

Stakeholder Challenges in Developing the Equestrian Tourism: A Case Study of Malaysia

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ABSTRACT

This study explores the challenges and opportunities within Malaysia's growing equestrian tourism sector by examining stakeholder experiences and identifying key barriers to development. Despite increasing interest in equestrian activities and the sector's potential as a unique tourism product, the industry faces several constraints including financial limitations, inadequate infrastructure, and difficulties in obtaining land use approval. Using a qualitative research approach, data were collected through semi-structured interviews with 20 equestrian operators across various states in Malaysia. Thematic analysis was employed to extract significant themes from the data, with NVivo software utilized to support an organized and rigorous coding process. The findings reveal that rising operational costs, limited government support, and complex land ownership issues continue to hinder the full potential of the industry. In response, the study provides practical suggestions for equestrian operators such as diversifying services and improving marketing strategies as well as theoretical insights to assist tourism authorities and policymakers in formulating better support mechanisms. By contributing both applied and conceptual knowledge, this research serves as a valuable reference for stakeholders seeking to elevate Malaysia's equestrian tourism to an internationally competitive level.

Keywords: Equestrian tourism, Equestrian operator, Stakeholders challenges, Tourism planning, Operational constraints

INTRODUCTION

Equestrian tourism has emerged as a rapidly growing tourism product, offering travellers a distinctive way to engage with nature and the outdoors (Paula & Grajfoner, 2020; Oana-Daniela & Iren, 2022). Grounded in longstanding equestrian traditions and a vibrant cultural heritage, this specialized tourism sector is largely fuelled by horse enthusiasts with a deep passion for equine pursuits (Sigurðardóttir & Steinthórsson, 2018). Development of micro-clusters in tourism: a case of equestrian tourism in northwest Iceland, 2018). As a lifestyle-focused segment, equestrian tourism has evolved in response to travellers' emotional connection with horses, shaping the experiences and services around their preferences and expectations (Notzke, 2019; Paula & Grajfoner, 2020). For it to flourish as a preferred option for adventure, leisure, and wellness travel, comprehensive planning at all levels is crucial (Dashper et al., 2021). Such planning must encompass infrastructure development, sustainable practices, community engagement, and marketing initiatives to ensure long-term growth and appeal to a broader range of tourists.

In addition, equestrian tourism offers significant advantages for operators by enhancing their visibility and providing valuable insights into operational challenges through direct interactions with tourists (Helgadóttir & Sigurðardóttir, 2020). These interactions help providers better understand market expectations and highlight areas that require improvement, innovation, and strategic development. Moreover, equestrian tourism plays a vital role in shaping a country's tourism image by showcasing cultural heritage, traditions, and natural beauty, aligning with the global demand for meaningful and immersive travel experiences (Dashper et al., 2021; Rezapouraghda et al., 2024). This shows that equestrian tourism can serve as a strategic tool for destination branding, helping countries differentiate themselves in an increasingly competitive global tourism market.

Lessons from countries like Iceland and New Zealand offer valuable guidance for developing a sustainable and competitive equestrian tourism sector. Iceland, with its advanced equine industry, strong cultural ties to horse breeding, and consistent government support, serves as a leading example of how equestrian tourism can thrive when built on a foundation of cultural heritage, sustainable practices, and community involvement (Sigurðardóttir, 2018; Sigurðardóttir & Steinhórrson, 2018; Helgadóttir & Sigurðardóttir, 2020). Similarly, New Zealand successfully integrates equestrian tourism into its broader tourism offerings, appealing to adventure-seeking travellers through nature-based experiences (Tolls & Carr, 2021), while Australia has their own approach to bring wildness experience in equestrian tourism activities

(Douglas et al., 2022). Both examples demonstrate the importance of strategic planning and branding in establishing equestrian tourism as a resilient and attractive niche market. Drawing from these global best practices, this study aims to provide insights that can help Malaysia and similar destinations develop a robust equestrian tourism industry that appeals to both local and international audiences.

The main objective of this study is to identify the challenges faced by equestrian stakeholders in Malaysia. In line with study Deale and Lee (2021), identifying the main challenges in the tourism sector will help stakeholders alleviate their burdens and provide appropriate initiatives. Therefore, the objective of this study will help stakeholders to establish more effective strategies, policies, and support systems tailored to the specific needs of the equestrian sector. By understanding the key challenges, stakeholders can prioritize resource allocation, develop targeted training programs, enhance infrastructure, and foster stronger collaboration among industry players. Ultimately, this will contribute to the growth and sustainability of the equestrian industry in Malaysia, while also promoting its potential as a niche tourism segment that can attract both domestic and international visitors.

However, the study is limited to Peninsular Malaysia, while Eastern Malaysia has not been covered due to time constraints and logistical challenges in accessing relevant stakeholders. The research focused primarily on regions within Peninsular Malaysia where equestrian tourism has a more established presence, making it difficult to include Eastern Malaysia within the scope of this study. Additionally, the research relies on qualitative data from interviews and surveys with a limited number of stakeholders, which may not fully represent the views of all industry participants. The time frame for data collection was also constrained, limiting the scope of fieldwork and engagement with a broader range of stakeholders. Finally, challenges in obtaining comprehensive or up-to-date information from some stakeholders may affect the overall findings, as the industry continues to evolve. Therefore, the researcher is taking a cautious approach in interpreting the results and acknowledges that some information may be subject to change as the industry develops further. The dynamic nature of the equestrian tourism sector means that some aspects of the research may need to be revisited in future studies to reflect emerging trends and changes in the market.

By identifying key challenges faced within the industry and analysing stakeholder experiences, the study seeks to offer actionable insights that support strategic planning, improve collaboration, and strengthen the overall structure of the sector for future growth.

Equestrian Tourism's Status in Malaysia

The equestrian tourism sector in Malaysia is showing drastic growth through various equestrian activities across the country. Equestrian activities that are popular among equestrians in Malaysia include dressage, jumping, and endurance. This equestrian discipline brings joy to most horse enthusiasts across the country because these sports not only attract competitive riders but also appeal to a growing number of recreational enthusiasts who are seeking meaningful and engaging outdoor experiences. Although Malaysia has made consistent strides in developing its equestrian industry, the tourism segment remains underexplored, presenting significant opportunities for growth, innovation, and global visibility.

Compared to neighbouring countries such as Indonesia and Thailand, Malaysia is still in the process of refining its high-potential tourism products and destinations (Sakolnakorn, 2020), especially within the niche segment of equestrian tourism. According to Puah et al. (2018), Malaysia's tourism strategy has shifted toward offering value-based experiences with an emphasis on personalized and high-quality vacation packages rather

than catering to the mass market. This transition was prompted by the environmental concerns, generic offerings, and lack of competitiveness associated with conventional mass tourism (Hussin & Bunchmann, 2019). As evidence of the growing interest, there are currently 87 equestrian centre that support both recreational and competitive programs, as shown in Figure 1. This indicates a robust and sustained interest in equestrianism and reflects the nation's commitment to advancing the industry through education, infrastructure, and strategic investments. The increasing demand for structured equine programs highlights Malaysia's potential to emerge as a notable player in the Southeast Asian equestrian tourism scene, provided that the challenges faced by stakeholders are systematically addressed.

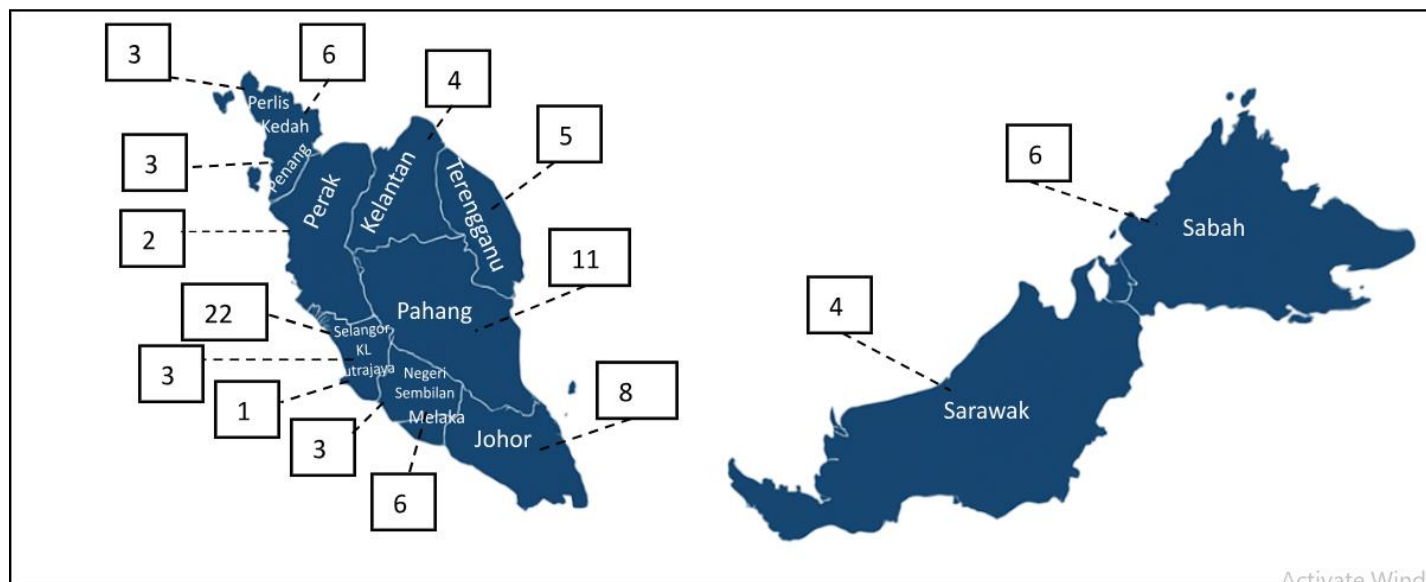


Figure 1. List of equestrian centres in Malaysia.

Therefore, participating in equestrian activities offers both personal fulfilment and a way to bond with nature, especially in scenic rural settings that enhance the overall experience. These disciplines also form the core of organized equestrian tourism packages, which can include riding lessons, trail rides, equestrian camps, and even cultural experiences linked to traditional Malaysian horsemanship. As more local equestrian and international tourists discover the joy of horseback riding, the industry continues to show promising signs of expansion and diversification.

METHODOLOGY

This study employs a qualitative research methodology, which is particularly well-suited for exploring the complex and experiential nature of equestrian tourism development in Malaysia. The decision to use a qualitative approach is grounded in the observation that many recent scholarly articles on tourism and niche tourism sectors (Buhalis & Shahriar, 2022), such as equestrian tourism, have effectively utilized qualitative methods to collect rich, in-depth data directly from participants. These methods allow researchers to access the lived experiences, perspectives, and expectations of individuals who are directly involved in or affected by the phenomena under study. In the context of this research, semi-structured interviews were conducted with a total of 20 participants from various regions across Malaysia. All participants were selected based on their active involvement in the equestrian sector, particularly as equestrian centre operators or individuals with substantial operational knowledge. The semi-structured format of the interviews provided the flexibility to explore emerging topics while ensuring consistency in key areas of inquiry. According to King et al. (2018), this approach enabled participants to freely share their experiences, operational challenges, and views on the development and potential of equestrian tourism in Malaysia. The data collected from these interviews were analysed using thematic analysis, a method that helps identify, analyse, and report patterns within qualitative data (Braun & Clarke, 2020). This approach not only provides a rich and detailed account of the data but also allows for the interpretation of underlying meanings and insights relevant to the study aim.

In this study, the use of Computer- Assisted Qualitative Data Analysis Software (CAQDAS) played a vital role in the process of coding and theme development. According to Creswell and Creswell (2023), CAQDAS tools facilitate the organization, retrieval, and interpretation of large volumes of qualitative data, allowing researchers to systematically manage complex datasets while maintaining analytical rigor and transparency throughout the research process. The researcher specifically chose NVivo as the preferred platform over other available software due to its robust features, user-friendly interface, and suitability for managing large volumes of qualitative data. NVivo facilitated the systematic organization of interview transcripts, enabling the researcher to efficiently code participants' responses and identify recurring patterns and themes (Allsop et al., 2022). By using NVivo, the researcher was able to categorize data into nodes, visualize relationships between codes, and ensure consistency throughout the analysis process. Through this analytical process, key themes emerged, shedding light on the recurring issues and challenges faced by equestrian operators, which were later used to define the main variables of the study. Thematic analysis not only allowed for the organization of complex data but also helped uncover deeper insights into the systemic and operational barriers hindering the growth of any tourism niche in the country (Creswell & Creswell, 2023). This methodology has proven effective in presenting a comprehensive understanding of the stakeholder perspectives and in identifying areas that require strategic attention and improvement.

Challenges

Despite the growing interest in equestrian activities around Malaysia, the industry continues to face several key challenges that hinder its full development and potential. Although public enthusiasm and demand for equestrian experiences have increased, the growth of the industry has been hindered by persistent operational and regulatory obstacles. Among the most pressing concerns are financial limitations, insufficient facilities, and complications involving land ownership and regulatory authority. These challenges not only affect the daily operations of equestrian-related businesses but also influence long-term planning, investment opportunities, and the ability to scale services to meet rising demand. As a result, the industry struggles to reach the level of competitiveness and recognition seen in other regional tourism sectors. This challenge is seen to be faced by several equestrian operators who believe that the equestrian tourism industry has great potential in their area because their location is in an attractive place for conducting trail rides and the existence of collaboration with nearby homestays as accommodation.

Financial Constraints among Equestrian Operators

Several operators have expressed growing concern about the rising operational costs associated with running equestrian facilities in Malaysia. According to one equestrian operator based in Selangor, the cost of maintaining a single horse is already quite substantial, covering daily feed, grooming, healthcare, and routine veterinary check-ups. These costs increase significantly when managing a stable of more than five horses, as additional resources are required not only for feeding and basic care but also for stable maintenance, staffing, and utilities such as water and electricity. Operators also pointed out that specialized equipment, bedding materials, and regular farriery services further add to the financial strain. This issue is not isolated to Selangor alone, as similar concerns were raised by equestrian operators in Kuala Lumpur, Johor, Perak, and Pulau Pinang. In these states, many operators are struggling to break even due to the lack of steady income from equestrian tourism, especially during off-peak travel seasons or in the absence of events and riding programs. Without sufficient financial support or incentives from the government or private sector, many of these businesses find it challenging to sustain operations, let alone expand their offerings or invest in better facilities. This widespread concern highlights the urgent need for strategic financial planning, funding mechanisms, and policy support to ensure the long-term viability of equestrian tourism in Malaysia.

Condition of the Current Facilities

Aside from the financial issues faced by several equestrian operators, another significant challenge lies in the state of facilities at their respective locations. While recent visits indicate that many equestrian centres are in satisfactory condition, this is not the case for all operators. For those managing centres with limited financial resources, the inadequate infrastructure has become a substantial burden, making it increasingly difficult to maintain daily operations and attract visitors. The absence of modern amenities, well-maintained riding arenas,

and proper accommodation for horses not only affects the quality of service but also diminishes the overall experience for tourists and riders. Equestrian centres with minimal financial supports often rely on outdated facilities, which negatively affect safety standards, operational efficiency, and the overall attractiveness of their services. Through the findings of a study with experts in equestrian planning, it is stated that addressing infrastructure deficiencies is crucial for the growth and sustainability of the industry. Experts emphasize the need for modernized facilities, including well-maintained arenas, stables, and support services, to ensure both rider and horse safety while enhancing the overall experience for visitors. Furthermore, they suggest that without adequate financial backing and strategic planning, many equestrian centres will struggle to keep up with the rising demand for high-quality equestrian tourism offerings.

Complications in Securing Land for Trail Ride

In addition, the challenge of obtaining approval to use wider trails for trail riding activities remains a common and persistent hurdle faced by many equestrian operators in Malaysia. This issue is particularly evident in the study findings, which highlight the difficulties in gaining trust and formal approval from landowners whether private individuals or government bodies. The process is often slow and complicated, largely due to unclear land policies and bureaucratic procedures that discourage collaboration. Moreover, equestrian operators frequently encounter obstacles when attempting to access trails that traverse multiple land jurisdictions, especially in areas where land ownership overlaps between different agencies or falls under separate parliamentary constituencies. For instance, equestrian centres operating in areas such as Dengkil, Selangor, cannot simply apply for land use that extends beyond their designated property boundaries, especially when the trails or open spaces they intend to use fall under different administrative jurisdictions or are owned by various government agencies or private entities. These territorial divisions can introduce political factors into the application process, further complicating and delaying approvals. As a result, operators are sometimes forced to limit or cancel trail riding activities, which significantly reduces the attractiveness of their equestrian tourism packages.

DISCUSSION

The challenges faced by several equestrian operators throughout Malaysia are not unique to the local context but reflect common issues encountered by newly developed equestrian centres globally, particularly in countries where the equestrian tourism sector is still emerging. These challenges typically include high operational costs, limited access to funding, lack of skilled manpower, regulatory constraints, and difficulties in acquiring suitable land for expansion or trail use. Similar patterns have been observed in other developing equestrian tourism destinations, where inadequate infrastructure, inconsistent policy support, and low public awareness about equestrian tourism have hindered industry growth (Buczek et al., 2018; Dashper K., 2021; Douglas et al., Social Licence to Operate: What Can Equestrian Sports Learn from Other Industries?, 2022). The experience of Malaysian operators mirrors these international trends, suggesting that the early-stage development of equestrian centres often demands strategic planning, strong institutional support, and long-term investment to build a stable and attractive tourism product. As equestrian tourism continues to gain popularity, both locally and abroad, understanding and addressing these foundational challenges becomes increasingly important for sustained growth and global competitiveness.

Therefore, based on the insights gathered in this study, several recommendations can be proposed for equestrian operators to strengthen their presence and appeal within the tourism industry. Equestrian operators are encouraged to broaden their offerings (Helgadóttir & Sigurðardóttir, 2020) by introducing diverse equestrian programs that not only improve market reach but also create additional revenue streams. These may include educational workshops, family-oriented riding experiences, and cultural showcases that reflect Malaysia's rich equine heritage, all of which can enhance visitor engagement and attract a wider demographic of tourists. Moreover, building strong networks with local tourism agencies, engaging with digital platforms for marketing, and participating in tourism expos can also help boost visibility and attract a wider audience. Additionally, the findings from this research can serve as a valuable resource for government bodies, especially Tourism Malaysia, to recognize the untapped potential of equestrian tourism. While financial support is often limited, promotional assistance through national tourism campaigns, inclusion in official tourism portals, and strategic branding efforts can significantly benefit the industry (Douglas et al., Social

Licence to Operate: What Can Equestrian Sports Learn from Other Industries?, 2022). By positioning equestrian tourism as a unique niche attraction, the government can help generate broader awareness, encourage private investment, and ultimately strengthen Malaysia's tourism portfolio.

Ultimately, the discussions presented by the researcher aim to propose effective solutions to address the challenges and offer deeper insights that support both practical improvements and theoretical advancements for stakeholders involved in the equestrian tourism industry. This includes offering insights into operational challenges, identifying areas for development, and guiding future strategies that can enhance the effectiveness and competitiveness of the sector in Malaysia.

CONCLUSION

In conclusion, this study successfully identifies the challenges faced by stakeholders in the equestrian tourism industry in Malaysia. This shows that these challenges need to be overseen by relevant authorities and industry stakeholders to ensure the sustainable growth and development of equestrian tourism in Malaysia. Drawing insights from countries like Iceland, United Arab Emirates (UAE), Kyrgyzstan, Australia and New Zealand, where equestrian tourism is well-established and integrated into national tourism strategies, this research emphasizes the importance of strategic planning, stakeholder collaboration, and policy support. Through a qualitative approach involving semi-structured interviews with 20 equestrian operators across Malaysia, the study was able to capture valuable firsthand experiences and perspectives. Using thematic analysis supported by NVivo software, key themes such as financial constraints, infrastructure limitations, and land use approval challenges emerged as core issues affecting the growth of the sector.

Based on the findings of this study, immediate actions and long-term strategies are essential for the development of equestrian tourism in Malaysia. In the short term, it is recommended to enhance promotion and awareness through social media campaigns and local events to attract both domestic and international tourists. Additionally, providing basic training for operators on marketing, customer service, and horse safety can improve service quality and competitiveness. In the long term, there is a need for sustainable infrastructure development, including better accommodation facilities and safe riding paths, to support the growth of the industry. Consistent government policies and incentives for operators would also play a crucial role in fostering the sector, while continuous research and innovation are necessary to stay aligned with global trends and market demands. These measures would help build a more robust and competitive equestrian tourism sector in Malaysia.

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