

Influencer marketing in the equine industry

in Germany, the Netherlands and Great Britain

Written by: Johanna Katharina Bunnefeld, Aeres University of Applied Sciences

Bachelor thesis

about

influencer marketing in the equine industry in Germany, the
Netherlands and Great Britain

to obtain the degree of a Bachelor of Science (B.Sc.) in the degree program
International Equine Business Management

Written by:

Johanna Katharina Bunnefeld

Student number: 3020939

Aeres University of Applied Sciences

Equine Business Management

Thesis teacher: Teatske Pol

Second corrector: Toine van Westering

Worms, 15th May 2018

DISCLAIMER

This report was made by a student of Aeres University of Applied Sciences Dronten as part of her study. This is not an official publication of Aeres University of Applied Sciences Dronten. This report does not represent the vision or the opinion of Aeres University of Applied Sciences. Aeres University of Applied Sciences Dronten does not accept any liability for any damage arising from the use of the content of this report.

Preface

This thesis about influencer marketing in the equine industry in Germany, the Netherlands and Great Britain is written to finish my bachelor studies in equine business management at the Aeres University of Applied Sciences in Dronten, the Netherlands.

I have chosen to do research on influencer marketing because it is a very current and important trend in online marketing at the moment.

Before it was possible to write this thesis, a preliminary research was written. Chapter one and two of this thesis, are the preliminary research. The preliminary research has already been assessed and no substantive amendments have been taken after the assessment. Just some grammatical improvements and the reformulation of the approach have been done.

I want to thank all employees of MagicTack, especially David Reichert and Nicola Butzengeiger, for giving me the possibility to gain first-hand experience in influencer marketing and providing me with information while taking the time to take an interview for this research. Furthermore, I want to thank Luca Hermann-Deckert from Epplejeck and Christopher Rand from Carr & Day & Martin for giving me the opportunity to take interviews with them.

I also want to thank Teatske Pol from Aeres University of Applied Sciences for the coaching during the writing of this thesis report.

Johanna Bunnefeld

May 2018

Summary

The summary of this thesis is written in English, German and Dutch. The German and Dutch summaries can be found on the next pages.

This report gives an insight into the topic influencer marketing in the equine industry in Germany, the Netherlands and Great Britain. Influencer marketing is a marketing trend using persons on social media to influence their followers. It is a big hype everyone should be aware of, but unfortunately the market of influencers is quite unstructured and unprofessional yet. Often, brands are doing just anything in order to follow the trend without knowing how to use influencer marketing in an efficient and effective manner.

The goal of this thesis is to make influencer marketing more clear and structured and to explain the chances and criteria for a good influencer marketing strategy. This thesis is especially for brands in the equine industry in Germany, the Netherlands and Great Britain, but also other brands can use this thesis to get an overview about influencer marketing.

This thesis will give an insight into the topic especially for brands in the equine industry, but also brands from other branches can gain knowledge about the topic by reading this report.

Chapter one contains the introduction into the topic of influencer marketing and the equine sector and the main and subsidiary questions.

The main question of this report is “What are the chances and criteria in influencer marketing for equine brands in Germany, the Netherlands and Great Britain?” The main question is answered by analysing differences in influencer marketing on Facebook, Instagram and YouTube, cultural differences and differences in social media use in the three respective countries, chances and risks in influencer marketing and possibilities to come in contact with influencers.

In chapter two, the chosen approach is mentioned. For this study, because of the currency, mainly online sources and interviews with equestrian brand managers were used.

Chapter three contains the results of this study. The differences in influencer marketing on Facebook, Instagram and Twitter were discussed. After that, the cultural differences between Germany, the Netherlands and Great Britain have been analysed and associated with the use of social media on the different platforms. Furthermore, the chances and risks in influencer marketing and possibilities to come in contact with influencers are given.

Chapter four is the discussion, in which the research is critical reviewed and discussed.

The results in chapter five show that there are chances in influencer marketing for brands if they recognize possible risks and different criteria for a successful influencer marketing strategy.

Zusammenfassung

Diese Arbeit gibt einen Einblick in das Thema Influencer Marketing im Pferdesektor in Deutschland, den Niederlanden und Großbritannien. Influencer Marketing beschreibt den bewussten Gebrauch von sogenannten „Meinungsmachern“ in sozialen Netzwerken um die Nutzer zu beeinflussen. Influencer Marketing ist ein regelrechter Hype, den jedes Unternehmen kennen sollte, denn es bietet viele Chancen und Möglichkeiten der Werbung. Heutzutage ist der Markt der Influencer noch sehr unstrukturiert und unprofessionell. Unternehmen fallen oft in einen Aktionismus nur um „up-to-date“ zu sein, was dem Markenimage erheblich Schaden kann.

Ziel dieser Arbeit ist es das Thema Influencer Marketing speziell für Reitsportmarken in Deutschland, den Niederlanden und Großbritannien übersichtlicher und strukturierter zu machen und die Chancen und Kriterien einer erfolgreichen Influencer Marketing Strategie zu erklären. Aber auch Marken aus anderen Branchen können von dieser Arbeit profitieren und Einblicke in das Thema Influencer Marketing bekommen.

Das erste Kapitel gibt eine Einführung in das Thema Influencer Marketing und einen Überblick über den Pferdesektor in den drei berücksichtigten Ländern und es werden die Hauptfrage und die vier Teilfragen dargelegt.

Die Hauptfrage lautet „Was sind die Chancen und Kriterien im Influencer Marketing für Reitsportmarken in Deutschland, den Niederlanden und Großbritannien?“.

Die vier Teilfragen behandeln das Thema Influencer Marketing auf verschiedenen digitalen Plattformen, beachten kulturelle Besonderheiten im Bezug auf den Gebrauch sozialer Netzwerke in den betrachteten Ländern. Außerdem werden Chancen und Risiken von Influencer Marketing beachtet, sowie Möglichkeiten der Kontaktaufnahme von Firmen zu Influencern.

Kapitel zwei beschreibt die angewandte Untersuchungsmethode. Aufgrund der thematischen Aktualität basiert diese Arbeit hauptsächlich auf Onlinequellen und Onlineartikeln. Ergänzend dazu wurden qualitative Interviews mit Managern von Reitsportmarken geführt.

Das dritte Kapitel beinhaltet die Ergebnisse der untersuchten Haupt- und Teilfragen. Es wurde tiefer eingegangen auf die Möglichkeiten und Unterschiede im Influencer Marketing auf den Plattformen Facebook, Instagram und YouTube. Danach wurden kulturelle Unterschiede anhand der kulturellen Dimensionen von Geert Hofstede erarbeitet und diese in Zusammenhang mit dem Gebrauch der sozialen Medien in den einzelnen Ländern gebracht. Im Anschluss werden die Chancen und Risiken im Influencer Marketing für Unternehmen erläutert und es werden Möglichkeiten der Kontaktaufnahme zu Influencern erklärt.

Das darauffolgende Kapitel vier hinterfragt die Untersuchung kritisch.

Das aus den Ergebnissen resultierende Fazit dieser Arbeit ist in Kapitel fünf zu finden. Allgemein lässt sich sagen, dass es im Influencer Marketing viele Chancen gibt, wenn man sich über die Risiken und die Kriterien für eine erfolgreiche Strategie bewusst ist.

Samenvatting

Dit onderzoek geeft inzicht in het onderwerp influencer marketing in de paardensector in Duitsland, Nederland en Groot Brittannië. Influencer marketing is het bewust gebruik maken van personen met veel volgers op social media om anderen te beïnvloeden. Influencer marketing is een hype die iedereen zou moeten kennen, omdat het veel kansen en mogelijkheden biedt voor merken in iedere sector. Helaas is de markt van influencers nog niet echt gestructureerd en heel onprofessioneel. Vaak doen bedrijven maar gewoon iets om “up to date” te zijn, maar met een slechte influencer strategie kan influencer marketing schade aan het merkimage toebrengen.

Het doel van dit onderzoek is, om het onderwerp influencer marketing speciaal voor merken in de paardensector in Duitsland, Nederland en Groot Brittannië overzichtelijk en gestructureerd te maken en daarnaast de kansen en criteria voor een succesvolle influencer marketing strategie duidelijk te maken. Ook merken vanuit andere sectoren kunnen van dit onderzoek profiteren.

Hoofdstuk één geeft een introductie in de onderwerpen influencer marketing en de paardensector in de drie gekozen landen. Verder worden de hoofdvraag en de deelvragen genoemd. De hoofdvraag van dit onderzoek is “wat zijn de kansen en criteria in Influencer marketing voor ruitersportmerken in Duitsland, Nederland en Groot Brittannië?” De hoofdvraag is onderverdeeld in vier deelvragen. Deze deelvragen gaan over de verschillen in influencer marketing op de verschillende sociale media platforms, culturele verschillen binnen de drie landen in sociale media gebruik, kansen, risico's en mogelijkheden tot contactopname met influencers.

Hoofdstuk twee beschrijft de gebruikte methode voor het onderzoek, wegens de actualiteit van dit onderwerp was er hoofdzakelijk gebruik gemaakt van online artikelen maar ook van kwalitatieve interviews met managers van ruitersportmerken.

Hoofdstuk drie bevat de resultaten van de deel- en hoofdvragen. Er wordt dieper ingegaan op de verschillen in influencer marketing op Facebook, Instagram en YouTube. Daarna worden culturele verschillen aan de hand van

de culturele dimensies van Geert Hofstede geanalyseerd en met de verschillen in het sociaal media gebruik per land verbonden. Vervolgens worden de kansen en risico's, maar ook mogelijkheden tot contactopname met influencers aangegeven.

Hoofdstuk vier is de discussie. Hier wordt het onderzoek kritisch gereflecteerd. In hoofdstuk vijf wordt de conclusie gegeven. In het algemeen is te zeggen dat influencer marketing heel veel kansen biedt, mits de bedrijven goed op de hoogte zijn over de risico's en criteria voor een succesvolle strategie.

Index

1	Introduction	1
1.1	Broad framework	1
1.2	Theoretical framework and knowledge gap	4
1.2.1	Marketing	4
1.2.2	Online marketing	4
1.2.3	Social media	5
1.2.4	Social media marketing	7
1.2.5	User generated content	7
1.2.6	Influencer	8
1.2.7	Influencer marketing	8
1.2.8	Different categories of influencers	9
1.2.9	Branches in influencer marketing	11
1.2.10	Development of influencer marketing	12
1.2.11	The equine sector	13
1.2.12	Equine sector in Germany	13
1.2.13	Equine sector in the Netherlands	14
1.2.14	Equine sector in Great Britain	15
1.2.15	Overview of facts and numbers in the equine sector in Germany, the Netherlands and Great Britain	16
1.2.16	Influencer marketing in the equine industry	16
1.3	Key question and subsidiary questions	17
1.4	Thesis goal	17
2	Approach	18
2.1	Research design	18
2.2	Material and Methods	18
3	Results	20
3.1	Influencer marketing on the different social media platforms	20
3.1.1	Influencer marketing on Facebook	20
3.1.2	Influencer marketing on Instagram	21
3.1.3	Influencer marketing on YouTube	23
3.2	Differences between German, Dutch and British social media users	25
3.2.1	Cultural differences between the German, Dutch and British society	25
3.2.2	Differences in social media use	27
3.2.3	Overview of Facebook, Instagram and YouTube	28
3.3	Chances in influencer marketing	30
3.3.1	Authentic advertisements	30
3.3.2	Viral effect and engagement	30
3.3.3	Influencer marketing in an niche, as in the equine industry	30
3.3.4	Benefits in comparison to other online marketing tools	30
3.4	Risks in influencer marketing	32

3.4.1 Fake accounts	32
3.4.2 Unreliability	33
3.4.3 Surreptitious advertising	34
3.4.4 Public perception	34
3.5 Possibilities to make contact with influencers	35
3.4.1 Models	35
3.5.1 Marketplaces for influencers	36
3.5.2 Tools to analyse influencers	36
3.5.3 Coming in contact with equine influencers	36
4 Discussion	38
5 Conclusion and Recommendation	41
6 Sources	45
Appendices.....	

List of figures and tables

Figure 1 - Part of the conversation prism.....	6
Figure 2 - 15 most important social networking sites.....	7
Figure 3 - Instagram Post of miss.everywhere	9
Figure 4 - Search interest in influencer marketing since 2012.....	12
Figure 5 - Benefits of influencer marketing for marketing managers	13
Figure 6 - Cultural dimensions in Germany (blue), the Netherlands (purple) and Great Britain (green).....	25
Figure 7 – Instagram “fake account” fflyg by Frederik Fleig	33
Figure 8 – Marketplace model.....	35
Figure 9 – Influencer marketing suite model.....	35
Table 1 - Facts and numbers in the equine sector.....	15
Table 2 – Use of Facebook, Instagram and YouTube.....	29

List of appendices

I. – Explanation of riding disciplines.....	49
II. - Conversation Prism.....	51
III. – Interview.....	52
IV. – Demography of Facebook users	59
V. – Demography of Instagram users.....	60
VI. – Content example Instagram.....	61
VII. – Content example YouTube.....	62
VIII. – Content example Facebook.....	63
IX. – Analysis of “biniebo” on InfluencerDB.....	64

1 Introduction

This chapter will introduce the topic influencer marketing. In first instance it describes the broad and theoretical framework. After that, the research questions are mentioned. The chapter concludes with the goal of this thesis.

1.1 Broad framework

„People influence people. Nothing influences people more than a recommendation from a trusted friend. A trusted referral influences people more than the best broadcast message. A trusted referral is the Holy Grail of advertising.“

– Mark Zuckerberg, Facebook CEO

When Mark Zuckerberg, the CEO of the social media platform Facebook, said this at Facebook’s social advertising announcement in New York City in November 2007 he probably did not think that ten years later influencer marketing were to become one of the most relevant and growing topics in social media marketing.

Within the last years communication between people saw a big change. In the past we visited each other at home or had to use mail services to deliver a message to someone else. Nowadays, human relationships are moving to a digital world consisting of media, programs, functions and services that are accessible worldwide. We can simply tap into our electronic devices like smartphones, laptops or tablets and deliver a message with a few clicks via a large amount of different communication channels and platforms to people all around the world and they receive the message within a few seconds, so it is not necessary to deliver messages personally to someone. Furthermore, we use different media and platforms to share content from our own lives and inform other people about it.

Due to these changes it is quite obvious that people start to write about their daily activities and share pictures of them on social media platforms. They indicate their profile content with the right hashtags and catchwords to get as much attention as possible from people with similar interests and raise their

number of followers. These people can be called web-bloggers, because they write about their own experiences, observations or opinions. These bloggers may be idols in the social medias for their followers, and their followers trust them. The followers of a blogger will adapt the recommendations about products, services or experiences to their own lives. But a blogger is not just someone who creates a lot of content for a blog. Bloggers can also influence a lot of people in their decisions and that is why they can be called influencers as well. Due to this fact it is obvious that brands want to use bloggers to influence customers in their buying-decisions.

On social media platforms we will find a lot of different bloggers, everyone is different and has different interests, for example horses. In this research, those bloggers are called equestrian bloggers or influencers. These equestrian bloggers create content about everything surrounding their life with horses like the latest trends, what training they do with their horses or which events they will visit the next time. These bloggers are idols for their followers and they have some kind of function of a model for them and that is what makes it interesting for companies to work with social media bloggers. Brand managers hope that they can influence their customers in different ways and achieve a higher turnover and brand awareness because of involving influencers in their marketing strategy. In the United States of America, being an influencer became a real job within the last ten years. For marketers, influencer marketing is a very big issue, because it relates to every business in every branch. Furthermore, influencer marketing has benefits in comparison with traditional paid advertisements, like TV commercials or newspaper advertisements. Traditional advertisements have become ubiquitous that they are no longer noticeable and less than half of people around the world trust paid advertisements. In comparison with these traditional advertisements, influencer marketing is very trustworthy. (Copywriterbiz.com, 2016)

The hype about influencers came from the United States to Europe in 2015 and while it is a professional issue in America, we are in an experimental phase about influencer marketing in Europe for now. The influencer market in Europe is not structured and professional yet, but it really booms and is very fast growing. This mixture of unprofessionalism and boom is quite dangerous because businesses are just acting on a trend without thinking about risks. They

take actions that could defame the image of them just because they want to be modern and trendy (Lammenett, 2017).

This thesis will focus on influencer marketing in the equine industry in Germany, the Netherlands and Great Britain. I chose to take a look at these three countries since I completed an internship at a German company, am a student at a Dutch university and put focus on the internationality of the study. The latter is the reason for including Great Britain into my survey.

During my internship at MagicTack, a German company that produces horse equipment, I was introduced to the topic of influencer marketing in Germany. The quite young company is busy with expanding their products to other European countries, so it will be necessary to create an online marketing and influencer marketing strategy for other countries. Therefore I became very interested in the topic and wanted to gain deeper knowledge about it.

This thesis research will be interesting for all brand managers of equine companies in Europe that are interested in influencer marketing strategies for Germany, the Netherlands and Great Britain.

1.2 Theoretical framework and knowledge gap

The following paragraphs will discuss the theoretical field that will be used for the analysis of the data.

To get an insight into the topic of influencer marketing in the equine industry it is necessary to define some terms about marketing and the equine industry. Definitions of the different equestrian disciplines can be found in the appendices.

1.2.1 Marketing

Marketing is thought of as being an activity designed to support sales by helping managers sell more of the company's products or services. Often, the goal of marketing is to sell more things, to more people, more often and for more money. But this is more a definition of sales. Marketing is much broader than sales, because marketing involves all aspects of developing the supply that is going to be sold (Chernev, 2014).

Peter Drucker, the founder of modern management theory defined marketing as
“the whole business seen from the point of view of its final result,
that is, from the customer's point of view.” (Drucker, 2014)

Furthermore marketing includes the coordination of the four P's of marketing.

1. Product → identification, selection and development of a product
2. Price → determination of the price of a product
3. Place → selection of a distribution channel to reach the customer's place
4. Promotion → development and implementation of a promotional strategy

(WebFinance INC, 2017)

1.2.2 Online marketing

Online marketing is marketing done through the internet. Disciplines of online marketing are for example search engine marketing, affiliate marketing, social-media marketing and e-commerce. Benefits of online marketing are low costs, flexibility, and target orientation and that it is good to analyse (techopedia.com, 2017). The big disadvantage of online marketing is that about 25% of the internet users use “Add-blockers” that hide online advertisements (Lammenett, 2017).

1.2.3 Social media

The term social media summarizes all online communication channels that enable its member to create community-based input, interaction and content. This can be forums, social networking pages or blogs. Collectively there are more than 300 social media and more than 2.28 billion users worldwide. Most of the social media platforms are free, but there are also some networks with membership fees (Statista , 2017).

Examples for social media platforms are Facebook, WhatsApp, Instagram, YouTube and LinkedIn.

The different social media platforms have different advantages for their users.

For example Facebook is a popular free social media network that enables the members to create profiles, upload photos or videos, send messages and be connected to friends and family all over the world.

WhatsApp is a mobile App for writing short messages; it replaced the short messaging system (SMS) nearly completely. If compared with the SMS, for which one had to pay per message, WhatsApp's biggest benefit for users is its cheapness: unlimited access via internet for a one-time fee of less than 1€.

Furthermore, with WhatsApp it is easy to send text messages, pictures and videos.

Instagram is a free app made for sharing photos and videos from a smartphone. It is necessary to register to see and upload content.

On YouTube, users can watch videos for free without any registration. If someone wants to upload or comment on a video it is necessary to register for free.

LinkedIn is a professional business community. The goal is to create networks of professionals helping them connect with each other. Often businesses are using LinkedIn to find potential employees. Using LinkedIn costs a monthly membership fee dependent on what type of profile the user wants (TechTarget, 2017).

These examples only show a very few of all social media networks, but they illustrate that the goals of social media platforms can be various.

The figure below shows a part of the conversation prism, which was launched by Brian Solis in 2008 to visualize the social media landscape. It tracks dominant and promising social networks and organizes them by how they are used in everyday life. The conversation prism is an on-going study that was last updated to version 5.0, in 2017 (Solis, 2018). The whole conversation prism can be found in the appendices.

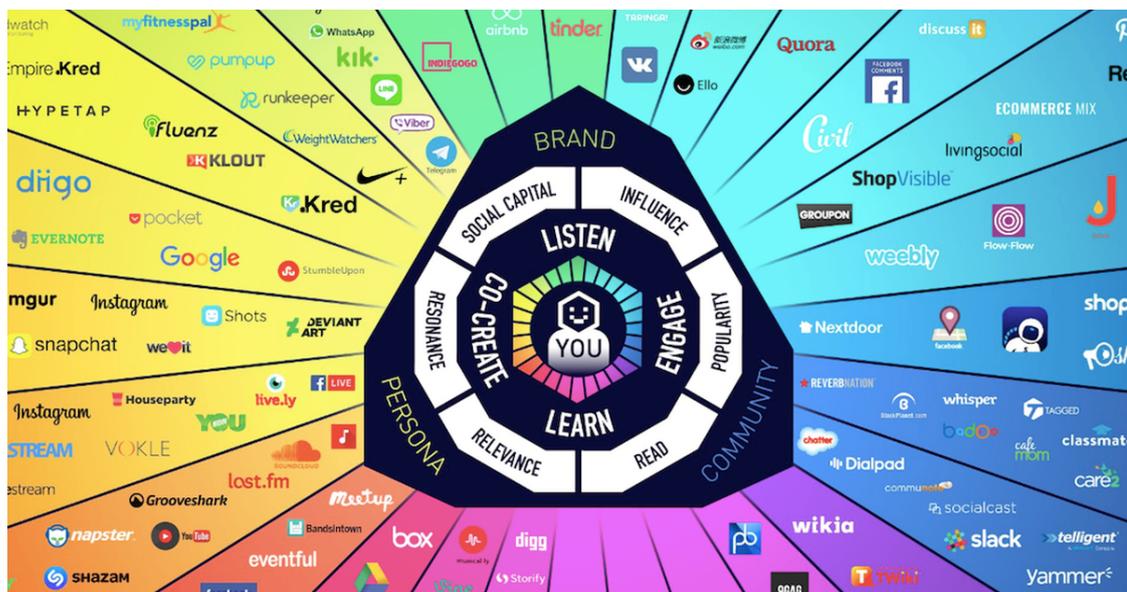


Figure 1 –Part of the Conversation Prism

Of course, not all social media have the same number of users. The number of active users in a specific social medium depends of the target group, country, language and the goal of the social medium.

The following graph describes which social media platforms were the most popular in 2017. If we take a look we can see that the most used social media platforms are Facebook with 2 billion users, YouTube with 1.5 billion Users and

Instagram with about 670 million users worldwide (Kallas, 2017).

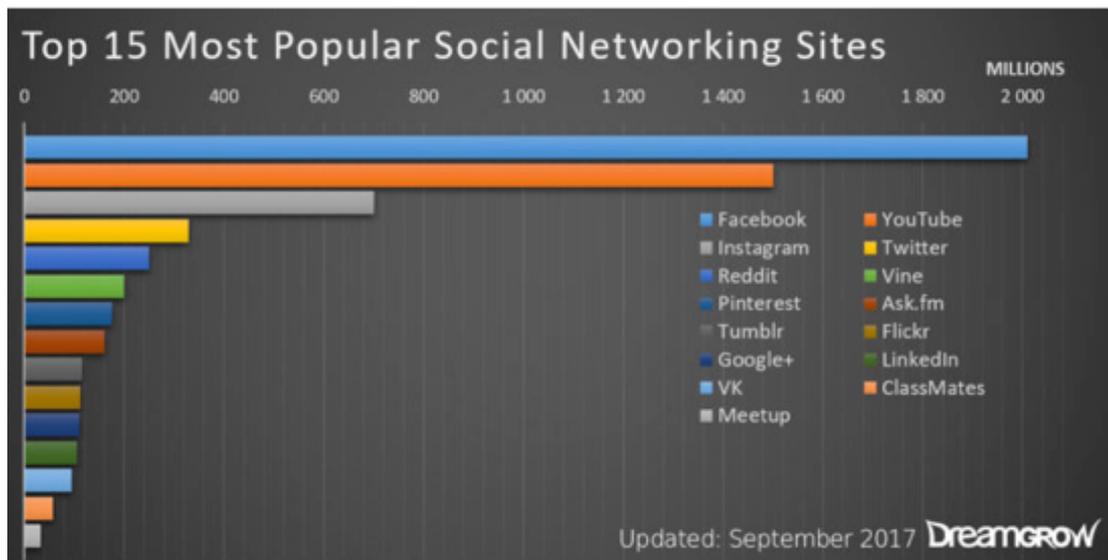


Figure 2 - 15 most important social networking sites

If we focus on users of social media networks in Germany we see that 31 million Germans are using Facebook, 17 million Germans are using Instagram and 6 million Germans are using YouTube (Medien, 2017). In the Netherlands there are 9.5 million users on Facebook, 3.2 million users on Instagram and 7.5 million users on YouTube (Oosterveer, 2017). In Great Britain there are 32 million users on Facebook, 19.1 million users on YouTube and 14 million users on Instagram (social-media.co.uk, 2017). More information about these numbers and the meaning of them will follow in the results of the thesis research.

1.2.4 Social media marketing

Social media marketing, or SMM, is marketing that is done through social media or social networking websites like Facebook, Twitter and Instagram. Social media marketing is a low-cost way for businesses to reach a lot of potential customers. It makes target orientated advertisement possible. Social media marketing does not replace other marketing tools, but it is a nice way to extend the marketing strategy of a company (techterms.com, 2017).

1.2.5 User generated content

User-generated content (UGC) is, as the name already says, content on social media that is produced by the users and not by the service or website itself. Examples for user-generated content are images, videos, comments or blogs on social media platforms (techterms.com, 2017).

1.2.6 Influencer

An influencer is someone who can create someone else's opinion or behaviour. So in general, the influencer is able to influence someone else. For example, this could be a parent influencing the behaviour of a child, or a trainer influencing the training methods of his student or a religion influencing the beliefs, rituals and actions of its members (Danny Brown, 2013).

1.2.7 Influencer marketing

Influencer marketing uses the online presence of influencers to influence the consumer's behaviour. It is a new approach to marketing and it is important because it directly addresses the most common sales barriers within prospective customers and focuses attention on those individuals who advise decision-makers. (Brown & Hayes, 2008)

The task of the influencers is to promote the product in their own community. The influencer has to create user generated content specific for the own community. With influencer marketing it becomes possible to make very target-specific advertisements. Often, the influencer tries to create an intimate atmosphere in his community, which is ideal for brands, because that makes advertisements very trustworthy (Brown & Fiorella, 2013).

A good example is the following post from "miss.everywhere" on Instagram. She recommends the teeth whitening products from the brand "brightwhite" to her community. As we can see in the comments she answers to a lot of follower comments, even if it is just with two "purple hearts". The follower will notice this very positively and this can be positive for the brand "brightwhite".



Figure 3 - Instagram post of “miss.everywhere”

1.2.8 Different categories of influencers

Influencers in social media can be split into four different categories according to their number of followers. These four categories are micro influencers, mid-level or middle influencer, macro influencer and celebrity influencers.

A micro influencer has 1,000-25,000 followers on social media. The costs for him are low. Often, the company just sends products and no money. The value of the produced content is small but the effort to find a good influencer for a specific company might be quite high, because there are a lot of them. Micro influencers are trustworthy to the customers, because the followers find the profile familiar and reliable.

Middle influencers have about 25,000-100,000 followers. The costs for the company are relatively low, in some branches it might be just product sponsoring. The content on the channel is semi-professional but good for their users. It is quite easy to find them. Middle influencers are digital personalities who enjoy high trust from their followers and they are often very active on their products.

Macro influencers, sometimes called top-tier-influencer, have 100,000-500,000 followers. They ask for quite a lot of money for the campaign and their content is professional. Macro influencers are easy to find via influencer agencies; the agency will connect the company with the right influencer and negotiate the deal. The relevance and trustworthiness is the same as for the middle influencer.

Celebrity influencers are the “stars” on social media. They have more than 500,000 followers. Due to that they are really expensive (they earn up to 25.000€ per posting). The user-generated content is very good and professional. Companies will find them via influencer agencies. Using celebrity influencers has advantages and disadvantages for the company. On one hand they are very famous and reach the most people but on the other hand they are very expensive and customers often do not trust them because they think their advertisements are just made for money, not for belief (Lammenett, 2017).

Furthermore, influencers are often categorized by what they do on social media platforms. For example being an activist, journalist, expert, insider, connector or artist (smartinsights.com, 2017).

Another possibility would be to divide them into the different social media networks. This could be blogs, YouTube, Facebook or Instagram.

Additionally, it is possible to divide influencers into the demography of their followers, for example very young or old, sex, location and so on (Lammenett, 2017).

1.2.9 Branches in influencer marketing

There are a lot of different influencers on social media platforms and also a lot of possibilities to define the type of social influencers. Apart from a categorization by number of followers (chapter 1.2.8) it is possible to differentiate them into different branches, social media channels or the demography of the followers (Lammenett, 2017).

If influencers are categorized into the branches where they are active the following branches will be seen very often.

1. Fashion and Beauty
2. Fitness and Sports
3. Fashion
4. Family
5. Luxury Lifestyle
6. Niche influencer
7. Singer/Actor/Producer → popular persons/celebrities

According to this list, influencers acting with horses are niche influencers. Niche influencers are very specific for one topic. This is quite logical because for example a beauty or lifestyle blogger can create content that is interesting for a lot of people while content about horses is very target-orientated and only interesting for people who are interested in equine sports. But equestrian influencers could also be activists for example for a fair sport or fair conditions, or an expert on something.

1.2.10 Development of influencer marketing

If we take a look at the following graph from Google Trends we see that the search queries in the field of influencer marketing rose massively since 2016. The numbers represent the search interest relative to the highest point on the chart worldwide within the last five years. A value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular. Likewise, a score of 0 means the term was less than 1% as popular as the peak (GoogleTrends, 2017).

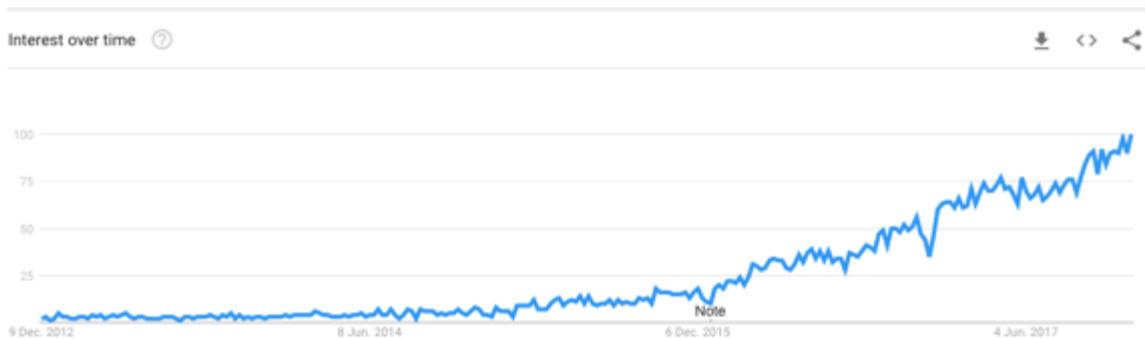


Figure 4 - Search interest in influencer marketing since 2012

Also, if we take a look at the budgeting for influencers, we see a growth. According to a study published by Linqia, a “leader in performance content marketing technology and delivering turnkey influencer marketing programs that are guaranteed to deliver concrete business results” (Linqia, 2016) most of the marketers spent between 25000€ and 50000€ per influencer marketing program in 2016. For 2017 the budget will rise and double (Linqia, 2016).

The budget will rise because marketers see benefits in influencer marketing they see nowhere else. According to the following graph of Linqia, marketers do not see just one benefit in influencer marketing. 89% of the marketers use influencer marketing because it is a way to create authentic content about the brand and 77% use it to drive engagement around the product and brand (Linqia, 2016).

What are the top benefits of influencer marketing? (Select all that apply)

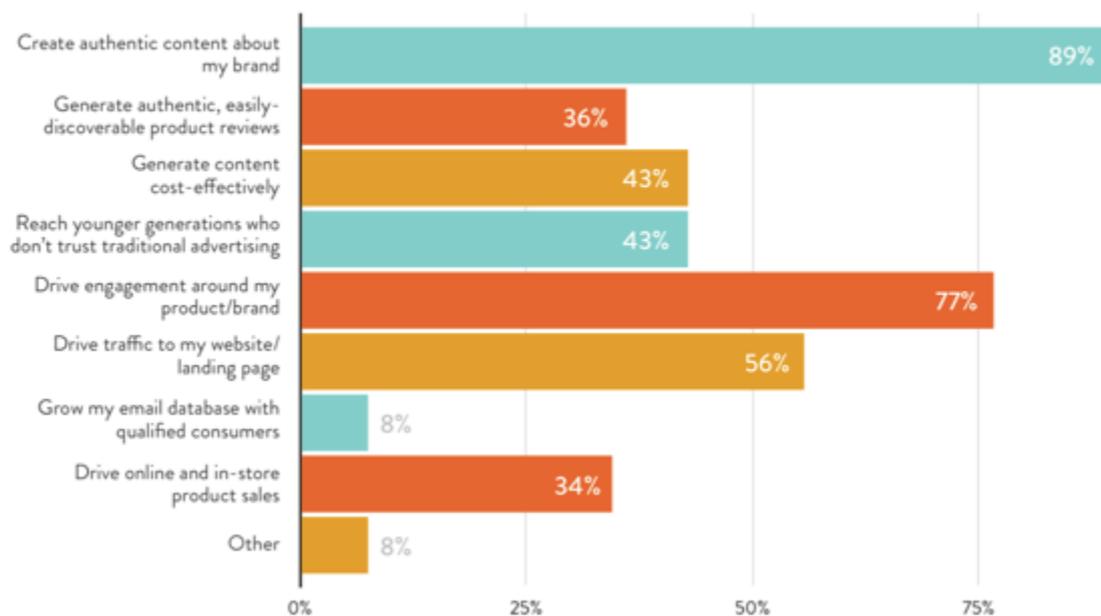


Figure 5 - Benefits of influencer marketing for marketing managers

In general, influencer marketing is booming and we already know some things about it, but before an analysis of influencer marketing in the equine industry is possible, it is necessary to do research about the equine sector in the respective countries.

1.2.11 The equine sector

The Equine sector is very important for the European economy. About 7 million people in Europe are interested in equestrian sport and there are more than 900,000 workplaces in the equine sector. Every year the equine sector obtains a turnover of 100 billion Euros. There are trends in industrialization and technology in the equestrian sport. 89% of all riders have a Facebook- Account and 37% are using Instagram (Hippische Monitor, 2017).

1.2.12 Equine sector in Germany

In Germany there are 3.89 million riders of which are 78% women. The average age of riders in Germany is 30 years. There are about 900,000 riders with own horses and all in all 1.3 million horses in the whole country. The German equestrian sport association, Fédération Equestre Nationale (FN), is the biggest equestrian sport organization worldwide with 690,995 members. Within the FN-members, 563,123 are women and 132,187 men.

More than 10,000 businesses, services and crafts businesses are dealing directly or indirectly with horses. Together they achieve a turnover of 6.7 billion Euro per year. From this 6.7 billion Euro turnover, horse keeping achieves 2.6 billion Euro of the turnover and 4.1 billion Euro are achieved by the retail and service sector. All this information is from 2016 (Fédération Equestre Nationale, 2017).

According to a study by HAS University in the Netherlands, in 2015 and 2016, 57% of the Germans bought riding clothes in offline retail shops and 43% in online shops. Per visit, the German customers spend between 20 and 100 Euro. For German customers the biggest disadvantage is the small assortment in offline retail shops and the unknown quality in online-shops. German customers expect a lot of knowledge from the shops where they buy riders and horse products.

The interests in equine sport disciplines in Germany rank as follows: Dressage sport is on the first rank, followed by riding out. Jumping is on rank three and western on rank four. Eventing, natural horsemanship and ambling gait riding share rank five (Hippische Monitor, 2017).

1.2.13 Equine sector in the Netherlands

In the Netherlands there are 495,900 riders of which are 95% women. The average age of riders in the Netherlands is 29 years and there are about 450,000 horses. (Hippische Monitor, 2017) 135,000 riders in the Netherlands own one or more horses. The equestrian sport organization in the Netherlands, the “Koninklijke Nederlandse Hippische Sportfederatie” (KNHS), has 200,000 members of which about 50,000 are active on competitions.

The horse related businesses achieve a yearly turnover of 2 billion Euros (KNHS, 2016).

In 2015, 60% of the Dutch bought riding clothes in an offline retail shop and 40% in an online shop, in 2016 there was a little increasing trend for online purchases (57% offline and 43% online). Per visit, the Dutch customers spend between 20 and 100 Euro. For Dutch customers the biggest disadvantage is the small assortment in offline retail shops and high shipping costs in online-shops. If customers from the Netherlands buy something they decide depending on price.

The interests for riding disciplines on the first three ranks are equal to the first three ranks in Germany (1. dressage; 2. riding out; 3. jumping). On rank four there is natural horsemanship, followed by eventing and western on rank five (Hippische Monitor, 2017).

1.2.14 Equine sector in Great Britain

In Great Britain there are 992,000 riders of which are 73% women. On average, the British rider is 31 years old. All in all there are 796,000 horses in Great Britain and 446,000 people have own horses. The national equine sport association is the British Equestrian Federation (BEF).

The Equine sector in Great Britain makes a yearly turnover of 3.45 billion Pound, what is about 3.93 Billion Euro (British Horse Society, 2016).

In 2015, 58% of the riders in Great Britain bought their tack in offline shops and 42% in online shops. In 2016, it was 54% offline and 46% online. Per visit, they spend between 10 and 100 Pounds (between 11,40€ and 114,00€). The British customer also sees disadvantages in a small assortment in offline retail shops and in high shipping costs in offline shops. British customers are sensitive for low prices.

The interests in the equestrian sport in Great Britain differ from the interests of equestrian sportsmen in Germany and the Netherlands. In Great Britain, eventing is on rank one, mounted games on rank two, dressage on rank three, jumping on rank four and working equitation on rank five (Hippische Monitor, 2017).

1.2.15 Overview of facts and numbers in the equine sector in Germany, the Netherlands and Great Britain

The following table gives a short overview of the most important numbers and facts about the equine sector in the different countries. A comparison of the three respective countries will follow in the research report.

	Germany	The Netherlands	Great Britain
Riders	3,890,000	495,000	992,000
% riders in population	4.7%	2.9%	1.5%
Gender	78% women 22% men	95% women 5% men	73% women 27% men
Horses	1,300,000	450,000	796,000
Average age of rider	30 years	29 years	31 years
Disciplines	1. Dressage 2. Riding out 3. Jumping	1. Dressage 2. Riding out 3. Jumping	1. Eventing 2. Mounted games 3. Dressage
Turnover in equine sector	6.7 billion Euros	2 billion Euros	3.45 billion Pound
Offline versus online retail	57% offline 43% online	57% offline 43% online	54% offline 46% online
Money spend in equine stores	20-100 Euro per visit	20-100 Euro per visit	10-100 Pound per visit

Table 1 – Facts and numbers in the equine sector in Germany, the Netherlands and Great Britain

1.2.16 Influencer marketing in the equine industry

We only have very little information about influencer marketing in the equine industry. Some equine brands already use influencer marketing, but mostly this is very unstructured.

But how can equine brands in Germany, the Netherlands and Great Britain use influencers effective? What are the chances and risks? Where should they start? There is still a lot unknown which this study aims to explore.

1.3 Key question and subsidiary questions

The key question of this study will be:

What are the chances and criteria of influencer marketing for equine brands in Germany, the Netherlands and Great Britain?

The sub-questions will be:

1. What are the differences of influencer marketing between the different social media platforms?
2. What are the differences between German, Dutch and British social media users?
3. Which possible risks do companies have to deal with when using influencer marketing?
4. How can equine brands find suitable influencers in Germany, the Netherlands and Great Britain?

1.4 Thesis goal

The goal of this thesis is to figure out how organizations in the equine industry can achieve more brand awareness and a higher overturn in Germany, the Netherlands and Great Britain with the help of influencers on social media platforms. Furthermore, this thesis will help the companies to get a better overview about the unstructured influencer market. At the end of the thesis, a suggestion for brands will be given on how to properly make use of influencer marketing strategies and the related tools for customers in Germany, the Netherlands and Great Britain."

2 Approach

This chapter will give an overview of the research design and the material and methods used for this thesis research.

2.1 Research design

The research design of this thesis is descriptive research, which means that the research is used to determine, describe or identify a topic. It explains current issues or problems through a process of data collection that enables them to describe the situation more completely than it was possible before this research. Another characteristic of descriptive research is that only one variable is needed to conduct a descriptive study. There are three main purposes of descriptive studies: describing, explaining and validating (Dudovskiy, 2007).

The research is a qualitative research. Qualitative research is designed to reveal a target audience's range of behaviour and the perceptions that drive it with reference to specific topics or issues. It uses in-depth studies of small groups of people to guide and support the construction of hypotheses. In this study, interviews with different brands are used. Depending on the location of the brand, these interviews were carried out in person and in writing (Qualitative Research Consultants Association, 2018).

2.2 Material and Methods

For this thesis research, the material used consists mainly of online articles due to the currency of the topic. However, a range of books has been consulted, as well.. Furthermore, interviews with equine brand managers were conducted.

In Germany, the interview was taken personally with David Reichert and Nicola Butzengeiger from the brand MagicTack. The language of this interview was German. For the Netherlands I took a personal interview with Luca Hermann-Deckert from Epplejeck. This interview was also taken in German, as Mrs. Hermann-Deckert and me are both Germans. With the British brand, Carr & Day & Martin, the contact was via e-mail with Christopher Rand and due to time problems it was a written interview. All interviews can be found in the appendices, translated into English.

To answer the first sub-question, “What are the differences of influencer marketing between the different social media platforms?” information from the different platforms directly has been used. All platforms have been looked up for their tools and how brands and influencers use them. Furthermore, it was considered on which platforms influencers are active and which platforms the interviewed brands perceive as the most important ones for their social media presence.

The sub-question, “What are the differences between German, Dutch and English social media users?” was answered by analysing the specific use of social networks and the cultural differences, defined by Hofstede in these three countries. After the cultural analysis, the information was transferred to the social media use in the three respective countries. The interviewed experts were asked if they see any cultural differences using influencer marketing in different countries.

Before it was possible to consider risks in influencer marketing, it was decided to give deeper insights in the chances. Therefore, the experts were asked what they expect from working with influencers and where they see chances.

To figure out where potential risks in influencer marketing are, previous examples of negative influencer marketing campaigns were examined, where companies had not identified potential risks.

In the interviews, the brand managers have been asked where they see possible risks in influencer marketing.

The fourth sub-question, “How can equine brands find suitable influencers in Germany, the Netherlands and Great Britain?” was answered by having a look at influencer networks, analysing tools and asking the brands how they would search for influencers and how they made contact with their current influencers.

In first instance, all sub-questions have been answered in general for all brands, because this is a condition to get an insight into the topic. The second step was to find out how brands in the equine industry can adapt the information to optimize their strategy.

3 Results

3.1 Influencer marketing on the different social media platforms

Influencer marketing is not bound to one platform. Brands can decide to use influencers on more than one platform, depending on their goal and strategy.

This chapter will give an insight into the differences of influencer marketing on Facebook, Instagram and YouTube. Examples of influencer content are in the appendices.

3.1.1 Influencer marketing on Facebook

With more than 2 billion users worldwide Facebook is the most popular social media network in the world. In Germany there are 31 million (Medien, 2017), in the Netherlands 9.5 million (Oosterveer, 2017) and in Great Britain 32 million (social-media.co.uk, 2017) users on Facebook. There is no other medium that can reach such a big audience in the three respective countries.

The users can decide very flexibly with which persons they want to share their content, because Facebook offers a lot of different privacy settings. For example, the user can choose to have a very public profile or a profile where just the accepted friends can see the content. Every user has an own timeline, where updates from friends, brands or influencers they are connected with are shown.

Also a lot of businesses are using Facebook. They can start a business profile that the Facebook users can like and where the user can comment on content. Businesses can choose from a lot of different features. They can choose and use whatever feature (groups, events, shops, photos, videos, text, etc.) suits the business needs each time they publish content. Things like business hours, events, addresses, and response rates can be found on most business pages. They can also create groups, events, product pages and shops (Nwazor, 2016). Influencers can use Facebook the same way as businesses. They have a profile where they can upload their content and interact with their followers. Facebook has been around for quite a long time and has a large user database. But even if Facebook has the most users and brands spend the most advertising budget on Facebook, it is not that popular in influencer marketing. In 2018, just about 67,1% of influencers plan to work on Facebook and just for

2,4% of influencers Facebook is the favourite platform (hashoff.com, 2018). Also the engagement of the users, that means how much they comment, share and like, was in 2016 lower than in 2015 and the influencers posted less original content in 2016 than in 2015. All in all, the interest of influencers in Facebook is quite low and trend forecasts a downward movement, as well.

Facebook is also more popular amongst the older users (Nwazor, 2016). That does not mean that there are more young people on other platforms, but the average age of Facebook users is older than on Instagram.

Looking at the demography of Facebook, 75% of online men and 83% of online women are using Facebook. Splitting this into the age it is as follows:

- 88% of 18–29 year olds use Facebook
- 84% of 30–49 year olds use Facebook
- 72% of 50–64 year old use Facebook
- 62% of 65+ year old use Facebook (sproutsocial.com, 2017)

3.1.2 Influencer marketing on Instagram

Instagram is a subsidiary company of Facebook and is supported by Facebook. The number of active users on Instagram rises very quickly. While there were 670 million active users in September 2017 there were 800 million active users in January 2018. In Germany, there are 17 million (Medien, 2017), in the Netherlands 3.2 million (Oosterveer, 2017) and in Great Britain 14 million (social-media.co.uk, 2017) active users on Instagram. On Instagram, it is possible to share pictures and short videos with texts in the description. The pictures and videos can be commented with a variety of hashtags (for example #horse or #riding). Users that are looking for horse-content can just search for the hashtag and will find a lot of pictures. The user sees the content of profiles he follows in his timeline. Another tool on Instagram are stories. Stories can be short clips or videos, which are shown in the “story-tool” which is the header of every timeline. After 24 hours, the stories are deleted automatically.

The big difference to Facebook is that there are no differences between profiles and pages. On Instagram, there are just profiles everyone can follow, no matter if the user is a brand, influencer or just user. In general, Instagram is “cleaner “ than Facebook.

70% of the Instagram users are looking up brands and want to consume their products (Daley, 2017). Influencer marketing on Instagram makes it possible to

promote the latest products, acquire new customers and communicate with existing customers.

According to Raghav Haran, a marketer and entrepreneur, it is important on Instagram to get creative instead of just posting something to stand out from your competitors. Advertising on Instagram has to be attractive and not too obvious. This is why Instagram influencer marketing can be such a winner for your brand. With influencer marketing, messages will get through to your target customers, all without coming off as too “salesy”– which is a marketer’s dream. (Haran, 2017) Also, Instagram is the most liked platform by influencers. 87,8% of all s chooses Instagram as their favourite platform 2018. In 2016, it was 79,7% and in 2017 91,9%. The forecast for 2018 is that 87,1% of influencers will use Instagram as their favourite platform (hashoff.com, 2018).

In comparison to Facebook, the users on Instagram are quite young. Young people are especially sensitive towards influencers and often do not see the difference between advertisements and normal content. For brands and influencers, this is a very profitable situation (Bundesministerium für Familien, Senioren, Frauen und Jugend, 2017).

Taking a look at the whole online world, 38% of online women and 26% of online men use Instagram. Allocated by the different ages the distribution is as follows:

- 59% of 18–29 year olds use Instagram
- 33% of 30–49 year olds use Instagram
- 18% of 50–64 year olds use Instagram
- 8% of people 65+ use Instagram (sproutsocial.com, 2017)

But even if it seems like Instagram is “the place to be” in influencer marketing, there are some disadvantages on this platform. In March 2016, Instagram announced that an algorithm showing you the content you care about would be installed soon (Instagram , 2016). In first instance, it seems to be quite practical that the users just see content they care about based on an algorithm but in practice it was very impractical. The result was that users just see 30% of the posts from people they follow and that is also disastrous for influencers and brands, because even if they grew organically the years before they would just reach a very small amount of their followers. Since 2016, Instagram improves

this algorithm consistently In February 2018, a lot of influencers and users moved to another platform called Vero. This platform promotes itself with being the best and user-friendliest social media platform ever and they promise to never install anything that will weaken the reach (vero, 2018). Time will show how this app can replace a big and famous app like Instagram without the support of another social media app and how Instagram will react to this trend.

3.1.3 Influencer marketing on YouTube

YouTube has about 1.5 billion registered users worldwide, 6 million in Germany (Medien, 2017), 7.5 million in the Netherlands (Oosterveer, 2017) and 19.1 million in Great Britain (social-media.co.uk, 2017).

For YouTube it is very important to notice that most of the YouTube users do not have an account. Only if the user wants to upload or comment on videos he has to sign up. According to a number of estimates, about 80% of the world's population with Internet access has watched YouTube videos at least once. (Statista , 2017). A benefit of YouTube is that there are a lot of tutorials about nearly everything, for example, explanations about school subjects, tips about cleaning up, building a new bookshelf or make-up tutorials. That makes advertisements for a big range of products possible. A disadvantage of using YouTube is that it is not possible to quickly scroll through the videos. Looking for videos takes time and often the users need the sound to understand, which makes it difficult to look sometimes, for example if the user is sitting in the train, it is easier to quickly scroll through Instagram instead of watching videos on YouTube.

Influencers can create their own YouTube channel where they can post new videos. Users can subscribe to the channels and they will be informed whenever something new is uploaded to the channel. But YouTube is not used that often, just 3,1 % of influencers used YouTube in 2016, 2,7% in 2017 but a raise is prognosticated for 2018 where 8,5% of influencers plan to use YouTube as their main platform (hashoff.com, 2018). A salient point about influencers on YouTube is that their YouTube channel often comes along with an Instagram or Facebook profile, that means that for example an Instagram influencer could produce their main content on Instagram but uses YouTube for longer videos or product advertisements. The YouTube video will be linked to the Instagram profile, so the influencer uses an integrated strategy of both platforms.

Also the interviews have shown that Instagram and Facebook are the most used platforms for influencer marketing. Chris Rand from Carr & Day & Martin also mentioned Twitter as an important social media channel. MagicTack and Epplejeck see YouTube as an additional feature to Facebook and Instagram in Germany, but in the Netherlands Epplejeck is very active on YouTube. For all brands it is important that the influencer is trustworthy and reliable and that they deliver content for the specific platforms.

While using one of these platforms for influencer marketing it is important that the company itself has a social media platform as well. Both the company and the influencer should be able to tag and share content with or from each other. Furthermore, the company should try to add value to their social media platforms every day by producing content the customer likes. Then, the chances are high that the customers will be active on their website and share the content with their friends and followers. By that way, the company can achieve a higher overturn through its own community. (Mark, 2014)

3.2 Differences between German, Dutch and British social media users

To define a good influencer marketing strategy it will be necessary to analyse the values and norms in the different countries. It won't work to just instruct some influencers to post content in English to target British customers.

3.2.1 Cultural differences between the German, Dutch and British society

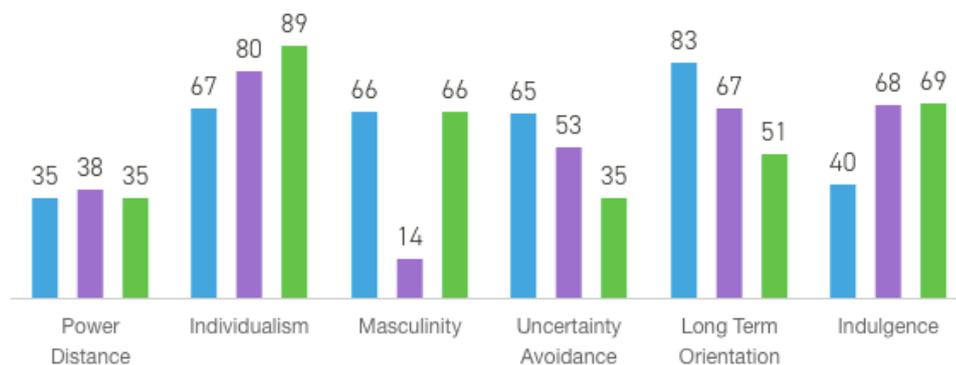


Figure 6 – Cultural dimensions in Germany (blue), the Netherlands (purple) and Great Britain (green)

The graph above shows cultural differences between German, Dutch and British people in the points power distance, individualism, masculinity, uncertainty avoidance, long-term orientation and indulgence. The bars show the importance of the respective points. The blue bar presents Germany, the purple bar the Netherlands and the green bar Great Britain. These cultural differences are called “The six cultural dimensions” and were developed by the Dutch social psychologist Geert Hofstede.

In the first dimension, power distance, are no significant differences between the three countries. Due to Hofstede Power distance is defined as the extent to which the less powerful members of institutions and organisations within a country expect and accept that power is distributed unequally. That means that the society believes that inequalities should be minimized. It is important to be independent and people want to have equal rights, regardless of position. They like direct and participative communication and a common meeting style.

The dimension of individualism is defined as the degree of independence a society maintains among its members. It deals with the people's self-image and if it is defined as an "I" or "We".

With a score of 67, Germany is an individualistic country even if it scores lower than the Netherlands (80) and Great Britain (89). The society in Germany cares about the family and nearest friends and self-actualization is a big issue. Communication is direct and honest, even if it hurts, but this is seen as a chance for the counterpart to learn from mistakes. In the Netherlands people care even more only about themselves, the society expects all individuals to care about themselves and only their family and they prefer a direct communication. The British society is one of the most individual countries. The British really live a "Me"-culture and that is what they teach their youngest people. Happiness is defined through personal fulfilment.

Masculinity is defined as the fundamental issue here is what motivates people, wanting to be the best (Masculine) or liking what you do (Feminine). Germany and Great Britain are masculine societies what means that they are success driven and orientated. Also the school system separates children into different types of schools at young age. The people live to show results and statuses often in cars, watches, houses or technical devices. Compared to that the Netherlands are a highly feminine society. Work/life balance is important as well as support and involvement from managers. Managers should have the goal to give their employees equality, solidarity and quality in their work. If there are conflicts, the Dutch will solve them by compromises.

Hofstede defined uncertainty avoidance as the extent to which the members of a culture feel threatened by ambiguous or unknown situations and have created beliefs and institutions that try to avoid these. Germany is on the higher end of this dimension, which means that they like to have a systematic overview and details are very important to create certainty. The Dutch society prefers security as an element of motivation and innovations may be resisted. They need rules and time is money. British people love it to see new things and they are happy to wake up and see what the day brings. They feel comfortable in new or uncertainty situations, because they will make it anyway.

The fifth dimension, long term orientation, describes how every society has to maintain some links with its own past while dealing with the challenges of the present and future. In this respect Germany and the Netherlands are very pragmatic countries and show an ability to adapt traditions to change. In Great Britain the society has no preference in this point.

The last dimension, Indulgence, is defined as the extent to which people try to control their desires and impulses. In Germany the culture is restrained in nature, they are cynic and pessimistic, put not much on leisure and they feel like indulging themselves is something wrong. In Great Britain and the Netherlands indulgence is something important. The society wants to realise their impulses and wishes, enjoy life and have fun. Their attitude is positive and they live like everything will be fine (Hofstede, 1993).

3.2.2 Differences in social media use

Chapter 3.1 already describes the different networks on which influencer marketing is used. This chapter will analyse the similarities and differences in social media use per country. In general, in all countries Facebook is the most used network. As already mentioned in chapter 3.1.1 Facebook users are quite old in comparison with Instagram users, which could be the reasons that Facebook is the favourite network of just 2,4% of influencers.

Round about 20% of the citizens in Germany, the Netherlands and Great Britain are using Instagram. The age of the users is younger than on Facebook, which can be the reason why 99,3% of influencers are working on Instagram and it is the favourite network of 87,1% of influencers. In general, the generation of Millennials, people from 12-34 years old, are more open for new things. Another benefit of this generation is that they have money to spend, because they are not limited by mortgages or children and they grew up online, which makes them ideal online customers and receptive for online advertisements and influencer advertisements (The New Economy, 2014).

A difference between the three countries in social media use is on YouTube. While in Germany just 7,3% of the citizens are registered on YouTube, in the Netherlands are 44,06% registered and in Great Britain 29,1%. Especially in the Netherlands YouTube videos and video blogs, called vlogs, are often used for influencer marketing. This could be linked to the cultural dimension indulgence,

which says that Germans are not likely to indulge things, while Dutch and British people like to take time and enjoy live. Transferring this fact to watching YouTube in comparison with Facebook and Instagram, YouTube takes more time and it is not possible to scroll trough the news within one minute.

3.2.3 Overview of Facebook, Instagram and YouTube

	Facebook	Instagram	YouTube
Users worldwide	> 2 Billion	> 800 Million	> 1,5 Billion
Germany	31 Million	17 Million	6 Million
Citizens: 82.670.000	37,5%	20,5%	7,3%
The Netherlands	9,5 Million	3,2 Million	7,5 Million
Citizens: 17.020.000	55,8%	18,8%	44,06%
Great Britain	32 Million	14 Million	19,1 Million
Citizens: 65.640.000	48,8%	21,3%	29,1%
Influencers work on	67,1%	99,3%	29,8%
Favourite of % influencer	2016: 9,8%	2016: 79,7%	2016: 3,1%
	2017: 2,7%	2017: 91,9%	2017: 2,7%
	2018: 2,4%	2018: 87,1%	2018: 8,5 %
Content	Pictures, Videos, text, live-stream	Pictures and short videos, text is only possible under pictures/videos, story's which are available for just 24h	Videos with short descriptions under video
Benefit	A lot of tools	Very clean	Longer videos

Table 2 –Facebook, Instagram and YouTube

Also, the marketers of the different companies were aware of cultural differences and that they have to implement them into the respective marketing strategy.

Unfortunately, the brands Carr & Day & Martin and MagicTack are not working with influencers in other countries than Great Britain and Germany, but they are planning to expand to foreign countries in a while. Carr & Day & Martin has sales teams in different foreign countries (for example Germany) where the marketers are aware of the specific culture in the respective country. MagicTack has no different marketing departments, so the marketers in Germany will make the marketing strategy for all countries (Butzengeiger & Reichert , 2018) (Rand, 2018).

The Netherlands based brand Epplejeck has an extra marketing department for German marketing and is working with influencers from Germany and the Netherlands. For the Netherlands, influencer marketing is focused on video blogs, called vlogs, and blog posts, not that much on Instagram and Facebook content. In comparison with German marketing, Instagram is becoming more important than Facebook while YouTube is not important at all. Epplejeck started with a YouTube channel for German customers, but they do not achieve more than about 30 views per video (Hermann-Deckert, 2018). These statements confirm the statistics in chapter 3.2.2 where it is mentioned that influencer marketing on Facebook becomes less important and more important on Instagram that in the Netherlands 44,06% of the citizens are registered on YouTube while in Germany and Great Britain less people are registered on YouTube.

3.3 Chances in influencer marketing

If companies are aware of the use of the different platforms and the cultural differences in the countries they want to start an influencer marketing campaign in, that provides possibilities and chances to get more brand awareness and a higher overturn.

3.3.1 Authentic advertisements

Influencer marketing is often seen as very authentic. The influencer has often has a model function or even is like the “best friend” for the follower, so it is a real emotional bond. This, next to the neutral and independent opinion of an expert, makes influencer marketing very authentic and trustworthy and the influencer becomes a person of trust for the followers, which can influence buying decisions of the followers (Lang, 2017).

3.3.2 Viral effect and engagement

By letting the influencer post content about a brand, the brands itself can raise its own social media followers. For example, the brand can share or repost the content of the influencer and link the influencer on it or the influencer can link the brand on the posts, so the profiles of both can reach more followers. Further, brand and influencer can be in contact with their followers by liking or answering their follower’s comments. This way, there will be a lot of engagement around the brand, which has a positive effect on the brand image.

3.3.3 Influencer marketing in an niche, as in the equine industry

A benefit for influencer marketing in the equine sector can be that the most influencers are micro influencers and not celebrities that address a broad target group. They are working as experts in the branch and are often very engaged and connected to their followers. For equine brands, it becomes possible to reach a very specific target group (Lang, 2017).

3.3.4 Benefits in comparison to other online marketing tools

Of course, every marketing tool has advantages and disadvantages. But why should brands use influencer marketing instead of other marketing tools? Influencer marketing has some benefits other online marketing tools do not have. Nowadays, people often feel disturbed by a lot of advertisements on the Internet. That’s why a lot of people (25% of online users) use Ad-blockers to

suppress advertisements. Next to the people who really block the advertisements, a lot of people fade out advertisements mentally.

Another benefit is that in comparison with classic advertisements the whole creative part can be outsourced to the influencer, so the brand has less work with that. Furthermore, the produced content is very long-living, because it will stay on the profile for a very long time and can be seen by followers over and over again. Another advantage for the brands is that the content is very target orientated. Other advertising methods may reach more people, but just a small percentage of them might be interested in the product.

Next to these facts, the results that an influencer campaign delivers are quite easy to track and to measure and improvements can be made during the campaign (Lammenett, 2017). Tracking and measuring influencer campaigns is for example possible by giving them special discount codes for the products, so that the brand can see how often this code was used. Furthermore, different tools can track the engagement of the influencer, that is how many comments and likes he generates, easily. (Chapter 3.5.2)

The interviewed brand managers also see chances in influencer marketing. For David Reichert and Nicola Butzengeiger from MagicTack, using influencer marketing is a reliable and cheap method for online marketing. They recognized that other marketing tools are often hidden by ad-blockers. From their influencers they expect absolute loyalty and support but also that they contact them if they see any improvements for the products or company. Luca Hermann-Deckert from Epplejeck mainly sees chances in influencer marketing in content production for the own social media channels of Epplejeck, but also expects loyalty and honesty from the influencers. Carr & Day & Martin expects an increase in brand and product awareness, social media followers and engagement, PR coverage and higher footfall and attendance at events where their influencers are present. For Carr & Day & Martin, it is important that the influencer has a positive public perception but is also grounded, normal and down to earth to relate with the followers.

3.4 Risks in influencer marketing

As it is often the case with marketing, influencer marketing also has some risks brands should be aware of beforehand. Of course, the risks can differ in every sector and can change as time goes by. In this paragraph, some risks every company should be aware of, like fake accounts and surreptitious advertisements, will be explained.

3.4.1 Fake accounts

One risk in influencer marketing is that the accounts may not be real. Nowadays it is possible to use bots. A bot is a device or piece of software that can execute commands, reply to messages or perform routine tasks, as online searches, either automatically or with minimal human intervention (dictionary.com, 2017). With the help of a bot it is possible that the influencer does not have to answer personally to all comments and messages, which could lead to wrong and even damaging information about products and brands. Furthermore, it is possible to buy followers and likes. The costs for fake followers and likes are quite low. For example, the price for 500 Instagram followers is about 5,99€ and for 500 Facebook likes 8,99€ (social-media-market.de, 2018).

On the basis of these facts it is quite logical that people start to create fake accounts to get a bigger amount of followers and a higher reach.

A good example for that is the profile of the German radio reporter Frederik Fleig. In December 2017 he started an experiment on how easy it can be to create an account that really looks like a professional influencer account. He decided to invest 200€ for fake followers and fake likes. He uploaded two pictures a day. The pictures were free stock pictures from different platforms. Within 4 weeks, his number of followers rose from 670 to 23.000. After two weeks, he got the first request from a Spanish clock producer who asked if they could send him a few watches that he could post on his account. After four weeks, he started to write to 40 companies and asked for collaborations. In the end, 15 of the 40 companies wanted to collaborate with him. The offers of all collaborations were 2.900€. So he would have reached a plus of 2.700€ after 4 weeks! Just one company found out that his profile is a fake profile with fake followers, pictures and comments. After the four weeks he stopped this experiment and concluded that it is very easy to earn money with a fake

account on Instagram. This example is a real warning message for all companies that want to work with influencers (Fleig, 2018).

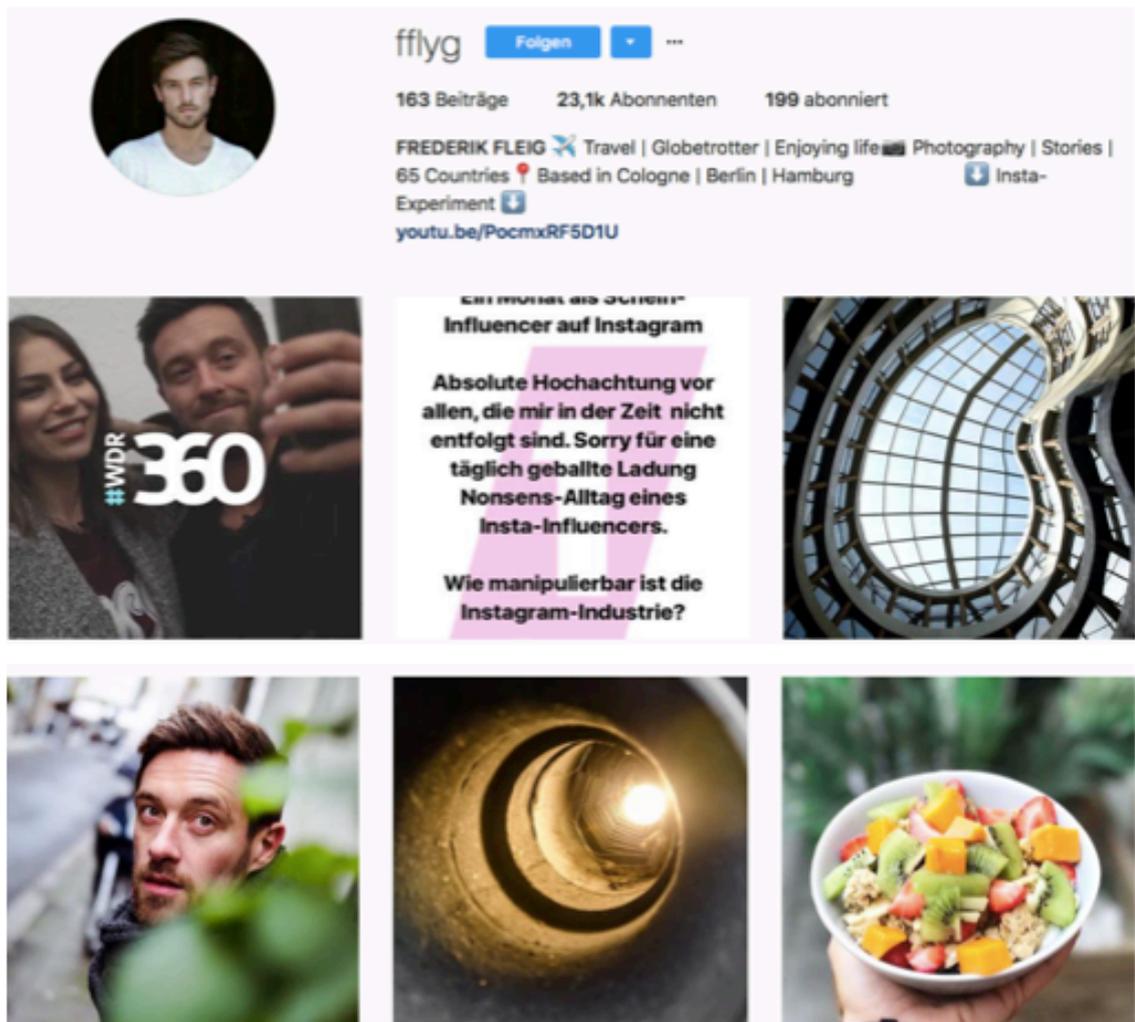


Figure 7 – Instagram “fake account” fflyg by Frederik Fleig

3.4.2 Unreliability

Another risk that brands should be aware of is unreliability of the campaign. For influencer marketing it is always important that the influencer campaign is reliable and trustworthy for the followers. That was the case by the end of 2017, when Milka, a famous chocolate producer, started their influencer campaign. Influencers who were normally posting about healthy food and a very sporty lifestyle had been posting pictures with Milka chocolate bars in really strange situations, like sitting in a limousine or walking through a shopping mall. Followers of both influencers and Milka found this campaign to be really not trustworthy and suitable for the influencer or brand (stern.de, 2018).

3.4.3 Surreptitious advertising

Surreptitious advertisements are secretive communication practices that might mislead the public about products or services (Out-Law.com, 2011).

This can be a risk in influencer marketing if the influencer does not mark the advertisement as an advertisement, because the European law requires it.

In consequence, the influencer and the brand should always keep in mind that advertisements have to be marked as advertisements, for example with hashtags like #add or #advertisement. If this is not done the influencer and the brand can get a fine for surreptitious advertising, which can damage the image of brand and influencer.

3.4.4 Public perception

Of course, a positive public perception of an influencer is important for the brand image. But sometimes it can be that the influencer gets a negative public perception for different reasons. For a rider this could be doping or problems with the animal welfare. So if, for example, the rider does not treat the horse right in the warm-up arena on a big competition, this can damage the image of the rider and of the supporting brand.

The three interviewed equestrian brand managers are also aware of risks in influencer marketing. For Chris Rand, the marketing manager of Carr & Day & Martin, the main risks were that the brand image could be damaged if the influencer became involved in a negative event or scenario and that focusing on one influencer could limit the brand's potential reach and coverage (Rand, 2018).

The founders of MagicTack see more risks in disloyalty of the influencer, for example that the influencer would cooperate with other brands from the same product range. They made this experience one time and finished the cooperation with this influencer directly (Butzengeiger & Reichert, 2018).

Luca Hermann-Deckert from Epplejeck sees unreliability as a potential risk in influencer marketing. An example for unreliability can be that the influencer was supposed to write a product review or produce a video for their channels by a defined date but the influencer does not do it on time. Another risk she is aware of are fake accounts (Hermann-Deckert, 2018).

3.5 Possibilities to make contact with influencers

Contacting influencers can happen in loads of different ways. Some of the most famous ways to come in contact with them are explained in this chapter.

3.4.1 Models

There are a few different options for brands to get in contact with influencers. The two most famous models are the “marketplace-model” and the model “influencer marketing suite”. The “marketplace-model” involves the brand making a briefing for a campaign and after that influencers can apply for the job. The “influencer marketing suite” means that the brand searches for suitable influencers and contacts them. When they agree they will make contracts and briefing about the campaign.



Figure 8 – Marketplace model



Figure 9 – Influencer marketing suite model

Both models have advantages and disadvantages. For the “marketplace-model” the brand has to do just the briefing before they announce it on special influencer-platforms, but it costs a lot of time to check all the applications and find out which influencer is the best for their campaign. Using the “influencer marketing suite” model, it is a lot of work to find suitable influencers, but if the brand found the right influencers they can directly start with the contracting.

3.5.1 Marketplaces for influencers

There are some marketplaces that simplify the search for influencers. A good example is brandnew.io, a German marketplace for influencers. “Brandnew” has about 45.000 influencers from Germany, Great Britain and the USA in its portfolio. When brands use this software they have to choose what category of influencer (chapter 1.2.8) they prefer and what the topic of the campaign will be. Then, the software will search for suitable influencers. After that, the brand can contact the influencer and if the influencer agrees they can start to make contracts and start with the campaign.

Another possibility using this platform can be for the brand to publish an announcement and the software will send it to suitable influencers, which can apply for the campaign.

3.5.2 Tools to analyse influencers

Next to marketplaces there are some tools that enable the company to do research about influencers, for example “InfluencerDB.net”. On “InfluencerDB”, it is possible to search for the name of the influencers and the software will give the most important information about followers, media value per post, comments per post and a lot of additional information about the chosen influencer.

In the appendices, an analysis of the German equine influencer “biniebo” can be found.

Using this or comparable tools can be very useful before contacting the influencer to avoid discrepancies between the influencer and the brand.

3.5.3 Coming in contact with equine influencers

As the paragraphs above describe there are different possibilities to contact influencers. Another possibility would be for equine brands to just contact influencers that they find interesting and ask them about possibilities for sponsoring and campaigns.

Furthermore, in the equine industry it happens quite often that micro influencers contact the brand by themselves and ask for collaboration. Here the benefit is that mostly the influencer can really identify himself with the brand and really likes the products, because otherwise he or she would not ask for sponsoring.

Regarding the interviews with MagicTack, Carr & Day & Martin and Epplejeck, we see differences in how they search for influencers. Carr & Day & Martin works mainly with Charlotte Dujardin, triple Olympic gold medallist in dressage riding. They make contracts with influencers and if they are searching for influencers they do it through agents or management companies (Rand, 2018). By contrast, Epplejeck works with a few micro influencers in the Netherlands, like Britt Decker. Mostly, the influencer contacts Epplejeck and then Epplejeck decide whether they want to sponsor the influencer or not. If the cooperation starts, they do not make contracts and the cooperation is based on product sponsoring, so the influencer does not earn money. In return for the product sponsoring, Epplejeck expects content for their social media channels, like pictures or short videos (Hermann-Deckert, 2018).

MagicTack mostly contacts the influencer after having a look at the profile and observing him or her for a while. They do have a contract with one influencer, "biniebo", a very engaged influencer in the equestrian sport. With all the other influencers they do not have contracts and the collaboration is based on product sponsoring in exchange for online content. With "biniebo", they have specific expectations about the quantity and quality of social media posts (Butzengeiger & Reichert , 2018).

Independent from the method of finding the right influencer for the equine brand it is important that the brand observes the possible influencer very well in order to minimize the chance of failing with the campaign.

4 Discussion

The aim of this thesis was to give an insight into the topic of influencer marketing in the equine industry for brands in Germany, the Netherlands and Great Britain and to help equestrian brands to establish a good influencer marketing strategy. Another goal was to give brands an overview of the most important aspects one needs to be aware of when using influencer marketing.

The thesis starts out with a quote by Mark Zuckerberg, the founder of Facebook. In the meantime, Mark Zuckerberg has come under international criticism because of data misuse. However, the quote is still valid as an introduction into the topic.

Chapter one introduces the topic of influencer marketing by defining the most important terms like marketing, online marketing, social media and a lot more and also introduces the equine sector in Germany, the Netherlands and Great Britain.

The chosen method for this research was to look at online-sources and articles and to take qualitative interviews with brand managers. The interviews have been taken with one brand per country. The participation in this study was voluntary. Interviews with at least one brand per country were taken.

In Germany, the interview has been taken with the founders of MagicTack, a company that produces horse tack with changeable Swarovski elements. The company in the Netherlands that has been interviewed was Epplejeck, a big reseller of horse tack for every budget. It was very hard to find a company to interview in Great Britain. Ultimately, it was possible to take a written interview with the marketing manager of Carr & Day & Martin, a company that produces horse and leather care products. The three companies all have different product ranges, which makes them hard to compare. But the interviews gave an insight into how brands use influencer marketing in the respective countries on a random basis.

The chosen approach was good to get an insight into the topic of influencer marketing for equestrian brands, but due to the number of interviews it is not representative for the whole sector in the three respective countries. For this

study, the data was sufficient, for further investigations into this topic, for example in case of a master thesis, more interviews would be necessary.

The main question of the research was “What are the chances and criteria in influencer marketing for equine brands in Germany, the Netherlands and Great Britain?”

The four sub-questions helped to answer the main question. The first sub-question was “What are the differences of influencer marketing between the different social media platforms?” In first instance, it was necessary to explain the different social media networks. Facebook, Instagram and YouTube were chosen to be explained, because those are the three biggest social media networks in the respective countries of the research. Maybe this should have been supplemented by Twitter, because Chris Rand from Carr & Day & Martin said that they also did influencer marketing on Twitter.

The second sub-question was “What are the differences between German, Dutch and British social media users?” In order to gain some insight into the cultural differences, the cultural dimensions of Hofstede for the three respective countries have been explained and compared. After that, the differences in social media use have been explained and it has been tried to connect them to the cultural dimensions. Here, it would have been desirable to find more differences in the use of social media and influencer marketing for the three countries in the equine industry. For this thesis, it was not possible to research this in depth, but this could be an idea for further research, for example in case of a master thesis.

Before it was possible to answer the third sub-question, “Which possible risks do companies have to deal with when using influencer marketing?”, it was decided to add a chapter about the chances of influencer marketing. Both the chapter about chances and the chapter about risks give general information about where companies can profit from influencer marketing and what they should be aware of. Due to the branch, time or other impacts there can be different chances and different risks in influencer marketing that are not mentioned in this research.

In order to answer the last sub-question “How can equine brands find suitable influencers in Germany, the Netherlands and Great Britain?”, different models and platforms for the detection and analysis of influencers were explained. In first instance, models, marketplaces and tools were introduced. After that, specific possibilities for the equine industry were explained.

All in all, all research questions could be answered sufficiently. It would have been nice if this study had focused more on the equine industry. But in general, equine brands can adapt their strategies from brands from other branches. For a study focused on the equine industry it would have been necessary to do research about equestrian customers and brands, which would have exceeded the possibilities of this bachelor thesis.

5 Conclusion and Recommendation

The goal of this thesis was to give an insight into the topic of influencer marketing in the equine industry for brands in Germany, the Netherlands and Great Britain and to provide brands with information they need in order to develop a working influencer marketing strategy.

The main question of this thesis was “What are the chances and criteria in influencer marketing for equine brands in Germany, the Netherlands and Great Britain?”. Before an answer for the main question will be given, the four sub-questions of this research will be answered. The sub-questions helped to deepen and structure the topic.

The first sub-question was “What are the differences of influencer marketing between the different social media platforms?”. The respective social media platforms are Facebook, Instagram and YouTube. It was decided to look at these three platforms because these are the top three social media platforms in Germany, the Netherlands and Great Britain. The three platforms have the biggest differences in the style of their content. On Facebook, content can be presented in a lot of different ways, like videos, texts, pictures etc. On Instagram, the content is always bound to something visual, like pictures or videos, and YouTube is a platform only for videos. In influencer marketing, Instagram is the most popular platform and Facebook becomes less important. Further, Instagram users are younger than Facebook users. YouTube is often used as an addition to Instagram, for longer videos or product explanations. On Instagram, the users are younger than on Facebook. With around 30 years, the average age of riders in the three countries is quite young, which is why equestrian companies should focus on Instagram when it comes to influencer marketing. But of course, this depends on the target group. If the brand wants to target older people, Facebook will be the right place and if they sell products that need time to explain, it can be helpful to use YouTube next to another channel.

The second sub-question was, “What are the differences between German, Dutch and British social media users?”. Comparing the six cultural dimensions of Hofstede in Germany, the Netherlands and Great Britain, there are differences in the behaviour of the societies which companies should be aware of before they enter the market in one respective country. Further, there are differences in social media use. Facebook has the most users in all countries. About 20% of the citizens in the three countries are registered on Instagram. The biggest differences between the three countries are on YouTube. Just 7,3% of Germans are registered on YouTube. In Great Britain 29,1% and in the Netherlands even 44,06% of the citizens have a YouTube account. The interviews with the equestrian brand managers have reflected these user behaviours, as well.

So in Germany and Great Britain, brands should focus on Instagram and in the Netherlands more on YouTube.

The third sub-question was “Which possible risks do companies have to deal with when using influencer marketing?”. Before going in-depth into the risks of influencer marketing, the chances were explained. In influencer marketing, there are a lot of chances for a brand, but of course, it can also take some risks. Chances in influencer marketing are in authentic advertisements and interaction with followers, which can raise the brand awareness and the overturn of a company. But if the influencer is unauthentic and unreliable to the followers it can be a risk for the company. Another risk can be that the influencer is involved in negative perception, which can have an impact on the brand working with this influencer. Furthermore, there are a lot of “black sheep” on social media. Unfortunately, it is possible to buy followers, likes and comments and there are a lot of fake accounts.

In the equine industry, brands can use influencers to test and talk about their products and post this on their social media channels. Further, companies can use influencers during events by organizing “meet and greets” for their customers at their stands.

The last sub-question was “How can equine brands find suitable influencers in Germany, the Netherlands and Great Britain?”. There are a lot of ways how

brands can find the right influencers and how they can get in contact with them. There are marketplaces and agencies, which can bring brands and influencer together. In the equine industry, the influencer often contacts the brand or the other way around. Another possibility would be to meet them on events in the sector. Before starting a campaign with an influencer, the brand should always observe the influencer beforehand in order to figure out if the influencer is suitable for the brand and if the influencer has the right followers. If this fits, they can start to work together. The company should think about whether they would work with a contract or not and really make clear what they expect from the influencer. A contract can reduce, but not avoid the risks.

Concluding the sub-questions, it is possible to provide an answer to the main question of this thesis “What are the chances and criteria in influencer marketing for equine brands in Germany, the Netherlands and Great Britain?”. Chances in influencer marketing in the equine industry are in authentic and trustworthy advertisements and in the variety and creativity of content. Compared to other online-marketing tools, the whole creative part can be outsourced to the influencer and the content will reach a specific target group. But making a good influencer campaign is more than just asking someone who is active on social media to place products. There are criteria, which are important to be aware of using influencer marketing. First of all, it is very important that the brand chooses an influencer who fits the image and the mission of the brand. If this is not the fact, the content will be unauthentic and that will be negative for the brand image. Brands can get in contact with influencers via agencies or by themselves through social media or sector specific events. To minimize risks in the influencer campaign, it should be very clear what influencer and brand expect from each other. Therefore, a contract can be helpful.

If it comes to internationalisation of the influencer marketing strategy, the brand should be aware of cultural differences and differences in social media use. Facebook is still the platform with the most registered users in all countries, but not for influencer marketing. In Germany and Great Britain, influencer marketing happens mainly on Instagram. In the Netherlands, vlogs on YouTube play an

important role for customers and influencers. Before starting an influencer campaign, it is important to know which platform the target group is on.

All in all, if the brands are aware of the criteria and risks, every brand in the equine industry should start using influencer marketing, because it provides a lot of unique chances and is very positive for the brand image.

6 Sources

Scientific sources

Books

Brown, D. & Fiorella S. (2013). *Influence Marketing - how to Create, Manage and Measure Brand Influencers in Social Media Marketing* . QUE.

Brown, D., & Hayes, N. (2008). *Influencer marketing*. Routledge.

Chernev, A. (2014). *Strategic Marketing Management* . Cerebellum Press.

Lammenett, D. E. (2017). *Influencer Marketing*. Lammenett.

Mark, W. van der . (2014) *MARKETING.COM 3.0; E-Commerce, Social media & Mobiel Internet*. Noordhoff Uitgevers

Internet Sources

Bundesministerium für Familie, Senioren, Frauen und Jugend. (2017). *Studie zeigt: Influencer beeinflussen Jugend*. Retrieved from: <https://www.schau-hin.info/news/artikel/studie-zeigt-influencer-beeinflussen-jugend.html>, 26 February 2018

Hofstede, G. (1993) *Country Comparison*. Retrieved from: <https://www.hofstede-insights.com/country-comparison/germany,the-netherlands,the-uk/>, 28 February 2018

Non-scientific sources

Articles

British Horse Society. (2016). *The Equine Industry*.

Copywriterbiz.com. (2016) *Why use influencer marketing*.

Hippische Monitor. (2017). *Hippische Monitor* . HAS Hogeschool .

KNHS. (2016). *Netherlands, Land of horses* .

Sectorraadpaarden.nl. (2014). *Nederland Paardenland*

Internet Sources

Agentur für neue Medien. (2017). *Aktuelle Social Media Nutzerzahlen*. Retrieved from: <https://www.kontor4.de/beitrag/aktuelle-social-media-nutzerzahlen.html>, 30 November 2017

Carr & Day & Martin. (2017). *Our core values*. Retrieved from: <http://www.carrdaymartin.co.uk/our-core-values/>. 09 April 2018

Daley, R. (2017). *How to drive sales with instagram*. Retrieved from: <https://blog.kissmetrics.com/drive-sales-with-instagram/>, 26 January 2018

- Dictionary.com. (2018). *Bot*. Retrieved from:
<http://www.dictionary.com/browse/bot>, 26 January 2018
- Dudovskiy, J. (2007). *Descriptive research*. Retrieved from: <http://research-methodology.net/research-methodology/research-design/conclusive-research/descriptive-research/>, 20 December 2017
- Epplejeck. (2018). *About us*. Retrieved from <https://www.ej.nl/english/about-epplejeck/>, 09 April 2018
- Fédération Equestre Nationale. (2017). *Zahlen und Fakten*. Retrieved from:
<https://www.pferd-aktuell.de/fn-service/zahlen--fakten/zahlen--fakten>, 11 January 2018
- Fleig, F. (2018). *In vier Wochen zum Influencer auf Instagram*. Retrieved from:
<https://www1.wdr.de/unternehmen/der-wdr/unternehmen/fake-instagram-influencer-fleig-100.html>, 26 January 2018
- GoogleTrends. (2017). *Influencer marketing* Retrieved from [trends.google.com: https://trends.google.com/trends/explore?date=today%205-y&q=Influencer%20marketing](https://trends.google.com/trends/explore?date=today%205-y&q=Influencer%20marketing)
- Haran, R. (2017). *Instagram influencer marketing*. Retrieved from:
<https://www.oberlo.com/blog/instagram-influencer-marketing>, 26 January 2018
- Hashoff. (2018). *Influencer Marketer: A #Hashoff state of the union report*. Retrieved from: <http://www.hashoff.com/wp-content/uploads/2017/04/A-HASHOFF-State-of-the-Union-Report.pdf>, 26 January 2018
- Instagram. (2016). *See the moments you care about*. Retrieved from
<http://blog.instagram.com/post/141107034797/160315-news>, 27 February 2018
- Kallas, P. (2017). *Top 15 most popular social networking sites* . Retrieved from:
<https://www.dreamgrow.com/top-15-most-popular-social-networking-sites/>, 2 October 2017
- Lang, D. (2017). *Chancen und Risiken im Influencer Marketing*. Retrieved from:
<https://www.adzine.de/2017/11/chancen-und-risiken-im-influencer-marketing/>, 14 April 2018
- MAVRCK. (2017). *The 2017 Facebook User-Generated Content Benchmark Report*. Retrieved from: <http://info.mavrck.co/facebook-user-generated-content-benchmark-report-q1-2017>, 23 February 2018
- Nwazor, Toby. (2016). *Faceoff: Instagram vs. Facebook*. Retrieved from:
<https://www.entrepreneur.com/article/280833>, 29 April 2018

- Oosterveer, D. (2017). *Nationale social media onderzoek*. Retrieved from: <https://www.marketingfacts.nl/berichten/nationale-social-media-onderzoek-2017>, 30 November 2017
- Out-Law.com. (2011). *EU advertising laws can apply to surreptitious ads even if payment not made*. Retrieved from: <https://www.out-law.com/page-11996>, 11 April 2018
- Qualitative Research Consultants Association. (2018). *What is qualitative research?*. Retrieved from: <http://www.qrca.org/?page=whatisqualresearch>, 16 January 2018
- Social Media. (2017). *Most Popular Social Networks in the UK*. Retrieved from: <https://social-media.co.uk/list-popular-social-networking-websites>, 30 November 2017
- Social Media Market. (2018). *Instagram Follower*. Retrieved from: <https://www.social-media-market.de/produkt/instagram-follower-kaufen/>, 26 January 2018
- Solis, B. (2018). *Conversation Prism*. Retrieved from: <https://conversationprism.com>, 06 January 2018
- Statista. (2017). *Soziale Netzwerke*. Retrieved from: <https://de.statista.com/themen/1842/soziale-netzwerke/>, 06 January 2018
- Sproutsocial.com. (2017). *Social Media Demographics to Inform a Better Segmentation Strategy*. Retrieved from: <https://sproutsocial.com/insights/new-social-media-demographics/#facebook>, 26 February 2018
- Stern.de. (2018). *Peinliche Milka-Kampagne: So albern kann Werbung für Schokolade sein*. Retrieved from: <https://www.stern.de/neon/vorankommen/das-ging-daneben--milka-und-die-peinliche-instagram-kampagne-7842438.html>, 10 April 2018
- TechTarget. (2017). *What is social media?* Retrieved from: <http://whatis.techtarget.com/definition/social-media>, 06 January 2018
- Techterms.com. (2017). *social media marketing*. Retrieved from: <https://techterms.com/definition/smm>, 20 December 2017
- Vero. (2018). *True Social*. Retrieved from: <https://www.vero.co/why-vero/>, 26 February 2018
- WebFinance INC. (2017). *Marketing*. Retrieved from: <http://www.businessdictionary.com/definition/marketing.html>, 20 December 2017

Tables and Figures

Fleig, F. (2018). *Instagram profile “fflyg”*. Retrieved from:
<https://www.instagram.com/fflyg/> 26 January 2018

GoogleTrends. (2017). *Influencer marketing* Retrieved from trends.google.com:
<https://trends.google.com/trends/explore?date=today%205-y&q=Influencer%20marketing>, 5 December 2017

Kallas, P. (2017). *Top 15 most popular social networking sites* . Retrieved from:
<https://www.dreamgrow.com/top-15-most-popular-social-networking-sites/>, 2 October 2017

Linqia. (2016). *Benefits in influencer marketing* . Retrieved from:
http://www.linqia.com/wp-content/uploads/2016/11/The-State-of-Influencer-Marketing-2017_Final-Report.pdf, 5 December 2017

Mashable.com.. (2017). *2017’s social media Landscape in one stunning infographic*. Retrieved from:
<https://mashable.com/2017/07/11/conversation-prism-brian-solis-update-2017/#kl4kw78azqqM>, 31 January 2018

Miss.everywhere. (2017). Retrieved from:
<https://www.instagram.com/miss.everywhere/>, 18 December 2018

Adweek. (2017). *Influencer marketing*. Retrieved from:
<http://www.adweek.com/digital/report-75-of-marketers-are-using-influencer-marketing/>, 31 January 2018

Appendices

I. Explanation of horse disciplines

In chapter 1.2.12 till 1.2.15 different horse disciplines are mentioned. The following definitions will give an insight into the different disciplines.

Dressage = the training of a horse to perform special, carefully controlled movements as directed by the rider as a sport in training or in competition (dictionary.cambridge.org)

Eventing = an equestrian sport in which competitors must take part in each of several contests, usually cross-country, dressage and showjumping. (dictionary.com)

Jumping or showjumping = the competitive sport of riding horses over a course of fences and other obstacles in an arena, with penalty points for errors. (dictionary.com)

Mounted games = a branch of equestrian sport in which very fast games are played by people of all ages (mounted-gamed.org)

Natural Horsemanship = a philosophy of working with horses based on the horse's natural instincts and methods of communication, with the understanding that horses do not learn through fear or pain, but rather from pressure and the release of pressure. (naturalthorsemanship.wordpress.com)

Ambling gait riding = riding discipline where the gait of horses is important. Ambling gaits are often genetic traits in specific breeds, like Iceland horses. (hiddentraits.com)

Riding out = riding through nature on a horse

Western = a style of horseback riding which evolved from the ranching and warfare traditions brought to the Americas by the Spanish Conquistadors, and

both equipment and riding style evolved to meet the working needs of the cowboy in the American West. (Quizlet.com)

Working Equitation = a discipline created with the objective of enhancing the equestrian techniques developed in countries whose riders use horses in different aspects of “fieldwork” or “in the field”. (workingequitation.today)

II. Conversation prism



Source: <https://conversationprism.com>

III. Interviews with brands in the equine industry

The following questions will be the main structure for the Interview. It could be possible that in the course of the interview other questions will be asked. If this is the case, the Interview is going to be adjusted.

Questions of the interview

Do you already work with influencers?

→If not: Do you plan to work together with influencers?

What do you expect from working with influencers?

Where do you see risks in influencer marketing?

How do you get in contact with influencers?

Do you have contracts with your influencers?

What do you pay your influencer?

What are the most important social media channels in your opinion?

What are important characteristics of an Influencer for your company?

Do you cover all riding disciplines with your influencers?

Interview with David Reichert and Nicola Butzengeiger from MagicTack

Date: Friday, 19th January 2018

Location: MagicTack, Worms

Do you already work together with influencers?

Yes, we work together with different influencers.

What do you expect from working with Influencers?

We think that Influencer marketing is a good and cheap online- marketing tool to make reliable advertisements. Other online-marketing tools, like affiliate links, are often not valuable because a lot of people use Add- blockers nowadays. That makes online marketing difficult.

What are important characteristics of an Influencer for MagicTack?

It is very important that the Influencer is loyal and supports the company anytime. It is important that they talk with us if they see any problems or possible improvements.

Where do you see risks in Influencer marketing?

If you do not have a contract with the Influencer, one risk is that the Influencer may not like our product and publish negative content about our product. Another risk for our company is that the Influencer may use other browbands as well and produce content for other "browband-companies "; we had this one time and decided then to finish the cooperation with this Influencer.

How do you get in contact with Influencers?

Mostly, we contact them via the different social media channels. Sometimes we meet them on exhibitions or shows.

Do you have contracts with your Influencers?

We have a contract with one Influencer (biniebo).

What do you pay for your Influencer?

We pay money just for one Influencer (biniebo). The rest is based on product-sponsorings.

What are the most important social media channels for you?

Definitely Instagram and Facebook.

And what about YouTube?

We do not see YouTube as an own platform for Influencers. It is rather the way that people who are active on YouTube share the links to their videos on the other platforms. So YouTube is directly connected to Instagram and Facebook.

Do you cover all riding disciplines with your Influencers?

Not all of them, but we have a lot of different Influencers. Some Influencers are dressage or jumping riders, but we work together with hobby riders, as well. One Influencer is doing working equitation. For 2018, we plan to expand our product range for western bridles, a western-influencer will follow then, for sure.

Are you also working together with Influencers in the Netherlands and/or Great Britain? Do you see cultural differences between the countries?

Not yet. We are aware of cultural differences and have to figure out how to find the best strategy for other countries.

Interview with Luca Hermann-Deckert from Epplejack

Date: Friday, 23rd March 2018

Location: Aeres Hogeschool, Dronten

Description of the company: Epplejack is the new superstore formula in the equestrian branch. They have super trendy and modern showrooms, combined with a saddle service, webshop and a wide product range. At Epplejack, riders will find a wide range of well-known and less-known top brands such as, Ariat, ANKY, Kieffer, Pikeur, Passier, Kingsland, Euro-Star, BR, FRA, Uvex, HV Polo, Eurostar, Sectolin, Horseware, Aigle, Petrie, PK Sportsware, Mountain Horse, Harry's Horse, and so on. On top of that, Epplejack also has three brands of its own: barato, Epplejack and Quur. (Epplejack, 2018)

What are the most important social media channels for your brand?

Facebook, Instagram but also YouTube (and Pinterest for the Netherlands)

Do you already work together with influencers?

In Germany yes, Micro and middle,

Netherlands not much but Britt Dekker

In Netherlands very well-known brand so that they do not need Influencers

On which channels are your influencers active?

Instagram, Paardenpraat, Facebook and YouTube

What do you expect from working with Influencers?

Postings on social media, and linkings, product tests, guest blogs and videos

What are important characteristics for an Influencer of your brand?

Honesty, reliability, trustworthy for the specific campaign

Do you plan activities with the influencers? (E.g. "meet and greet" for your customers)

For example Ladies Night in Groningen (Zauberpony amy)

Where do you see risks in influencer marketing?

Unreliability (→ for example we ask them to write a blog or post for social media and they do not do it in time and then we have no content for our online channels because we planned with them.)

Or we give them product sponsoring but they do not post about it.

How do you get in contact with Influencers?

Mostly they contact epplejeck, epplejeck checks account and decides if it is good

Do you have contracts with your Influencers?

No

What do you pay for your Influencer? (Or just product sponsoring?)

Till now just product sponsoring

Do you cover all riding disciplines with your Influencers?

Everything that we can offer

Are you also working together with Influencers in Germany and/or Great Britain? Do you see cultural differences between the countries?

In Great Britain, we do not have any influencers yet but we are selling in Great Britain. Our influencer marketing is more focused on Germany, Belgium, France and the Netherlands. I recognized that vlogs and YouTube is very important in the Netherlands, but it does not work in Germany. In Germany, Facebook is getting less important while Instagram gets more important.

Written interview with Chris Rand, Marketing Manager at Carr & Day & Martin

Date: Thursday, 5th April 2018

Description of the company: Founded in 1765, Carr & Day & Martin is the oldest company producing horse and leather care products. The company is based in the UK and sells their products worldwide. Their core values are producing super premium products, continuous investment in research and development, world-class service, long-term partnerships and industry-leading education. (Carr & Day & Martin, 2017)

Interview:

What are the most important social media channels for your brand?

In order of importance for our brand: Facebook, Twitter and Instagram.

Do you already work together with influencers?

Yes, our main partnership is with Charlotte Dujardin (Triple Olympic gold medallist)

On which channels are your influencers active?

Facebook, Twitter and Instagram.

What do you expect from working with Influencers?

- Increased brand and product awareness
- To increase social media followers and engagements
- Increased PR coverage
- Increased footfall and attendance at events where our influencer is present

What are important characteristics for an Influencer of your brand?

- Positive public perception
- Our customers and followers must be able to relate with the influencer, therefore they must be quite grounded, normal and down to earth

Do you plan activities with the influencers? (E.g. “meet and greet” for your customers)

- Attendance at trade shows and events
- Social media competitions
- Social media promoted posts
- Live Q&A sessions on social media
- Promotional photoshoots

Where do you see risks in influencer marketing?

- If the influencer became involved in a negative event or scenario, the association could be damaging for the brand
- Focusing too much on an association with one influencer will limit the brand’s potential reach and coverage

How do you get in contact with Influencers?

Through agents and management companies

Do you have contracts with your Influencers?

Yes

What do you pay for your Influencer? (Or just product sponsoring?)

Undisclosed.

Do you cover all riding disciplines with your Influencers?

Not yet but we hope to cover more disciplines in the future.

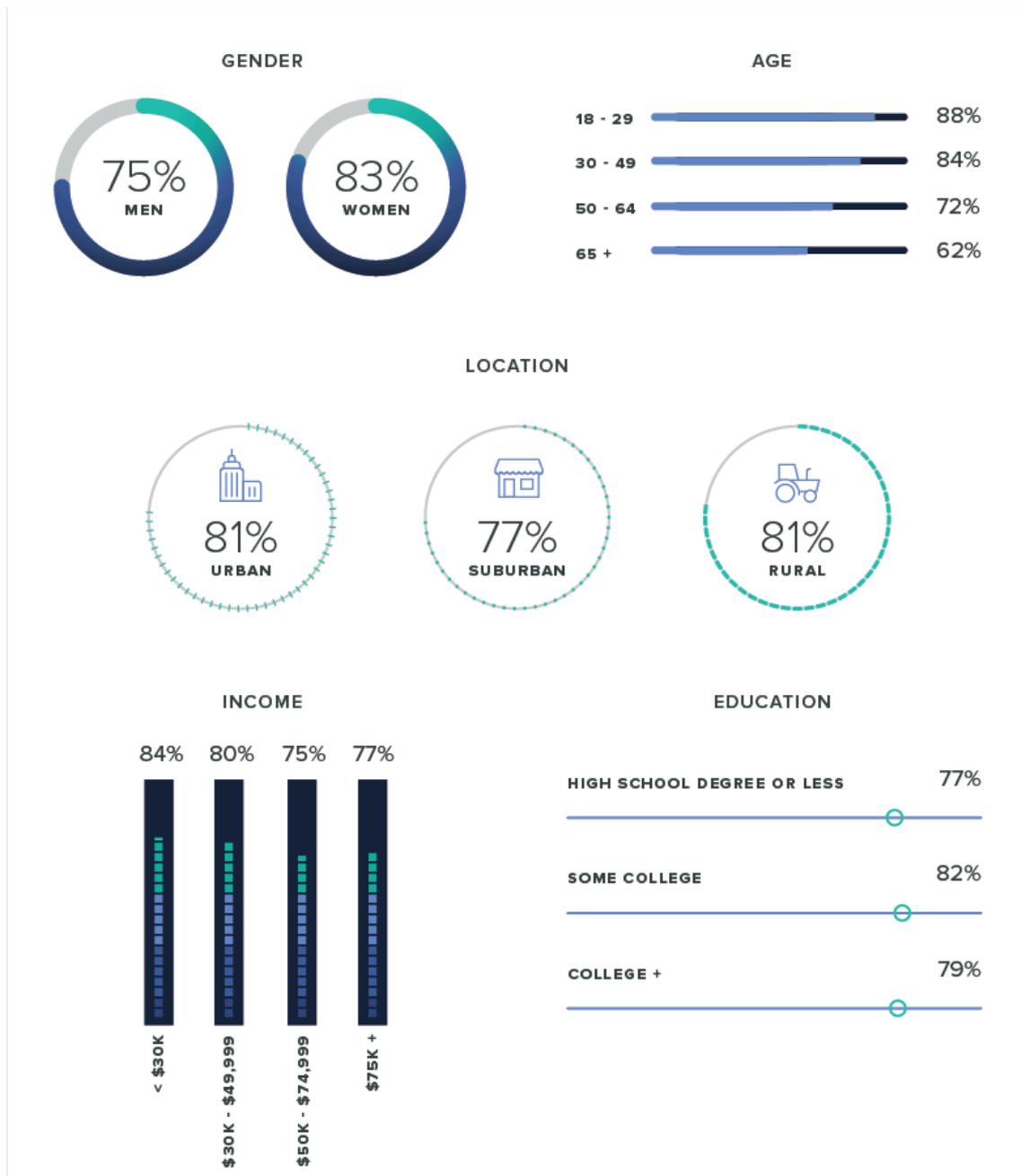
Are you also working together with Influencers in Germany and/or the Netherlands?

Not yet but again, this is something we will potentially look to do in the future (in Germany)

Do you see cultural differences between the countries?

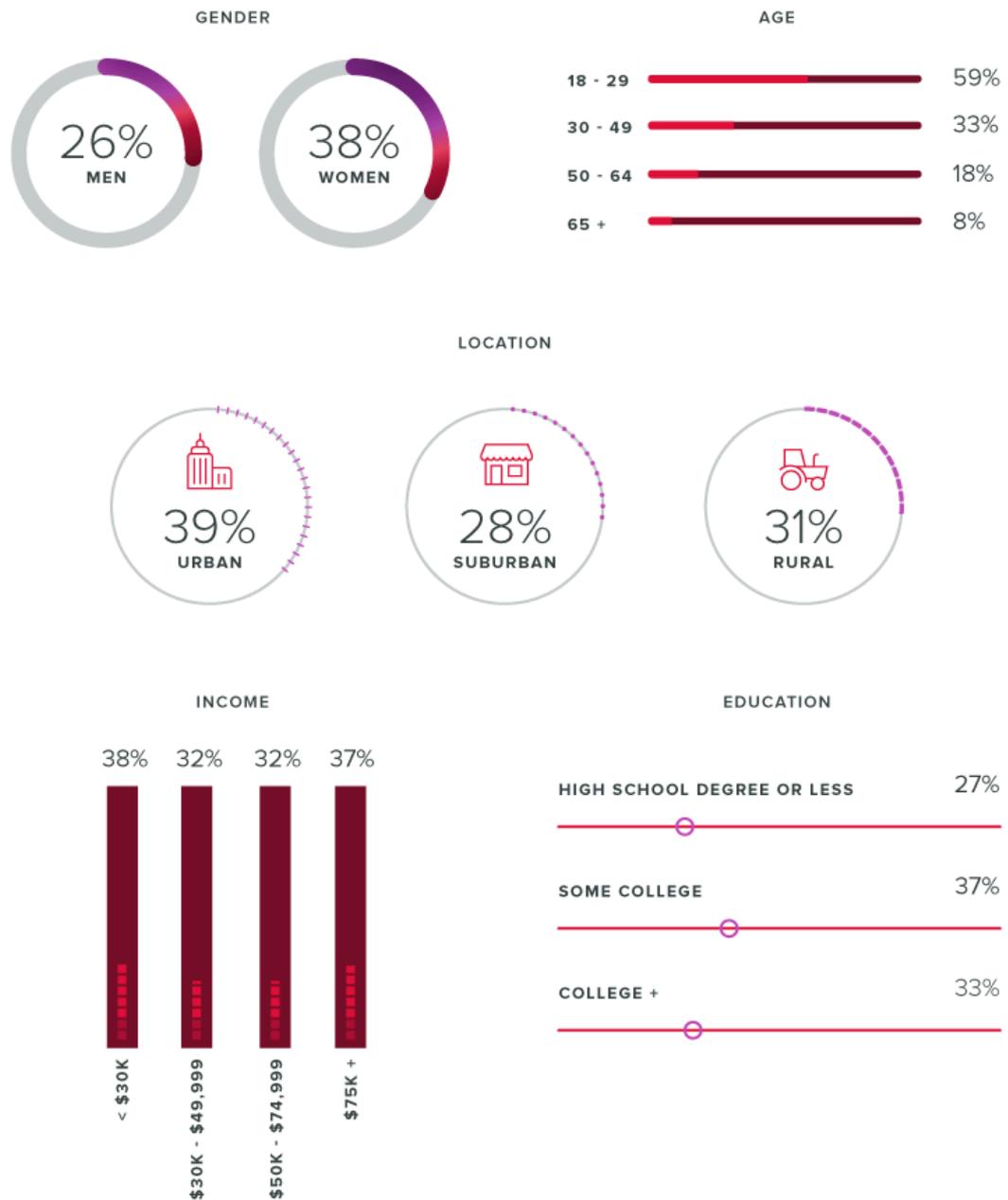
I am aware of some differences yet this is something our sales team in Germany is more aware of.

IV. Demography of Facebook users



Source:
<https://sproutsocial.com/insights/new-social-media-demographics/>

V. Demography of Instagram users



Source:
<https://sproutsocial.com/insights/new-social-media-demographics/>

VI. – Content example Instagram



Translation: What is a haygain?- This and more questions about this topic will be answered in my new YouTube video today at 2pm! Thanks to farmstable for the good cooperation! Advertisement #haygain #horsecare #hay #horselove #stabletime #equestrian #knowledgevideo

This screenshot shows an example of an equestrian influencer posting on Instagram. The influencer "biniebo" makes an advertisement for haygain. She tested the product, which makes the hay for horses cleaner, for a while and now she gives a report about it in her new YouTube video.

This is a nice example for the linking of brands but also for a good product placement. Further, it is an example of the transition between the two social media channels Instagram and YouTube.

Source: Instagram account "biniebo", picture from 11 April 2018

VII. - Content example YouTube

This is the video about haygain already mentioned in the Instagram post from “biniebo”. In the video description, she presents the links to the product.



Was ist ein HAYGAIN? | BinieBo

47,791 views

2.8K 35 SHARE



BinieBo

Published on Apr 13, 2018

SUBSCRIBE 86K

Moin ihr Lieben!

Ich teste seit ein paar Wochen den Haygain und bin total begeistert. In diesem Video erfahrt ihr mehr darüber!

Dieses Video wird unterstützt durch Farm & Stable : <http://farmstable.de>

Forschungsergebnisse: <https://www.haygain.com/pages/research...>

Schaut auch auf meinem Blog vorbei! www.biniebo-blog.de und abonniert dort den Newsletter. Auch das ist kostenlos, aber ihr bekommt dann immer mit wenn was auf meinem Blog passiert.



NELLHIED 12

Source: YouTube channel “biniebo”, video from 11 April 2018

VIII. - Content example Facebook

 **Rubinio B & Quater's Rubin B** 4. April um 15:38 · 🌐

Heute muss ich euch was Schönes zeigen! 😊 Und nein, damit meine ich nicht das wundervolle Pferd auf dem Bild 🐾 Und Achtung! Was nun folgt ist #Werbung 🙄 Und zwar Werbung für ein Produkt, welches ich selber gestaltet habe. Und ja, ich bin auch etwas stolz drauf. ❤️

Der ein oder andere weiß ja, dass ich ein kleiner MagicTack Junkie bin und es freut mich wahnsinnig, dass es nun offiziell drei Inlays zu kaufen gibt, die ich selber designt habe. 🎨 Heute möchte ich euch „Naughty Nautical“ vorstellen. Und ihr seht glaube ich sofort, was ich mir bei dieser Kombination gedacht habe. Passend zur neuen Eskadron Kollektion habe ich hier drei Swarovski Steine kombiniert und als „Mixed Inlay“ zusammengesetzt. Diese Kombi passt nicht nur hervorragend zur aktuellen Flower Edition, sondern durch die dunkelblauen Steine auch zur Brillant Dura oder Diagonal Crystal in Deepblue. ❤️ Natürlich auch zu allen Decken in der Farbe Jade, aber hierfür habe ich noch eine andere Alternative, die ich euch bald vorstelle. 🙄 Die Inlays (Swing, Gerde und Kurz) sowie die Patches gibt es bei MagicTack im OnlineShop zu kaufen. 🙄 Ich hoffe euch gefällt diese Farbzusammenstellung? Ich würde mich sehr über eure Meinungen freuen! 😊 Seid ihr schon neugierig auf die anderen Inlays?

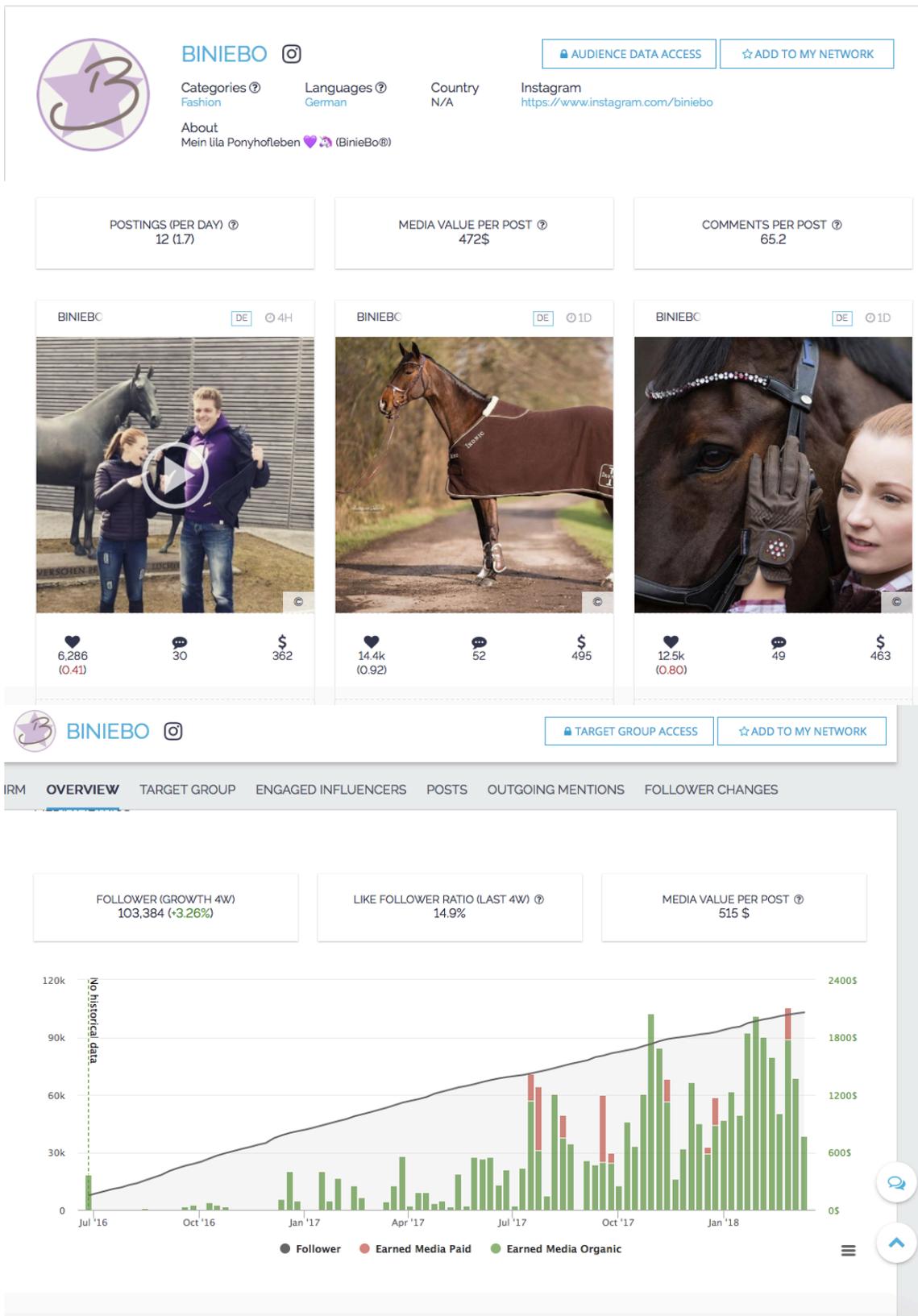
[#rubinio](#) [#herzespferd](#) [#seelenpferd](#) [#oldhorse](#) [#cushing](#) [#soulhorse](#) [#fuchspower](#) [#rubinequestrian](#) [#equestriangirl](#) [#fuchsliebe](#) [#twohearts](#) [#pferdeverrückt](#) [#stallleben](#) [#pferdeblogger](#) [#horseoftheday](#) [#magictack](#) [#magictackfashion](#) [#fuchsfashion](#) [#swarovski](#) [#lasstesglitzern](#)



This is an example of content on Instagram. It is an advertisement for MagicTack from the page “Rubinio B & Quarter’s Rubin B”. She shows three products of the brand and links the brand. Further, she recommends the products to her followers.

Source: Facebook profile from “Rubinio B & Quarter’s Rubin B”

IX. - Example of an analysis of “biniebo” on InfluencerDB



This is the analysis of “biniebo” on InfluencerDB.net. Interested brands can find a lot of information about the influencer. They can see the engagement, likes, comments, followers, target group, media value and a lot more. This is very practical to get some information beforehand.

Source: <https://www.influencerdb.net/insights/2a117d19-c183-4b09-a5fe-eab91988fff4/>