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EXPLORING THE CHALLENGES IN DEVELOPING EQUESTRIAN TOURISM: A CASE STUDY OF MALAYSIA

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Abstract

Equestrian tourism is a highly specialised sector with enormous growth potential for Malaysia's tourism industry. However, its development faces numerous challenges, particularly regarding financial, infrastructure, and government support. This study will investigate the major challenges to developing equestrian tourism in Malaysia. In-depth interviews with 22 equestrian and tourism industry participants were conducted using a qualitative methodology. The findings highlight several issues, including inadequate funding, poor infrastructure, and a lack of government support and training. Recommendations for overcoming these obstacles and realising Malaysia's equestrian tourism potential are provided.

Keywords: Equestrian Tourism, Challenges, Development, Stakeholders, Equine Industry

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INTRODUCTION

Equestrian tourism, a specialised sector within the larger tourism product, is gaining global prominence for its ability to combine adventure, nature, and cultural experiences (Helgadóttir & Sigurðardóttir, 2018; Danby & Grajfoner, 2022). Horseback riding is a niche industry that allows tourists to explore rural landscapes (Fredman & Margaryan, 2021), participate in outdoor sports (Jaelani, Erdinaya, & Perbawasari, 2020), and learn about local traditions (Pickel-Chevalier, 2020). Countries such as Australia, Germany, the United Kingdom and Spain have successfully integrated equestrian sports into their tourism offerings (Douglas, Owers, & Campbell, 2022), considerably contributing to rural economic (Lupoae & Radu, 2022) development and broadening the tourism portfolio (Kedebe, 2020). Equestrian tourism in these areas appeals not just to adventure seekers, but also to a growing need for environmentally beneficial travel experiences (Helgadóttir & Sigurðardóttir, 2018; Fredman & Margaryan, 2021).

Malaysia, known for its diverse landscapes that include coastal regions and dense rainforests, possesses considerable untapped potential for the growth of equestrian tourism (Salleh & Ismail, 2015). It also benefits from a well-developed tourism infrastructure, strong governmental backing for the tourism industry, and a rich cultural heritage, making it an ideal candidate for promoting equestrian tourism as a distinct attraction (Mahzan & Tan, 2017; Ng & Lee, 2020). However, despite these strengths, the sector remains underdeveloped. Although there are some equestrian centres and events, the industry lacks coordinated growth, clear policy guidance, and adequate resources to compete with more established tourism sectors such as eco-tourism and cultural tourism.

The global success of equestrian tourism in rural regions is frequently linked to the direct economic benefits it provides to local communities, particularly job creation and rural development (Helgadóttir & Sigurðardóttir, 2018; Lupoae & Radu, 2022). However, in Malaysia, the development of equestrian tourism confronts several problems, including insufficient funds, inadequate infrastructure, less support from the government, and a lack of specialised training. These limitations limit the sector's potential to grow and attract both domestic and foreign tourists. Thus, the purpose of this research is to investigate the key impediments to the growth of equestrian tourism in Malaysia, as well as to examine the perspectives of industry stakeholders. By identifying these constraints, the study will shed light on how Malaysia can better leverage the potential of equestrian tourism to diversify and improve its tourism offers.

LITERATURE REVIEW

Equestrian Tourism: A Global Perspective

Equestrian tourism is becoming an increasingly popular niche within adventure and rural tourism (Sandor & Adam, 2019), drawing visitors looking for immersive experiences in nature and culture. Horseback riding has been integrated into tourism services in nations such as New Zealand, Argentina, Spain, and South Africa, allowing visitors to see natural landscapes, wildlife, and rural communities (Kedebe, 2020; Fredman & Margaryan, 2021). These places offer a wide range of equestrian activities, including trail riding, equestrian safaris, and cultural riding festivals, while also benefiting from sustainable tourism practices and the economic benefits they give to rural regions (Danby & Grajfoner, 2022). The industry encourages environmental conservation by offering low-impact tourism options, and it also helps local economies by creating jobs in rural tourism-related companies (Pickel-Chevalier, 2020). Equestrian tourism caters to an increasing need for environmentally friendly travel and provides a distinct alternative to other types of adventure tourism, helping to diversify local economies (Bunchmann, 2019).

However, the growth of equestrian tourism presents certain concerns. Key challenges include a shortage of infrastructure (Helgadóttir & Sigurðardóttir, 2018), such as stables (Bunchmann, 2019) and trained horses (Mahzan & Tan, 2017), as well as a demand for competent experts (Jaelani, Erdinaya, & Perbawasari, 2020), such as instructors and guides (Lupoae & Radu, 2022). These constraints hinder the sector's expansion, especially in resource-constrained areas (Sandor & Adam, 2019). Equestrian tourism's seasonality, as well as competition from other adventure tourism activities, impede its development (Bunchmann, 2019). Despite these obstacles, the potential for growth remains high, particularly with rising interest in sustainable travel experiences and the rise of digital platforms that improve accessibility (Helgadóttir & Sigurðardóttir, 2018; Lupoae & Radu, 2022). Strategic cooperation between governments, the business sector, and local communities can help establish the infrastructure and regulations required for sustainable development, hence supporting future growth in the industry (Bunchmann, 2019).

Stakeholders in the equestrian tourism industry

The equestrian tourism industry's stakeholders include a varied group of players who contribute to the sector's growth and sustainability (Sturød, Helgadóttir, & Nordbø, 2020). Local governments, tourism agencies, equine operators, riders, and rural communities are all common stakeholders (Helgadóttir & Sigurðardóttir, 2018; Lupoae & Radu, 2022). Local governments and tourism authorities play an important role in policymaking, infrastructure development, and marketing activities to attract visitors (Pickel-Chevalier, 2020). Equestrian

operators and service providers, such as riding schools and stables, are critical for providing experiences while maintaining safety and quality (Le Clinche, Martinent, & Chanavat, 2017). Equestrian tourism also benefits rural areas by creating jobs and increasing demand for local goods and services, which promotes rural economic development (Douglas, Owers, & Campbell, 2022). Collaboration among these stakeholders is essential for building a comprehensive plan for equestrian tourism development and sustainability, ensuring reciprocal benefits and long-term success (Pavić, Blešić, Petrović, Radovanović, & Prišenk, 2019).

Challenges in equestrian tourism development

Equestrian tourism growth faces several significant hurdles (Brzezińska-Wójcik & Baranowska, 2012; Le Clinche, Martinent, & Chanavat, 2017; Sturød, Helgadóttir, & Nordbø, 2020). One important difficulty is a lack of suitable infrastructure, such as good-quality riding trails (Helgadóttir & Sigurðardóttir, 2018), stables (Danby & Grajfoner, 2022), and transportation choices (Fredman & Margaryan, 2021), which are required to provide tourists with a safe and enjoyable experience (Pickel-Chevalier, 2020). Furthermore, skilled specialists are scarce, such as horse trainers and tour guides, particularly in areas where equestrian tourism is still growing (Kedebe, 2020). Seasonal variations can influence demand for equestrian activities, and increased competition from other types of adventure and eco-tourism can make it difficult to market equestrian tourism effectively (Sandor & Adam, 2019). Finally, the lack of effective government policies and cooperation among key actors makes it more difficult to overcome these obstacles and promote the expansion of equestrian tourism (Le Clinche, Martinent, & Chanavat, 2017; Mahzan & Tan, 2017; Pavić, Blešić, Petrović, Radovanović, & Prišenk, 2019). Addressing these difficulties will necessitate infrastructural investment, professional training, and improved policy formulation.

RESEARCH METHODOLOGY

This study used a qualitative research approach to investigate the problems of establishing equestrian tourism in Malaysia. Qualitative interviews provide in-depth insights into the experiences and viewpoints of people directly involved in the industry. An in-depth interview method allows participants to express their thoughts on the topic (Creswell & Creswell, 2017), resulting in rich, thorough data. A purposive sampling strategy was utilised to select 22 participants, who included equine operators, associations, tourism authorities, and stakeholders interested in equestrian sports and associated sectors. The informants must have experience in the equine industry and tourism (more than 5 years or less than 5

years). The interviews were done physically and face-to-face to collect the actual data. Table 1 represents the study informants' backgrounds.

Table 1: Informants background

No.	Code	Job Title	Categories	Experience
1.	Informant 1	Coach	Equestrian	More than 5 years
2.	Informant 2	Coach	Equine operators	More than 5 years
3.	Informant 3	Coach	Equine operators	More than 5 years
4.	Informant 4	Operation manager	Equine operators	Less than 5 years
5.	Informant 5	Web blogger	Equestrian	Less than 5 years
6.	Informant 6	Owner	Equine operators	More than 5 years
7.	Informant 7	Coach	Equine operators	More than 5 years
8.	Informant 8	Owner	Equine operators	More than 5 years
9.	Informant 9	Executive secretary	Association	More than 5 years
10.	Informant 10	Owner	Equine operators	More than 5 years
11.	Informant 11	Owner	Equine operators	More than 5 years
12.	Informant 12	Owner	Equine operators	More than 5 years
13.	Informant 13	Owner	Equine operators	More than 5 years
14.	Informant 14	Owner	Equine operators	More than 5 years
15.	Informant 15	Operation manager	Equine operators	More than 5 years
16.	Informant 16	Owner	Equine operators	Less than 5 years
17.	Informant 17	Owner	Equine operators	More than 5 years
18.	Informant 18	Owner	Equine operators	More than 5 years
19.	Informant 19	Coach	Equestrian	More than 5 years
20.	Informant 20	Deputy director	Tourism authorities	More than 5 years
21.	Informant 21	President	Non-profit organisation	More than 5 years
22.	Informant 22	Operation manager	Equine operators	More than 5 years

N=22

In-depth interviews were conducted between February and June 2024. Each interview lasted 30 to 90 minutes and was recorded with the participant's consent. Interview questions were aimed to go into a variety of issues, such as infrastructure, horse welfare, government support, training, marketing, and challenges specific to equestrian tourism in Malaysia. The interview data were transcribed and analysed thematically to identify main themes based on the informants' input. Turboscribe was utilised for transcription, catching exact words and key information like pauses and background noise to eliminate bias. The transcripts were examined several times for accuracy, and audio recordings

were double-checked. The data was then entered into NVivo 14 for coding, where themes and sub-themes were found and properly classified for the next interpretation procedures.

DATA ANALYSIS

It is worthwhile to mention that theme analysis is used while analysing the interview data (Braun & Victoria, 2021). To provide consistency, the word 'informant' is applied to all twenty-two (22) selected individuals from various groups. Four major themes emerged from the informants' responses: (i) Operation Cost, (ii) Infrastructure and Services, (iii) Government Support, and (iv) Training and Knowledge.

Challenges of Equestrian Tourism

The following findings were obtained based on interview data processing using the NVivo application:

Table 2: Informant facing operation cost challenge

Informant	Quote
Informant 3	"...our costs are quite high. For example, RM2500 for 25 bales just to last until the end of the month."
Informant 6	"... the performance horse must be fed with 8 kilos of hay per day and the hay costs around RM385 for 61 kilos and only last for a few days."
Informant 7	"...the operational cost is high. That is why people say the one who runs a horse stable has another side business."
Informant 13	"...we can't cover it because of the horse feed costs for me it is very high."
Informant 15	"...we only facing financing issues to maintain the horse need, overhead cost, grass and building condition and we are unable to provide a comfortable stable for horses that got rained during the heavy rain and it made it difficult for them to get comfortable in the stable."
Informant 16	"...the cost of horses is high, and the business must adapt to alternative resources like straw and sawdust."
Informant 18	".... the maintenance cost is quite high and our income is not too high to cover all the costs."
Informant 19	"....the cost of operation is the biggest challenge for me."

Table 2 shows most of the equine operators having operation cost issues. Equine operators often struggle with the cost of operations, where revenue is highly dependent on riding school events, and training programmes. This unpredictable cash flow makes it difficult to sustain operational costs all year since operators must manage spending with less income during off-peak months.

Furthermore, many horse operators are tiny or family-owned businesses with insufficient collateral or financial history, making it difficult to obtain consistent income from horse owners due to stable conditions and receiving funding from financial institutions.

According to the report, equine operators confront considerable problems due to the high expenditures involved with horse care, which include food, sawdust, hay, and supplements. Additional challenges where their account exceeds their operational budgets, due to the cost of feed and bedding supplies increasing consistently over time. Equine operators reported that price changes in hay and specialised feeds, caused by domestic supply concerns and worldwide market patterns, burden their finances. Furthermore, the escalating expenses of supplements and veterinary care add to the financial stress. Many equine operators reported difficulty managing rising costs while maintaining the level of care required for the horses' health and performance. This has caused some equine operators to reduce their herd size or cut back on other services, affecting their capacity to attract and retain clients and, as a result, limiting their growth potential.

Table 3: Informant facing infrastructure and services challenges

Informant	Quote
Informant 3	"...there is also a bad review from the rider saying there is a problem with the horse here."
Informant 4	"...the biggest challenge is when the public makes unfair comparisons."
Informant 5	"...the facility condition quite uncomfortable for riders and horses, even like the saddle, sometimes it is quite worn out."
Informant 6	"...the facility has become outdated. So many repairs we need to do here and maintenance is indeed very high for old buildings."
Informant 16	"...our issue related to the community where some people might not like what I did at my property."

Table 3 indicates several infrastructure-related difficulties greatly impede their capacity to operate smoothly. Equine operators raised concerns about issues with old stable buildings, which are not only expensive to maintain but also pose safety risks to both horses and staff. The deteriorating state of these facilities, along with limited road access to the centre, makes transporting horses and equipment problematic, especially during the rainy season when key routes become inaccessible. Concerns about the centre's security were also raised where horse owners worried about their horses and the high value of horses which may trigger someone from outside to bring out the horses. These infrastructure issues cause operational inefficiencies and contribute to the overall financial strain on equine businesses.

Equine operators also have issues regarding the quality of services given, exacerbated by unskilled riders and poor opinions from the community. Several operators expressed annoyance with riders who left a bad review for their services due to the low-level handling of horses shown by the riders. The local community's negative view of equestrian activities, which is frequently caused by misconceptions about the industry's exclusivity or cost, hinders efforts to recruit new clients and establish a loyal clientele. These combined constraints impede the equine sector's growth and development, limiting its ability to prosper as a significant component in the tourism and leisure industries.

Table 4: Informant facing issues with government support

Informant	Quote
Informant 3	"...but now there are many affordable equestrian tourism places, yet there is no support from the government."
Informant 6	"... the changing of government led to the slow process of my horse funding proposal."
Informant 10	"...our government should grant us the permit to use the land and invest in these activities like the Dubai government where they build tracks for cycling and riding horses in the same areas."
Informant 11	"...we didn't receive any support from the government. Even during COVID time, there is no support from local authorities."
Informant 12	"...we were disturbed by a government body and then you can't listen in even though it's for work purposes, but that's the influence we don't have much strength against."
Informant 13	"...I could say very minimal support from the government because this is not a popular sport. So, the government is not interested."
Informant 15	"...we didn't receive any funds or support from the government. Currently, for water supply, we supply the water to horses through the nature supply."
Informant 20	"... we focused on which parliament has special tourism activities, and we hardly received which area needs to be promoted from the operators due to reporting's medium."

Table 4 demonstrates that one of the issues informants encounter is a lack of government support when compared to other countries where equestrian tourism is heavily sponsored and promoted. Operators expressed frustration over the limited involvement of the Malaysian government in directly supporting equine businesses through financial aid or operational subsidies. Compared to countries with successful equestrian tourism industries, where government programs give grants, subsidies, or operational funds, equine operators reported receiving little more than promotional help. The tourism department's responsibility is typically limited to marketing equestrian activities, rather than providing the financial resources needed to sustain and develop the firm. This

inadequate support hinders equine operators' ability to expand their operations and enhance their facilities, impeding the growth of equestrian tourism as a significant economic contributor.

Equine operators also encounter problems due to a lack of government understanding and outreach about equestrian tourism. Equine operators remarked that there is insufficient effort to teach or promote the benefits of equestrian tourism in the local community, affecting both customer interest and possible investment in the sector. They also highlighted land access impediments, as various property ownership forms make it difficult to install track facilities or expand operations. These problems are exacerbated by regulatory barriers and lengthy procedures required to seek funding or sponsorship, which many operators find discouraging and time-consuming. Despite their need for financial assistance to pay high operational costs, government officials reiterated that their responsibility is limited to promoting activities rather than providing direct funds, exacerbating equine operators' frustration.

Table 5: Informants facing challenges with training and knowledge

Informant	Quote
Informant 1	"...in Malaysia, there aren't many Levels 1 coaches because it's not easy to get it and you need a lot of time to spare."
Informant 9	"...what I can see now veterinary department didn't enforce the act toward the irresponsibility horse stable. I can see a lot of horse welfare issues due to a lack of horse owner knowledge in horse care management."
Informant 11	"...equine council should improve the facilities at each stable, and assist in knowledge and expertise."
Informant 13	"...we have a coach but not at a certain level and most of the trainers are not exposed to international courses."
Informant 14	"...to find a worker with horse knowledge is also a challenge for us, and the most challenging is our management."
Informant 18	"... I only educate my staff from my previous experience and too many refer to the council because sending them for class will take a high cost."

Table 5 illustrates that the industry has significant challenges in terms of training and knowledge management. One typical proposal from operators is for more formal training in horse care management, particularly through established groups such as Majlis Ekuin Malaysia. Informants stated that, while there is an increasing interest in equine activities, there is a significant knowledge gap, particularly among horse owners who lack the essential horse care competence. This lack of understanding frequently results in poor decision-making, with some horse owners purchasing horses without sufficiently preparing for the obligations that come with their care. This knowledge gap

presents extra hurdles for operators, who may be forced to cope with the consequences of ill-prepared owners, resulting in higher operational expenses and possibly animal welfare issues.

Furthermore, equine operators raised worries about a general lack of high-level training and inconsistent understanding among coaches, trainers and groomers which they believe has an impact on service quality and the possibility for expansion in equestrian tourism. The results show that the training available to equestrian professionals falls short of the minimum criteria, with various coaches and trainers having variable levels of knowledge. This unpredictability in training harms riders' skill development and the reputation of equine centres. Additionally, there is a lack of understanding of the significance of trail riding for horses, which could serve as a major activity to increase equestrian tourism. Operators believe that if the importance of trail riding was better known and marketed, it would attract more tourists and benefit the sector economically. However, the current knowledge and training gap remains a significant impediment to realising Malaysia's full potential in equestrian tourism.

DISCUSSION

The development of equestrian tourism in Malaysia is heavily influenced by several interrelated challenges, as illustrated by the four primary themes of operating cost, infrastructure and services, government support, and training and knowledge (Table 6). A key discussion point revolves around how these variables are interconnected and must be handled comprehensively for the industry to grow. High operating expenses can be reduced by targeted government support in the form of subsidies or incentives (Elabd, 2022) for infrastructure improvements, which can increase accessibility and attract more tourists (Lupoae & Radu, 2022). Simultaneously, improving employee knowledge and training (Fredman & Margaryan, 2021) can assist minimize operational inefficiencies, resulting in cost savings and enhanced service quality (Douglas, Owers, & Campbell, 2022). As these themes are deeply interwoven, a deliberate, multifaceted approach combining both governmental and private sector partnerships is required to overcome existing impediments and support development in Malaysia's equestrian tourism industry.

Table 6: Triangulation of main theme data

Informant	11	12	13	14	15	16	17	18	19	110	111	112	113	114	115	116	117	118	119	120	121	122
Theme																						
Operation Cost			•			•	•						•		•	•		•	•			
Infrastructure and Services			•	•	•	•										•						
Government Support			•			•				•	•	•	•		•					•		
Training and Knowledge	•								•		•		•	•				•				

Based on data collection, equine operators face high operation costs partially attributed to insufficient infrastructure. As Bunchmann (2019) described, poorly designed facilities such as stables, route accessibility, and riding trails lead to extreme maintenance expenses. Furthermore, when infrastructure is not well-planned, equine operators may have to invest more in other services, such as transportation or additional personnel, to compensate for limited accessibility (Helgadóttir & Dashper, 2021).

Most of the equine centres in Malaysia own a proper stable, car parking, and training arena. This has reduced the expensive maintenance for the established equine centres and well-developed stable. Additionally, most equine operators suggest that when the government allocates resources toward building infrastructure like roads and trails, equine operators can enhance the tourist experience by offering services like guided tours, accommodations, and horse care services.

Regarding government support, most of the visited stable and equine centres hope for strong government support to develop equestrian tourism. Their suggestion highlights that government funding can help improve infrastructure and facilities, create more accessible trails and support the development of tourism services in equestrian tourism areas. Moreover, the government should establish industry standards for safety, animal welfare, and sustainable tourism practices (Notzke, 2019), which would enhance the reputation of Malaysia as a responsible destination for equestrian tourism. Informants from the National Equine Council emphasize the mandatory horse care policy toward horse owners to avoid violence to the horse. Therefore, the training programs that equine centres practice in Malaysia should be aligned with centralized standards introduced by the National Equine Council to ensure that workers have the necessary skills to comply with safety and welfare regulations.

Furthermore, data collection found that equestrians emphasize the lack of high-level coaches in Malaysia compared to countries with more established equestrian industries like Indonesia. Equestrian critiques local coaches have not received international standard training, restricting their capacity to deliver world-class instruction and reducing the overall quality of the equestrian experience. This issue has also been rising by equine operators as they are also unable to provide high-level coaches. Even though the National Equine Council approved a large number of coaches, they tend to become freelance rather than working with equine centres due to compensation issues. Furthermore, routinely bringing in international coaches to conduct seminars and training sessions in Malaysia would allow local coaches to learn directly from top-tier pros, elevating the overall calibre of coaching and boosting the country's equestrian tourism industry.

Therefore, equestrian tourism is considered a complex tourism product, and the discussion here illustrates that experiences can vary widely. In the final section, some of the implications of these findings for understanding equestrian tourism will be considered.

CONCLUSION

The challenges faced by equestrian tourism in Malaysia such as high operation costs, inadequate infrastructure, limited government support, and insufficient training for coaches highlight the need for a comprehensive approach to address these issues. The contribution of this study to the concept of tourism development lies in its identification of these interconnected themes, providing a structured understanding of the key factors that influence the development of equestrian tourism. By focusing on the relationships between operation costs, infrastructure, government support, and training, the framework offers a roadmap for stakeholders to enhance the sector's sustainability and growth. The implications for the national economy are significant, as improving equestrian tourism could lead to increased job creation, higher tourist arrivals, and more substantial contributions to the broader tourism and hospitality industries. By addressing the challenges and investing in this niche market, Malaysia can diversify its tourism offerings, attract international tourists, and boost local economies, positioning equestrian tourism as a vital component of the nation's economic development.

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