positioning well-being benefits
- Emphasis on digital over traditional horse/human connection

Biggest Risk / Opportunity

- Rethink of traditional membership and pathway
- Greater focus on virtual connection to attract new participants, and address cost and time issues
- Explore ease of connecting with horses e.g. shared ownership
- Stronger collaboration with riding schools – recognising increased localisation of delivery
- Offer shorter/sharper opportunities to reflect time constraints
- Degrading of key value proposition of mental wellbeing through human/horse connection
- Tension between FEI rules and domestic realities

Necessary Capabilities

- Ability to look at model with fresh eyes, and courage to start again with specific disciplines
- Technologically savvy – notably delivery and partnering with virtual sport
- Effective relationships to connect with local deliverers
- Strategic ability to explore alternative delivery models
- Strong stakeholder communication to advocate for change and engage equestrian community

Plausibility

Mid-level plausibility. Existing virtual sport trends, emerging concerns about welfare, but uncertainty about increasing or decreasing availability of leisure time.

Scenario B: David Attenborough

Society remains supportive despite increasing environmental and welfare sensitivities. Leisure pursuits continue to diversify to a generally online, time-challenged majority.

Key Implications

- Greater emphasis on shared horse access
- Impact on international competition
- Increase in home-based or local activity resulting in decentralisation of facilities

Biggest Risk / Opportunity

- Greater connection with multiple local providers
- Rethink use of space to enable people to congregate and build sense of community
- Explore horse access opportunities such as shared ownership to reduce cost of involvement
- Explore other cost sharing opportunities connected with gear and travel
- Use of technology to better understand and respond to changing participant trends
- Review annual calendar to reflect climate change impacts
- Conduct review of facilities
- Review current skillsets within ESNZ

Necessary Capabilities

- Agility – ability to quickly respond to change and adapt
- Conviction to challenge status quo
- Innovative mindset
- Environmental, social, governance (ESG) skills

Plausibility

Mid to low level of plausibility. Viewed as least plausible scenario given uncertainty over use of time and assumption that social licence remains in focus



Scenario C: Local leisure

There's an impatience to improve welfare levels and environmental health. Expanding leisure time enables these goals to be pursued, though cost remains a barrier for many.

Key Implications

- Cost has become bigger barrier to participation in equestrian activity
- Increased competition for leisure time with community wellbeing a factor in pursuits pursued
- Increased importance of community connectors given decrease in societal trust
- Heightened environmental concerns leads to decrease in international travel
- Environment more inviting to traditional leisure pursuits, rather than at-home, time constrained virtual pursuits

Biggest Risk / Opportunity

- Equestrian clubs as community hubs, partnering with other sports and leisure pursuits
- Provision of more local opportunities using available spaces and places more creatively
- National trend to decentralised facilities threatens viability of National Equestrian Centre
- Clarity of value proposition required to gain share of hearts and minds of participants and volunteers who have increased leisure options
- Greater promotion of horse/human connection to heightened mental health
- Improved collaboration with local providers
- Increase in local events and non-competition events aimed at social connections
- Re-emphasise of competition structure and pathway from high performance to participation focus

Necessary Capabilities

- Relationship management to build collaboration
- Strong community connections, notably with local deliverers, and councils
- Innovative and learning mindset
- Courage to challenge status quo
- Effective communication strategy

Plausibility

Mid to high level plausibility. Trends of social licence pressure being seen and possibly desire for realisation of increased leisure time (opposed to reality).



Scenario D: Horse, human, harmony

Strong wellbeing outcomes for participants (human and animal) are recognised and supported. The sector is attractive to many who have increased time to get involved.

Key Implications

- Mental health benefits of horse/human recognised and supported
- Digital backlash returning traditional leisure pursuits to favour
- Community cohesion remains strong driver for leisure pursuits
- Inclination to spend on experiences rather than ownership

Biggest Risk / Opportunity

- Refocus delivery and value proposition to stronger focus on horse/human (away from elite), recreation, and connection with nature
- Demonstrate equestrian is accessible to participants beyond current view of 'elite, white, privileged'
- De-emphasise of focus on rules/disciplines, and strongly focus on horse/human relationship
- Explore culture, focusing on ways of working as opposed to programmes
- Build collaboration and co-design participation opportunities with local deliverers
- Promotion of 'great rides', akin to 'great walks'
- Likely introduction and/or increased presence of private providers working in competition to ESNZ
- Explore differentiated membership models

Necessary Capabilities

- Strong communication and story-telling skills to position value proposition and expanded opportunities
- Relationship management and co-design
- Optimisation of business processes and systems to support increase in services

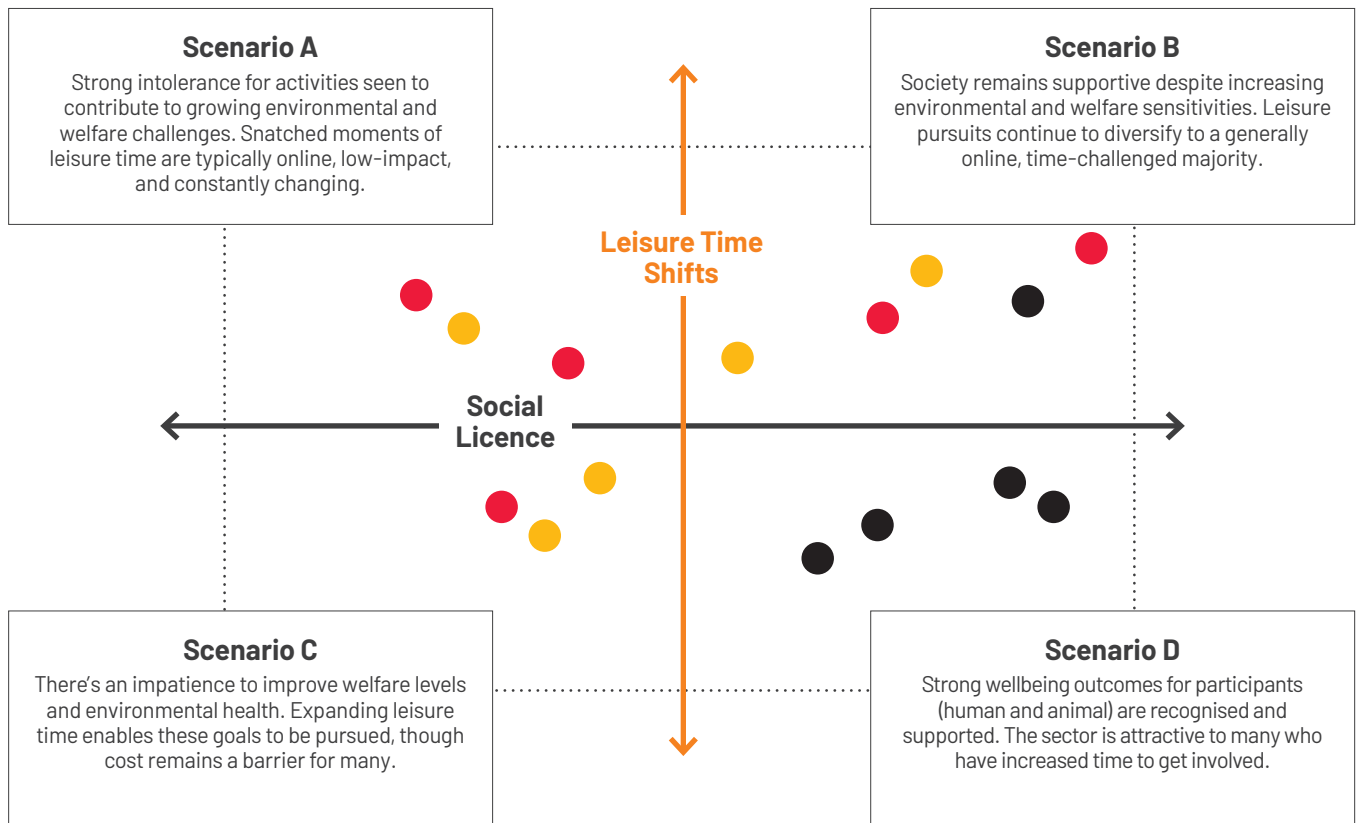
Plausibility

Mid to low plausibility. The preferred scenario but doubts over positive social licence and increased leisure time.



Scenario Outlook

Participants identified the most preferred scenario (black), the scenario most reflected in the present (yellow), and what they believe to be the most likely future (red).



The scenario outlook exercise is qualitative and biased by the group perspective but is a useful mirror for reflection.

- There is a reasonable spread of views that the present (yellow) is reflected across three different scenarios. This highlights that perceptions of the current context within the group are not clear-cut and reflect significant levels of ambiguity. This is healthy as it implies a spread of perspectives that can be explored with ongoing critique of assumptions.
- The highly aligned preferred future is reflective of the team's values but acknowledged as unlikely. That said, a useful question for ESNZ is *to what extent does a considered action align to this ideal, or does it need to reflect an alternate reality?*
- There is a wide variety of views on where the future context lies (red), with three scenarios featuring. This recognises the uncertainty about whether people will have more or less leisure time and if equestrian's social licence will strengthen or weaken. This emphasises the need to consider all scenarios when making strategic decisions and should prompt greater exploration of reference points / data that validate the emergence (or otherwise) of the scenarios.

The scenarios provide a link between the developing New Zealand environment and the strategic conversation within BNZ. Having reflected upon them, and the strategic questions they prompt, it is useful to consider what early indicators point to their emergence.

The Preferred Future

Given the consideration of the range of future possibilities, a fundamental question remains:

What future does ESNZ wish to make happen?

Elements of this were covered in responses to the survey and included:

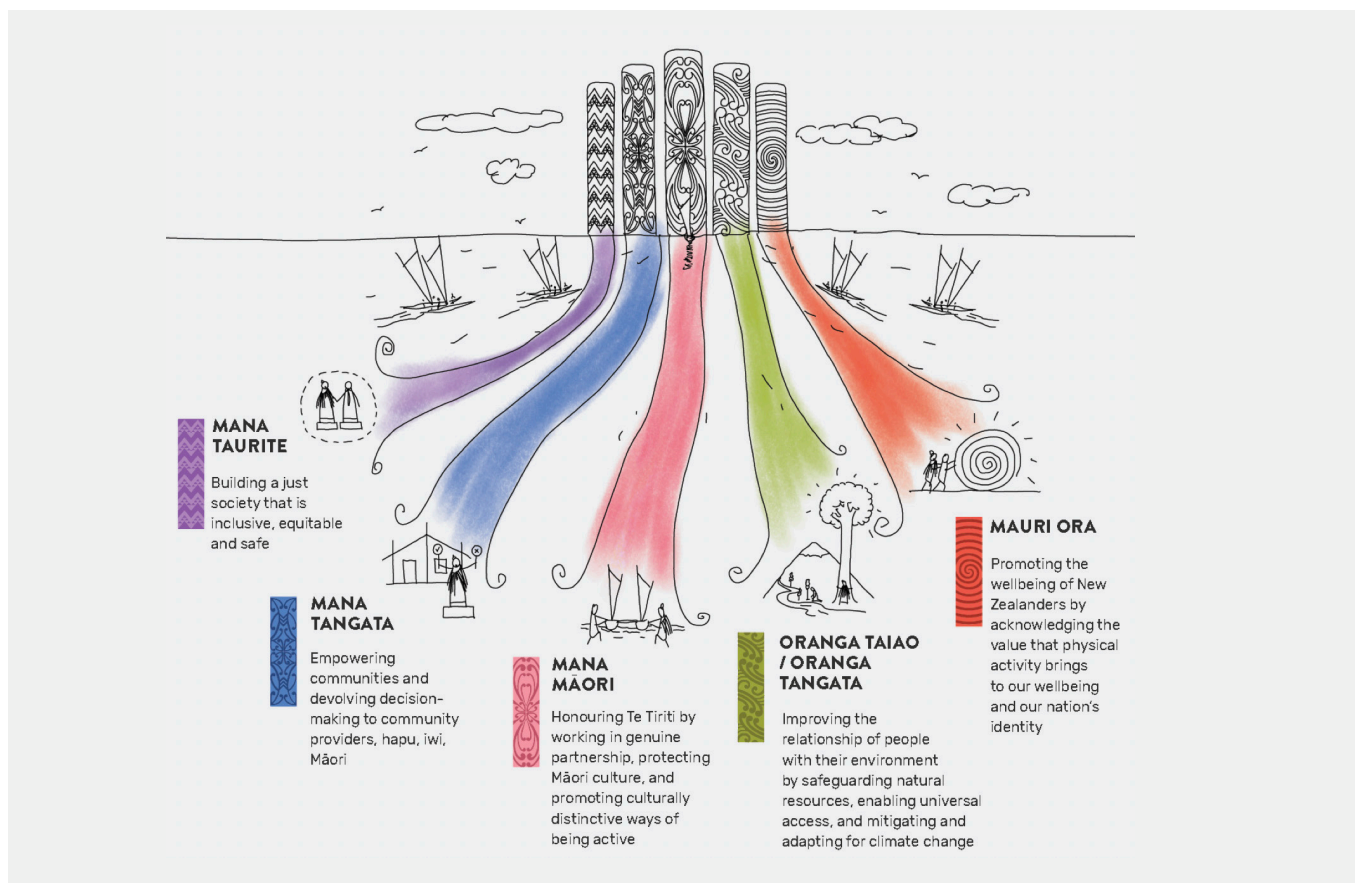
- Making equestrian attractive and accessible to a broader participant base
- A national body with a clear value proposition
- Improved collaboration across the equestrian community
- Ability to attract and retain talented people

An elaborated vision of ESNZ's preferred future can then also be gauged against the changing external context represented either by the scenarios above, or additional trend analysis of specific areas.

Understanding how these fit within the broader context may also lead to discussions around ESNZ's strategic objectives and the extent to which it wishes to influence wider discussions and developments that impact the lives of equestrian participants.

Sector's preferred future

Sport NZ, in conjunction with the wider sector, has developed a preferred future that guides its decisions and approaches and is offered as an exemplar. Sport NZ is encouraging the sector to take actions aligned to one of more of the five characteristics of the preferred future.



ESNZ has strong alignment with Mana Tangata given its networks of clubs and associations, and its ability to connect people in communities. This is of particular importance in a time of decreasing trust in institutions and each other, and growing polarisation accelerated by information, disinformation, and misinformation.

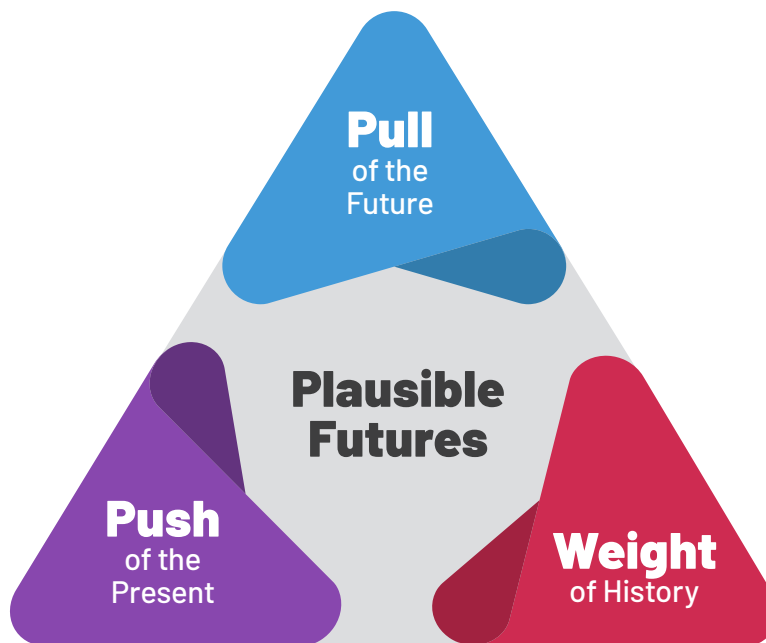
ESNZ's values (Inclusive, Wellbeing of horse and human) also align with making equestrian accessible to all (Mana Taurite), and for promoting the physical and mental wellbeing of all New Zealanders (Mauri Ora).

Weight of history

In workshop 1, equestrian identified some factors that are not aligned to its future aspirations and are therefore holding the sport back. It would be worth the equestrian community building on this discussion.

If you would like to read more about the futures triangle, Sohail Inayatullah's paper on [Six pillars: Futures thinking for transforming](#) is recommended.

- Wellbeing
- Just society
- Empowered communities



- Disposable income
- Changing social license
- Workforce and volunteers
- Status of public funding
- Gaming and interactive experiences
- Changing leisure patterns
- Sustainable financial model

ESNZ

- Not for profit sectors volunteer driven model in modern environment
- Centralised control
- Cost of competing
- Growth mentality
- Connection between success and participation
- Non-alignment across disciplines
- Investment distribution
- Social media impacting social licence
- Lack of strategy execution
- Value proposition clarity



Summary of Action Areas for ESNZ

The scenarios highlighted several key action areas ESNZ may consider in extending its strategic thinking and/or as part of its strengthen and adapt proposal. These, combined with the factors that are holding equestrian back, and its aspirations for the future form the basis for the following actions.

Mitigate Challenges

- Review existing delivery model to ensure adequate focus is given to local delivery, recreational opportunities, and social connections. Challenge the connection between elite success and increased participation.
- Explore shared ownership and cost models to enhance accessibility to equestrian, aligned with the 'Just Society' value, and to address the current image of equestrian being a rich only pursuit.
- Review event delivery and annual calendar to reflect climate change impacts, increase local and non-competition events, and provision of shorter/sharper opportunities. Introduce 'great rides' akin to 'great walks'.
- Explore how increased agility can be built into delivery model to enable improved ability to respond and adapt
- Clarity and promotion of value proposition to gain share of hearts and minds of participants and volunteers who have increased leisure options. This connects with wellbeing value.
- Develop digital and social media capability to enhance communication and strengthen community network.
- Develop/expand customer insights and data analysis capability to respond to changing consumer preferences to avoid losing participants to other competing leisure options.
- Review current skillsets within ESNZ to identify any gaps with preferred state.

Capitalise on Opportunity

- Place greater emphasis on home/local community-based model, including building technological savvy to explore delivery of virtual equestrian.
- Partner with deliverers of virtual sport and embrace eSport to compliment traditional equestrian and delivery new revenue source.
- Re-position equestrian clubs as part of community social facilities – building community connection.
- Explore provision of spaces and places more creatively to deliver more local opportunities to engage in equestrian. Understand the role of the National Equestrian Centre within a revised facilities strategy.
- Actively explore collaboration and co-design with local deliverers of equestrian and local government to build alignment and to offer local opportunities. This aligns with the value of empowered communities.
- Review culture of ESNZ to ensure there is a strong focus on horse/human relationship. This may result in a de-emphasise of focus on rules/disciplines, and events.

Ongoing futures focus for ESNZ board

This report provides a framework and some initial futures thinking that ESNZ can build from. Most immediately, the report can inform ESNZ's strengthen and adapt proposal for Sport NZ. Beyond that, it can help ESNZ to develop better strategy through understanding the longer-term issues or challenges shaping its future.

Futures triangle

The future triangle is useful for kickstarting a process of thinking beyond the now. While it is a simple tool, it can support deep discussions about possible futures and be combined with other tools such as scenario planning to increase its complexity and depth. It is particularly useful in identifying the factors that may be holding you back.

Alternative futures

Equestrian can use the alternative futures with a wider audience to build on the implications, opportunities and challenges identified through this process. This will also assist with promoting greater engagement within the equestrian community in strategic thinking processes.

Alternatively, Equestrian could craft different scenarios to extend its thinking beyond the assumed future and generate new insights and a more resilient strategy.

Ongoing Assumptions

The process of evaluating the future strategic context is ongoing. Regularly surfacing and non-judgementally assessing underpinning assumptions is a critical element of this. For example, the workshops identified the assumption that New Zealanders will enjoy increased leisure time. This is unlikely to be true for significant parts of the population.

Appendix 3 provides an example of assumptions that the ESNZ Board could adapt for monitoring on a six-monthly basis.

Metrics to Track

Tracking the changing ESNZ's operating context is an ongoing task to assess whether the anticipated challenges and opportunities are more/or less likely to eventuate. Given the nature of the scenarios explored, and the deep levels of uncertainties they represent, the ESNZ team may consider a limited set of metrics that provide pointers to what the future may hold.

Appendix 4 provides an example of how the ESNZ Board might monitor its operating context.



Appendix 1

Survey responses

What would you identify as the critical issue for your organisation in the next 5-10 years?

- Lack of competitors due to financial pressures and cost of events/attending events
- Sound governance and management across all disciplines for growth.
- Societal licence - challenges and opportunities arising from public perceptions of welfare in equestrian sport
- Athlete development and overall inclusivity - the gap between grassroots and high performance is increasing. Competing at a high level in the sport is at risk of becoming unachievable due to its elitist and exclusive nature overseas
- Growing the sport, maintaining levels of participation across all levels, being accessible to the wider equestrian community. Pathways
- Coach, official, volunteer development and progress
- Ability to commercialise Intellectual property
- Core business of organisation is identified and well managed in a sustainable way - able to make timely, nimble and robust decisions enabling efficient and cost-effective delivery of equestrian activity
- Ability to attract talent to enable us to become a world-leading sports organisation

If things go well for your organisation, what would you expect to see in 5-10 years?

- Growth in participation numbers, membership satisfaction and more Kiwi's performing on the international stage
- Alignment with other groups which currently sit 'outside' the organisation
- A financially secure organisation able to fully embrace the interests of everyone from casual riders to world class athletes in all equestrian disciplines.
- More inclusivity of athletes, volunteers, officials based on gender, sexuality, race, religion and socio-economic states.
- Horse and rider wellbeing at the forefront
- Greater use of technology to deliver information and results. More real-time data available
- International competition without leaving the country. Prizes on the world stage.
- Robust facilities strategy

What are the factors holding you back from achieving success?

- Cost of competing, cost of living, decreasing disposable income
- Current structure/governance; non-alignment across disciplines all operating differently
- Lack of funding and funding not being applied into the right areas, and perception of inequitable funding across disciplines
- Leadership on horse welfare, equine abuse
- Declining volunteers, burnout and people being time poor
- Social media impacting social licence
- Strategy execution
- Unwillingness to call out bad behaviour
- Too much focus on way things have always been done

If things went wrong for your organisation in the next 5-10 years, what has occurred and what would you most worry about?

- Misunderstanding of animal welfare in society of working with our Equines, and responding loss of social licence
- Eventing numbers continued to decline where not plausible to run competitions
- Disciplines not managed/lead well, membership/participation numbers dropped
- Organisation becomes fragmented
- Membership (and therefore ESNZ's main source of revenue) would be insufficient to fund the organisation
- Sport has become inaccessible and increasingly a sport only for the rich
- Another pandemic or similar that shuts down competition and revenue
- Cost of competing is out of reach of the grassroots riders
- A focus on delivering financial results over membership satisfaction and increase in participation
- Too much falling in step with an international body
- A reliance on a large group of volunteers to drive the sport with limited support from those few who get paid.



Looking back 10–20 years, what are the key factors that have shaped your organisation to be in its current position?

- Elite success and profile that came with this
- Effective leadership, vision and planning for the sport
- Hard work to change the perception that it is only an elite sport for the rich
- Significant efforts of volunteers
- A move from having 99% of staff National Office based to being location based, without gaps created being filled
- Hard calls not always made
- Build of indoor arena at Taupo impacting financial position of ESNZ
- Decline in public interest without the key personalities and Olympic medals
- Unclear value proposition
- Lack of capacity – hard to influence social change when only have capacity to do basic administration
- Attracting talented people to the sport at all levels, ESNZ team, discipline teams and volunteers committed to the cause
- International competition and training opportunities more accessible
- Interest from corporate funders has grown
- People are more time poor
- Dysfunctional database

Looking forward, what do you see as the priority actions your organisation should carry out now?

- Volunteer / officials growth
- Greater connectivity with all other grassroots organisations – grow the ESNZ family
- Greater grassroots/participation focus – leave high performance/top end of the sport to the high-performance programme
- Maintain numbers and make more accessible for new people to enter the sport
- Clear position on purpose of the organization
- Review how we can make participating more affordable
- Provide more support or less administration for organisers who are mostly volunteers
- Deliver current strategy
- Culture change to make equestrian more inviting
- Good communication with all stakeholders
- Assistance with getting everyone on board with new medical standards
- Strategic and financial planning, encourage participation and development programmes for athletes and officials.
- Broaden the way development is looked at

Appendix 2

Scenarios

Scenario A

- The digital economy continues to grow, driven by online gaming and entertainment advances. In addition, the focus on emissions reduction has seen a move toward more localised manufacturing where possible with bytes, rather than physical bits moving between countries.
- Single-person households have outpaced the growth of any other household type. This shift continues to pressure the housing market and is overturning the age-based life-stage generalisations of the past. Many in the burgeoning retired community are physically isolated, with younger generations focused on the daily juggle between home and work life.
- While physical globalisation has receded, economies remain digitally interdependent. Multinational corporations supplying 'leisure products' are now the most significant factor influencing NZ consumer choices with new pay-to-play models. Virtual theme parks are proving popular both for consumers and the commercial real estate sector, repurposing former physical retail sites as online shopping predominates.
- Political discussions are highly fragmented and polarised, with little sense of agreed approaches to the increasingly pressing mid-century issues. Moreover, risk-averse politicians show little appetite for spending on any sector that mainstream opinion perceives as extravagant.
- Increasing international social media connectedness has created new ways for individuals to form collective interests that can be distinct from their local community. Identity may be driven less by age/socio-economics/location but based on who or what provides focus.
- As work has become digitised and unconstrained by time or place, so, to a high degree, has leisure. The boundary between the two has become extremely difficult to detect.
- As the pandemic fades in consciousness, the global community has renewed efforts to tackle environmental breakdown, but the overshoot on energy and resource consumption associated with the economy of the last 150 years continues. Tensions have arisen as individuals, and economies, are now being restricted by governments and international agreements aiming to slow environmental impacts.

Scenario B

- The labour shortages of the post-pandemic years led to significant investment in workplace robotics, from nurse assistants to agricultural robotics. However, this counter-intuitively had the effect of increasing demand for human staff, and those in employment are often working long hours.
- A steady acceleration in legislation to improve environmental performance has led to significant curbs on using un-recyclable materials and non-renewable energy. As most countries have now introduced bans on new fossil-fuel cars, governments are applying steep levies to air travel as its proportion of emissions continues to climb.
- There has been a steady shift from ownership to access as those without assets faced financial challenges. For example, private ownership of cars has declined as they are more affordable public transport options, and ride-shares have become the norm.
- Increasing Summer temperatures are creating significant welfare concerns for humans and livestock. The days topping 25°C have steadily increased from 30 in 2020 as it heads toward 50 by mid-century. As well as the usual consequences like drought, less apparent impacts are the higher rates of hospital admissions for mental health emergencies on the hottest days.
- There has been an explosion in virtual reality applications for all ages as high-carbon transport increases the cost of international travel. It has also become a core part of senior living communities, enabling them to improve life experiences, especially given the ongoing pandemic-related health challenges.
- The pandemic and Russian/Ukraine conflicts underlined the need for far greater global cooperation. As a result, there is greater access to services and products for all, as governments remove previous restrictions. The priority is to develop solutions that deliver on human and planetary wellbeing rather than monetary outcomes.
- In New Zealand this has changed attitudes across society. As a result, it is standard practice for organisations (both public and private) to report on a range of environmental, social and governance goals.

Scenario C

- Ongoing supply-chain challenges and an emphasis on minimising resource use have seen an increase in re-shoring with products manufactured locally where possible. However, there has not been a subsequent surge in employment as automation has largely displaced repetitive work and even occupations thought immune are now affected.
- Inequality is now at record levels, and those reliant on wage-income find it challenging to finance leisure activities despite having more time. Moreover, it underpins political tensions between the asset-rich older generations and the younger precariat.
- Purchase decisions for goods and services are now heavily weighed given the increasing cost of products (with more constrained choices) and consideration of their broader impacts. As a result, people choose activities they perceive as beneficial for individual and community wellbeing, especially if participation costs little.
- Trust in government and private organisations continues to decline. After all, despite years of environmental and social pledges (e.g. UN's Social Development Goals), the crises keep coming, and little traction appears to have been achieved by the global community on the critical issues.
- Despite the political cynicism and tension between haves and have-nots, NZ is enjoying a resurgence of multicultural expression. People are open to new cultural experiences in their communities that offer variety and in which they can participate at a minimal cost. A standout has been the uptake in te reo, which is now commonly used in conversation.
- New Zealanders have shed their 'OE loving' globe-trotting image of the past as travel overall is low and the rest of the world seems further away. Most are comfortable with this transition as they contemplate the turbulence of the world and compare it with local stability. However, externally they are seen as somewhat insular, and the global influence of the country 'punching above its weight' has declined.
- Income for those without assets is now supported through KiwiWage (a form of Universal Basic Income). It has enabled many to reflect on their life focus which now revolves less around their transitory work opportunities, and more through contribution to society.

Scenario D

- New Zealand has embraced a new 'Green Revolution' with an economy focused on circular systems of production aimed at protecting and restoring the environment. It has also re-centred the value placed on the work (both paid and unpaid) of caring for the more vulnerable as a fundamental activity necessary for a thriving society.
- Increasing personal debt levels has led to an economic reckoning. This ushered in new tax laws focused on wealth rebalancing. Despite vigorous disagreement at the time, it has led to a more equitable society and new opportunities for all ages (not just retirees) to engage with their life passions. One consequence is a rebalancing of volunteer support that is now not so heavily reliant on the older generations.
- Over the past decade, there's been a significant shift to renewable energies combined with solid uptake in new modes of transport and less reliance on private vehicle ownership. Personal transport modes tend to be small/low-impact vehicles, with public transport used for movement outside local areas.
- A mostly online world is experiencing regular disruption with ongoing cyber-attacks related to the unstable geopolitical climate. It's encouraged people to be less digitally reliant, support the local physical economy, and engage in collective leisure pursuits that take advantage of New Zealand's unique outdoor environment.
- The financial crisis at of 2024-26, and the previous pandemics, led to the recognition of the need for strong community cohesion, whether based on geographic areas or collective activities. Governments of all political persuasions now support organisations that can demonstrate their support for this goal.
- The global economy recovered slowly after the financial crisis that drove unsustainable debt levels. However, after a painful reset, consumers are now more conscious about their buying choices in terms of origin, impact, and disposal. While global products remain available, there is also a desire to spend money on experiences, leading to a growth in leisure and cultural activities.

Appendix 3

Monitoring of assumptions

The following are an example of the assumptions typically made within the sport and recreation sector. A low level of confidence in the accuracy of an assumption should prompt organisations to adjust their planning or develop a 'plan b' (another term for alternative future).

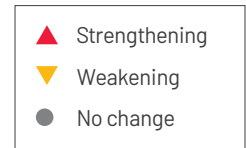
ESNZ could use these assumptions to develop their own assumptions for monitoring. This should occur at least annually. See [The assumptions we hold about the future](#).

Assumption	Level of Confidence in Accuracy
Sport and active recreation will continue to enjoy strong cross-societal support (social licence)	1 2 3 4 5 6 7 8 9 10
Total funding levels to sport and recreation will not decrease	1 2 3 4 5 6 7 8 9 10
Further development of the Te Tiriti relationship will foster a positive Māori experience of active recreation	1 2 3 4 5 6 7 8 9 10
The level of volunteer support for active recreation and sport will not decline	1 2 3 4 5 6 7 8 9 10
Local government will not decrease its support for sport and recreation	1 2 3 4 5 6 7 8 9 10
Climate impacts will have only a moderate impact on sport and active recreation	1 2 3 4 5 6 7 8 9 10
The cost of sport and active recreation will only be a moderate barrier to participation	1 2 3 4 5 6 7 8 9 10
The sport and recreation sector sufficiently adapts to change to remain viable and relevant	1 2 3 4 5 6 7 8 9 10
Integrity management frameworks will adapt to emergent challenges and maintain public confidence in fair competition	1 2 3 4 5 6 7 8 9 10
Attitudes to elite sporting events will remain positive	1 2 3 4 5 6 7 8 9 10
An ageing population will not change the Government's priorities for active recreation and sport	1 2 3 4 5 6 7 8 9 10
The Summer and Winter Olympic and Paralympic Games retain their global appeal as pinnacle international events	1 2 3 4 5 6 7 8 9 10
Government continues to view national identity/pride as the key rationale for investment in elite success	1 2 3 4 5 6 7 8 9 10
Gaming, virtual and augmented reality have little negative impact on participation in sport and recreation	1 2 3 4 5 6 7 8 9 10
Changing working life and leisure patterns do not negatively impact on participation in sport and active recreation	1 2 3 4 5 6 7 8 9 10

Appendix 4

Monitoring disruptors

The ESNZ board could introduce a regular monitor of the issues and events it believes could disrupt its planning. The STEEP categorisation is commonly used for this purpose. An indication that a possible disruptor is strengthening may prompt ESNZ to seek more information or to consider how it might respond.



Political



- ▼ **Social wellbeing policy**
COVID-19 recovery, economy and climate dominating, although Govt still operating under wellbeing banner.
- ▲ **Status of public funding**
Inflation/cost of living/supply issues placing pressure on central and local government spending.
Budget reflects balancing short-term cost of living with longer-term climate change and health implications.
- ▲ **Evolution of Treaty Partnership**
Co-governance being used by some to stir up public alarm over the supposed threat it poses.
- **Health response**
Pandemic response continues to dominate health system under pressure. Could increase focus on physical fitness and healthy communities.
- ▲ **Governance policy initiatives**
Reforms across health, education and local government continue to gather momentum, and present engagement opportunities for us.

Social



- **Increasing ethnic, age and gender diversity**
Increased support and awareness for transgender and non-binary people.
- ▲ **Changing nature of work**
Rise of hybrid work – a blended model where some employees return to the workplace and others continue to work from home.
- ▲ **Social resilience**
Increasingly vulnerable to further lock-downs, other set-backs.
- ▲ **Changing leisure patterns**
Lockdowns accelerated/embedded reshaping of work, time for activity, home entertainment.
- **Changing demographics**
Annual growth rate continues to decrease with births declining 0.7% year on year, although life expectancy continues to climb. Urban populations growing faster than rural.
- ▲ **Individual wellbeing**
Impact on mental health from COVID-19 restrictions becoming more evident.

Economic



- ▲ **National outlook**
sitioning economy from overstimulated domestic demand to a rapid withdrawal of monetary stimulus in order to tame the inflation. Reopening of border may offset some of slowing in domestic demand.
- ▲ **Socio-economic inequality**
The bottom 40% of households account for just 3% of total wealth. 53% of wealth in hands of 10% of households. Māori households have 15% less income than non-Māori households. Gap not increasing but remains an issue.
- **Māori economy**
Approximately \$50 billion asset base and growing.
- **Disposable income**
Housing has biggest impact on income; rising cost of living also impacting.
- ▲ **Changing business patterns**
Increase in flexible workforce, and flexible working hours and arrangements, including telecommuting.

Technological



- ▲ **Gaming and interactive experiences**
Lockdown accelerating on-line tech; rise of virtual and augmented forms of entertainment.
- **Human augmentation**
Bionics, bio-engineering, genetic manipulation, wearables – potential upsides to physical activity but challenges to 'level playing field'. All developing rapidly.
- ▲ **Digital and surveillance**
The level of data is going to potentially overwhelm participants and coaches seeking to compete at the highest levels. Use and access to data will use ethical issues.
- **Increased automation**
Artificial intelligence (AI), robotics and other forms of 'smart automation' are advancing at a rapid pace and have the potential to bring great benefits to the economy, by boosting productivity and creating new and better products and services.
- **Advances in health and medical drugs**
Health and social services must be provided to increasing numbers of older people who are living longer. The health burden of long-term conditions, such as heart disease, diabetes, depression, dementia and musculo-skeletal conditions, is growing.

Environmental



- **Climate change consequence**
Warming and related weather disruptions threatens activity and societal expectations for change.
- ▲ **Climate change response**
Omissions Reduction Plan, informed by the Climate Commissions report. Criticised by some for lacking urgency and relying too much on technocratic rather than political solutions.
- **Space and place dynamics**
From August 2022 Kiwi's will be able build up to three story homes on most sites without the need for additional resource consent. Cost of building and supply issues resulting in deferred maintenance, and higher costs down the road.
- ▲ **Active Transport**
Permissions reduction plan includes \$350 million to fund transport services and infrastructure investments that reduce reliance on cars and support uptake of active and shared modes.

Sector



- **Social licence for sport and recreation**
Cycling review and white ferns selection point to increased negative public sentiment about the duty of care afforded athletes.
- ▲ **Athlete and participant wellbeing**
Divide within athlete community over representative body for athletes.
- ▲ **Workforce (including volunteers)**
Heightened competition for skilled labour; increased pay gap between not for profit and commercial sector; older volunteers deterred through fear of contracting COVID-19 (post loosening of restrictions)
- ▲ **Changes in geopolitical power**
Likelihood of sport being called on to strengthen relationship with Pacific neighbours to counter China's influence. Wimbledon example of sport events as platform for political protest.
- ▲ **Sustainable financial model**
Lotto review, increased focus on alcohol sponsorship, instability of gaming.
- **International travel**
while borders are reopening 90% of the world's population now lives in countries with travel restrictions. Health likely to be embedded in every aspect of travel with increased automation and face and body becoming passport.



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