

2011

The ins and outs of the subscribers and readers of De Paardenkrant and Bit

A market research



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'The equine sector is a huge and complex beast. It combines aspects of the leisure, entertainment and service sectors and draws its customers from all geographic areas and social backgrounds.'

Foreword

For the final step in completing my education Equine, Leisure and Sports at Van Hall Larenstein Wageningen, this research among the subscribers and readers of De Paardenkrant and Bit was conducted. This market research was conducted to give more insight in the characteristics, the reading behaviour and the degree of satisfaction. These results are necessary to assess which marketing strategy is most applicable and if there is an interest among the subscribers and readers in a (new) product and/or service with informative and/or educational purposes. Complementary, also a recommendation for Eisma Media Groep is included in this report.

I want to thank Eisma Media Groep for giving me the opportunity and trust to conduct this research among their subscribers and readers. A special thanks to Marleen Jaarsma-Teuling for the excellent cooperation and instructive feedback.

Next to that I want to thank Sylvie Beekman, for her involvement and guidance along the way.

Marleen van Delft

Wageningen, July 2011

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Samenvatting

De paarden sector is zeer gevarieerd van aard en er is een breed scala van spelers die actief zijn op de markt. Eén van de bedrijven die actief is op het gebied van uitgeven met als doel te informeren en onderwijzen is Eisma Media Groep. Met het paarden cluster, bestaande uit; 'het Hengstenboek' 'De Paardenkrant', 'Bit' en de website Horses.nl is dit bedrijf ook actief in de paarden sector.

Enkele jaren geleden was er al een onderzoek uitgevoerd onder de lezers van De Paardenkrant en Bit. Maar deze resultaten zijn nu gedateerd. Ook vanwege de overname, zijn er nog onduidelijkheden binnen Eisma Media Groep over de kenmerken, het leesgedrag en de mate van tevredenheid van de abonnees en lezers van De Paardenkrant en Bit. Deze resultaten zijn nodig om te beoordelen welke marketing strategie het meest van toepassing is op De Paardenkrant en Bit. En daarnaast of er onder de abonnees en lezers van de Paardenkrant en Bit een interesse bestaat voor een (nieuw) product of dienst met informatieve en /of educatieve doeleinden.

Voor het uitvoeren van dit onderzoek is een vragenlijst ontworpen, die online op de website Horses.nl kon worden ingevuld. Daarnaast werd de vragenlijst ook gepubliceerd in De Paardenkrant, om ook de wat oudere abonnees en lezers van De Paardenkrant te bereiken. Een totaal van 878 respondenten heeft de vragenlijst ingevuld, waarbij een onderscheid wordt gemaakt tussen abonnees van De Paardenkrant (N=271), lezers van De Paardenkrant (N=340), abonnees van Bit (N=236) en lezers van Bit (N=325). Er moet in acht worden genomen dat er een overlap tussen deze vier groepen bestaat. De vragenlijst was online beschikbaar met het programma Polldaddy. Met dit programma werden de resultaten geëxporteerd via Excel naar SPSS, waar de data in werd geanalyseerd.

Uit dit onderzoek kan worden geconcludeerd dat er overeenkomsten maar ook verschillen tussen de abonnees en lezers van De Paardenkrant, de abonnees en lezers van Bit, maar ook tussen De Paardenkrant en Bit bestaan. Vooral de abonnees van De Paardenkrant wijken af van de andere groepen. Voor zowel De Paardenkrant als Bit is er een significant verschil tussen de abonnees en lezers te vinden in de tijd van het lezen, in hoeverre zij het product lezen en de mate van tevredenheid. Met het oog op de marketingmix, kan het grootste voordeel worden behaald op het gebied van promotie, voornamelijk omdat de abonnees en lezers over het algemeen tevreden zijn over het product en de prijs. De focus van de promotieactiviteiten dienen te liggen op het aanbieden van proefabonnementen en cadeauabonnementen en het aanwezig zijn op evenementen, waarbij een actieve benadering van de potentiële klant belangrijk is.

Aanvullend, is er onder de respondenten interesse in de aanvullende activiteit workshops en zij geven ook aan geïnteresseerd te zijn in een tijdschrift dat volledig gaat over dressuur. Maar voordat de markt wordt betreden met een nieuw product of dienst is het aan te bevelen om meer onderzoek te doen om meer inzicht te krijgen in de wensen, motieven en verwachtingen van de doelgroep.

Abstract

The equine sector has a diverse nature and a wide variety of players are active on the market. One of the businesses which are active in the field of publishing and media to inform and educate is Eisma Media Group. With the 'horse cluster', consisting of; 'De Paardenkrant', 'Bit', the website Horses.nl and 'het Hengstenboek', this business is also active in the equine sector.

Several years ago there was a research done among the readers of De Paardenkrant and Bit. But now the results are out dated. Also because of the acquisition, there are still things unclear for Eisma Media Groep about the characteristics, the reading behaviour and the degree of satisfaction of the subscribers and readers from De Paardenkrant and Bit. These results are necessary to assess which marketing strategy is most applicable to De Paardenkrant and Bit. And whether there is an interest among the subscribers and readers of De Paardenkrant and Bit for a (new) product or service with informative and/or educational purposes.

To conduct this research a questionnaire was designed, which was online on the website Horses.nl. Next to that the questionnaire was published in De Paardenkrant, to also reach the somewhat older subscribers and readers of De Paardenkrant. A total of 878 respondents filled in the questionnaire, where a distinction is made between the subscribers of De Paardenkrant (N=271), readers of De Paardenkrant (N=340), subscribers of Bit (N=236) and readers of Bit (N=325). Note that there is an overlap between these four groups. The questionnaire was available online with the program Polldaddy. With this program the results were exported via Excel to SPSS, where the data was analysed.

From this research can be concluded that there are similarities but also differences between the subscribers and readers of De Paardenkrant, the subscribers and readers of Bit, but also between De Paardenkrant and Bit. Especially the subscribers of De Paardenkrant differ from the other three groups. For De Paardenkrant as well as Bit a significant difference between the subscribers and readers is found in the time of reading, extent of reading and the degree of satisfaction.

When looking at the marketing mix, the biggest benefits can be achieved on the area of promotion, while the subscribers and readers are satisfied about the product and price. The focus of the promotional activities should be on events, to play an active role on these events, and on offering trial subscriptions.

Complementary, the respondents stated to have interest in a new product and/or service, this can be a complementary activity like workshops and/or a magazine which is completely about dressage. But before entering the market it is recommended to conduct more research to get more insight in the desires, motives and expectations of the target group.

1. Introduction

'The equine sector is a huge and complex beast. It combines aspects of the leisure, entertainment and service sectors and draws its customers from all geographic areas and social backgrounds' (Eastwood et al., 2006)

This quote shows that the equine sector has a diverse nature and a large size. The next definition confirms this. The equine sector is, according to the Nota Dierenwelzijn 2007 from the Ministry of LNV, a rapidly growing sector with a wide variety of players, which differ from professional breeders and owners of horses to individuals who keep horses as a hobby.

The diverse nature and the size of the equine sector makes it difficult to analyse the market. For businesses it is therefore necessary to conduct (market) research to be close to the market (Gilligan and Wilson, 2009).

When a business wants to be successful (in the equine sector) it is necessary to have a clear understanding of the environment it operates in. In this way the business can attract new customers and keep the existing customers happy. Not only is it necessary to understand what the customers' needs and desires are, but also what its competitors are doing (Dibb et al., 2006; Eastwood et al., 2006; Gilligan and Wilson, 2009). By conducting market research and analysing the internal and external environment of a business, the business can create a suitable marketing strategy. In this way a business makes the best use of its resources to achieve its marketing objectives (Dibb et al., 2006; Kotler, 2005).

As already mentioned the equine sector has a diverse nature. There are a wide variety of players, not only focused on breeding or trading, but some of these players focus on informing and educating horse enthusiasts. Some of these businesses are active in the field of media. Also the media has gone through a lot of changes the recent decades. Commercialisation, cross-mediatisation and digitisation are terms that cite to the changes that are made: the introduction of commercial television and radio in the late eighties, focus on audio-visual and digital media and the emergence of internet as home media (SCP, 2009). There are still a lot of developments happening, concerning the media. In recent years the internet has become a lot more interactive and sociable, through the use of e.g. Hyves, Facebook, YouTube and Myspace. Personal digital assistants (pda's) and smartphones make it possible to stay in constant reach of different media and to be reachable at all times (SCP, 2009).

These developments make it hard to describe the trends in the media environment. You can wonder whether it is still possible to distinguish between the individual media types; the newspaper, television and the internet. From the perspective of the user, these types of media get more an overlap. Also the use of these media is changing. However, historians have pointed out that the new communication technologies will never eliminate the old completely (SCP, 2009).

One of the businesses which are active in the field of publishing and media to inform and educate is Eisma Media Groep. Eisma Media Groep is specialised in business to business communication and educational publications. The headquarter of Eisma Media Groep is in Leeuwarden. The organisation is, since its foundation in 1874, situated in Leeuwarden, but has since 2010 also a location in Doetinchem.

Eisma Media Groep includes five publishing groups:

- Eisma Businessmedia
- Eisma Buildmedia
- Eisma Trademedia
- Eisma Industrialmedia
- Eisma Edumedia

The 'horse cluster', consisting of; 'De Paardenkrant', 'Bit', the website Horses.nl and 'het Hengstenboek' is part of Eisma Businessmedia.

Several years ago a research was conducted among the readers of De Paardenkrant and Bit. But now the results are out dated. Also the internal and external environment changed. Because of the acquisition there is still a lot unclear for Eisma Media Groep about the characteristics, the reading behaviour and the degree of satisfaction of the subscribers and readers from De Paardenkrant and Bit. These results are necessary to assess which marketing strategy is most applicable to the readers of De Paardenkrant and Bit. And whether the subscribers and readers are interested in a (new) product or service with informative and/or educational purposes.

The intention of this research is therefore to provide insight on the characteristics, the reading behaviour and the degree of satisfaction of the readers of De Paardenkrant and Bit. To give insight on how the marketing can be adapted to the subscribers and readers of De Paardenkrant and Bit and to assess whether the readers and subscribers are interested in a (new) product or service with informative and/or educational purposes.

The main question of this research is: What are the differences between the characteristics of the subscribers and readers of De Paardenkrant and Bit, their reading behaviour and the degree of satisfaction and is there an interest among the subscribers and readers for a (new) product or service with informative and/or educational purposes?

To conduct this research, seven sub questions were designed:

1. What are the characteristics of the subscribers and readers of De Paardenkrant and Bit?
2. How can the reading behaviour of the subscribers and readers of De Paardenkrant and Bit be characterized?
3. What is the degree of satisfaction of the subscribers and readers of De Paardenkrant and Bit about the offered product?
4. Is there a difference between the reading behaviour and the degree of satisfaction of the subscribers and readers of De Paardenkrant and Bit?
5. Is there an interest among the subscribers and readers of De Paardenkrant and Bit in a (new) product or service which has informative and/or educational purposes?
6. What kind of marketing strategies do businesses use to reach their customer?
7. How can the marketing of Eisma Media Groep be adapted to the target group?

2. Literature review

2.1 The equine industry

According to the Nota Dierenwelzijn 2007, from the Ministry of LNV the equine sector is rapidly growing and has a wide variety of players, which differ from professional breeders and owners of horses to individuals who keep horses as a hobby. The conclusion from the research 'Inventarisatie Paardenhouderij', which was conducted commissioned by the Ministry of LNV in 2005, was that based on the available indicators the number of horses in the Netherlands cannot be determined (Rijksen et al., 2005). Therefore, it is difficult to gain insight in the actual size of the industry, because the available data is largely based on estimates.

Estimated is that there are between 400,000 and 450,000 horses kept in the Netherlands (Nota Dierenwelzijn, 2007). The number of horses last estimated by Sectorraad Paarden in 2005, was a total of 420,000 (Rijksen et al., 2005). The number of locations where horses are kept is estimated on 81,000 (Agricola, 2008).

The line between horses which are kept on a recreational basis and on a professional basis is not very clear. Horse owners with 1-5 horses are considered to keep the horses on a recreational basis. When a business has between 5 and 25 horses it is assumed that this is not the main income, the Ministry of LNV defines these businesses as semi-professional. Businesses with more than 25 horses are defined as professional (Agricola, 2008; Nota Dierenwelzijn, 2007). Based on this distinction it is estimated that 90 % of the horse owners keep horses on a recreational basis, about 8% can be defined as semi-professional and less than 3 % is involved with horses on a professional basis (Agricola, 2008).

The horses which are kept on a recreational basis are spread over many locations, while the horses kept on a professional basis are more concentrated at one place (Agricola, 2008). From the research from LEI and the Animal Science Group it is shown that 79 % of the horse enthusiasts are not income dependant on horses, 16 % is partly dependant and 5 % are income dependant on horses (Wijk-Jansen et al., 2009).

There are different purposes for which horses are kept. But the largest number is kept for recreation and leisure, it is estimated that there are about 450,000 recreational riders in the Netherlands (Wijk-Jansen et al., 2009). The research which was conducted by ZKA Consultants & Planners (in 2001 and 2006), showed that the amount of horses which are kept in private ownership is estimated on 211,000 horses in 2006. In the research from 2001 on the other hand, this number was 260,000 (KNHS, 2006). This means a decrease of 19 %. On the other hand, the amount of horse athletes that keep one or more horses increased with 22 % between 2001 and 2006. In 2001 this number was 74,400 and in 2006 this was 90,700 (KNHS, 2006). The increase of the amount of horse athletes which own a horse can have an effect on the amount of horse athletes who keep their horses at home. A horse athlete with a own horse or pony had in 2001 on average 1,8 horse and 1,7 pony, in 2006 this was 1,3 horse and 1,0 pony (Agricola, 2008).

Results also showed that the amount of active horse athletes from 8 years and older increased with 16 % between 2001 and 2006. The number of active athletes in 2001 was estimated on 392,000 and in 2006 this was 456,000 (KNHS, 2006). The average horse athlete is relatively young, from the total number of horse riders is 42 % under the age of twenty. 80 %, of the horse athletes is female (KNHS,

2006). The study of LEI and the Animal Science Group showed that 85 % of the horse enthusiasts are female and 15 % male (Wijk-Jansen et al., 2009). The income is slightly above average and 20 % of the horse athletes owns a horse and lives by reasonable proportions across all provinces of the Netherlands (KNHS, 2006).

Most of the equine sports is practised on a recreational basis, dressage and jumping are the most important disciplines (Agricola, 2008). Between 2001 and 2006 the equine sports is increasingly practised on own property or at livery yards and less often at riding schools (KNHS, 2006).

Horse enthusiasts in the Netherlands can be involved with horses in several ways. In the research of LEI and the Animal Science Group a distinction between thirteen ways is made. From an analysis of the interviews (N=4,267), it was found that 71 % of the horse enthusiasts are involved with horses in more than one way of the thirteen ways. Riding or driving horses themselves was the most common way to be involved with horses (85 %). Secondly 36 % stated that they are busy with stabling or caring for horses, 26 % breeds horses, 23 % trains horses, 22 % stated that they are living in the countryside with a horse near home, 20 % gives riding or driving lessons, 8 % is doing an equestrian course or education, 7 % is treating horses/ keeping horses healthy, 7 % is involved in horse keeping from an administrative point of view, 5 % is trading horses, 4 % delivers goods or services to the horse-keeping sector and horse sport sector, 2 % is busy with horses through their children but are themselves not involved with horses, 9 % is busy with horses in a different way (Wijk-Jansen et al., 2009).

Most of the horse enthusiasts are affiliated with an organisation (75 %), 25 % of the respondents of the research of LEI and Animal Science Group stated that they are not affiliated with an organisation in the horse-keeping sector. From the respondents which are affiliated with an organisation, 60 % are affiliated with an organisation for sports, riding or recreation. 29 % is affiliated with a breeding organisation, 3 % is part of an entrepreneur organisation and 7 % is affiliated differently (Wijk-Jansen et al., 2009).

Personal contacts with other horse enthusiasts who are involved in a similar way with horses is for horse enthusiasts the main channel through which they search for information, followed by the veterinarian, farrier and riding instructor (Wijk-Jansen et al., 2009).

About three out of ten horse athletes reads one or more horse magazines, the most widely read magazine is Hoefslag, but also Paard & Sport and Bit are widely read (KNHS, 2006). Although the magazine Bit is the most popular magazine according to the research of LEI and the Animal Science Group, followed by Paard & Sport and Hoefslag and Bokt.nl is the most popular website (Wijk-Jansen et al., 2009).

2.2 Development of marketing

When a business wants to be successful (in the equine industry) it is necessary to have a clear understanding of the environments it operates in. The business can attract new customers and keep the existing customers happy. It is not only necessary to understand what the needs and desires of the customers are, but also to keep track what the competitors of the business are doing (Dibb et al., 2006; Eastwood et al., 2006; Gilligan and Wilson, 2009). Therefore it is important for businesses to invest in marketing (Kotler, 2005).

Over the years marketing has been described and defined differently. The vision on this matter is greatly changed in recent decades (Boekema et al., 2005). Nowadays marketing is defined as *'a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others'* (Kotler, 2005).

Centuries ago markets did not even exist, the households were self-sufficient in their necessity of life. Gradually there came a division of labour into being, creating a specialisation in certain goods or services. But this specialisation lead to a surplus of goods that these households produced and a shortage of goods that they did not produce anymore. The result was a mutual exchange of goods. Initially there was a direct change of goods, but by introducing money and intermediate trade also indirect exchange of goods became possible. Gradually there became a need for a system which would held the flow of products from producer to consumer on the right track. To satisfy those needs, marketing arose (Boekema et al., 2005).

After the industrial revolution, entrepreneurs were largely oriented on the production. Efficiency was an important part of production, in practice this meant mass production at low costs. Starting point of these businesses is the idea that customers are only interested in low prices (Boekema et al., 2005). Once the market of a business begins to reach a certain point of saturation, sales of the products will go less smoothly. The position of the business in the market is weaker, because the sales is stagnating. Now the role of the buyer gets more important. But the businesses are primarily focused on identifying and attracting customers and it is most important to look at how they can easily sell. This occurred a lot before and after the Second World War (Boekema et al., 2005). As well in the production as the sales oriented vision, the vision of the businesses are focused on the existing product. To whom the product is sold is not important as long as the revenue exceeds the costs (Boekema et al., 2005; Kotler, 2005). When a business does not take into account who the customer is and what kind of needs they have, the business is more likely to disappoint the customer. A competitor who takes the needs of the customer into account will satisfy the needs of the customer and will reach a bigger market. This point of view lead to the marketing concept, which arose from the 1950s (Boekema et al., 2005). Businesses found that they first had to determine what customers wanted and then produce it, rather than simply making products first and then trying to change the needs of the customer to correspond to what was being produced. The needs of the customer became more important and a business could find a place in the market when they were targeting on a certain group of customers. In other words, businesses made use of market segmentation (Boekema et al., 2005; Dibb et al., 2006).

Before businesses paid attention to the needs of the customer, marketing decisions were mainly based on judgment and experience. This does not mean that there was no marketing analysis, but until the sixties the emphasis was more on collecting data than on analysing these data in a way that is helpful for executive decision making (Frank et al., 1962). In the first half of the sixties there came a more analytical approach of marketing decision making into being (Hillier and Wierenga, 2008).

At the beginning of the 1970s there are relevant societal subjects added to the existing marketing concept. The well-being of the customer in general was becoming more important. This meant that the public interest is sometimes more important than the interests of the individual. This is called the societal marketing concept (Boekema et al., 2005). Also the field of marketing models grew exponentially in this decade. Especially consumer brand choice models attracted a lot of attention from researchers. But most attention was for models concerning the marketing mix instruments (Hillier and Wierenga, 2008).

Knowledge and data about marketing was growing (Hillier and Wierenga, 2008) and in the 1990s the priority for marketing was to identify the needs of the customer, determine priority target markets and achieve sales through marketing programmes (Dibb et al., 2006). The view of marketing was largely transaction based. Long-term success and market share gains depend on such transactions, but businesses found it more and more important to maintain customer's loyalty and to repeatedly gain sales from existing customers. The businesses are more and more moving away from the transaction-based marketing and towards relationship marketing (Dibb et al., 2006; Kotler, 2005).

Relationship marketing refers to *'long-term, mutually beneficial arrangements in which both the buyer and seller focus on value enhancement through the creation of more satisfying exchanges'* (Dibb et al., 2006).

In the recent years the individual customer is getting more important. This approach lead to the development of new models, for example Customer Relationship Management (CRM). The upcoming use of e-commerce or online marketing plays a big role in placing more emphasis on the individual customer. The way suppliers interact with their customers is dramatically changed through online marketing (Hillier and Wierenga, 2008).

2.3 Marketing analysis

A business has the biggest change on success when it takes the needs of the customers into account. This is called the marketing concept, this is *'the philosophy that an organisation should try to provide products that satisfy customers' needs through coordinated set of activities that also allows the organisation to achieve its goals'* (Dibb et al., 2006).

Not only the satisfaction of the needs of the customers are important for a business, but it is also important to keep an eye on what competitors are doing. The business should notice and analyse the changes of the (external) environment.

This means that before starting with a marketing strategy, the market has to be analysed. This marketing analysis contains different parts, the analysis of the customers, competitors, the marketing environment (trends) and the internal capabilities. The external environment and trends can be assessed by using the PEST-analysis (Eastwood et al., 2006). Marketing strategist Micheal Eugene Porter developed a framework for industry analysis and business strategy development. Porter defined five forces (figure 2.3.1) that together determine competition in an industry or market (Mandour et al., 2005).

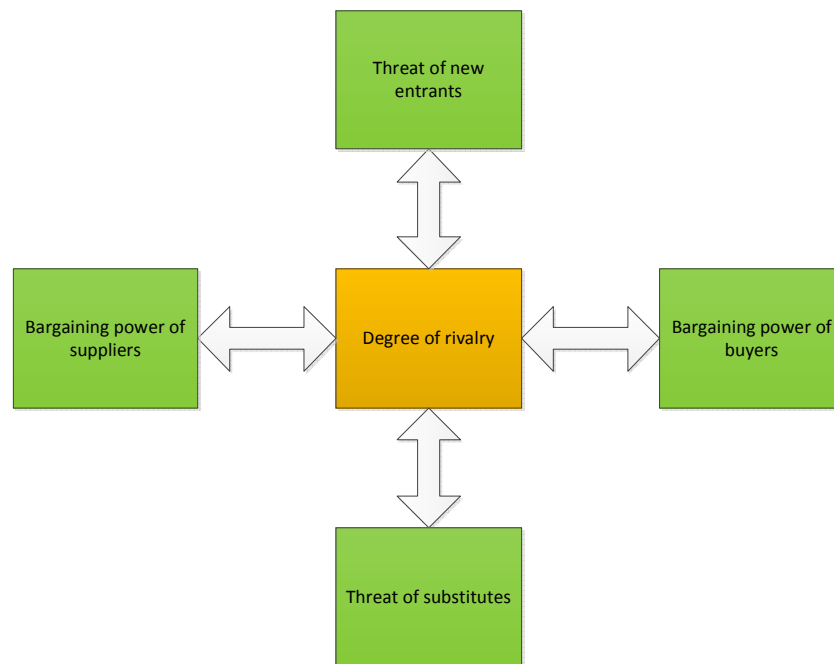


Figure 2.3.1

Porter's Five Forces that determine the competition and attractiveness of a market (Porter, 1985).

Starting point of the model is formed by the five different forces and the interconnection between the forces. The next step is to assess how much influence these forces have on a business (Mandour et al., 2005).

The internal capabilities of a business can be analysed in different ways, the SWOT analysis is one of the most simplistic used by marketers. In this model not only internal elements are evaluated, but also the external environment is analysed. Using the SWOT analysis, first the internal elements (strengths and weaknesses) of a business are identified. Then the external elements (opportunities and threats) are identified. The third step is to make a confrontation matrix and to name the issues. The last step is to create strategic options on basis on the information of the SWOT analysis (Mandour et al., 2005).

2.4 Marketing strategy

When the marketing analysis is completed, the next step is to set a marketing strategy. *'This is a strategy indicating the opportunities to pursue, specific target markets to address, and the types of competitive advantages that are to be developed and exploited'* (Dibb et al., 2006).

To be effective a marketing strategy has to be goal driven. In this way a business is moving in a certain direction. To set objectives it is key to take three aspects of the business into account:

- The nature of the current business
- Where it should go
- How the business gets there

(Gilligan and Wilson, 2009).

Igor Ansoff developed a model, known as the Ansoff matrix (figure 2.4.1), to help to determine the

best suitable growth strategy that can be implemented through marketing strategies. A business may choose one or more competitive strategies as the basis for its strategic objectives.

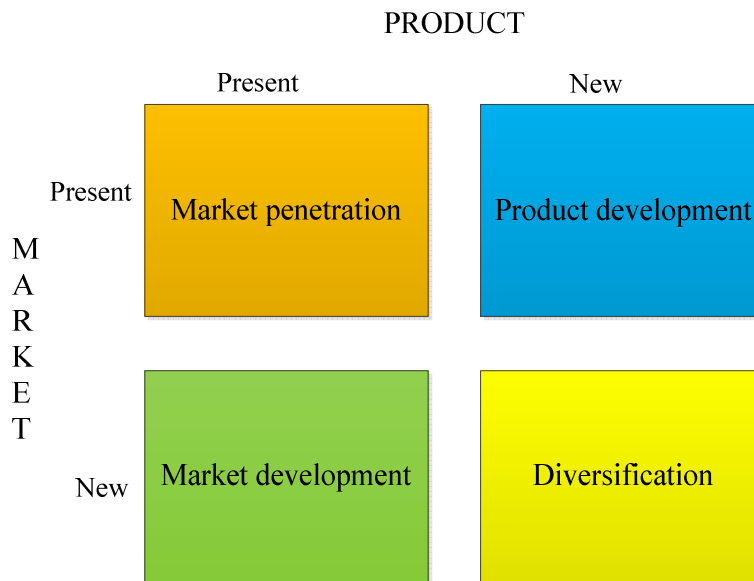


Figure 2.4.1

The Ansoff matrix which helps a business to determine a growth strategy based on existing and/or new products and existing and/or new markets (Ansoff, 1988).

Dependent on the current market situation and the objectives of the business, the business may choose one of these four growth strategies. The goal of market penetration is to increase the current market share. This is achieved by getting customers from competitors or to ensure that current customers make greater use of the product or service. In market development businesses try to sell their existing products on new markets or to increase the existing market. With product development customers are encouraged to spend more at a certain business, to achieve this the offer to the existing customers is expended. The last growth strategy, diversification, is when a business offers totally new products on a completely unknown market (Mandour et al., 2005).

The marketing strategy contains different parts, first the market segment has to be identified. There are many ways in which customers can be grouped and markets segmented. And once the segments have been identified, the business has to decide about which and how many customer groups to target. The third step is to position the product within the market. The business must decide how and where within the targeted segment to aim the product or brand (brand positioning). Then it is necessary for the business to create a basis for competing in the market. The creation of a competitive advantage is a core component of the development of a marketing strategy and can be achieved in different ways. Micheal Eugene Porter developed three generic routes to achieve competitive advantage. (Dibb et al., 2006).

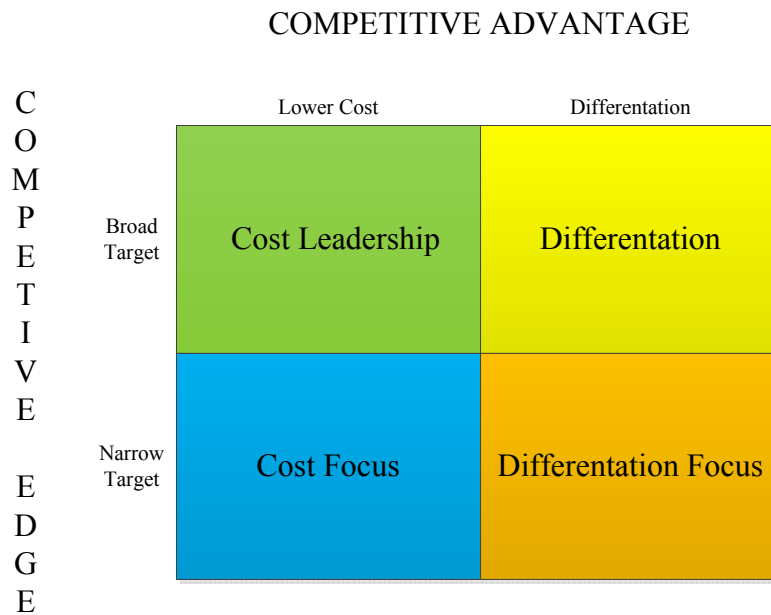


Figure 2.4.2

Porter's generic strategies, consisting general types of strategies to achieve and maintain competitive advantage. (Porter, 1985).

As showed in figure 2.4.2, there are several strategies distinguished by Porter. The first approach is cost-leadership. This is when a business sets out to be the low cost producer in its industry. The second approach is differentiation, a business sets out to be unique in its industry. The third competitive advantage contains two variants, cost focus and differentiation focus. A business sets out to be the best in a segment or a group of segments (Porter, 1985). When a business fails to achieve any of these strategies, this can result in the business becoming 'stuck in the middle'. Then the business does not have a real competitive advantage.

The selection of marketing opportunities, analysis of target market(s) and the creation and maintenance of an appropriate marketing mix all come together in the marketing strategy of a business, in a way to satisfy the customers in the target market (Dibb et al., 2006).

3. Methodology

3.1 Research design

It is a two-part study and consists out of desk and field research.

The desk research contains a literature review of secondary data and also previous and related studies were reviewed. The aim of the literature review was to get more insight in the equine industry in the Netherlands. Furthermore the development of marketing and marketing strategies were studied. The information about the equine industry was needed to be able to assess the final results of this research in the right context and to be able to analyse whether there are differences and/or similarities between the 'average horse enthusiast' and the subscribers and readers of De Paardenkrant and Bit. The literature review of the development and marketing strategies was needed to gain more insight in marketing to be able to give a proper recommendation to Eisma Media Groep. Previous studies were reviewed to see whether there are similarities and/or differences between previous studies and this research.

The field research is conducted among readers of De Paardenkrant and Bit to give more insight about their characteristics, reading behaviour and degree of satisfaction. And complementary to assess whether there is an interest among the subscribers and readers for a (new) product or service with informative and/or educational purposes. Moreover also the reading time, the extent of reading and the degree of satisfaction of the subscribers and readers of De Paardenkrant, but also for Bit, are compared to be able to see whether there are differences. Also the differences between De Paardenkrant and Bit are analysed. This knowledge is important to assess in what degree the products (De Paardenkrant and Bit) fit to the customer and if the customers are satisfied about the product. This information is also important to assess how Eisma Media Group can attract new customers and if they can reach a new segment.

3.2 Data collection

The data of the field research is collected among the subscribers and readers of De Paardenkrant and Bit, by using questionnaires (see annex 6 for the questionnaires). The questionnaire was available online from 11 March till 11 April, on the website www.horses.nl/mijnmening. The questionnaire was available online with the program Polldaddy. As well in De Paardenkrant as in Bit an announcement and reference for the questionnaire was made. Because the subscribers of De Paardenkrant are relatively older (from previous research it was shown that the average age of the subscribers of De Paardenkrant is 50 years) than the subscribers of Bit (previous research has shown that the average age is 32) the questionnaire was also published in De Paardenkrant itself. This in order to prevent that a part of the target group would be missed.

To attract readers to visit the website and to fill in the questionnaire, there were 75 prizes available.

3.3 Data processing

		De Paardenkrant			
		No subscriber	Subscriber	Reader	Total
B i t	No subscriber	0	222	95	317
	Subscriber	138	26	72	236
	Reader	129	23	173	325
	Total	267	271	340	878

Fig. 3.3.1 The amount of respondents who participated in this research, divided in no subscribers, subscribers and readers of De Paardenkrant and/or Bit

With the program Polldaddy the results were exported via Excel to SPSS (PASW Statistics 17.0). In Excel the data was processed to that extent that the data could be exported to SPSS. Complementary the handwritten surveys were also added in SPSS. Not all the surveys could be used, because not all the respondents answered all the questions.

The data was analysed in SPSS using descriptive statistics to describe the characteristics, reading behaviour and degree of satisfaction of the subscribers and readers of De Paardenkrant and Bit.

The Mann-Whitney test was used to compare two independent groups. This test was performed to analyse whether there is a difference in reading time between the subscribers and readers of De Paardenkrant. Also to analyse whether there is a difference in extent of reading in this group and whether there is a difference in the degree of satisfaction.

The Mann-Whitney test was also used to analyse whether there is a difference in reading time between the subscribers and readers of Bit. For the same group this test was performed to analyse whether there is a difference in extent of reading and also to analyse whether there is a difference in the degree of satisfaction. An effect was considered to be significant when $p\text{-value} < 0.05$.

4. Results

4.1 Characteristics

	Subscribers PKR (N=271)	Readers PKR (N=340)	Subscribers Bit (N=236)	Readers Bit (N=325)
Average age	46.8 years	29.7 years	33.1 years	29.8 years
Sex	48 % male 52 % female	7.7 % male 92.4 % female	4.7 % male 95.3 % female	4.3 % male 96 % female
Province	20.3 % Gelderland 14 % Noord-Brabant 12.2 % Overijssel	17.4 % Gelderland 17.1 % Zuid-Holland 14.1 % Noord-Brabant	16.5 % Zuid-Holland 15.7 % Gelderland 11.4 % Noord-Holland	16.6 % Gelderland 14.2 % Noord-Brabant 13.9 % Zuid-Holland
Education	43.2 % MBO 24.7 % HBO	32.4 % MBO 26.5 % HBO	35.6 % HBO 26.7 % MBO	29.9 % MBO 28.6 % HBO
Income	30.3 % average income 28.8 % above average 22.9 % below average	32.4 % is doing an education 27.7 % average income 20.6 % below average	29.7 % average income 25 % below average 18.2 % is doing an education	28 % average income 28 % is doing an education 21.9 % below average
Busy with horses (per week)	22 hours 48 minutes	21 hours 7 minutes	19 hours 42 minutes	19 hours 27 minutes
Amount of own horses	6.8	2.3	2.2	2.1
Horses stabled	70.9 % at home 14 % at a livery yard	40 % at a livery yard 25.6 % at home	36 % at a livery yard 34.3 % at home	39.1 % at a livery yard 25.5 % at home
Involvement with horses	74.2 % owns a horse 56.5 % breeds horses 47.2 % keeps horses as a hobby 39.9 % rides competitions	76.8 % owns a horse 51.5 % rides competitions 34.4 % rides on a recreational basis 29.4 % keeps horses as a hobby	81.4 % owns a horse 51.3 % rides competitions 40.7 % rides on a recreational basis	74.5 % owns a horse 45.5 % rides competitions 39.7 % rides on a recreational basis
Income dependence on horses	78.23 % hobby 14.76 % partly income dependent 7.01 % profession	81.8 % hobby 14.7 % partly income dependent 3.5 % profession	86 % hobby 12.7 % partly income dependent 1.3 % profession	84 % hobby 11.7 % partly income dependent 4.3 % profession

Fig. 4.1.1 Characteristics of the subscribers and readers of De Paardenkrant and Bit.

	Subscribers PKR (N=271)	Readers PKR (N=340)	Subscribers Bit (N=236)	Readers Bit (N=325)
Membership association	72.3 % member of studbook 60.9 % member of KNHS 59 % member of riding association	63.8 % member of riding association 60.6 % member of KNHS 36.8 % member of studbook	62.3 % member of riding association 60.6 % member of KNHS 36 % member of studbook	57.2 % member of riding association 53.2 % member of KNHS 32.3 % member of studbook
Visit of events	48.1 % KWPN Hengstenkeuring 40 % other option	41.2 % Horse Event 35.6 % Indoor Brabant 28.8 % Jumping Amsterdam	44.9 % Horse Event 30.9 % Indoor Brabant	43.4 % Horse Event 30.5 % Indoor Brabant
Channels to obtain information about horses	81.2 % magazines 80.8 % internet 72.3 % via family, friends, relatives	96.2 % internet 85.9 % magazines 82.4 % via family, friends, relatives	97.9 % internet 94.5 % magazines 77.1 % books 75 % via family, friends, relatives	94.5 % internet 87.1 % magazines 79.4 % via family, friends, relatives 70.8 % instructor
Use of websites	70.8 % Horses.nl 61.6 % Startlijsten.nl 60.5 % Knhs.nl 59.4 % Kwpn.nl	87.1 % Horses.nl 69.1 % Bokt.nl 67.6 % Knhs.nl 60.9 % Startlijsten.nl	95.3 % Horses.nl 63.6 % Knhs.nl 63.6 % Startlijsten.nl 60.6 % Bokt.nl	88.3 % Horses.nl 72.6 % Bokt.nl 59.4 % Knhs.nl 50.8 % Startlijsten.nl
Use of social media	57.2 % makes no use of social media 32.5 % Hyves 21.4 % Facebook	69.4 % Hyves 50 % Facebook	64 % Hyves 48.3 % Facebook	66.2 % Hyves 48.6 % Facebook
Topics of interest	83 % sport 77.9 % breeding 55.7 % health 55 % training	70.9 % training 70.6 % sport 66.2 % health 52.9 % behaviour	74.6 % training 72.5 % health 69.5 % sport 61.4 % behaviour	72.6 % training 66.5 % health 64 % sport 56.3 % behaviour
Disciplines of interest	69.7 % dressage 53.9 % jumping 37.3 % driving	78.8 % dressage 49.7 % jumping 42.6 % hacking out	85.6 % dressage 50.4 % hacking out 37.7 % jumping	77.2 % dressage 49.5 % hacking out 44 % jumping
How in contact with the product	33.2 % via family, friends, relatives 27.3 % through a trial subscription 24.7 % did not know it anymore	46.6 % via family, friends, relatives 20.4 % through an event 17.1 % through Horses.nl	36.9 % through a trial subscription 24.2 % via family, friends, relatives 22.9 % did not know it anymore	40.9 % via family, friends, relatives 20.6 % did not know it anymore
Duration of subscription (in years)	28.4 % between 1-5 25.1 % between 6-10 19.6 % more than 20	not applicable	22 % between 3-4 19.5 % between 1-2 14.8 % between 5-6	not applicable

Fig. 4.1.2 Characteristics of the subscribers and readers of De Paardenkrant and Bit.

In figure 4.1.1 and 4.1.2 on the previous pages the characteristics of the subscribers and readers of De Paardenkrant and Bit are described. 40 % of the subscribers of De Paardenkrant stated to visit other events than the mentioned events, the majority stated to also visit regional events. For additional information about the characteristics see annex 1.

4.2 Reading behaviour

De Paardenkrant

The magazines that are most commonly read by the subscribers of De Paardenkrant are: In de Strengen (62.5 %), Paard & Sport (61.7 %) and the magazine of the studbook (43.5 %). The magazines that are most commonly read by the readers of De Paardenkrant are: Paard & Sport (67.9 %), Bit (67.1 %) and the Hoefslag (52.6 %). See also figure 4.2.1.

	Subscribers PKR (N=271)	Readers PKR (N=340)
Other magazines that are read	62.5 % In de Strengen 61.7 % Paard & Sport 43.5 % magazine of studbook 32.3 % Hoefslag 30.9 % Bit 17.5 % Mensport 13.8 % Het Sportpaard 6.3 % Hippische ondernemer 3.7 % Ros 3 % Cap	67.9 % Paard & Sport 67.1 % Bit 52.6 % Hoefslag 37.6 % In de Strengen 22.4 % Ros 21.8 % magazine of studbook 11.2 % Het Sportpaard 9.4 % Mensport 5.9 % Cap 5.3 % Hippische ondernemer

Figure 4.2.1 Other magazines that are read by the subscribers and readers of De Paardenkrant.

A small majority of the subscribers (28.8 %) stated that their Paardenkrant goes to someone else after reading, 27.3 % cuts out some interesting articles and 23.6 % sometimes keeps a copy of De Paardenkrant. A small majority of the readers (30.1 %) stated that their Paardenkrant goes to someone else after reading, 23 % throws the paper in the garbage after reading and 21.2 % sometimes keeps a copy.

Of the subscribers of De Paardenkrant 33.6 % stated that their Paardenkrant is not only read by themselves but also by another person, 28 % states that this are 2 persons.

The time the subscribers and readers spend reading De Paardenkrant is shown in figure 4.2.2. Most of the subscribers of De Paardenkrant have a reading time between 20-30 minutes (29.9 %) and 30-40 minutes (26.2 %). Most of the readers of De Paardenkrant have a reading time between 10-20 minutes (29.9 %) and 20-30 minutes (27.5 %).

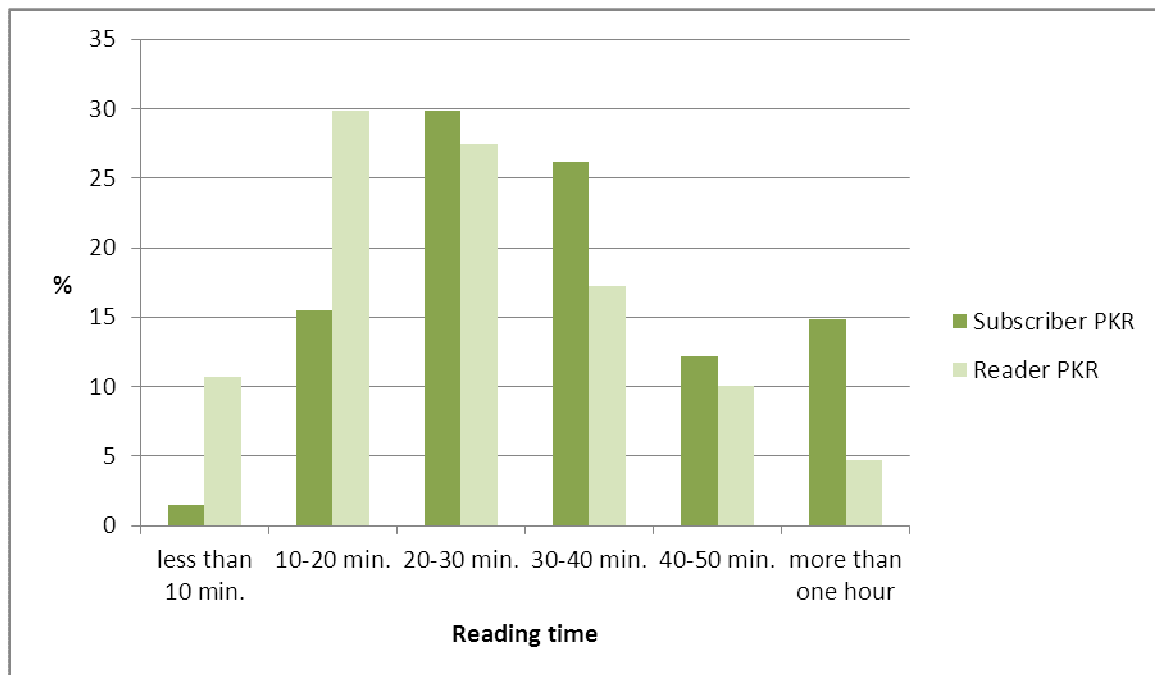


Figure 4.2.2 Reading time of the subscribers (N=271) and readers (N=340) of De Paardenkrant.

The majority of the subscribers reads De Paardenkrant largely, this is 43.2 %. Of the subscribers 28 % state that they almost completely read De Paardenkrant and 22.5 % reads about half of the paper. The majority of the readers reads De Paardenkrant largely (37.6 %), 24 % reads about half of the paper and 21.6 % reads it almost completely (see fig. 4.2.3).

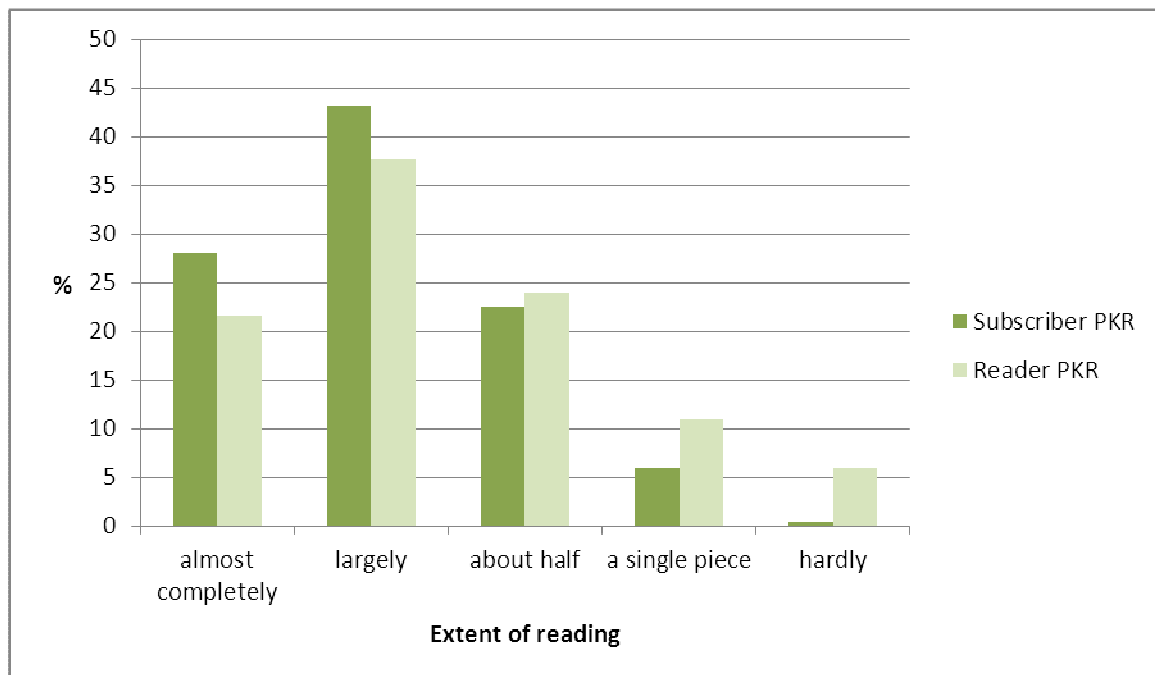


Figure 4.2.3 The extent in which the subscribers (N=271) and readers (N=340) read De Paardenkrant.

Bit

The magazines that are most commonly read by the subscribers of Bit are: Paard & Sport (71.2 %), Hoefslag (43.8 %), De Paardenkrant (37.9 %) and In de Strengen (35.2 %). The magazines that are most commonly read by the readers of Bit are: Paard & Sport (64.6 %), Hoefslag (52.9 %), De Paardenkrant (43.1 %) and Ros (29.5 %). See also figure 4.2.4.

	Subscribers Bit (N=236)	Readers Bit (N=325)
Magazines that are also read	71.2 % Paard & Sport 43.8 % Hoefslag 37.9 % De Paardenkrant 35.2 % In de Strengen 21 % magazine of studbook 19.6 % Ros 9.1 % Cap 7.8 % Mensport 5.5 % Penny 5 % Het Sportpaard 4.6 % Hippische ondernemer	64.6 % Paard & Sport 52.9 % Hoefslag 43.1 % De Paardenkrant 29.5 % Ros 27.4 % In de Strengen 22.8 % magazine of studbook 11.7 % Cap 9.5 % Penny 8 % Het Sportpaard 8 % Mensport 5.2 % Hippische ondernemer

Figure 4.2.4 Other magazines that are read by the subscribers and readers of De Paardenkrant.

The majority of the subscribers (69.5 %) stated that they keep all copies. 17.4 % gives Bit to someone else after reading. The majority of the readers (50.5 %) stated that they keep all copies. 20.6 % of the readers sometimes keeps a copy and 16.6 % gives Bit to someone else after reading.

Of the subscribers of Bit 32.6 % stated that their Bit is not only read by themselves but also by another person, 27.5 % states that this are 2 persons and 22.5 % only reads Bit themselves and is not read by anyone else.

The time the subscribers and readers spend reading Bit is shown in figure 4.2.5. Of the subscribers of Bit 36 % has a reading time of 60-90 minutes, 30.9 % takes about 30-60 minutes to read Bit and 22.9 % between 90-120 minutes. Of the readers of Bit 39.4 % has a reading time of 30-60 minutes and 32.9 % takes about 60-90 minutes to read Bit.

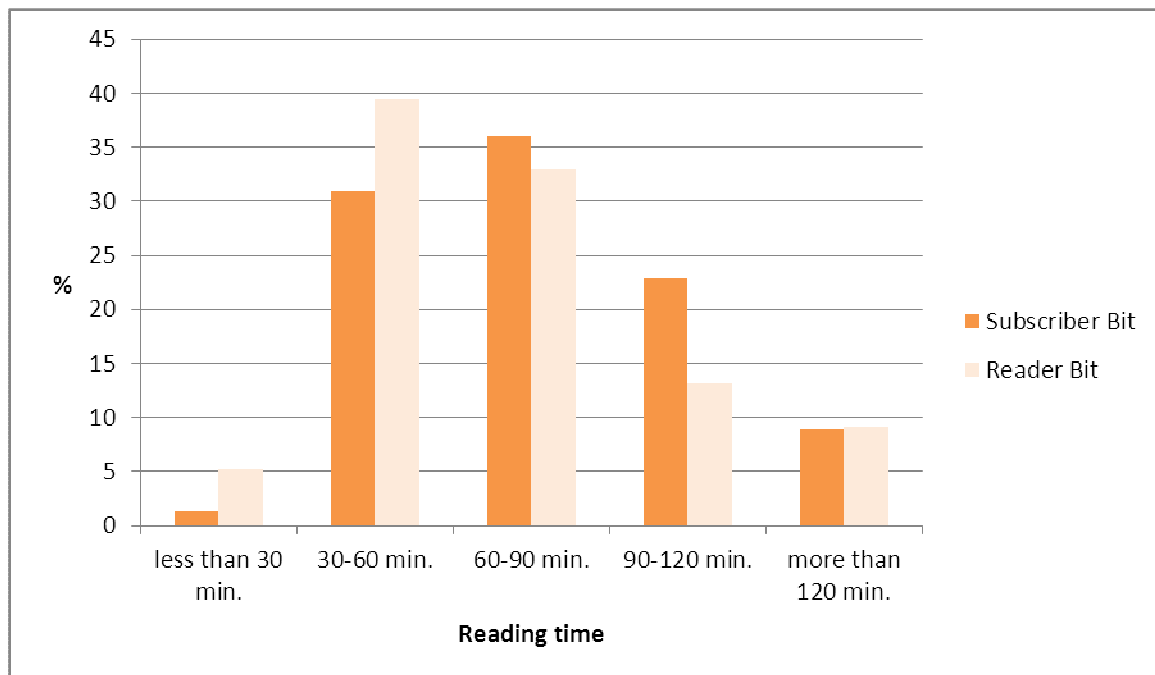


Figure 4.2.5 Reading time of the subscribers (N=236) and readers (N=325) of Bit.

The majority of the subscribers reads Bit almost completely, this is 68.6 %. Of the subscribers 23.7 % stated that they largely read Bit. The majority of the readers read Bit almost completely, this is 56.6 %. Of the readers 33.5 % stated that they largely read Bit. In figure 4.2.6 all the results with regard to the extent of reading of the subscribers and readers of Bit are shown.

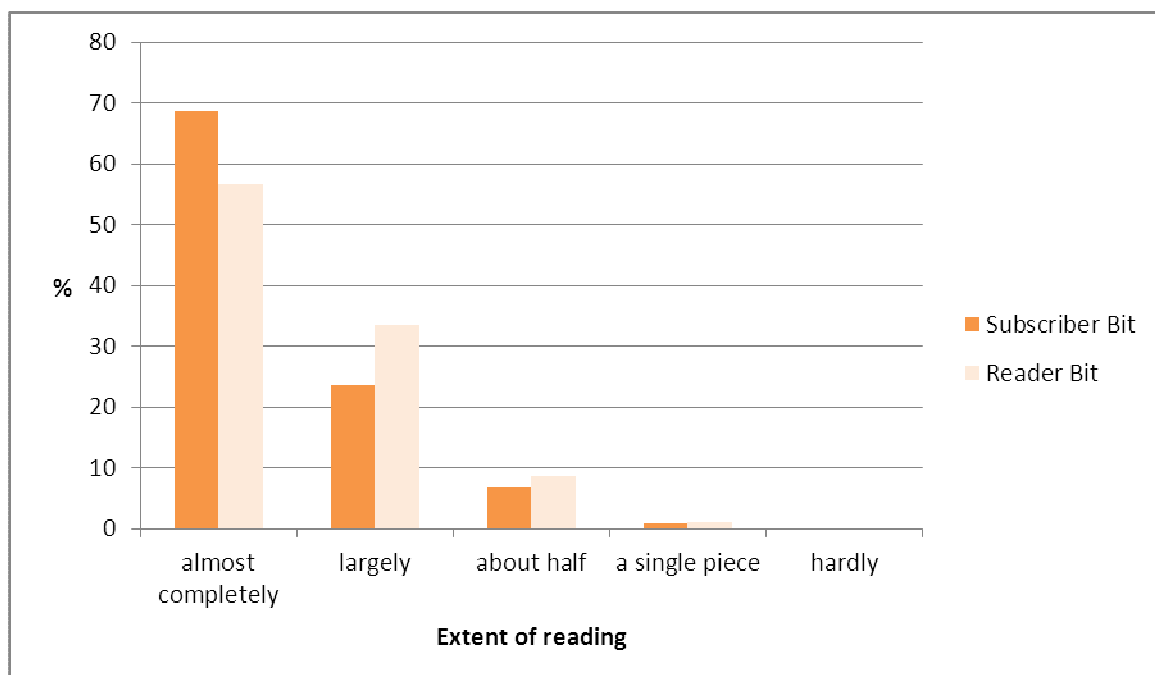


Figure 4.2.6 The extent in which the subscribers (N=236) and readers (N=325) read Bit.

Of the readers of Bit 20.6 % buys Bit 5 or 6 times per year. 20.3 % does this 3-4 times per year, 18.8 % 1-2 timer per year and 16.3 % buys Bit less than one time on an annual basis. For additional information about the reading behaviour see annex 2.

4.3 Degree of satisfaction

The vast majority of the subscribers are satisfied (64.6 %) about De Paardenkrant, 18.5 % is very satisfied and 13.3 % is to some extent satisfied. The vast majority of the readers are satisfied (60.5 %) about De Paardenkrant, 19.9 % is somewhat satisfied and 13.4 % is very satisfied.

The vast majority of the subscribers are satisfied (51.3 %) about Bit and 36 % is very satisfied. Furthermore the vast majority of the readers are satisfied (54.5 %) about Bit and 28.6 % is very satisfied. All the results about the degree of satisfaction are shown in figure 4.3.1.

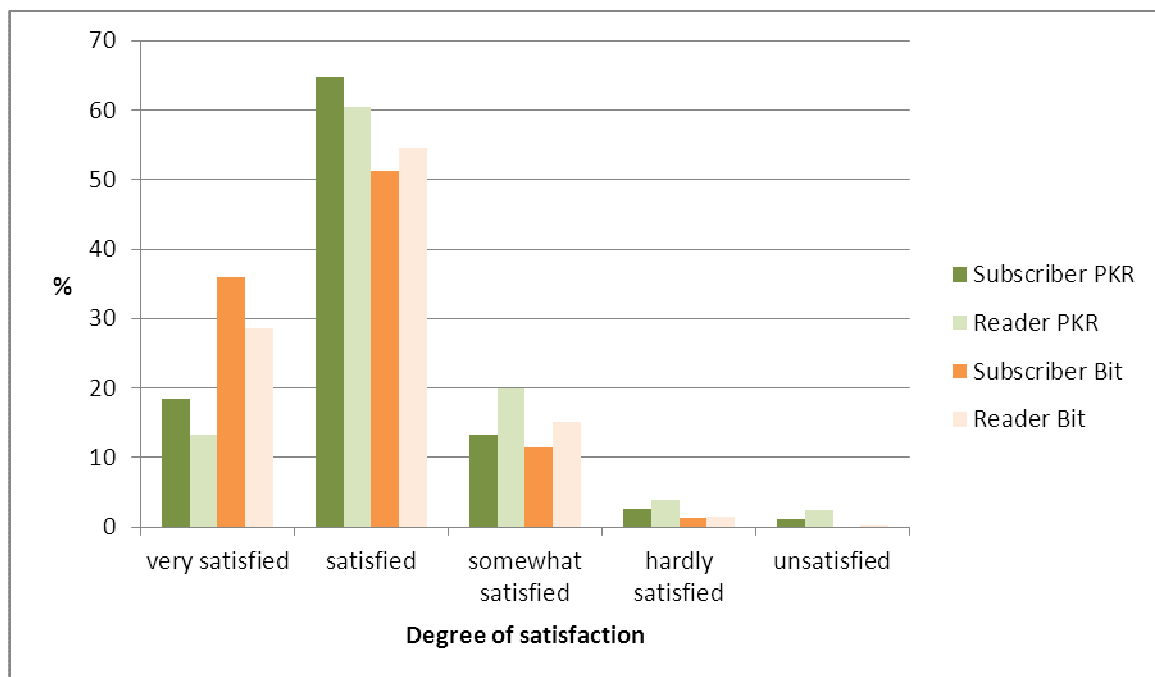


Figure 4.3.1 The degree of satisfaction of the subscribers and readers of De Paardenkrant and Bit.

De Paardenkrant

The grade which the subscribers gave for De Paardenkrant varies from 4 up to 10, with an average grade of 7.6.

52 % of the subscribers stated that their appreciation for De Paardenkrant is unchanged, 36.5 % came to a more positive appreciation and 11.4 % became more negative about De Paardenkrant. One of the reasons for choosing one of these answers is the changed lay-out of De Paardenkrant.

However 42.1 % states that they totally agree with the proposition that 'the new layout of De Paardenkrant is a good change'. The subscribers totally agree (37.6 %), neutral (14.4 %), disagree (4.1 %) and totally disagree (1.9 %) with this proposition.

From the subscribers 52 % thinks that the price is consistent with the quality, 42.8 % states that the price is too high and 5.2 % thinks the price is much too high.

Almost all the subscribers stated that the proportion of pictures and text is good (97.4 %), 0.4 % stated that there are too many pictures in De Paardenkrant and 2.2 % thinks that there are too little pictures. Next to that 71.2 % of the subscribers of De Paardenkrant states that the paper provides enough background behind the news, 19.6 % thinks this might be enough and 9.2 % states that there is not enough background behind the news.

The grade which the readers gave for De Paardenkrant varies from 1 up to 10, with an average grade of 7.3.

75.4 % of the readers stated that their appreciation for De Paardenkrant is unchanged, 19 % came to a more positive appreciation and 5.6 % became more negative about De Paardenkrant.

One of the reasons for choosing one of these answers is the changed lay-out of De Paardenkrant. 47.5 % states that they agree with the proposition that 'the new layout of De Paardenkrant is a good change'. 35.2 % states to be neutral and 15.8 % totally agrees.

From the readers 65.6 % thinks that the price is consistent with the quality, 26.4 % states that the price is too high and 7.1 % thinks the price is much too high.

Almost all the readers stated that the proportion of pictures and text is good (94.1 %), 5 % stated that there are too little pictures in De Paardenkrant and 0.9 % thinks that there are too many pictures.

Next to that 69.7 % of the subscribers of De Paardenkrant stated that the paper provides enough background behind the news, 21.4 % thinks this might be enough and 8.9 % state that there is not enough background behind the news.

Bit

The grade which the subscribers gave for Bit varies from 5 up to 10, with an average grade of 7.9.

63.6 % of the subscribers stated that their appreciation for Bit is unchanged, 23.7 % came to a more positive appreciation and 12.7 % became more negative about Bit.

From the subscribers 61.9 % thinks that the price is consistent with the quality, 36.4 % stated that the price is too high and 1.7 % thinks the price is much too high.

Almost all the subscribers stated that the proportion of pictures and text is good (93.2 %), 5.1 % stated that there are too many pictures in Bit and 1.7 % thinks that there are too little pictures.

The grade which the readers gave for Bit varies from 1 up to 10, with an average grade of 7.7.

69.9% of the readers stated that their appreciation for Bit is unchanged, 19.7 % came to a more positive appreciation and 10.5 % became more negative about Bit.

From the readers 47.1 % states that the price is too high, 46.2 % thinks that the price is consistent with the quality and 6.5 % thinks the price is much too high.

Almost all the readers stated that the proportion of pictures and text is good (92 %), 7.4 % stated that there are too many pictures in Bit and 0.6 % thinks that there are too little pictures. For additional information about the degree of satisfaction see annex 3.

4.4 Differences between the subscribers and the readers

The subscribers (N=271) and readers (N=340) of De Paardenkrant are compared to analyse whether there are significant differences between reading time, the extent of reading and the degree of satisfaction.

There is a significant difference between the reading time of the subscribers and the readers of De Paardenkrant (p-value of 0.00).

There is also a significant difference between the extent of reading of the subscribers and the readers (p-value of 0.001).

Furthermore there is also a significant difference found between the degree of satisfaction of the subscribers and readers of De Paardenkrant (p-value of 0.008).

The subscribers (N=236) and readers (N=325) of Bit are also compared to analyse whether there are significant differences between reading time, the extent of reading and the degree of satisfaction.

There is a significant difference in reading time when comparing the subscribers and readers of Bit (p-value of 0.002).

There is also a significant difference in the extent of reading of the magazine Bit between the subscribers and readers (p-value of 0.007).

Furthermore there is also a significance difference in the degree of satisfaction between the subscribers and readers of Bit. Although the p-value of 0.048 is only a bit smaller than 0.005 (for the tables see annex 4).

4.5 Interest in complementary activities and/or products

	Subscribers PKR (N=271)	Readers PKR (N=340)	Subscribers Bit (N=236)	Readers Bit (N=325)
Interest in complementary activities	46.9 % no interest 40.6 % workshops	67.7 % workshops 24.3 % theme trip 23.4 % no interest	82.2 % workshops 32.2 % theme trip 13.6 % group trip	73.8 % workshops 22.5 % theme trip 18.8 % no interest
Interest in a magazine completely about	56.8 % breeding 51.7 % dressage 34.3 % jumping 24 % health	62.9 % dressage 45.3 % health 28.5 % breeding 27.9 % jumping	67.8 % dressage 44.1 % health 24.6 % breeding	66.5 % dressage 48 % health 24.9 % jumping 24.6 % breeding
Interest in a online horse community	43.17 % maybe 29.52 % no 14.39 % yes 12.92 % do not know	53.24 % maybe 21.76 % yes 16.76 % no 6.24 % do not know	46.19 % maybe 23.73 % yes 16.76 % no 14.41 % do not know	44.92 % maybe 26.15 % yes 21.23 % no 7.69 % do not know

Figure 4.5.1 Interest of the subscribers and readers of De Paardenkrant and Bit in a complementary activity/product or a magazine completely about one topic.

Figure 4.5.1 shows the interest of the subscribers and readers of De Paardenkrant and Bit in a complementary activity. For additional information see annex 5.

5. Discussion

Looking at the profile of the 'average horse enthusiast' and the profile of the subscribers and readers of Bit, there are a lot of similarities, but also differences noticeable. The biggest difference can be found between the profile of the 'average horse enthusiast' and the subscribers of De Paardenkrant. For example the male/female distribution is different for the subscribers of De Paardenkrant.

The study of LEI and the Animal Science Group showed that 85 % of the horse enthusiasts are female and 15 % male. The research of the KNHS on the other hand showed that 80 % of the horse athletes is female. Results of this research among the subscribers and readers of De Paardenkrant and Bit (N=878) showed that 19 % is male and 81 % is female.

Thus, when comparing the male/female distribution of all the respondents of this research to the other two studies, the distribution is quite similar. But when looking at the male/female distribution separate for the subscribers and readers of De Paardenkrant and Bit, this is different. Especially with the subscribers of De Paardenkrant, there the distribution is 48 % male and 52 % female. The distribution of the readers of De Paardenkrant 7.7 % male and 92.4 % female; the subscribers of Bit 4.7 % male and 95.3 % female; the readers of Bit 4.3 % male and 96 % female. The percentages of the subscribers and readers of Bit are quite similar, while the percentage males in De Paardenkrant is bigger.

In the research of LEI and the Animal Science Group it is shown that 79 % of the horse enthusiasts are not income dependant on horses, 16 % is partly dependant and 5 % are income dependant on horses. On the other hand in the Alterra report it is estimated that 90 % of the horse owners keeps horses on a recreational basis, 8 % can be defined as semi-professional and 3 % is involved with horses on a professional basis (Agricola, 2008).

Comparing this to the results of this research, there is a small difference. 82.9 % of all the respondents (N=878) stated they are involved with horses as a hobby, 12.9 % are partly income dependent and 4.2 % are income dependent on horses for their profession. This difference can be a result of that this target group is more involved with horses on a professional basis. Especially the subscribers of De Paardenkrant (7 %) are involved with horses for their profession.

The Alterra report showed that a horse enthusiast with a own horse or pony had in 2001 on average 1.8 horse and 1.7 pony, in 2006 this was 1.3 horse and 1.0 pony (Agricola, 2008). Also here the biggest difference is noticeable with the subscribers of De Paardenkrant. The subscribers of the Paardenkrant on average keep 6.8 horses and ponies altogether, while the total of 2.3 the Alterra report in 2006 is much closer to the amount of horses kept by the readers of De Paardenkrant (2.3 horses), subscribers of Bit (2.2 horses) and the readers of Bit (2.1 horses).

Results from the research of LEI and the Animal Science Group showed that riding or driving horses themselves was the most common way to be involved with horses (85 %). Secondly 36 % stated that they are busy with stabling or caring for horses, 26 % breed horses, 23 % trains horses, 22 % stated that they are living in the countryside with a horse near home, 20 % gives riding or driving lessons, 8 % follows an equestrian course or education, 7 % is treating horses/ keeping horses healthy, 7 % is involved in horse keeping from an administrative point of view, 5 % is trading horses, 4 % delivers

goods or services to the horse-keeping sector and horse sport sector, 2 % is busy with horses through their children but are themselves not involved with horses, 9 % is busy with horses in a different way.

From this research, among subscribers and readers of De Paardenkrant and Bit (N=878), it is also shown that a common way to be involved with horses is riding. In this study a distinction between riding competitions and recreational riding is made. 44.9 % of all the respondents are riding competitions and 33.8 % of the respondents altogether are riding on a recreational basis. In this research 75.7 % stated that they own horse(s) and 35.6 % keeps horses as a hobby. 25.4 % of the respondents stated to breed horses and 21.3 % trains horses. Note that in this research a distinction between eighteen ways in which horse enthusiasts can be involved with horses is made, the respondents were also able to give multiple answers and that there are different options given compared to the study of the researches of LEI and the Animal Science Group.

The research of the KNHS showed that equine sports is increasingly practised on own property or at livery yards and less often at riding schools. The vast majority of the subscribers and readers of De Paardenkrant and Bit also stated to keep their horses at home or at a livery yard. Especially a large percentage of the subscribers of De Paardenkrant stated that they keep their horses at home (70.9 %). But also more than 25 % of the other three groups stated that they keep their horses at home and more than 36 % of these three groups stated to keep their horses at a livery yard.

In the research of LEI and the Animal Science Group among horse enthusiasts, 25 % of the respondents stated that they are not affiliated with an organisation in the horse-keeping sector. From the respondents which are affiliated with an organisation (75 %), 60 % is affiliated with an organisation for sports, riding or recreation. 29 % is affiliated with a breeding organisation, 3 % is part of an entrepreneur organisation and 7 % is affiliated differently.

In this research, among subscribers and readers of De Paardenkrant and Bit, there are different options given to analyse where the respondents have a membership. But also in this research it is shown that most of the respondents are affiliated with an organisation concerning riding, sports or recreation. 59.9 % of all the respondents (N=878) stated that they are members of a riding association and 57.5 % is member of the KNHS. 44.8 % is member of s studbook, 12 % of the FNRS, 13.1 % of the SRR, 0.9 % of the NVVR and also 0.5 % of the SVP. 15.9 % of the respondents choose differently, most of the answers were that they are not a member of an association.

Personal contacts with other horse enthusiasts who are involved in a similar way with horses is, for the horse enthusiasts in the research of LEI and the Animal Science Group, the main channel through which they search for information, followed by the veterinarian, farrier and riding instructor.

In this research on the other hand, the most common channel to find information about horses is the internet (91.5 %), followed by magazines (86.4 %) and family/friends/relatives (76.9 %).

According to the results of the research of the KNHS the most widely read magazine is Hoefslag, but also Paard & Sport and Bit are widely read. The magazine Bit is the most popular magazine according to the research of LEI and the Animal Science Group, followed by Paard & Sport and Hoefslag. Paard & Sport is in this research the most read by readers of De Paardenkrant as well as the subscribers and readers of Bit. The majority of the subscribers of De Paardenkrant on the other hand stated to read In de Strengen and secondly Paard & Sport. Also Hoefslag is not mentioned by the subscribers of De Paardenkrant in their top three, while the Hoefslag does have a place in the top three

most read magazines of the readers of De Paardenkrant and the subscribers and readers of Bit.

In the study of LEI and the Animal Science Group Bokt.nl is the most popular website. However in this research, among the subscribers and readers of De Paardenkrant and Bit, the most popular website is Horses.nl. 83.9 % of all the respondents states to use this website. 61.4 % mentioned Knhs.nl, 57.7 % Startlijsten.nl and 55.6 % Bokt.nl. 44.9 % of the respondents uses Sporthorses.nl and 42.3 % Kwpm.nl.

Note that the questionnaire was online on the website Horses.nl, that could have an influence on the amount of respondents which stated to use this website.

Furthermore there is an overlap between the subscribers and readers of De Paardenkrant and Bit (see also fig. 3.3.1). This overlap might have an influence on the results, because quite a few respondents filled in the questionnaire for De Paardenkrant as well as Bit. The overlap is the largest with the readers of De Paardenkrant and the readers of Bit. This can be one of the reasons why the subscribers of De Paardenkrant differ the most from the other three groups. Taking the profile of the average horse enthusiast in consideration, there is also the biggest difference with the subscribers of De Paardenkrant.

To get more insight in the subscribers and readers further research is recommended. Especially to get more insight in the opinion of the subscribers and readers. With qualitative research is possible to get more insight in the underlying motives and opinions of the subscribers and readers of De Paardenkrant and Bit. This is also needed to get more insight in the interest of the subscribers and readers in complementary activities and/or products.

Another important group to research are the people who had a subscription on De Paardenkrant and/or Bit. This to gain more insight on the motives about why they ended their subscription and what would be reasons to withhold them from ending their subscription.

In order to be able to assess whether there is a gap in the market, more research should be done among all the stakeholders in the equine industry.

6. Conclusion

In this research there are actually four groups distinguished; the subscribers of De Paardenkrant, the readers of De Paardenkrant, the subscribers of Bit and the readers of Bit. Between these groups similarities and differences emerge. But also between De Paardenkrant and Bit there are a few similarities, but mostly there are differences.

It can be concluded that there are more differences between the subscribers and readers of De Paardenkrant than between the subscribers and readers of Bit. When looking at the four groups it is noticeable that the subscribers of De Paardenkrant are the most deviant from the other groups. The subscribers of De Paardenkrant also differ the most when looking at the profile of the 'average horse enthusiast'. Within the group of the subscribers of De Paardenkrant there are more respondents involved with breeding, there are more males, they keep more horses, the horses are mostly stabled at home, the majority is member of a studbook, they mostly visit KWPN Hengstenkeuring, are more interested in sports and breeding and do not make use of social media.

That there are a lot of differences even between the subscribers and readers of De Paardenkrant, means that the differences between De Paardenkrant and Bit are even to a larger extent.

Furthermore there is a significant difference between the reading time of the subscribers and the readers of De Paardenkrant (p-value of 0.00). There is also a significant difference between the extent of reading of the subscribers and the readers (p-value of 0.001) and a significant difference between the degree of satisfaction of the subscribers and readers of De Paardenkrant (p-value of 0.008). There is a significant difference in reading time when comparing the subscribers and readers of Bit (p-value of 0.002).

There is also a significant difference in the extent of reading of the magazine Bit between the subscribers and readers (p-value of 0.007) and there is also a significance difference in the degree of satisfaction between the subscribers and readers of Bit. Although the p-value of 0.048 is only a bit smaller than 0.05.

These differences are due to the fact that the readers for as well De Paardenkrant as Bit, have a shorter reading time, read the product to a smaller extent and are less satisfied about the product. Although the difference between the degree of satisfaction of the subscribers and readers of Bit are small. That the readers are less satisfied about the product is also reflected in the average grades that they give for the product. The subscribers of De Paardenkrant give a grade of 7.6 while the readers give a valuation of 7.3. The subscribers of Bit give a grade of 7.9 while the readers give a 7.7.

Complementary, there is interest among the subscribers and readers of De Paardenkrant and Bit in a complementary activity or product. The results show that 46.9 % of the subscribers of De Paardenkrant are not interested in the mentioned activities, but 40.6 % on the other hand stated to be interested in workshops which take place in their region. The readers of De Paardenkrant, the subscribers and the readers of Bit are mostly interested in the complementary activity workshops in their region.

All the subscribers and readers stated that they might be interested in an online horse community.

The results of this research also show that there is an interest in a magazine which is completely about dressage. Within all the four groups a relatively large percentage of the respondents stated to be interested in a magazine which is completely about dressage. Only among the subscribers of De Paardenkrant is the topic breeding the most popular (56.8 %). But this topic is followed by dressage (51.7 %).

When looking at the discipline where the respondents are most interested in, the interest for a magazine completely about dressage is emphasized. All the four groups stated to be most interested in the discipline dressage (see also fig. 4.1.2).

7. Recommendation

From this research it can be concluded that the target group of De Paardenkrant and Bit is different. A different target group means a different approach. Of course the product and the price are also different and this has to be taken into consideration. Although as well the subscribers and readers of De Paardenkrant as the subscribers and readers of Bit are satisfied about the product and also quite satisfied about the price of the products. Therefore, when looking at the marketing instruments, the biggest benefits can be achieved on the area of promotion. With the results of the research the promotion can be better adapted to the customers.

Looking at the results, the way that the respondents came in contact with De Paardenkrant is noticeable. Most of the subscribers and readers came in contact with De Paardenkrant through family, friends and relatives. Also quite a large percentage of subscribers and readers came in contact with de Paardenkrant through a trial subscription or an event. Looking at how the subscribers and readers came contact with Bit, family, friends and relatives play an important role. But also more than one third of the subscribers came in contact with Bit through a trial subscription.

KWPN Hengstenkeuring is the most mentioned event among the subscribers of De Paardenkrant and this group also visits a lot of regional events. Horse Event on the other hand, is most visited by the readers of De Paardenkrant, followed by Indoor Brabant and Jumping Amsterdam.

Horse Event and Indoor Brabant are the most popular events among the subscribers and readers of Bit. Note that only quite a small number of respondents stated to come in contact with Bit through an event, here might be an opportunity for Eisma Media Groep to not only be present on events but also play an active role in attracting new customers. Offering trial subscriptions and present subscriptions, is also a good way to attract new customers.

For both subscribers and readers of De Paardenkrant and Bit, Horses.nl is the website which is most used, but this result can be influenced by the fact that the questionnaire was online on this website. Because the website Horses.nl is also part of Eisma Media Groep it is easy to do promotional activities for De Paardenkrant and Bit on this website.

The subscribers and readers of Bit do make use of social media, especially Hyves and Facebook. This can play an important role in trying to be close to the customer and keep the existing customer satisfied. Through social media Eisma Media Group can create a feeling among their customer that they feel involved.

Complementary, the results show that there is a possibility for Eisma Media Groep to enter the market with a new product, the respondents are most interested in workshops in their own region or a (new) magazine which is completely about dressage. When Eisma Media Groep wants to enter the market with a new product such as workshops or a new magazine it is recommended to do more in-depth research among the subscribers and readers of De Paardenkrant and Bit (this was also already mentioned in the discussion). With for example qualitative research is possible to get more insight in the desires, motives and expectations of the target group.

Also more research is recommended to explore the possibilities of the online horse community. It might be unclear what the possibilities of such a community is and therefore more research is necessary.

Another important group to research are the people who had a subscription on De Paardenkrant and/or Bit. This to gain more insight on the motives about why they ended their subscription and what would be reasons to withhold them from ending their subscription.

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