

HORSE RIDING TOURISM – DEFINITIONAL CONUNDRUM

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Abstract

Horse tourism, as a part of special interest tourism, recorded a significant growth over the last two decades or so. This growth is partly due to the increased popularity of equestrian sports in developed world and, partly, to the need to diversify the horse industry income base. Nevertheless, research of, both, supply and demand for horse tourism is still rare, fragmented and incomparable, slowing down creation of a coherent body of knowledge and development of a conceptual model that would provide a systematic approach to designing horse tourism development strategies guiding entrepreneurship and destination-wide actions. Against this background, this review article is a step towards the synthesis of existing research on horse-tourism supply and demand based on which it provides guidelines for defining the holistic model for the development of equestrian tourism. It is argued that such model should take into account the key stakeholders' perspectives and differentiating products based on the basic typology of experiences provided by equestrian tourism.

Keywords: horse industry, special interest, demand, supply, destination.

INTRODUCTION

It has been almost four decades ago that tourism scholars and professionals have become aware of the emergence of markets interested in specific type of activities, giving birth to special interest tourism. Soon, special interest tourism has become a backbone of tourism development and marketing strategies, with planners seeking to capture these large and fast-growing segments. Of the few segments detected at that time, rural tourism was one of the most significant.

While demand for rural tourism was fuelled by general lifestyle changes, it was the naturophilia, lost connection with rural space and search for authenticity that spurred renewed demand for holidays in rural areas from 1990s onward. Rural tourism, as a product, is highly fragmented. This fragmentation reflects a broad change in leisure and recreation patterns, with a growing number of people participating in ever increasing number of activities in rural areas. One such fast growing activity is horse riding. Increased interest for horses and horse-riding in Europe/world-wide is reflected in the growing demand for equestrian tourism.

Yet, despite its fast growth, the equestrian tourism is still of marginal interest of tourism scholars. Subsequently, the phenomenon of equestrian tourism is poorly understood and defined; research is fragmented and scattered across a range of disciplines. The aim of this paper is, therefore, to provide a review on the topic of equestrian tourism and its relevance for the product development with a view to propose a conceptual framework. Such framework is needed to overcome the current state of theoretical confusion and scattered body of knowledge into a unified and meaningful whole. Methods wise, this is a review paper based on the critical analysis of the currently available research published in scholarly journals and industry reports.

1. TRAJECTORY OF HORSE/EQUESTRIAN TOURISM

Equestrian industry is important for many countries of Europe, North America and Australia. In the past, horse was used for work, transport and in military. With the advent of machinery, the number of horses was on the decline in most of the developed world. This trend was turned around in 1950s and 1960s with a rising popularity of outdoor recreation marking the emergence of equestrian tourism. This was most notable in France followed by Spain, Germany, United Kingdom and other Western European countries (Pickel-Chevalier, 2015). In spite of its history being closely related to horses, Croatia (Čačić, Simundža & Matasović, 2013), similar to other countries of Central and Eastern Europe (Kozak, 2013; Buczek-Kowalik, Klamár & Kozoň, 2017; Obadovics & Kulcsar, 2015) lagged behind as it was only in 1990s that the horse breeding started to increase.

The shift in horse use from work to recreation reflected some wider socio-economic changes with more leisure time that got increasingly commercialised. In addition, and especially relevant for the horse industry, was the growing importance of children welfare with horse becoming an emotional subject and a product (Pickel-Chevalier, 2015; Helgadóttir 2006). There was also a change in horse-riding population. While in the past it was a male sport with prestige attached to it and often related to military skills, nowadays it is associated with grace, hedonism, youth and passion for horses. Thus, horse riders today are mostly women and young people (Auchter, 2008; Gilbert & Gillett, 2014).

There is about 20 million horse-riders world-wide, of which six million in Europe (EUquees project 2015). It is estimated that two per cent of European population practices horse riding. The largest number of riders – 2.4 million – is in United Kingdom followed by 2.2 million in France (Grefe & Pickel-Cheavlier, 2015) and 1.2 million in Germany (Deutsche Reiterliche Vereinigung e.V. Fédération Equestre Nationale, 2014). The number of riders in Croatia is estimated at about three thousand (Croatian Equestrian Association, personal interview, January 2018).

This vast pool of horse-riders has gradually created demand for horse tourism. The literature of equestrian tourism is generally in agreement that it emerged in France in 1950s and 1960s. It has since evolved into a well organised equestrian tourism industry with a network of sixty thousand trails (Grefe & Pickel-Chevalier, 2015). However, a boom in French equestrian tourism is recorded only over the last two decades or so (Cressent & Jez, 2013). Similarly, a surge of demand after 1990s was also noticed in

Poland (Buczek-Kowali, Klamar & Kozon, 2017). In Australia, Beeton (2001) also reports that the popularity of leisure riding increased fast after 1980s spurred by domestic and overseas tourist demand.

2. HORSE TOURISM DEFINITIONS

Despite the relatively long history of horse tourism and its surge in popularity over the last thirty years, serious scholarship on equestrian tourism is lacking. Already ten years ago Helgadóttir & Sigurðardóttir (2008) argued that horse-based tourism is not well researched; this still holds true today. One of the obstacles to serious and comparable research a lack of clear definition and a diverse terminology in use (Buchmann 2017).

First, most definitions are functional, taxonomical and activity based. They differ in the spectrum of activities included and thus range from a very narrow that reduce horse tourism to horse riding (Kozak 2013, Hofstee in Buchmann 2017) to very broad that include all activities related to horse. As presented in Table 1, the broadest definition includes everything that is related to horses – from horse riding right through to horse-related business events. Picket-Chevalier (2015) has neatly captured this diversity proposing simply that horse tourism in tourism by the horse and tourism for the horse. Definitions also differ according to the different perspective of stakeholders. The International Federation of Equestrian Tourism has a slight bias towards horse riding activities; the USA Agricultural Marketing Resource Centre stress the importance of the profitability of horse tourism for its owners. The Croatian Equestrian Sport Association sees horse tourism through the lenses of horse riding. Organisations in charge of tourism development, such as the French National Tourism Association takes the broadest possible view of horse tourism. In contrast to others, this definition is motivational and developed from a visitor perspective in stating that it is the type of tourism where the main motivation is the horse.

Table 1: **Definitions of horse tourism**

Focus	Author	Definition	Setting/ country
Narrow (riding)	Delambre (in Picket-Chevalier, 2015)	Tourism activity on the back of a horse on a trail ride for pleasure of over 24 hours.	n/a
	Buczek-Kowalik, Klamar & Kozon (2017)	Horse riding tourism that require certain level of fitness and professional training on the part of a tourists.	Poland/Slovakia
	Hofstee in Buchmann (2017)	Riding activity undertaken away from home while staying in holiday accommodation.	n/a
	Helgadóttir & Sigurðardóttir (2015)	Horse riding in a rural setting	Iceland

Focus	Author	Definition	Setting/ country
	Ollenburg (2005)	Horse tourism ranges from guided horse tracks, tours and trail rides, fixed site farm-stay, guest and working ranch, riding clinics and camps and horse-drawn carriage	n/a
	Kozak (2013)	A form of an active tourism in rural areas consisting of recreational horse riding centres or in a field, including on a horseback, in a carriage or behind the horse	Poland
	USA Agricultural marketing Resource center) in Buchmann (2017)	Using horses for horseback riding lessons, trail riding opportunities, boarding facilities and reproduction services and may provide profitable value added businesses.	USA
	Picket-Chevalier (2015)	Tourist activities related to horse including tourism on a horseback and horse as an attraction.	France
	International Federation of Equestrian Tourism Buchmann (2017)	All equestrian activities undertaken by tourists outside their normal place of residence such as training courses, improvement courses and other aspects or diverse types of vacation principally revolving around the horse.	n/a
	Croatian Horse Tourism Association (in Jakovinac, Caput-Jogunica, Ramljak, 2013)	It includes use of all horse resources, regardless of the breed - hiring horses, riding horses, horseback riding events, races, sports events, exhibitions and shows, parades, animated games, one-day or multi-day organized trekking, panoramic and field riding and many other activities innovatively designed for target groups of visitors or tourists.	Croatia
	Irish National Tourism Development Authority Buchmann (2017)	Multitude of horse-related activities including participatory activities (riding or driving the horses) as well as spectator activities and other ways of embracing the equestrian culture.	Ireland
	Kline in Buchmann (2017)	Equestrian tourism includes guided horse treks, tourism and trail rides, fixed-site farm stays, quest and working ranches, riding clinics and camps, competitions, horse-related conferences and meeting and horse drawn carriages	Austra-lia
Broad	Atout (French National Tourism Organisation) in Buchmann (2017)	Type of tourism where the main motivation is the horse.	France

The lack of the definitional clarity is not a purely theoretical issue. It reflects on the (lack of) a collective body of knowledge for, both, scholars and professional. An attempt to estimate the size of the horse tourism will suffice to illustrate the point. The most comprehensive statistics comes from Iceland but focused only on the segment of horse riders. It is estimated that about 17.5 per cent of summer and 10 per cent of winter international tourists to Iceland are engaged in horse-riding (Schmudde 2015; Sigurðardóttir & Helgadóttir 2015). In Spain estimated include, both, riders and those attracted to horses - about 25 per cent of international tourists participate in horse tourism in Spain, of which about 30 per cent on horse-back riding, 25 per cent in activities related to horses (fairs, competitions and similar) and about 7 per cent on long trail rides (Pickel-Chevalier, 2015), where, obviously, horse-back riding and long trail riding categories overlap and data is limited to international demand. In Australia, size of the horse tourism is estimated from the number of horse riders on trails to about a hundred thousand annually (Buchmann, 2017), thus reducing the measure solely to trail riders. A survey of Croatian summer visitors along Adriatic shows that about 3.5 per cent participates in horse riding; however, in some parts with developed network of horse trails and dominance of visitors from Italy, Austria, UK and France, this goes as high as almost nine per cent (Institute for Tourism, 2018) but, again, this is limited by activity, season and geographical coverage.

Even less is known about those attracted to horses. The actual size of this market can only be guessed from a sporadic and often incomparable data, such as the number of horse lovers - about 19 million in United Kingdom (British Horse Society, 2015) and 11 million people in Germany express love/great interest for horses (Deutsche Reiterliche Vereinigung e.V. Fédération Equestre Nationale, 2014). Alternatively, it can be gauged by the visitor number of horse-based attractions, sourced from the attraction visitor surveys, such as that conducted and made widely available in United Kingdom or Ireland. While the number of visitors attracted to horses seems to be sufficiently large to sustain commercial horse-based visitor attractions as well as to provide additional revenues for private and state-owned studs, these type of attractions are almost completely ignored in scholarly research and set up of such an attractions seems to be drawing insights from the key success factors of animal-based attractions, museums and theme parks, as it combines all three into a well-rounded visitor experience.

3. KEY SUCCESS FACTORS

The two key aspects of the horse tourism – horse rides and horse-based attractions – have different audience and, thus different success factors. The need for socialising with a like-minded people, for recreation and development of riding skills together with a need to learn something new about horses, especially the local breeds (Magalhaes, Barroco & Antunes, 2015), are the basic motivations of horse-riding tourists. They are attracted by the beauty of a nature, diverse landscape forms with rich cultural heritage. Accommodation should be comfortable but not necessarily luxury and food and drinks should be traditional, but of high quality (Plea, 2015). In short, they require comfort and authenticity. Tradition of horse breeding, type and quality of horses (calmness) and professional staff skilled in riding and knowledgeable about horses are also important. They also value service quality and safety is high on their agenda. It helps if there are

well-known riders or trainers (Sigurðardóttir & Helgadóttir, 2015). When travelling to lesser known destinations, they prefer the service of travel intermediaries, especially for their first trip (Auchter, 2008; Sigurðardóttir & Helgadóttir, 2015).

Then there are specific requirements of trail riders – reliability of trails for horses, quality of accommodation for horses along the trail, its location and price, places to eat or refresh, friendliness and safety. Trails should have comfortable accommodation for riders and horses every 25 to 40 kilometres, they should be well marked with maps and guides provided and accommodation should have a person able to give help or advise (Pickel-Chevalier, 2015).

There is virtually no data / research available on those attracted to horses. One way to identify the key success factors is through an analysis of the key feature of horse-related visitor attractions. Most countries or regions that have a strong connection to horse breeding / racing have a visitor attraction dedicated to horses. In Newcastle, UK, a cradle of horseracing, there is a Palace House – National Heritage Centre for Horseracing and Sporting Art featuring a horse museum, a gallery of horse-racing art and a demonstration of retired sport horses retraining. It was awarded as the best regional museum and nominated for a best national one. When opened in 2016, it attracted about 23 thousand visitors annually (Knott, 2017), although less than anticipated 40 thousand (Pelis, 2016). In France, on the estate of the Chantilly castle, about 200 thousand annual visitors are recorded by the Living Horse Museum that presents horse-related art and ceramics, library, dressage demonstration and stables – with 186 meters in length, housing 240 horses it is considered a master-piece of 18th century architecture. In Verden, Germany, a town renown for horse racing and auctions, there is a National Horse Museum housed in a former cavalierly building (www.dpm-verden.info). Visitors are attracted by a modern permanent exhibition, a wide range of temporary exhibitions, educational programs and events for a variety of visitor segments. Adjunct to a zoo in Munster, Germany, there is a new Museum of Westphalian Horses (www.pferdemuseum.de), stretching over three thousand square meters with permanent and temporary exhibitions, arena for horse shows and other events and horse and playground where children can interact with a variety of horse breeds.

In many countries state studs are popular visitor attractions, partly to fulfil its educational mission and partly for revenues. The European State Studs Association (2012) published a visitor brochure listing attractions and visitor programs of its thirty-two members. For example, Piber National Stud in Austria, breeding horses for the Spanish Royal Riding School at Vienna, besides stable visits, watching training session, blacksmith quarter and a museum, has a special program for children and a monthly program of events, ranging from parades to concerts, as well as a facility hire for private and corporate events. It attracts more than sixty thousand visitors annually. Similar programs for visitors is offered by the Lipica Stud Farm in Slovenia. In 2017, it was visited by eighty-eight thousand people, 16 per cent more than in 2016 (STA, 2017).

Some insights into key success factors can also be derived from a research of animal-based attractions in general – such as zoos, aquariums, safaris or farms. Horse farms and studs belong to this type of attractions. Animal based attractions are currently caught between two opposing trends – a demand for personal interactions with animals are

increasing rapidly as is awareness about animal welfare with many attractions being criticized for inhuman conditions and poor care. Moreover, the growing and influential movement of ethical or responsible tourism instructs tourists to avoid such attractions (Hall, Wemelsfelder, Farish, 2004). The key success factors of such attractions are that they should appeal to a broad range of visitors but, in particular, families and young people with a bundle of experiences that will foster education about less known aspects of behavioural and biological characteristics of animals, interaction with animals that is safe for both animals and visitors to offer unique experience that is not normally available to them. A third important aspect is that such attractions should be set up in a way to foster in-group socialisation and family togetherness, to counteract the trend of individualisation of recreational and leisure activities (Shani 2012).

4. CONCEPTUAL APPROACH TO HORSE TOURISM

It is obvious that due to the diversity of horse-related activities and a complexity of horse industry that forms the foundation for horse tourism, a search for an all-encompassing unifying definition is futile. However, both research and professionals would benefit from a greater conceptual clarity. To start with, the holistic conceptual approach would require acknowledgment of at least three different perspectives – that of tourists motivated by horse riding and all other activities related to horses; that of horse enterprises offering experiences, products and services to tourists and that of destinations seeking to develop and promote horse-related products. Thus, horse tourism can be defined from the perspective of tourists, enterprises and destinations. Second dimension of the horse tourism concept should involve a typology of horse-related experiences by a degree and nature of involvement with the horse and depth of interest for the horses, as part of sport and recreation as well as natural and historical heritage. Once conceptual clarity is achieved, a horse tourism destination model can be developed. Such model should consist of core horse product, such as horse studs and clubs offering a range of interactive opportunities from the basic such as observing and interacting with horses in stables or paddocks to a variety of horse rides (instructions, short rides, daily rides, trekking). The augmented horse tourism product should then consist of a comfortable accommodation with regional character, authentic food experiences and opportunities to learn about local/regional history and heritage. While the core and augmented horse tourism products are mostly in the domain of a variety of enterprises, cooperative actions are required to ensure the core destination appeal is developed and maintained. Destination appeal is made of attractive scenery, well sign-posted and managed network of trails, and availability of information, horse-related events and variety of things to see and do. Such model would assist, both, scholars and professionals. Scholars would be able to better tailor their research to the real needs of the industry in terms of setting up horse tourism product and build a horse tourism destination appeal, and better focus their market research in order to derive results that are comparable across countries, region and horse-tourist segment. Even more so, such model would provide a necessary clarity for destination management bodies, especially in terms of the product that augments the basic horse related experience and target marketing.

CONCLUSIONS

The aim of this paper was to provide a review of the state of the art research and knowledge about horse tourism to contribute to a development of a conceptual horse-tourism model providing foundation for researchers and guiding horse industry and tourism stakeholders. As horse-tourism is defined almost solely through a narrower or broader set of horse-related activities, research is fragmented and incomparable and largely theoretical. In this paper, an approach to conceptual model of horse tourism is proposed, advocating that it should be defined from the perspectives of its main stakeholders – tourists, enterprises and destination management and based on a typology of horse-related experiences instead on a never-ending list of horse related experiences. The next step is to, based on these propositions, build a holistic conceptual model. Such model should form a foundation for a coherent research agenda, it should be able to guide stakeholders in setting up successful horse tourism enterprises and devise tourism development strategies based on horse-tourism.

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KONJIČKI TURIZAM – KONCEPTI I PRAKSA

Sažetak

Konjički turizam jedan je od proizvoda turizma posebnih interesa koji bilježi značajan rast potražnje. Rast te potražnje uvjetovan je rastom popularnosti konjičkog sporta u zemljama razvijenog svijeta, ali i potrebom za diversifikacijom dohodovne baze u konjičkoj industriji. Ipak, istraživanja kako ponude tako i potražnje konjičkog turizma još su uvijek rijetka, fragmentirana i neusporediva te, kao takva usporavaju kreiranje koherentnog korpusa informacija i izgradnju konceptualnog modela koja bi osigurala uspješniji i sustavniji pristup osmišljavanju strategija razvoja konjičkog turizma na razini destinacija i poduzetništva. U tom kontekstu ovaj pregledni članak korak je prema sintezi postojećeg istraživanja na području ponude i potražnje na temelju kojih donosi smjernice za definiranje holističkog modela razvoja konjičkog turizma uvažavajući stajališta ključnih dionika i razlikujući proizvode temeljem osnovne tipologije iskustava koje pruža konjički turizam.

Ključne riječi: konjički industrija, posebni interesi, ponuda, potražnja, destinacija

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