

Wellness and equestrian tourism – innovation and product development

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The presentation

- An introduction on the Icelandic horse and equestrian tourism in Iceland
- The study
 - Questions and aims
- Methods
- Theoretical background
- Findings
- Conclusions



The Icelandic horse

- Was brought to Iceland by permanent settlers between 860 and 934
- No outcross with other breeds
- The only breed in the island
- Was used as a riding horse (and working horse)
- Has gotten a new role as a leisure and sport horse in Iceland and abroad
- Is famous for it's:
 - Five gates
 - Variety of colors (eleven main colors)



The 5 gaits of the Icelandic horse



<http://hestafrettir.is/stodhestar>



<http://www.siggisig.is/default.asp>



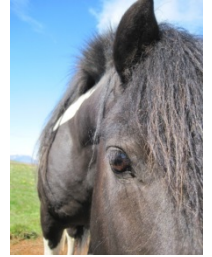
<http://i43.tinypic.com/2ywg86v.jpg>



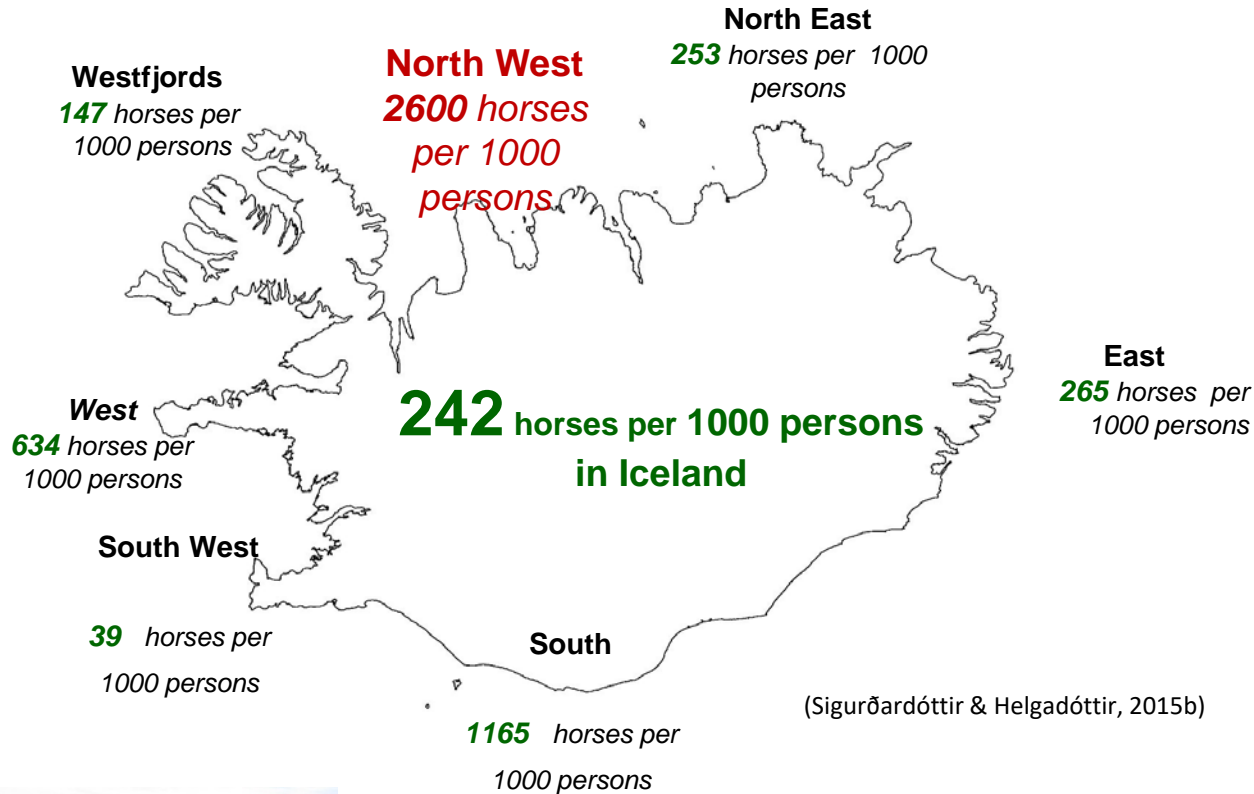
<http://i41.tinypic.com/suytc9.jpg>



<http://frontpage.simnet.is/inga.toni/myndir.htm>



Number of horses per 1000 persons



| | |
|----------------|------------|
| Iceland | 242 |
|----------------|------------|

(Sigurðardóttir, 2011)

| | |
|----------------------|----|
| Sweden | 31 |
| Belgium | 29 |
| Denmark | 28 |
| Ireland | 19 |
| Great Britain | 17 |

(Liljenstolpe, 2009)

(Sigurðardóttir & Helgadóttir, 2015b)



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Equestrian tourism in Iceland

- A popular recreation of foreign visitors (from around 1970) including e.g:
 - Horse trekking (riding tour of more than a day out in the nature)
 - Horse rental (from half hour ride to one day ride)
 - Live horse shows (showing horses, gaits, colours and telling the story of the horse)
- Services are commonly offered by small family run businesses
- In 2002 the estimated number of foreign visitors riding during the stay in Iceland was **41791** (Sigurðardóttir, 2004)
- In 2014 about **114.000** foreign visitors went riding during the stay (calculations based on figures from Óladóttir, 2015)
 - Number of guests in other horse based tourism services is unknown
- Riding tours are widely practised by Icelanders
- No figures do exist on the number of domestic riding tourists (riding own horses and/or travelling with horse tourism businesses)

Innovation and product development in equestrian tourism in Iceland

- The main focus has been on the Icelandic horse and the nature
- Current innovation towards:
 - “Active tourists” - Similar/same target groups as before/revisitors
 - New tours/new riding trails
 - “Spectators” - New target groups
 - Horse theatre and horse shows
- Can some businesses in equestrian tourism increase its competitiveness by developing further towards the needs of more specialised target groups?

Research questions and aims

- Research questions:
 1. Do operators in equestrian tourism in Iceland focus on health, wellness or adventure, in their product development and marketing?
 2. Is a combination of wellness, slow adventure and outdoor recreation a feasible option for future innovation and product development in the field of equestrian tourism in Iceland?

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Methods

- A study of equestrian tourism businesses offering horse rental (riding for up to one day), horse trekking (riding for more than a day) and live horse shows
- A mixed method research:
 - Content analysis of all available webpages of operating equestrian tourism businesses
 - Open ended interviews with 21 equestrian operators

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The innovation idea

- Based on four main concepts:
 - Health tourism (wellness tourism)
 - Adventure tourism (slow adventure)
 - Horse's effects on humans
 - Nature



Wellness tourism

- Health tourism is a growing field on academic and entrepreneurial level
- Health tourism is commonly divided into wellness tourism and medical tourism (Smith & Puczko, 2009)
 - The focus of this study is on wellness tourism
- **Wellness is in this study defined as a concept including physical, mental and spiritual wellbeing, elements of lifestyle and one's relationship with oneself, others and the environment** (Based on Smith & Puczko (2009; 2014))

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Adventure tourism

- Hard to define (Katrin, 2008)
- Usually bound up with factors as risk, excitement and adrenaline rushes (Buckley, 2010)
- “Slow adventure” - contrast to the mainstream risk managed ‘fast’ adventure tourism products (Varley & Semple, 2015)
- This research defines adventure tourism as an experienced adventure where personal background and the perception of each individual is a basis for defining what adventure is

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Horse's effects on humans



- Horses have been used in therapeutic purposes for people since the time of the ancient Greeks
(Bracher, 2000; Fine, 2010)
- The positive effect is not limited to riding (Pettito, 2010)
- Most research presented, have been done among participants with some kinds of disabilities (see e.g. MacKinnon, et al., 1995; Bizub, Joy & Davidson, 2003; Davis et al., 2009; Asselin, et al., 2012)
- Cochrane and Dashper (2015, p. 82) point out „the physical, psychological and emotional benefits“ of leisure riding

The importance of nature

- The Nordic countries have shown to have “many attractions, but generally nature and natural phenomena play an important role” (Hjalager, et.al., 2011, p. 28)
- About 80% of foreign visitors in Iceland state that an interest in the nature had a major impact on their decision to travel to the country (Óladóttir, 2015)
- The nature has shown to be important to visitors in equestrian tourism in Iceland:
 - “Among the visitors in horse trekking the Icelandic horse is stated as the main attraction with Icelandic nature in second place. For horse rental visitors the reverse is the case, nature comes first for 40% and the horse is the main attraction for just over 20%” (Sigurðardóttir & Helgadóttir, 2015a, p. 112)

Findings – a profile of the businesses

- A total of 137 businesses - >only 52% had webpages that could be analysed
 - 28% did not have a webpage
 - 20% were travel agencies offering service from others
- 1-8 languages offered on webpages. First language:
 - 66% English
 - 21% Icelandic
 - 13% German
- 46% had two or three languages
- 39% had only one language (most commonly English)

Findings – services and image building

- Services offered:
 - 96% offer horse rental (a short ride)
 - 52% offer trekking
 - 3% offer live horse shows
- Emphasis is put on business profile and image → commonly farm and family
 - 41% focus on horse, sheep or cow farming
 - 58% focus on the family and its part in the business
 - Visting the farm and the getting to know the family

Findings - is there a focus on health or wellness in equestrian tourism?

- **Signs of developed health/wellness equestrian tourism were not found BUT...**
- The promotional material indicates operators' awareness of wellness concepts
 - Over 90% of the businesses highly emphasize the nature
 - Wilderness and 'being alone' is a focus of the material on webpages of about 40% of the businesses, including focus on getting away from more populated areas and enjoying the open spaces and vastness
 - Tourism packages including a combination of riding and spa experience are apparent
 - Enjoying baths in thermal water or hot tubs was focused by 32% of the businesses as a good way to end the day after a long ride
 - Local food and Icelandic catering is highlighted by 35% of the businesses
 - Pleasure, comfort and relaxation of the guests is also commonly mentioned as an aim of the provided service

Findings – adventure and horse's affects of people

- The adventure tourism concept is commonly used in marketing
 - Usually with focus on excitements and experience
- Operators do not seem to be well aware of possibilities of making use of the positive effects of horses on humans



Findings – opportunities pointed out by operators

- **None of the interviewed operators directly mentioned health tourism or wellness as an interesting niche to develop into BUT...**
- When analysing in more details what those operators really say, concepts related to wellness and health start to appear:
 - Healthy homemade food, homey atmosphere and relaxation of the guests are mentioned among opportunities for further development within the industry
 - Operators mention opportunities in product development where being around the horse is the main focus
 - An interviewee emphasised that it is rewarding and relaxing for his guests to ride to deserted areas, enjoy the nature, the horses and the company of each other and “to stop thinking about their mobiles and stuff for a while” (Interviewee 14). To his opinion such an experience is healing for the soul and an opportunity for development of equestrian tourism.

Conclusions

- Operators in equestrian tourism have not set a strong focus on developing health/wellness tourism products
- Resources like nature, horses, thermal water/hot tubs and healthy food exists as well as awareness of those resources among operators - > opportunities for innovation and product development
- Awareness of opportunities of using horses in creating health tourism products seem to be limited
- The health tourism market is a demanding and challenging market
- Conclusion:
 - A comprehensive strategy is needed for health tourism in Iceland as a destination and operators of small lifestyle businesses have limited time and knowledge resources to implement professional product development processes without external financial and epistemic support

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Thank you...

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