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THE PRESENT OF EQUINE TOURISM IN HUNGARY IN REFLECTION TO AN EMPIRICAL RESEARCH

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Abstract: In the last years the necessity of developing equine tourism in Hungary has been called for by experts. Moreover, the government has spent a significant amount on constructing equestrian facilities all around the country, and has published equestrian brochures in order to attract foreign guests. On the contrary, little attention is paid to equestrian life inside Hungary, though it would be essential to create a Hungarian equestrian audience, so that more and more horse riders could regularly exercise different riding activities. A more economical operation of equestrian facilities is vital in order to achieve a busier domestic equestrian life, since it is currently self-supporting: it is covered exclusively by the incomes of horse riding. A reinforced financial support of the sector, however, would provide countless additional advantages for the economy. Moreover, enriched riding opportunities drive people back to nature, promote environmental awareness, and provide regular horse riding opportunities for a high number of riders. The present study aims at introducing an empirical survey research in the framework of which participants of Hungarian equestrian life and their features of touristic demand were investigated.

The results of the research show that Hungarians riding on a regular basis are mostly attracted by affordable European riding holidays and riding study visits.

Key words: equine tourism, equestrian life, horse riders, developing opportunities

Introduction

Equestrian culture has a long tradition in Hungary and Hungarians are considered as a riding nation in Europe. Furthermore, several inventions and innovations in the world of riding are linked to Hungary. For tourists visiting the country, riding attractions, such as “csikós” riding shows in the “puszta” (plain regions of Hortobágy and Bugac) have always been of special interest. Riding enthusiasts may also visit Hungary with the aim of learning riding, show jumping, carriage driving, they may take part in riding or carriage tours and hunting.

At the beginning of the twenty-first century, amongst the various branches of tourism, experts consider hard tourism to be of the widest perspective, in which equine tourism may have a principal role in sport-related travelling and may become the most significant attraction of tourism in Hungary. (Hungarian Government ad hoc committee, 2004).

It is therefore not surprising that the Kincsem National Equestrian Development Programme, ratified by the Hungarian government in February 2012, supports all measures taken in order to develop the equine sector and equine tourism. Within the framework of the development programme a unique Hungarian model of the sector is to be created, which is characterized by an increased amount of trails, adequate quality assurance, and high standards of infrastructure and services related to tourist attractions.

A fundament of the above mentioned model is the fact that, with regards to developing equine tourism, Hungary is from several perspectives in an advantageous position compared to the neighboring countries. On the one hand, its geomorphological configuration, water and climate favour equine management and riding. On the other hand, the climate which in several parts of the country is sub-mediterranean, provides smooth weather conditions for outdoor activity from early Spring till late Autumn. Since forests and the soil are of exceptionally high quality, there are few rocky, uneven trails and dirt roads, sand-textured soil and loam are typical, the Hungarian landscape is especially compatible for outdoor physical activity of any kind (Hungarian Tourism PLC., 1998). Most importantly, land is predominantly state-owned, therefore off-road riding, even considering the strict regulations of the currently binding forest act (Act No. XXXVII/2009 on forests, on the protection and management of forests) is available. It is a general trend all over Europe that off-road riding is less practiced by riders due to the high proportion of railed-off private property. According to Hungarian Tourism PLC. (Magyar Turizmus Zrt., 1998), in Western European countries limited spaces deprive riders of the incomparable sensation of freedom. Hungary is especially appealing for riders arriving from Western Europe due to the fact that the network of dirt roads in agricultural areas does not notably obstruct cross-country riding. This exceptional opportunity must be taken into consideration in the development of equine tourism.

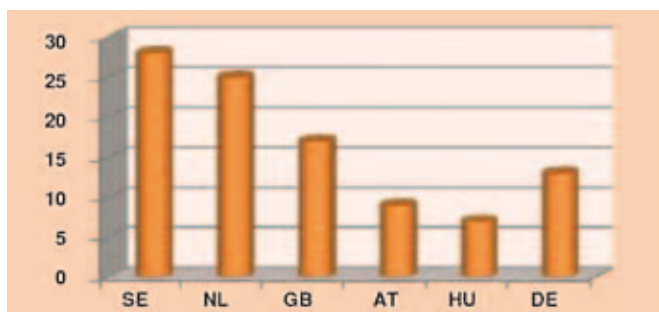


Figure 1. The number of horses per 1,000 people in 2009

In order to achieve tangible improvements, several requirements must be fulfilled, for instance the appropriate number of horses available, or an outstanding infrastructural background. Currently almost all equine-related Hungarian indices are far behind the EU average proportion (Carolina Liljenstolpe, 2009), so is the number of horses compared to the population (see Figure 1). Improvements are therefore inevitable, since equine tourism is centered around horse-related services. The services include riding lessons, therapeutical riding, cross-country, harness racing, driving lessons, and horse carriage tours. During riding shows tourists have no direct contact with horses. Visiting studs or stables, reining and lectures on horses and riding are regarded as horse shows. Therefore the guest mentioned first is an active, the latter is a passive sport tourist.

Demand for equine tourism is shown by local and foreign riders, „hobby-riders” and horse enthusiasts. Riders are well trained members of a riding club who are interested especially in high level riding competitions and cross-country riding and are horse owners. Since riders are in the position to form and express their opinion concerning horse tourism, they play a strategic role in boosting it. Hobby-riders have adequate riding knowledge. Although they are interested in races, equestrian traditions and horse shows, they are most motivated by taking part in tours ranging from an hour till several days of length and by developing their riding abilities. Horse enthusiasts are those with a great love for horses who, thus, prefer to stay more distant from horses, but are pleased to get on horseback or participate in a carriage tour from time to time. They are most interested in watching riding shows, taking riding lessons and going on riding trips of maximum an hour. Furthermore, they generate significant demand by being present in high numbers in the audience of different races and it is rewarding for them to spend their free time in a country where they may gain new information about horses and equestrianism (Hungarian Tourism PLC., 1998).

In the 1990s 80% of clients of the Hungarian equine tourism industry came from abroad, mainly from Austria, Germany, Italy, Switzerland and Holland. According to data collected by Hungarian Tourism PLC. in 1998, the result was 3 100 000 potential guests. As the results of several surveys conducted by the Hungarian Equestrian Tourism Association (Magyar Lovas Turisztikai Szövetség) in 2000 show, the proportion of domestic and foreign clients was almost equal, 50–50%. In 2004, 90% of clients of Hungarian equine tourism were Hungarian youngsters aged 18 or under. As shown by

the related data, almost 8000 children spent over a week in Hungarian riding clubs and schools.

Price-value proportion, as well as in other services, is a determining factor. Riding holidays are about 20% cheaper in Hungary than in Western Europe and prices of other equestrian services are 40–50% lower. A great professional acknowledgement for Hungarian equestrian tourism is that according to a ranking of journalists of the international magazine, *Harpers* (2002), 2 of the 5 most outstanding equestrian tours are in Northern Hungary and in the Northern part of the Great Hungarian Plain.

In Europe Great Britain and Ireland have excellent trekking and off-road facilities and alternative services are also available. In Ireland 250 riding holiday centres were created in a few years with EU financial support and more than 100 000 equine tourists are hosted annually. Spain and Portugal have gained a leading position in equine tourism thanks to the significant German interest in the Spanish equestrian culture and riders use Spanish horses and saddles (MLTSZ, 2004).

South America is also an attractive destination for European and Hungarian riders due to the fact that the landscape and the style of riding are so different from what they are used to, for example pampa riding in Argentina, cowboy camping in Chile, or riding trips in the Ecuadorian Andes, where special hacks can be completed in not only English saddles, but also in a Western saddle or in its classical version, the vaquero saddle. Australia is also a stakeholder on the market (MLTSZ, 2006) and lately Iceland has gained popularity with its expensive geyser, waterfall and whale watch riding trips.

To what extent are Hungarian riders present in equine tourism? What opportunities and ideas do they have concerning the field? How much are they attracted by equestrian programmes inside and outside Hungary?

The present study intends to introduce the Hungarian demand for equestrian services by presenting the results of a survey research. As additional information to the survey research, semi-structured interviews were conducted with experts of tourism working for Pegazus Online Media LTD (Pegazus Online Média Kft).

Methods

The tool for data collection was a survey containing thirty closed questions. Respondents had access to the survey via the most popular equestrian homepage, www.lovasok.hu, powered by Pegazus Online Media LTD. Visitors were motivated to fill in the questionnaire by an instant win game. The homepage has on average eight-ten thousand visitors a day. The 252 respondents who filled in valid questionnaires confirmed to be involved in horse riding on a regular basis and most of them own a horse. Data was entered in an Excel chart and was processed with basic statistic calculations.

Semi-structured interviews were made personally, at pre-arranged appointments with experts who have been working for several years on the market of equine tourism as intermediaries between service providers and clients.

Results

Although official statistical data are not at our disposal, service-providers confirm that the number of women participating in equestrian sports is significantly higher than that of men, which fact may be the reason why 89.7% of respondents were female. In the experts' experience women are emotionally more linked to horses than their male counterparts, they love the animals more and are more motivated to care for them. Consequently, riding is becoming a feminine sport.

As Figure 2 shows, most respondents belonged to younger generations, 53% were students and only 6.4% were over 40. Interviewees also pointed out that younger generations are more involved in equine activities. However, a reason for the high proportion of young respondents is that they are more frequent users of the internet than older people.

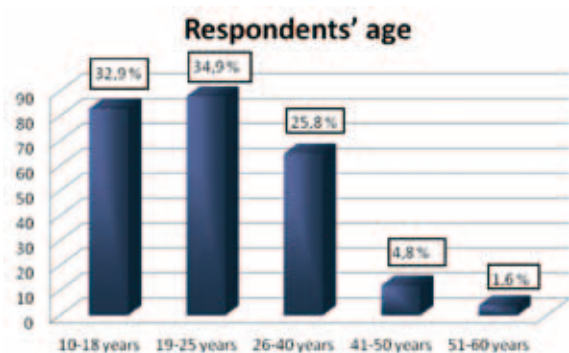


Figure 2. Respondents' age

Respondents lived predominantly in villages and towns (see Figure 3). Riding centres and trails are mostly located outside urban structures and therefore provide easier and more regular access for citizens living in the countryside. As the data show, more than half of riders, meaning those who ride at least three times a week, own at least one horse, and are present in equine tourism as service-providers.

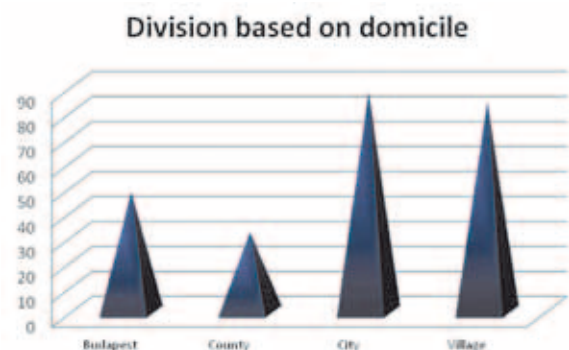


Figure 3. Division based on domicile (n)

Mapping the touristic habits and demand of Hungarian riders was started by inquiring where and what sort of sport touristic event they had taken part in before. As the data reflected, almost one third of respondents had participated in domestic equine tourism events, in the first place in riding

tours or riding races in different parts of Hungary. 71% are planning to participate in similar events in the following three years, and most of them would spend not more than 30000 HUF there.

From the perspective of service providers it is essential to know how far riders are willing to travel to take part in equestrian events. Few respondents (only 19%) stated they would travel exclusively inside Hungary. 44.5% would be pleased to travel in Europe, and 36.5% would travel even further if they could afford to (see Figure 4.).

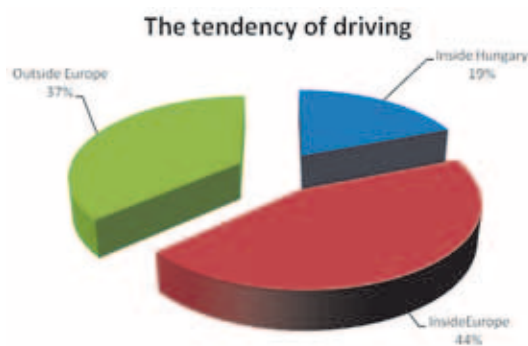


Figure 4. The tendency of driving

The following part of the questionnaire investigated equine touristic habits and requirements abroad. Only 20% of respondents had taken part in equine programmes abroad before, and the destination in all cases was a European country. Participation proved to be partly of a passive nature, as tourists were attracted by equestrian galas, horse shows, exhibitions and horse fairs. Active participation meant engagement in riding camps, holidays or races.

Researchers were also eager to know what other horse-related events are interesting for riders. Surprisingly enough, 64.3% responded they would take part with great pleasure in riding courses, which suggests that riders are highly motivated to study and gain new riding experience. It is, however, not astonishing that 60.3% said they would love to watch riding or harness races, which are the most spectacular and exciting riding events, and the majority of respondents are involved in these fields. Many riders (55.5%) are interested in riding exhibitions and fairs abroad, and half of respondents would visit foreign studs with pleasure. Between 40-50% are keen to take part in riding trips, visit mare and stallion parades and horse shows and more than 30% would gladly attend riding camps and auctions. Considering that trotting and galopp races are not remarkably popular in Hungary, it is not surprising that only 11.9% of respondents are keen to watch them (see Figure 5).

Almost half of respondents (46%) are planning to take part in equestrian activities abroad within the following 5 years. 54.4% said they would travel to Austria. Their choice can be explained by the fact that for Hungarian riders nearby and lower cost, though less special places are more affordable than distant, expensive and exotic countries. In the second place Spain was mentioned, then Romania, Germany, France, Italy and England. Some respondents underlined Iceland, Ireland, Australia and The United States as attractive destinations.

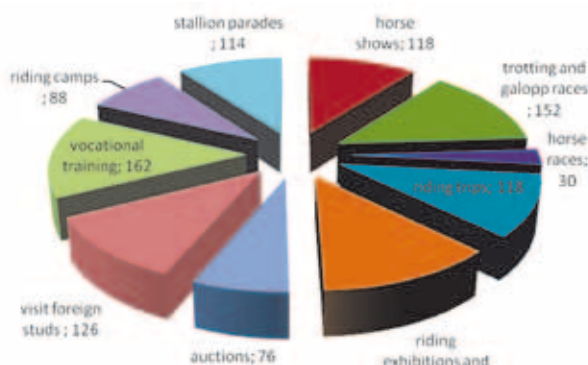


Figure 5. Horse-related events are interesting for respondents

Apart from the given answers, the following locations were pointed out: Holland, Africa, The United Arab Emirates, Scotland, Sweden, Switzerland, Mongolia, Argentina and New-Zealand. Information was also collected on respondents' solvency. 49.2% of respondents would spend between 51 000–150 000 HUF on traveling, an amount which would cover costs of participation at a riding holiday exclusively in a neighbouring country. A high proportion (34.9%) of respondents would spend less than 50 000 HUF, which would only cover costs of a riding holiday inside Hungary. 11.9% of respondents could afford to spend 151 000–350 000 HUF on a journey abroad. As the low percentage as well as the interviewees confirmed, only better-off riders can devote considerable amounts on unique, exotic journeys.

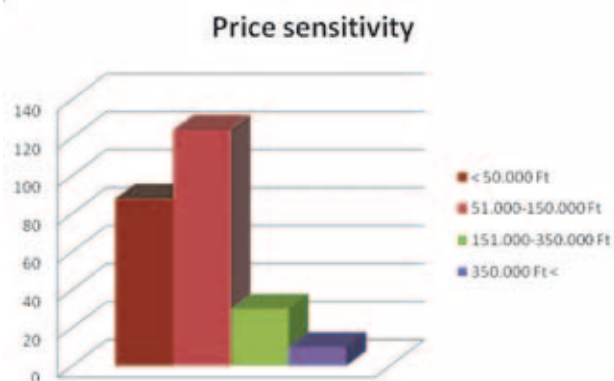


Figure 6. Price sensitivity

Discussion

As the results of the research show, a small proportion of Hungarian riders are present at equine tourism. However, experts believe that the number of guests may increase in the future. As one of the interviewees confirmed, most riders who participate in equine tourism are present as service providers (they possess one or more horses, are trainers or ride leaders). Riding opportunities for beginners or less experienced riders are available in almost all regions of Hungary. The regions of Alföld (the Great Plain), Kisalföld (Little Plain), Észak-középhegység (North Hungarian Mountain) are suitable for riding and driving all year long, and Dunántúli-

középhegység (Transdanubian Mountain), Dunántúli-domb-ság (Transdanubian Hills) and the Western borderline of the country are similarly adequate for the mentioned purposes. The Észak-Alföld (Northern part of the Great Plain) offers a wide range of equestrian services, such as riding, driving, riding hacks, hunting, dressage, showjumping, military, voltig, trails, therapeutical riding, races, visiting studs and riding shows (Incze-Hevessy).

As a result of globalisation, international riding news travels fast, and the latest news on equine tourism can be consulted online. Riders are offered extremely attractive equestrian programmes, such as riding holidays in Europe and overseas. Though participants are required to have a high standard of riding skills, the results of the survey show that these journeys are really attractive for Hungarian riders, especially due to the unique surroundings and the different riding style. Unfortunately, in the current economic crisis a limited number of riders is in the position to pay for them. Hungarian riders, however, show enthusiasm about riding holidays inside and outside the country, the latter destinations are in Europe and near Hungary. Respondents show interest in riding-related courses, exhibitions, fairs and competitions, however, also in these cases price can discourage participation.

Conclusion

The study investigated features of Hungarian riders' participation in equine tourism. The topic is up-to-date as the National Equestrian Development Programme, which has been ratified this year, defines certain product-specific goals with regards to equine tourism as well. The achievement of goals can be promoted by collecting information on the expectations and ideas of current and potential clients. Highlighted goals of the programme are increasing participation in equestrianism and equestrian tourism, broadening the pool of riders and multiplying persistent demand. The development of equine tourism is a milestone in conserving national equestrian traditions, since it includes not only teaching riding techniques, but also all aspects of equestrian traditions and equine culture. Essential requirements, such as improving the conditions of accommodating guests, infrastructural development and the construction of trails attractive for foreign audience, must be fulfilled in order to take a step forward. At present Hungarian equestrian service providers work in isolation, though a cohesive touristic product, complemented by additional services which are not linked to weather conditions, is the basis of a successful equine touristic sector. As for the education of experts, it is worth noting, that equestrian culture educators have been trained since 2005 at Semmelweis University, Faculty of Physical Education and Sport Sciences. The course gives students a complex knowledge of sport, entrepreneurship and management, in order to have qualified riding experts working in different positions for the promotion of the Hungarian equestrian industry. The importance of expanding therapeutical riding services must be emphasized, as a further opportunity for the sector to boost. Experts

specialized on hippotherapy are trained by Hungarian Riding for the Disabled Federation (Magyar Lovasterápia Szövetség). Hungarian equestrian life can only be promoted in the future through the complex and parallel improvement of all equestrian sectors mentioned above.

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