Date: 2022-11-07

Final report

Utveckling av den didaktiska processen i ridundervisning (Delstudie 3: Ridlärare-Häst)
Improving Teaching Methods in Riding Education:
the Interplay between Rider, Riding Instructor and Horse
(Work Package 3: Riding Instructor-Horse)

Project number: H-17-47-278

Project period: 2017-01-01-2022-09-15

Main applicant:

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Co-applicant(s):

N/A

Part 1: Detailed summary

I "Delstudie 3: Ridlärare-Häst" vidareutvecklas analyserna av materialet som samlades in inom den av Stiftelsen Hästforskning finansierade första delstudien i projektet "Utveckling av den didaktiska processen i ridundervisning". Delstudie 3 har som syfte att beskriva och analysera samspelet mellan ryttare, häst och ridlärare/tränare med särskilt fokus på relationen ridlärare/tränare-häst. Det inomvetenskapliga syftet är att vidareutveckla hästforskningens och kommunikationsforskningens teorier och metoder.

Projektet utgår från kommunikationsetnografiska metoder för materialinsamling och analys. De videoinspelningar som gjordes vid fältarbetet som genomfördes den första delen av projektet har nu analyserats med fokus på framför allt hur ridlärare/tränare förstår hästens handlingar och använder denna förståelse i interaktionen med såväl ryttare som häst. Materialet har samlats in vid fem olika ridanläggningar och totalt har träningar med femton olika ekipage/fem olika tränare spelats in (tre ekipage per tränare och anläggning). Inspelningarna har analyserats med hjälp av samtalsanalytisk metod.

Projektet har fått förlängd dispositionstid (beslutad av forskningssekreterare Lina Bengtsson) beroende på pandemin och på att jag varit sjukskriven under långa perioder och i stor utsträckning endast kunnat arbeta på deltid. Denna förlängning har dock inte inverkat negativt på genomförandet av projektet, utan endast försenat dess slutförande.

Projektet har lett till goda resultat både med avseende på de emipiriska frågeställningarna och metod- och teoriutvecklingsmässigt. Det har lett till en <u>ökad kunskap om hur tränare använder sina observationer av hästens handlingar som pedagogiska resurser</u> i träningssituationen. Tränaren kan ta rollen som "översättare" av hästens handlingar, och därigenom tydliggöra för ryttaren sådant som hen inte fullt ut uppmärksammar och tar hänsyn till i sin ridning. Men tränaren kan också använda hästens handlingar – i situationen,



i en av ryttaren återberättad situation eller i en fiktiv framtida situation – för att understryka för ryttaren vikten av att försöka förstå vad hästen uttrycker med sina handlingar och därmed öka chanserna att hästens välfärd, och inte bara ryttarens personliga mål, får påverka olika situationer, inte bara under det pågående träningstillfället utan också i andra situationer, inklusive eventuella tävlingstillfällen. Texten utgår (liksom projektet i sin helhet) från ett *appreciative inquiry*-perspektiv (Bushe, 2011), vilket innebär att syftet inte är att lyfta de hästvälfärdsproblem som kan finnas inherenta i situationen (och som synes mycket svåra att diskutera på ett konstruktivt sätt för närvarande) utan istället fokusera på de aspekter som har potential att inverka positivt på hästarnas välfärd, inte bara i de mycket lokala situationer som analysen utgår från utan framförallt genom att med hjälp av exempel ur materialet synliggöra praktiker som kan stärka andra (ridlärare/tränare och ridlärar-/tränarutbildare) att fortsätta utveckla ett förhållningssätt och ett praktiskt arbete med elever, hästar och ekipage där hästvälfärd får en tydligare plats i träningspraktiken. Dessa empiriska resultat presenteras bland annat i kapitlet i antologin *Equine Cultures in Transition: Ethical Questions*.

Men projektet har också väckt mycket uppmärksamhet genom den utveckling av metoder för transkription av multimodal interaktion över artgränserna som arbetet lett till. Detta har lett till att jag blev inbjuden till att skriva ett kapitel om transkription och analys av djurmänniska-interaktion i en ny och mycket omfattande bok om samtalsanalytisk och interaktionsanalytisk metod (hittills endast utgiven på svenska, men förhandlingar om en översättning pågår). Exemplet i kapitlet utgår av etiska skäl inte från det tidigare insamlade videomaterialet (bilder från inspelningar riskerar att röja deltagarnas identitet), utan från en analys av interaktionen mellan Peder Fredricson, H&M All In och "Allans" skötare Malin Henlöv, i ett klipp hämtat ur SVT-dokumentären Allan – den bevingade hästen. Tanken är att denna text ska kunna inspirera studenter (inom hippologi såväl som inom andra ämnen) och forskare att själva utforska interaktionen mellan människor och hästar, både vid ridning och i andra situationer (klippet visar hur Peder försöka sitta upp ute på stallplan på Grevlunda, men misslyckas eftersom Allan störtar i väg med Malin i släptåg, och hur situationen löses på ett mycket stillsamt och – hävdar jag – hästvänligt sätt). Ironiskt nog är jag inte särskilt nöjd med den konvention för transkription som denna metodbok lyfter fram (ett tema som jag utvecklat vid flera presentationer efter bokens publikation, se även nedan). Men jag tror ändå att mitt kapitel där kan tjäna som en god ingång för den som vill undersöka hur interaktionen mellan häst och människa faktiskt ser ut och fungerar, i detalj.

Även på det internationella planet har de metodologiska landvinningarna uppmärksammats, dels som en konsekvens av min medverkan vid diverse olika konferenser genom åren, men också genom systerprojektet *Moving with horses* (finansierat av VR/NOS-HS) där jag samarbetat med en finsk och en fransk kollega, och genom kapitlet i antologin *Dreaming of Pegasu: Equine Imaginings*. Denna antologi samlar gräddan av den internationella forskargemenskapen inom HumSamHäst (som jag är glad över att jag mycket aktivt kunnat bidra till att etablera tack vare Stiftelsens finansiering av de tre delprojekten). Antologin är ganska djärv i så motto att den utgår från de medverkande forskarnas personliga relation till hästar, och utforskar hur denna påverkar vårt arbete med avseende på metoder, teoretiska utgångspunkter och frågeställningar. Boken har fått ett mycket positivt mottagande. Så här långt har konsekvenserna för min del bland annat varit en inbjudan till en högprofilerad men exklusiv workshop om människa-djur-relationer i Belgien och ett därtill hörande

The project has been financed by:



specialnummer i en tidskrift, där jag kommer att utveckla resonemangen om hur jag menar att man kan lösa en del av de utmaningar som en detaljerad beskrivning av häst-människainteraktion bjuder på, och diskutera olika transkriptionspraktikers möjligheter och begränsningar. Uppmärksamheten har också lett till ett nyss påbörjat samarbete med kanadensiska forskare inom veterinärmedicin där jag kommer att vara med och handleda en av deras doktorander när de ska undersöka hästträning (dressyr och hoppning) genom att kombinera biomekanisk teori med de metoder jag utvecklat för analys av multimodal, artöverskridande interaktion.

Projektets empiriska resultat kan användas inom utbildningar för ridlärare och tränare i syfte att stimulera diskussion kring hur ridlärare/tränare kan och bör använda sina möjligheter att påverka sina adepters kunskaper om och förståelse av hästen som kommunicerande varelse. Men resultaten bör också kunna användas för att stimulera diskussioner om vad ridlärare och tränare i sin undervisning förmedlar om hästar och ridning, samt hur man som professionell leverantör av en tjänst (oavsett om det är på en ridskola eller i form av privat ridträning) kan hantera det spänningsfält som kan uppstå mellan å den ena sidan ryttarens/"kundens" förväntningar (och behovet av att inte utmana kunden så mycket att hen väljer att sluta köpa ens tjänster) och å den andra sidan hästarnas välfärd, både i den lokala situationen under ett träningstillfälle och på ett mer allmänt plan. För att bidra till en god utveckling av hästvälfärden (och därmed också till ridsportens legitimitet, vilken som bekant inte kan tas för given) inom ridsporten måste ridlärare/tränare kanske i större utsträckning än tidigare våga utmana sina kunders förgivettaganden om vad som är "god ridning" och "god hästvälfärd".

Den metod- och teoriutveckling projektet bidragit till bör kunna komma väl till pass vid fortsatta studier av hur kommunikationen mellan hästar och människor faktiskt ser ut och fungerar (till skillnad från hur vi människor tror, eller vill tro, att den ser ut och fungerar). Genom att transkribera videoinspelningar av naturligt förekommande häst-människainteraktion kan såväl studenter som forskare komma närmare en riktig beskrivning av sakernas tillstånd än vad man kan göra genom att till exempel intervjua människor om deras ridning och annan interaktion med hästar. Genom att utgå från en kvalitativ, etnografisk ansats där analysen är öppen för emergenta mönster (mönster som blir synliga allteftersom det analytiska arbetet pågår), kan vi utveckla en annan sorts förståelse för interaktionen än den kunskap som bygger på testning av på förhand uppställda hypoteser.



HÄSTFORSKNING

Pert 2: Main report (max. 10 pages)

Introduction

This report concludes the work within the project *Improving Teaching Methods in Riding Education: The Interplay between Rider, Riding Instructor and Horse.* The project began in 2013, when the data was first collected. The overarching aim of the project was to improve the knowledge about communication during training sessions, focusing on the communication between horse and rider (in the first study), the rider and the trainer (in the second study) and between horse and trainer (in the third study), as illustrated below (illustration 1).

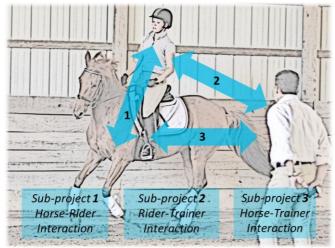


Illustration 1. The three sub-projects making up *Improving Teaching Methods in Riding Education: The Interplay between Rider, Riding Instructor and Horse*

In this third study, or sub-project, theories on learning and communication have been combined with cutting edge methods for multimodal interaction analysis to show how riding instructors orient towards, and in various ways emphasize to the rider, the needs of the horse during training sessions. The aim of this study was to lay a foundation for active reflection amongst trainers, hopefully inspiring development of teaching and training practices that may not only lead to good results but, most importantly, improved well-being and work satisfaction for horses and humans alike. From the point of view of the professional trainers, the ability to reflect over and develop teaching and training practices that align with state-of-the-art knowledge of good horse welfare. Even though this study does not evaluate the welfare of the participating horses, it seeks to show how teaching and training practices can allow for a focus on related issues. It also seeks to inspire reflection, amongst practitioners of dressage and other disciplines, over how what trainers focus on, and teach their riders to focus on (explicitly and implicitly), can improve – or impair – horse welfare and thus help secure – or ruin – the social license¹ for equestrianism.

Material and methods

The study is based on triangulation of three types of data (video recordings, interviews and field notes) from five Swedish equestrian centres. The fifteen participating riders all have more than five years of experience in riding and are 16-65 years old. The five participating

¹ SLTO ref



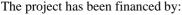
trainers all work professionally as riding trainers. All participants (or their guardians) have left their written consent to participating in the study after having received written information about the study, about their voluntary participation and about their right to withdraw from the study at any point prior to publication.

Fifteen trainings have been recorded, three at each equestrian centre. The recordings were made during routine trainings (during six months in 2013-2014), meaning that no trainings have been arranged for the benefit of the data, and thus consist of naturally occurring interaction as opposed to interaction taking place in an experimental setting. Three cameras were used: one unmanned, wide angle, high-resolution camera to cover the whole extension of the riding hall, and two manned cameras following the equipage and the trainer respectively as they move around in the arena. To overcome the bad acoustics of the riding halls, a separate audio recording was made of the riders' voice using a wearable audio recorder. After each training, audio recorded interviews were made with the riders. Field notes were made during and after the visits at the different equestrian centres. Interviews and field notes have been used to enhance the understanding of the video recorded interaction in the riding hall.

The analyses thus build primarily on the video recordings, which have been analysed both in accordance with established principles within interaction analysis (as presented in the chapter on multimodal interaction analysis across species boundaries (Lundgren 2020), where the interaction between Peder Fredricson, his horse All In and groom Malin Henlöv are analysed). However, the limitations of the established forms of transcription have also led to the development of new ways of transcribing interspecies interaction between horse and human (Lundgren 2022a, 2022b). The events unfolding during each of the fifteen trainings have first been described in a video log, and based on the emerging patterns in this data, shorter clips from the recordings that depict analytically interesting sequences of events have been transcribed. In the first step, a basic transcription has been made which has been followed by more detailed analytical transcriptions focusing on the minute details of the interaction. In one of the other publications reported on here (Lundgren 2019), a third stage has followed where the analytical transcript in the examples used in the published text has been adapted both to suit the aim of the work presented in the text as well as to a broad audience not specialised in interaction analysis. In these examples, most of the details that are not relevant to make the precise point the text is focused on has been stripped out to enhance accessibility. As one of the main goals of the project as a whole is to inform a better understanding of horse-rider-trainer interaction amongst practitioners within the equine industry, this principle has been followed throughout the project.

Results and discussion

Both with respect to the empirical questions this substudy set out to answer and the ambition to the develop methods and theories within interaction analysis, the results have been a satisfying. The empirical results have enhanced our understanding of how trainers can use the observations they make of the horse's actions during trainings as pedagogical resources in the training situation. The trainer can take the role of "translator" of the horse's actions, thus focusing the rider's attention on aspects of "what is going on under the saddle" (as one trainer put it) that the rider might otherwise not notice or not understand in accordance with the trainer's way of understanding the actions of the horse. The trainer can





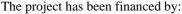
thus amplify the horse's voice in relation to the rider. What the trainer choses to focus the rider's attention on, and how s/he explains why the aspects highlighted are important and how the rider should interpret them, is not the main focus of the analysis. Instead, the practice of doing so, as well as how it can be done, is what is relevant here in order to stimulate reflection on behalf of trainers/instructors and educators of trainers and instructors alike.

This practice is very powerful from a pedagogical point of view, and the question of what is highlighted and not, as well as how the highlighted aspects are discussed and/or explained, will influence not only the unfolding interaction in the local situation, but also the rider's understanding of what horses do and of what the rider should do with this information in other situations.

But the trainer can also highlight the horse's actions – in the local situation, in a by the rider described situation or in a fictional future situation – to use them as a point of departure for a discussion on the various ways in which the action can be interpreted, and on how important it is that the rider tries to understand what might be causing the horse's actions. Such everyday analytical work, carried out together with the trainer or in solitude, can impact the wellbeing and welfare of the horse. As shown in the chapter on what trainers teach their riders (Lundgren 2019), trainers can use their expert position and the practice of highlighting certain actions of the horse to strengthen the horse's "voice" and inspire the rider to take the horse's perspective on the unfolding interaction and not only focus on his/her own goals, especially if there might be a conflict between these two aspects. Furthermore, this practice can be extended to discussions relating not only to the ongoing training but also to other situations, including previous or future competitions.

The project has also contributed to the development of methods for transcribing multimodal interaction. The scope of multimodal interaction analysis now includes not only interaction between humans in various situations, but also between human animals and non-human animals. My chapter in the interdisciplinary anthology on methods for multimodal interaction analysis edited by professors Leelo Keevalik and Mathias Broth (Lundgren 2020) seeks to open up this methodology also for non-specialists, including students of hippology and ethology. To reach Swedish students I decided to publish my work in this anthology although it has been published (hitherto only) in Swedish, and I hope this text will (like some previous publications related to the project) make it to the literature lists of courses outside of the humanities and social sciences.

Also among anthropologists and others who have an empirical interest in human-animal interaction within (the very wide umbrella of) human-animal studies there is a growing interest in this way of exploring everyday relations across the species divide. My chapter (Lundgren 2021) in the methods anthology Dreaming of Pegasus (in English, and with a different perspective as it provides an exposé of various methodological approaches within horse-human relations research in the humanities and social sciences) apparently reaches new readers, and has lead to several interesting new collaborations. During 2022, I have been invited twice to Professor Veronique Servais, head of the Laboratoire d'Anthropologie Sociale et Culturelle (LASC) at Liège University in Belgium. The second visit was to participate in an exclusive workshop seeking to bridge the divide between on the one hand





the more empirically oriented human-animal relations scholars (departing from an interest in the interaction between them, and taking a welfarist stance), and on the other hand the more theoretically oriented critical human-animal studies scholars (departing from a critique of human-animal relations in all shapes and forms, and taking an abolitionist stance). The discussions were interesting, and a special issue in a bilingual (French/English) scientific journal will be put together later on, where my presentations will form the core of an article on how multimodal interaction analysis across species divisions (between human animals and non-human animals as well as between non-human animals, such as interactions between horses and barn cats) is a necessary next step to further our understanding of the relations between us and properly explore both differences and similarities between different mammals with reference to their communicative practices, including their ability to communicate with other species. In the summer of 2022, I was contacted by a group of Canadian researchers within the veterinary sciences (led by Dr Caroline Ritter at University of Prince Edward Island), who wanted to include me in a proposal for a research project and as a co-supervisor of one of their PhD students (Megan Ross). We are still awaiting the final decisions for this proposal. If accepted, Ms Ross will conduct an ethnographic study (including multimodal interaction analysis of trainer-rider interaction) on Canadian trainers talking with their riders about horse biomechanics. This autumn, I have also been in contact with Beatrice Szczepek Reed, a (originally German) professor in linguistics, based at King's College in London, who wants to collaborate with me on analysis of prosody in equestrian training sessions and clinics. She has done some preliminary work, inspired by (a google translate translation (!) of) one of my previous publications from the project (the article on riding instructors multimodal teaching practices, Lundgren 2017) which she presented at my department at Linköping University in early October.

Conclusions

Based on the above mentioned results in terms of both the direct scientific output and the increased visibility for research on multimodal interaction in horse-human and human-animal studies, one may certainly conclude that the project has contributed to a process of recognition that is gaining momentum. This is of course deeply satisfying to a researcher who like me have – thanks to the generous support from The Swedish-Norwegian Foundation for Equine Research – had the opportunity to be an active party in the establishment of horse-human relations as a research field both nationally and internationally.

Relevance for the practical horse sector incl. recommendations

Training riders, and/or instructing riders in a riding school setting, means teaching riders how to act in response to horses' actions, but also – even if this is less often made explicit in training situations – teaching riders how to think about horses, and how to relate to them in a more general sense.

Theories² on learning teach us that any learning situation has both a formal (what is explicitly and intentionally taught) and an informal (what is implicitly and often

² The scientific study of teaching and learning has led to a rich flora of theories of learning that goes well beyond the so called "theory of learning" presented by B.F. Skinner in the mid 1900s. Skinner's theory focuses on the relation between exposure to a stimulus and different ways of reinforcing the reaction to that stimulus and is



unintentionally taught) side. It is important to understand, not least in the light of the ongoing discussions regarding the wider society's acceptance of equestrian sport³, that both what is explicitly taught by the trainer through the interaction with the rider, and the underlying assumptions that his/her solution to a problem is based on, will be passed on to the riders. It is also important to understand that what is passed on is independent of the practice itself: it can be ways of acting that are in alignment with good horse welfare, or not. It can be ways of acting that are in alignment with what the wider society perceive as good horse welfare, or not. Regardless, what is passed on will likely influence future interactions between horse and rider – after all, this is the point of riding for a trainer: to learn how to interact with the horse when *not* riding for that trainer.

The practice of highlighting and translating the horse's actions to the riders might also provide a solution to a problem mentioned by some trainers (participants in the project as well as others that I have discussed the results with over the years), namely that some riders tend to let their ambitions overrun the (current or general) capacity of their horses. This is a delicate problem to address, as doing so risks putting strain on the relation between trainer and rider and might lead to the rider simply leaving the trainer for another who does not bring up such face-threatening discussions. By departing from the actions of the horse, translating them to the rider, and putting the horse's perspective on centre stage, more constructive discussions might be possible – without threatening the face of the rider, and risking losing clients. The practice of highlighting and translating the horse's actions may also direct the rider's attention away from what the horse does (not) do, and to the actions of the riders themselves, and to how those actions are being perceived by the horses. Trainers who have a good understanding of how their ideas about horses relate to how they interpret the actions of the horses participating in their trainings, and consequently to how they teach their riders to respond to what the horses do (and do not do), will be able to provide more convincing explanations to why the horses act like they do, and what constitutes a reasonable response on behalf of the rider. In a longer perspective, this may be what we need to transfer the focus of teaching and training from the rider's expectations on their horses to what the horses have the right to expect from their riders.

The recommendation is thus to engage in reflection and discussion with peers within the trainer/instructor communities, and within the trainer/instructor training communities, on how pedagogical practices can be used as resources in teaching riders more about horses. Furthermore, discussions on what is explicitly taught and what is implicitly, intentionally or unintentionally, passed on to riders – the content of the pedagogical practice – needs to be discussed within these groups of professionals. The research-based knowledge regarding horses (predominantly within the natural sciences) and horse-human relations (predominantly within the humanities, social sciences and art) is growing rapidly, and trainers and instructors need to align their training and teaching with both these bodies of knowledge in order to ensure that your work supports the wider society's continued support for equestrianism. If this challenge is not taken seriously, the long-term implications will not

³ The so called SLO or Social License to Operate, a term brought to the equestrian world by Julie Fiedler in a article on management of accidents during equestrian events, Fiedler & McGreevy 2016).



sometimes presented as the one and only theory on learning there is. Albeit Skinner's theory is a good model of one type of learning, social scientists have since then shown that teaching and learning are much more complex processes, dependent on various contextual factors – amongst mice and men alike.

only be that keeping and riding horses is endangered, but that your livelihoods are endangered as well.

References

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Lundgren, C. 2019. What do trainers teach their riders about horses and riding? An interaction analysis study of sports dressage training. In: Bornemark, J, Andersson, P. and Ekström von Essen, U. (eds.) Equine Cultures in Transition – Ethical Questions. London: Routledge.

Lundgren, C: 2017. Ridlärares kommunikation under privatlektioner i dressyr. En samtalsanalytisk studie. Scandinavian Sport Studies Forum, vol. 8: 67-86.

Part 3: Result dissemination

State all result dissemination from the financed project into the appropriate section, including information as indicated in each section. Additional rows can be added to the table.

Scientific	Lundgren, C. 2021. The horse loving interaction researcher OR Interspecies multimodal interaction analysis. In: Birke, L. and Wels, H. (eds.) <i>Dreaming of</i>
publications,	Pegausus: Equine Imaginings. Uttoexeter: Victorina Press.
published	Lundgren, C. 2020. Interaktion mellan djur och människor [Interaction between animals and humans]. In: Broth, M. and Keevallik, L. (eds). <i>Multimodal interaktionsanalys</i> . Lund: Studentlitteratur.
	Lundgren, C. 2019. What do trainers teach their riders about horses and riding? An interaction analysis study of sports dressage training. In: Bornemark, J, Andersson, P. and Ekström von Essen, U. (eds.) Equine Cultures in Transition – Ethical Questions. London: Routledge.
Scientific publications, manuscript	Lundgren, C. Modern hästkunskap – en vetenskapligt baserad lärobok för hästintresserade [Contemporary horsemanship – an evidense based text book on horse management and training] (A new text book in Swedish geared towards the basic levels of education has been needed for a long time, and this book will work as that – and hopefully replace the 25 years old but still used <i>Hästhållning i praktiken</i> [Practical horse management].)
Conference publications/ presentations	Lundgren, C. 2022. Multimodal horse-human interaction analyses: (Attempts at) giving "voice" to the horse. Invited speaker at the workshop On interspecies domination: Sovereignty, resistance, and human and non-human emancipation 2022, Université de Liège, Septembre 2022.
	Lundgren C. 2022. Challenges in multimodal horse-human interaction analyses. Invited speaker at higher seminar at Laboratoire d'Anthropologie Sociale et Culturelle (LASC), Université de Liège, April 2022. Lundgren, C. 2018. Feedback in Equestrian Training. OFTI 35 [Nordic Conversation Analysis Network annual conference nr 35], Karlstad University.
Other publications,	Interview in Swedish Radio P1 show "Språket" [Our language] (2021) about horse-human communication and horse related expressions. https://sverigesradio.se/avsnitt/1646673 [accessed 2022-09-25]
media etc.	Interview in regional newspaper Östgötacorrespondenten (multimedia and print, including first page) (2021) about horse-human communication https://corren.se/bli-prenumerant/artikel/jdmwqy1 and https://corren.se/bli-prenumerant/artikel/jn4nmonl [behind paywall, accessed 2022-09-25]
Oral communication,	Participated at national network meeting and seminars with the HumSamKonstHäst group [Horse-human relations research group] at Strömsholm, May 2022.
to horse sector, students etc.	Hästar, människor och kommunikation. [Horses, humans and communication.] Invited presentation for all members at Linköpings fältrittklubb [Linköping Eventing Association] 2019.
	Seminar on horse-human relations and ethics at the Swedish Equestrian Federation's course for young board members [Ridsportförbundet DUS-utbildningsdagar] 2018 (together with Josefine Linder, managing director of Smedstad Equestrian Centre, Linköping).

