

ANIMAL-BASED TOURISM SERVICES IN LAPLAND

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Dear reader

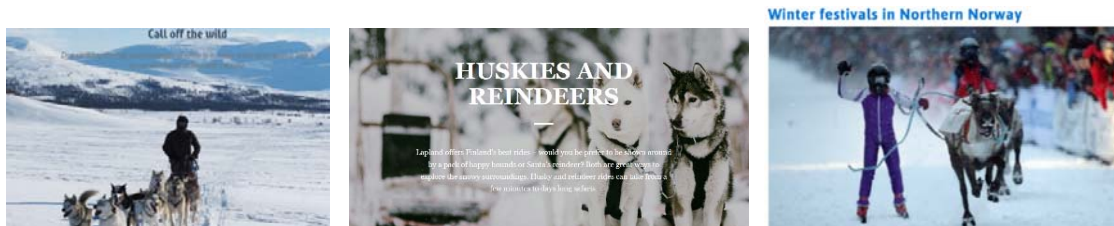
This report is one of a series of reports and infographics on animal-based tourism services in Lapland published by The Multidimensional Tourism Institute (University of Lapland) as part of the project “Animal Welfare in Tourism Services”. The main aim of the project is to promote both, the welfare of animals used in tourism services in Lapland and the possibilities for animal-based tourism firms and other stakeholders to benefit from the responsible practices in animal-based tourism.

The project “Animal Welfare in Tourism Services” is implemented by The Multidimensional Tourism Institute (MTI) (Lapland University of Applied Sciences and University of Lapland) in joint cooperation with the School of Industry and Natural Resources (Lapland University of Applied Sciences) during the years 2016 and 2018. It is funded by the Finnish Centre for Economic Development, Transport and the Environment under The European Agricultural Fund for Rural Development (EAFRD).

Introduction

Animals have become a very important part of tourism and leisure experiences around the world and they are used in tourism in many different ways. They can be seen in captivity (e.g. wildlife parks, zoos), in the wild (bird watching, wildlife safaris), as entertainers (aquariums and marine parks) and as part of tourism activities (horseback riding, dog sledding) (Fennell 2012). The picture of animals or human-animal encounters has become common in the marketing and promotion material of many travel destinations. In fact, it can be argued that destinations without any kind of animal encounters are exceptions, rather than the rule, in today's society.

Animal-based activities are particularly emphasized in the Nordic countries. The marketing campaigns of Finland, Sweden and Norway all include animals to a greater extent. By taking a glance at Visit Finland, Visit Sweden and Visit Norway travel portals, one will soon notice images of wild animals, horses, huskies and reindeer, among others. These images become stronger and more prevalent as soon as we look at destinations further north such as Northern Norway, Swedish Lapland and Finnish Lapland. Reindeer and huskies are not only represented as one of the main attractions, but they have also become an important branding element of these places. It is difficult to imagine a visit to Lapland without huskies or reindeer.



Source: Visit Finland, Visit Northern Norway & Visit Swedish Lapland

Although the tourism industry in Finnish Lapland is aware of the significance of animals, there is a lack of knowledge about the current situation of animal-based tourism services. *How many animal-based tourism firms are operating in Lapland? Which and how many animals are used in the creation of tourism experiences? Where are these animals situated? What is the economic impact and employment of animal-based tourism services?* This report aims to provide answers to these questions.

The results presented in this report are based on systematically collected information from different sources that were available both publicly and privately. The study identified a total number of 158 animal-based tourism service firms operating in Lapland. In order to get a deeper understanding of the firms identified, a Webropol online survey was conducted between July and October 2016. A total of 96 animal-based tourism service firms responded to the survey.

The information gathered is highly relevant in a time when animal welfare in tourism is being pushed forward due to market demand. While many tourists feel that close interaction with animals is an exciting way of spending a holiday, they have also become more aware of the negative impacts that tourism can have on animals (Fennell 2012). For instance, global tourism firms, such as TripAdvisor, TUI and Thomas Cook, have taken concrete actions to promote animal welfare in the tourism industry (e.g. Coldwell 2015; Fruen 2017; Rushby 2016). This development shows that animal welfare is becoming a critical criteria used by tour operators to select their suppliers.

Mapping animal-based tourism service firms in Lapland

This section offers an overview of how the study was conducted and the decisions that led to the results presented in the subsequent sections. The study was conducted in two stages during May and December 2016 by following a systematic approach. *The first stage of the study was focused on identifying animal-based tourism service firms with the help of lists made available by horse stable and reindeer tourism associations as well as governmental organizations.* Also, other tourism-related websites, such as Kidventures.fi and the website of the Finnish Association of Rural Tourism Entrepreneurs, were used to identify animal-based tourism firms outside the previously presented categories. The mapping process is represented in Figure 1.

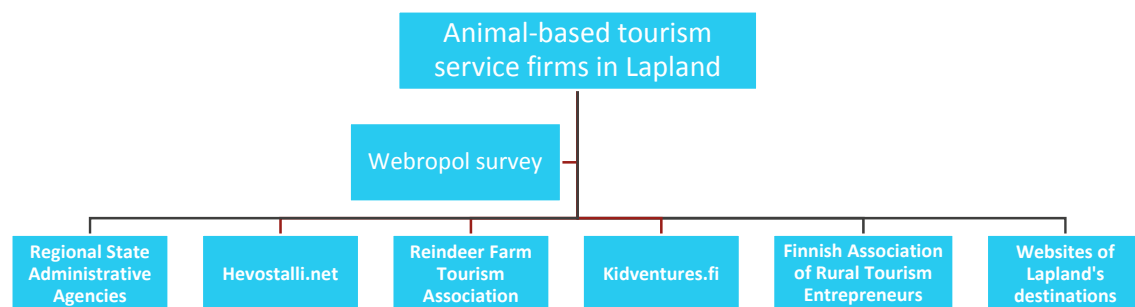


Figure 1: Process of mapping animal-based tourism service firms in Lapland

In the first stage, the study focused on identifying Dog sledding companies with the help of an inspection report maintained by **Regional State Administrative Agencies (Aluehallintovirasto)**. By going through each kennel in the report and checking every individual owner or company on the internet, it was determined which kennels were active and involved in tourism. The report also included mushers who own dogs for hobby or competition reasons. These mushers were left out of the study, because it was not possible to determine which mushers use their sled dogs in tourism activities.

Equestrian tourism companies were identified with the help of the previously mentioned inspection report by Regional State Administrative Agencies and **Hevostalli.net**, which is an internet portal providing equestrian-related information and discussions. Hevostalli.net offers a list of all horseback riding stables in Lapland. Nevertheless, not all listed companies take part in equestrian tourism. Some stables are mere livery stables, horse training facilities or riding schools for locals. In order to make a distinction between tourism and leisure activities, it was decided that only stables with web pages in English or other languages are considered as equestrian tourism companies. The web pages of the selected stables were reviewed in order to confirm their involvement in the tourism sector.

Reindeer farms or reindeer program service providers were identified through a list provided by the **Reindeer Farm Tourism Association (Porotilamatkailu ry)**. The list includes both individual reindeer owners and reindeer farms. The term “individual reindeer owner” refers to an individual person who works with reindeer in tourism without owning a tourism company. For example, an individual reindeer owner could be hired by a tourism firm to exhibit his or her reindeer or arrange reindeer sledding in a particular location. The term “reindeer farm” refers to a company that offers reindeer safaris and organized reindeer farm visits on a regular basis. These companies have fixed (or in some cases provisional) locations where they meet their customers and provide their services.

Petting zoos and zoos were identified by relying on a google search. This was possible because they are not numerous in Lapland. In fact, there is only one zoo and a few petting zoos in the Finnish province of Lapland. Nevertheless, to ensure that no petting zoo was omitted in the Google search, the webpage **kidventures.fi** was used as a final verification. The member list of the **Finnish Association of Rural Tourism Entrepreneurs** was reviewed to identify *farm holiday companies* in Lapland. Only farm holiday companies that have animals were considered for the purpose of this report. Reindeer farms that offer farm holiday services, but

do not engage in the conventional reindeer sleigh ride were considered to be farm holiday service providers.

Finally, *hunting-, fishing- and wildlife-related tourism companies* were identified. As these companies are not organized under any form of association, there was a need to rely on the information made available in the different destination websites. As a result, there was a need to go through destination websites in Lapland. Furthermore, the websites of destinations in Lapland were used to verify the number of identified dog sledding companies, reindeer farms, horse stables, (petting) zoos and farm holidays. This contributed to reaching a more accurate number of animal-based tourism service firms in Lapland.

In the second stage, a Webropol-online survey was sent to the animal-based tourism firms identified during the first stage of the mapping. The survey was used to get information about the location, type and size of the company in terms of which animal-based activities and how many animals they are using in their tourism operations. Furthermore, companies were asked to indicate the annual turnover and labour force of their animal-based activities.

The questionnaire was sent to 147 firms. A total of 11 companies could not be reached by email, and therefore, were left out of the study. After two weeks, a reminder e-mail was sent, and companies that did not answer after the reminder e-mail were contacted by phone and approached once more to answer the survey. Two companies announced that their companies were no longer active, and one company said that tourism activities in their company were so minor that their answers to the survey would have been insignificant. Finally, a total of 96 answers were gathered, making the response rate 65 %.

It should be noted that the information provided in this report represents an estimation of the number of animals and tourism firms directly involved in animal-based tourism services. Furthermore, it should be emphasised that all the figures related to the amount of animals, turnover and labour force are based on the responses of those 96 companies. As around one third of the companies did not answer our questionnaire their figures are missing from the data. This means that the overall amount of animals, turnover and labour force is bigger but figures in this report give some reference.

Main findings

This study identified a total of *158 animal-based tourism service firms in Lapland*. A total of *53 firms offered services such as hunting, fishing and wildlife watching*. There are *42 husky, 34*

reindeer and 11 equestrian farms. Nine firms offer multiple animal-based services, that is, they use two or more animal species (e.g. horses and huskies or petting animals, reindeer and horses) in their activities. For instance, a firm operating a petting zoo could be included in the category ‘Multiple animal-based services’ if the firm also offers reindeer safaris. Six firms offer farm holidays. In this case, animals are seen as a part of the farm environment, having minor significance for the production of safari services. Finally, there are three (petting) zoos in Lapland. One of them is Ranua Wildlife Park. For an illustration, see Figure 2.

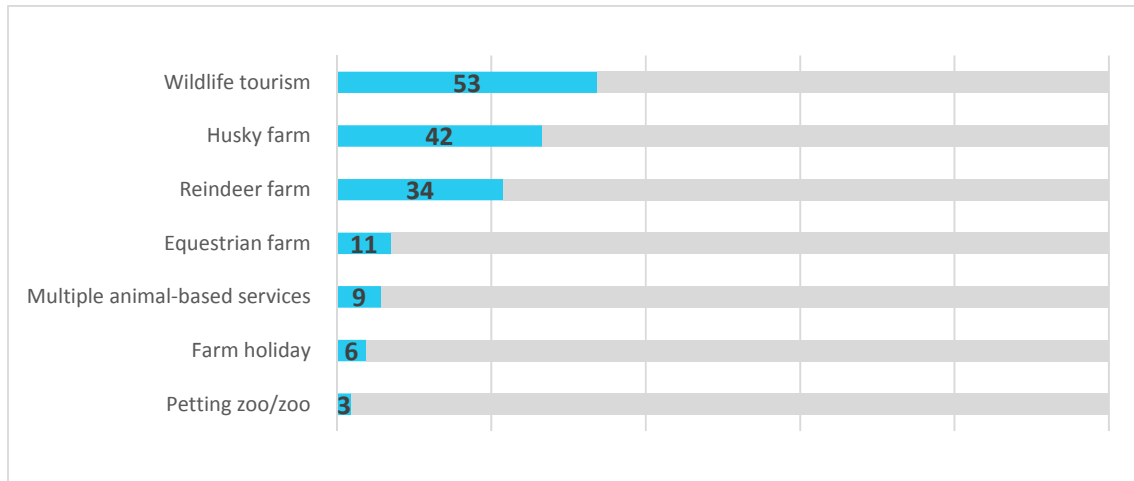


Figure 2. Animal-based tourism firms in Lapland

The animal-based tourism firms are well-distributed across Lapland; 34% are in Fell Lapland (e.g. Levi, Ylläs, Muonio, Enontekiö), 25% are located in Northern Lapland (e.g. Inari, Saariselkä, Utsjoki), 19% are in Eastern Lapland (e.g. Pyhä-Luosto, Sodankylä, Salla, Kemijärvi) and 22% are in Southern Lapland (e.g. Rovaniemi, Ranua, Tornionlaakso, Merilappi). For an overview, see Figure 3.

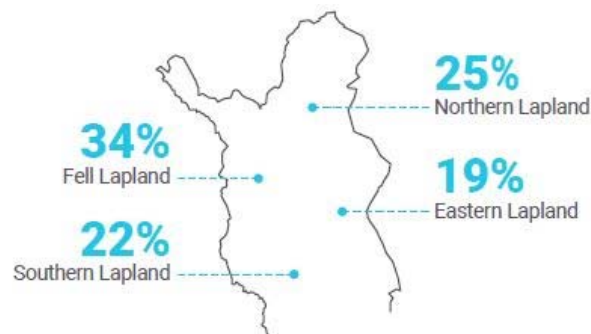


Figure 3. Distribution of animal-based firms

While most wildlife tourism firms are situated in Northern Lapland, the majority of sled dog firms are located in Fell Lapland. Reindeer farms are equally distributed in the different areas of Lapland. Most equestrian farms are located in Fell and Southern Lapland. For an overview of the number of animal-based tourism firms in the different areas of Lapland, see the figures below.

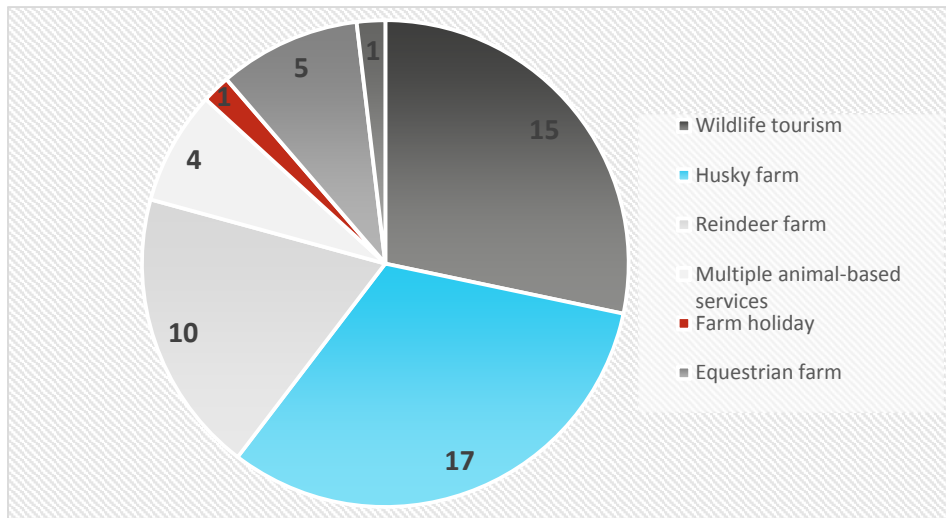


Figure 4. Number of animal-based tourism firms in Fell Lapland

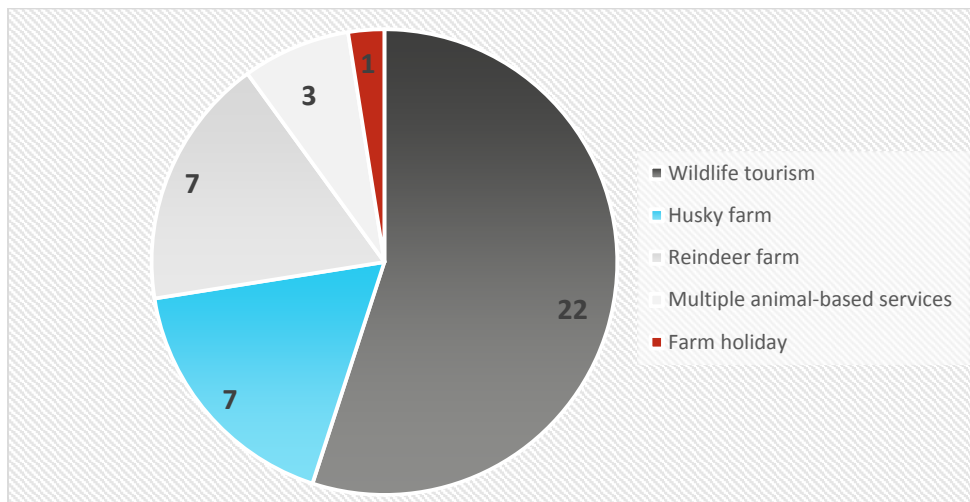


Figure 5. Number of animal-based tourism firms in Northern Lapland

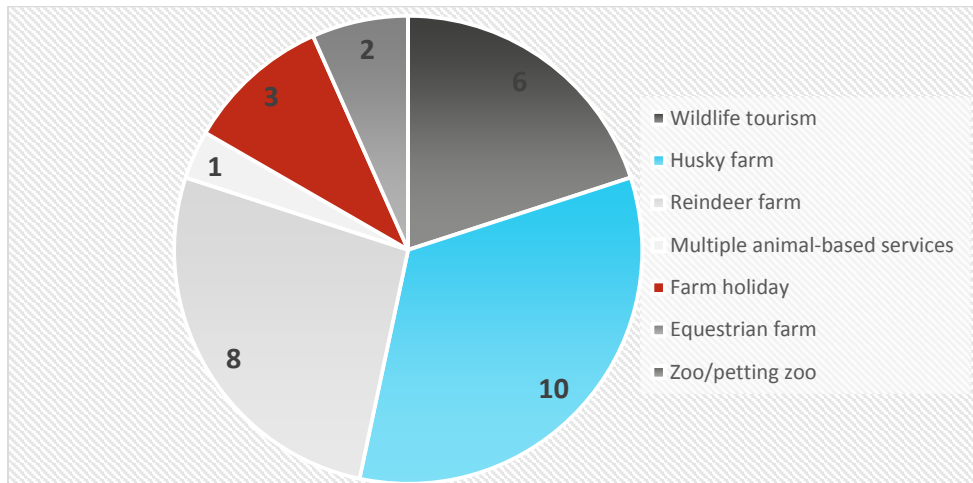


Figure 6. Number of animal-based tourism firms in Eastern Lapland

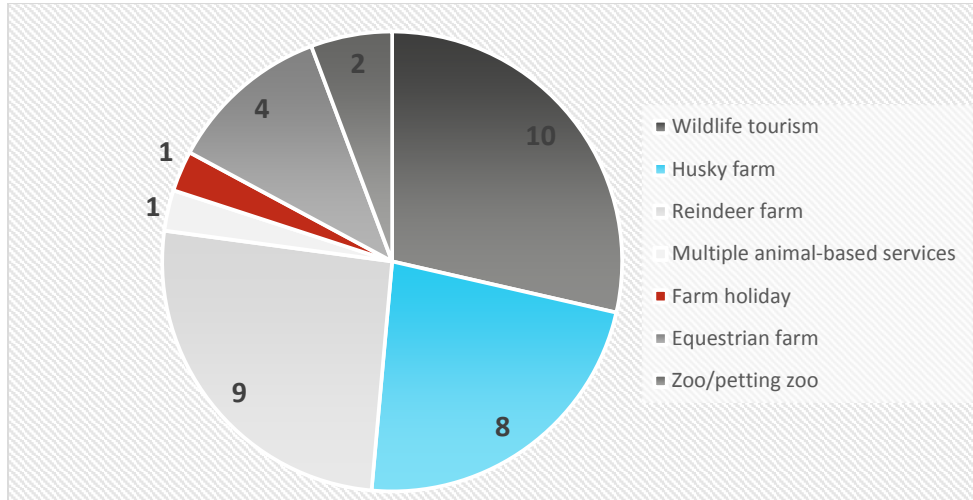


Figure 7. Number of animal-based tourism firms in Southern Lapland

There are around **12620** enterprises registered in Lapland (Nikander, Uusipaavalniemi & Holopainen 2016). **1022 (8%)** of these firms belong to the tourism industry. The accommodation and restaurant sector makes up the largest portion, with **728** firms. They are followed by tourism program service firms, with a total number of **294**. (Lapin liitto 2015.) With a total number of **158**, animal-based tourism firms represent **15%** of all tourism firms (see Figure 8).

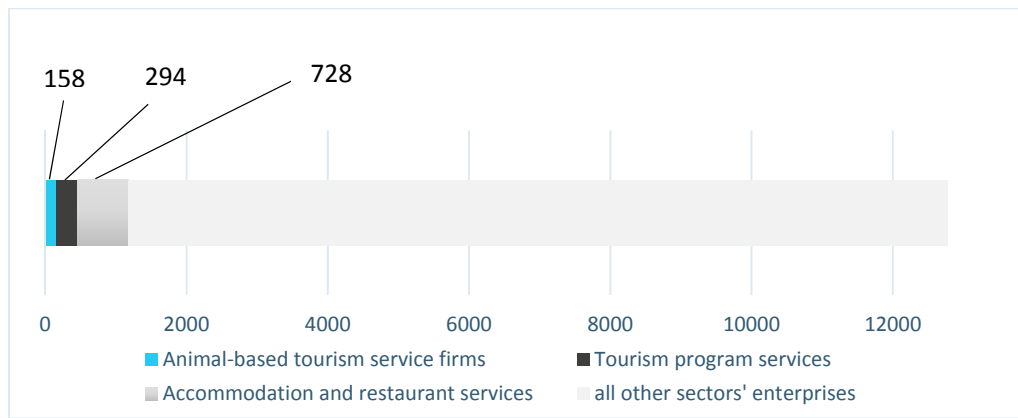


Figure 8. Tourism firms in Lapland's entrepreneurial landscape (based on Lapin liitto 2015; Nikander, et al., 2016)

According to the Regional Council of Lapland, Lapland's economy generates an approximate annual turnover of 11100 million euros. Approximately 7% (630m €) of this annual turnover is generated by the tourism industry. A total of 350 million euros is produced by accommodation and restaurant services, and 265 million euros – by tourism program services. (Lapin liitto 2015; Nikander et al., 2016.) By relying on the information collected through the online survey, it was calculated that *animal-based tourism firms generate an annual turnover of 15,1 million euros*. For a detailed overview, see Figure 9.

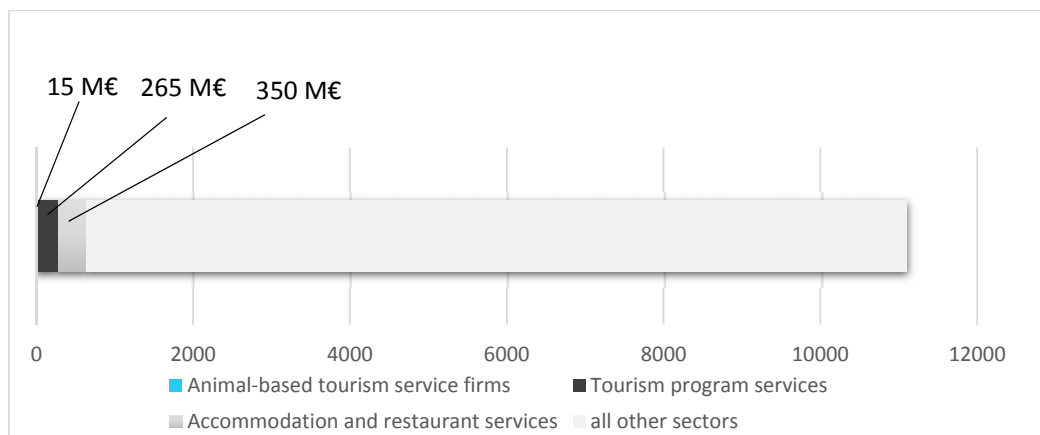


Figure 9. Tourism turnover in Lapland's economy (based on Lapin liitto 2015; Nikander et al., 2016)

The annual turnover of 15,1 million euros is generated by approximately 5400 (*semi-*) *domesticated animals and countless wildlife*. So, the approximate *annual turnover per animal is 2800 euros*. Huskies are the largest animal group, followed by reindeer, captive wild animals and horses. From the economical point of view, the most productive animals are reindeer, followed by horses. *The turnover per horse or reindeer is around 5000 euros. The productivity of huskies was estimated at 2400 euros*. If the company offered also other than animal-based

services such as accommodation, restaurant services etc. the respondent was asked to estimate only the turnover that is generated by animal-based services. For an overview of the economic impact of animal-based services in Lapland, see Table 1.

Animal	Total number	Turnover per animal (€)	Total turnover (M€)
Huskies	4000	2400	9,6
Reindeer	650	5400	3,5
Horses	150	4900	0,7
Captive wild animals	600	2200	1,3
Animal-based services total annual turnover			15,1

Table 1. Economic impact of animal-based tourism services (based on data collected through this study).

Animal-based tourism firms in Lapland can be categorized as micro enterprises, which provide mostly full-time employment for one or two persons including the entrepreneur. Indeed, 65% of the 96 firms that answered the online survey have between one and two full time employees working in animal-based services. 24% of the firms have no seasonal employees, and 32% – between one and two seasonal employees. If the company offered multiple tourism services, e.g. accommodation, restaurant services etc. the respondent was asked to estimate only the staff working on animal-based services. By relying on the information collected through the online survey, they generate 735 person-years overall. For an overview of the seasonal and full-time labor force in animal-based tourism firms, see Figure 10.

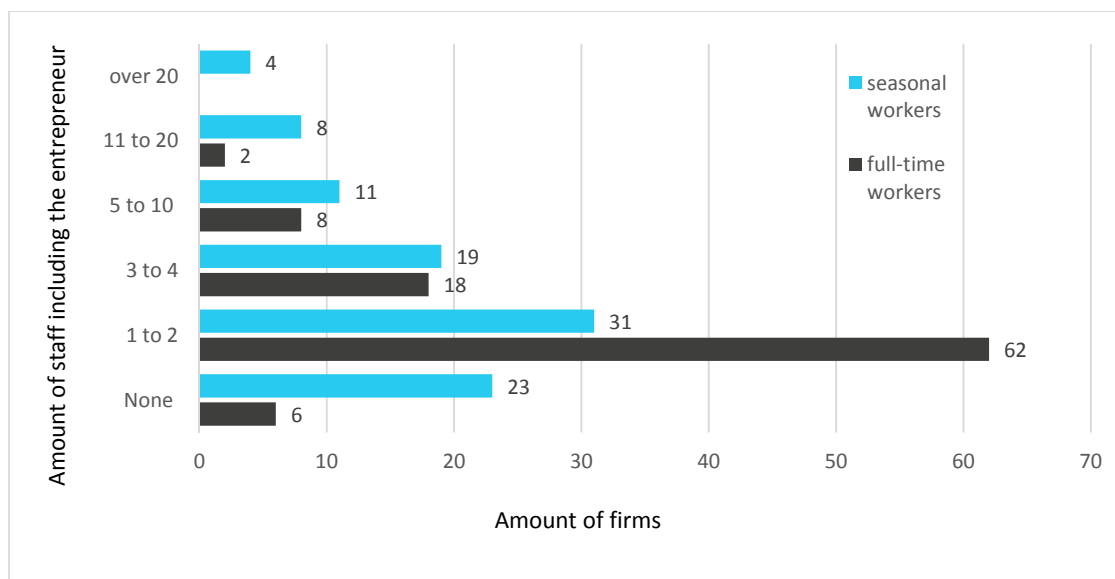


Figure 10. Labour force in animal-based tourism firms in Lapland.

Although the turnover of animal-based tourism services represents just 2,4 % of the turnover generated by the tourism industry, animal-based tourism service firms still play a major role in the economy of Lapland. Animals such as reindeer and huskies are a very important element of the Lapland brand and have been acknowledged as one of the most popular attractions among foreign visitors. From this perspective, animals have an impact on the turnover of tourism program service companies, restaurants and hotels. For example, this study identified 42 destination management organizations (DMO) in Lapland, which do not own animals, but the sales of animal-based tourism services represent a significant share of their annual turnover. In a similar way, it can be considered that the meat of animals such as reindeer and game is an important part of the local gastronomy, and thus, are contributing to the turnover of local restaurants. Reindeer also play a role as raw material (antlers, bones, hides, etc.) for the local souvenir industry. As a whole, it can be argued that animal-based tourism services have a considerable direct and indirect impact on Lapland's economy.

Limitations of the study

The report at hand offers a general overview of animal-based tourism services in Finnish Lapland. Nevertheless, there are some limitations in the accuracy of the results presented in the report. While the majority of sled dog tourism firms could be identified, the study was not able to determine the number of independent mushers collaborating with sled dog tourism firms. Also, foreign sled dog companies working in Lapland seasonally (winter season or shorter periods of time) could not be included in the study. There are no statistics or information about the number of seasonal sled dog operators in Lapland. As a result, the number of sled dogs used in Lapland tourism as well as their economic impact on the local economy is higher than the number presented in this report.

The list provided by the Reindeer Farm Tourism Association (Porotilamatkailu ry) offers an accurate overview of the reindeer farms and owners involved in tourism activities. Nevertheless, it does not provide information about the number of reindeer used in tourism. Determining the number of reindeer used in tourism is challenging due to culture-related reasons. It is considered impolite to ask reindeer owners about the amount of reindeer they possess. At the same time, the number of sleigh reindeer or reindeer on a farm fluctuates quite a lot due to deaths by car accident, predators or natural conditions. The number of reindeer identified in the study is based on the provided information gathered through the Webropol

survey. Reindeer owners (22) listed by the Reindeer Farm Tourism Association were not included in the study, as they are not involved in tourism on a regular basis. It would have been challenging to determine the labour and animal resources used in tourism. Similar to huskies, the number of reindeer used in tourism and their economic contribution to Lapland's economy is higher than the numbers presented in the report.

Equestrian farms offer information about the number of animals in their webpages. Furthermore, the number of horses was collected through the Webropol survey. Nevertheless, a decision had to be made about which equestrian farms are considered to be involved in tourism and which are not. It was decided that only farms which provide information in a language other than Finnish are considered as tourism service providers. As a result of this decision, the study left out stables only offering riding lessons and "summer camps" for local children.

Some challenges were also met in relation to petting zoos and Ranua zoo, as these firms do not provide accurate public information about the amount of animals kept on their premises. The same happens in relation to hunting, fishing and wildlife activities. It is almost impossible to get an accurate number of the animals which are involved in the activities.

There is no absolute guarantee that the study was able to identify all animal-based tourism companies in Lapland, as not every operating company has a website or has done search engine optimization. Furthermore, some companies do not sell directly to the tourist, but through destination management organizations or tour operators and are therefore harder to trace. It should also be noted that the study is based on the situation of the summer and autumn of 2016. Some companies might not exist anymore, and new companies might have been established recently. Furthermore, some of the figures, such as turnovers and labour force, are based on the online survey and calculations made from the responses which were estimates of the respondents. Nonetheless, the study offers a reference of the number of animal-based tourism firms and the number of animals used in Lapland. Moreover, it provides an estimated economic impact that animal-based tourism services have on the economy of Lapland.

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