



Bachelor- Thesis

Effective Media Exposure

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A German Equestrianism Print and Online Media Analysis

With regard to positioning Pavo
over long term

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Goch, 2010

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1. Abstract

Für den niederländischen Futtermittelhersteller Pavo, der sich in den letzten Jahren in Deutschland etabliert hat, stellt sich die Frage wie er effektiv und im Rahmen von 50.000€ mit seinen Zielgruppen in Deutschland über die verfügbaren Pferdezeitschriften und pferdeorientierten Webseiten kommunizieren kann. Da es bisher nur für Pferdezeitschriften einen groben, offiziellen Überblick der Fn gibt, bietet diese Studie zum einen, einen Überblick über die verfügbaren 65 Pferdezeitschriften sowie 77 Webseiten und zum anderen eine Auswahl von 26 Pferdezeitschriften Titeln und 27 Pferdewebsites, die mit Pavos Markenidentität -maßgebend, Gesundheit, Topfutter- am ehesten übereinstimmen. Daraus wurden Partner gefiltert, die sich über einen Zeitraum von 5 Jahren für eine Medienpartnerschaft besonders gut eignen. Grundlage für diese Filterung war eine für diese Studie entwickelte Methodik, die sich an die Literatur der Kommunikationswissenschaftler Unger (2007), Bachem (2002) und Pörner (2003) anlehnt. Auf Grund der Qualität des Inhalts, ihrer Zielgruppe und/oder Zielgebiet sowie Preis-Leistungsverhältnis wurden regionale Pferdema-gazine, die an den Landesverband angeschlossen sind, als Partner empfohlen, sowie das Freizeitreitermagazin Cavallo. Für Zielgruppen, die sich auf eine Reitdisziplin oder Pferderasse fokussieren, wurden Titel gewählt, die sich an diese Gruppen richten in einem günstigen Leser/Kostenverhältnis. Des Weiteren wurden für Kampagnen der Zuchtproduktlinie „Breeders“ und der Supplementenreihe Print- und Onlinetitel ausgewählt, die sich mit Ihrem Inhalt direkt an die Zielgruppe richten, um die Kampagnen in einem zusammenhängenden Kontext zu präsentieren. In dieser Konstellation kann Pavo effektiv auf dem Markt mit seinen Zielgruppen kommunizieren mit der Einschränkung, dass dieser Weg 2.272€ über dem Budget liegt.

2. Introduction

Media are part of our everyday life. We start the morning with the newspapers, the morning show on TV and/or listen to the radio on the way to work. We check our emails or purchase our holidays online. We buy magazines about fashion or about our hobbies.

But the average city inhabitant is now exposed to 3.000 to 5.000 ad messages a day. Ads in almost every medium and form have been on rise, but many consumers feel they are becoming increasingly invasive and actively avoid and ignore them reducing their effectiveness (Petrecca 2006, Stioy 2007)

Many companies use the media to communicate with the customer. In business a medium is a way to transfer and convey information about goods or services from the producer to the consumer, who is a potential buyer of that item. Of course there are also other ways to conveying information to potential buyers. (Katz, 2003)

Integrated marketing actions, when applied to meet the needs of consumer and buyers, can generate profits and other corporate results through customer satisfaction. This matching of corporate and customer interests require parties to communicate effectively. This communication can be spontaneous but it had shown that careful management of marketing communication can add value for all involved.

Selection of medium must be based on judgement of both effectiveness (suitability) and efficiency (performance). The effectiveness of a medium is its capacity to generate a desired outcome or condition in a particular situation or context, i.e. to accomplish a desirable communication objective. The efficiency of a medium is the amount of resource (time, money) expended in striving of the accomplishment of the desired communication objective. (Varey, 2002)

In order to market and communicate the products effectively it is important to know who the consumer is and what lifestyle he/she is living. After the consumer description channels for the message can be chosen. (Clow & Baack, 2007)

The Dutch horse feed manufacturer Pavo was established 1968 in the Netherlands and is a brand from Stimulan B.V., which is part of Hendrix UTD.



Hendrix UTD is a subcontractor from Nutreco holding. Pavo is market leader with Premium horse feed in the Netherlands and Belgium and a well established brand there. In the horse feed market in Germany Pavo stands out with innovative Products and is increasing its market share steadily. In the German equestrianism media landscape Pavo is communicating products and brand identity by advertisement, marketing PR and promotion. Currently they are busy with establishing the most direct and effective route to the German market and as there is a big selection of print and online media available in Germany demand an overview. Furthermore, Pavo looks for media partners they can build a partnership with over long term not just for advertisement but also for other ways of cooperation. Therefore they require:

- A helicopter view on the German equestrian magazines, horse related web sites and other media that is suitable to reach the Pavo various target groups.
- A well considered long term media plan for using the German media in the most optimal way, considering the different focus areas, the different target groups and the brand values of Pavo.

Therefore the objective of this research is to analyse the German equestrianism print and online media by assessing quality, characteristics and focus groups of each medium in order to find the suitable media that go in line with Pavo's marketing communication strategy and reach their target group effectively over long term.

This includes:

- ◆ Describing the brand values of Pavo
- ◆ Describing Pavo's target groups
- ◆ Investigating the print and online media available in Germany
- ◆ Investigating the pro's and con's of using a particular vehicle
- ◆ Investigating how much the reader/user is involved in the vehicle
- ◆ Investigating how Pavo can be integrated in the German media over long term



- ◆ Investigating what forms of cooperation between the media and Pavo are possible and suitable over long term as well as for a supplement and Breeder's campaign

3. Literature Review

3.1 Marketing communication

Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, services to create and exchange value and satisfy individual and organisational objectives (De Pelsmacker *et al*, 2007)

Marketing communication is a subfield of marketing which involves personal selling, advertising, publicity, public relations, product placement, direct marketing, sponsoring and trade shows (Unger and Fuchs, 2005; Ray 1973)

Media planning is one discipline of marketing communication and is trying to find the most efficient way to reach the target group most effectively with regard to the budget. (Unger *et al*, 2007)

3.2 Realization of marketing communication goals

For the realization and accomplishment of the demands of marketing communication there are several instruments that can help to achieve the goals.

Dynamic developments in traditional Media (e.g. new ad types in TV) and new media (e.g. online communication) offer companies new opportunities to communicate to their target groups. The challenge for the marketing communication management is to select the most efficient and most effective instruments including their appropriate application for the marketing communication goals and tasks. Pörner (2003) emphasises that it is nearly impossible to develop a successful media plan intuitively because of the large amount of media and vehicles. Therefore, it is crucial to make use of research done by media analysts and market researches. Furthermore, Pörner (2003) explains, it is the basis for a target oriented and effective communication with the target group.

Unger *et al* (2005) say, because there is an information overload, people from industrial countries can actually just take in a fractional amount of information that is surrounding them. This is combined with a lack of interest in commercial messages. They assume that a big amount of TV-spots is just perceived superficially and that magazine ads- even in special interest magazines- are

viewed for a few seconds. That is why, so Pörner (2003), a systematic media planning is essential

Unger and Fuchs (2007 as well as Pörner (2003) recommend to start with a look inside the advertiser organization and then start choosing instruments and vehicles.

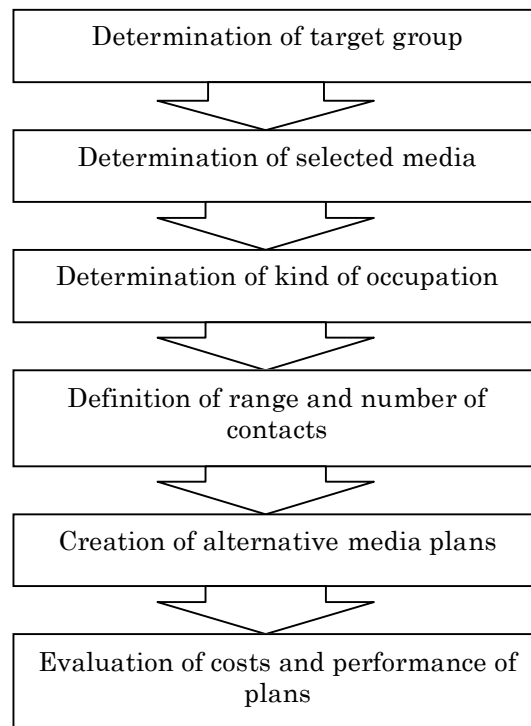


Plate 1-1: Process of media planning (Unger et al., 2005)

3.3 Inter and Intra media selection

In order to select a media type and vehicle inter- and intra media selection must be done. Inter media selection is dealing with the selection of the type. Different criteria are used in order to judge if the communication goals can be reached with the instrument. Pörner (2003) The criteria are:

- ◆ Function for the user
- ◆ Situation when media type is used
- ◆ Frequency and duration of usage
- ◆ Frequency of publication
- ◆ Availability

- ◆ Coverage
- ◆ Possibilities to display ad message
- ◆ Price
- ◆ Level of control in order to check success

Pörner (2003) states, depending on how a media type scored it is divided in basis medium and supplementary medium. In some cases a media type can be chosen next to the basis medium to round a campaign. By doing this the media planner has now a qualified selection of media types that suit the marketing communication.

Unger et al (2007) are stressing that the aim of a inter media selection is never to find the best medium but the most suitable for a situation. But within the media types there are many different programs and titles the media planner has to choose from. Alike the inter media selection the intra media selection must be done under several criteria in order to pick the most suitable communication vehicle. (Pörner, 2003)

The media vehicle selection should be done under the following criteria:

- ◆ Attractiveness of the media vehicle
- ◆ Availability in context of time
- ◆ Quantitative (number of contacts) and qualitative (target group) coverage
- ◆ Image of the vehicle
- ◆ Journalistic and advertising environment
- ◆ Price

In comparison to the inter media selection the evaluation is not universally valid. The results are strongly influenced by the requirement and characteristics of the company.

Criteria that cannot be quantified such as attractiveness or journalistic environment must influence the intra media selection equally to the criteria that can easily be quantified such as number of contacts. Here the media planner must manage to do this. (Pröner, 2003)

3.4 Measuring contacts and Price evaluation- the quantitative approach

In order to be able to measure the effect of a media plan it is necessary to have measure values. Contact measures are describing the number of contacts between the vehicle and the user. Usually coverage (number of people that are reached by the vehicle) and sum of contacts (total number of contacts with target person) are the measures that are used the most. Bachem (2002) says that in the online environment unique visitors and Page Impressions are the most important quantitative criteria for a Website.

In order to be able to compare prices and to be able to be certain whether or not the vehicle is fitting in the budget the CPT (cost per thousand) has to be calculated. This measure shows the money spend per thousand contacts with the user of the medium in this case of a print vehicle.

$$\text{CPT} = (\text{Cost per ad} \times 1.000) / \text{reach}$$

This can be calculated for print media as well as for Websites. For Websites it shows how much the price per 1.000 page views is. It is calculated as follows:

$$\text{Online CPT} = (\text{Cost per ad} \times 1.000) / \text{Page views per month}$$

Bachem (2002) points out that Page Impressions per month divided by visits per month is an indicator for user intensity and therefore a criterion in order to evaluate a website. But the score must be seen in the context of the type of the website. A low score is good for a search engine but a bad one for an online shop.

3.5 Qualitative measurements for Online Vehicles

Bachem (2002) suggests in his paper that qualitative measurements (soft factors) are as important as the quantitative ones. The soft factors can give a hint on the user characteristics. This is an important point because in comparison to other

media such as TV or print media for online vehicles are no established instruments yet to find out about user demographics of single websites. In order to measure qualitative features of a website Bachem (2002) suggest the following points as the most important for an evaluation: Brand equity, unique content position, content, design and navigation.

Unger and Fuchs (2007) are stressing that the critical point for vehicle selection is the image a vehicle has within the target group and the most important factor that is influencing the image creation of a brand is the advertising material and not the selection of the vehicle.

Pörner (2003) emphasises that after the suitable vehicles are found the media planner needs to develop a media strategy. The aim must be a harmonious application of the different vehicles and the marketing actions.

First a basic concept must be developed and based on that alternative concepts must be evolved. After Pröner (2003) for every alternative a cost plan as well as a plan how where and when the message is communicated.

3.6 Source credibility and Context of media

Ohanian (1991) is explaining source credibility refers to a message sender's positive characteristics that influence the receiver's acceptance of the message communicated. Petty and Cappioppo (1986) found out that source credibility even partly determines the persuasiveness of a message. There have been different researches such as Atkins and Block (1991) or Ohanian (1991) that found out that source credibility perception affect message evaluation, attitudes and behavioural attentions; more credible sources have been found to produce more favourable attitudes and stronger behavioural intentions than less credible sources. Several empirical studies have shown that different vehicles can influence the persuasiveness of the same ad (Aaker and Brown, 1972; Freiden 1982; Winick 1962). High status vehicles are in general more effective than low status vehicles in producing positive advertising outcomes.

Next to source credibility the context where the advertisement message is placed is important. Aaker and Brown (1972) and Chaiken and Stangor (1987)



discovered that context can influence audience perceptions of the ad and advertised product. When the advertised product fits well with the context the audience is likely to find the ads more useful and interesting. Individuals are more likely to use vehicles that meet their special interests or informational need within a medium. Therefore, ads that promote products that are relevant to the content of the vehicle in which the ads appear would induce more positive audience responses. (Cho 1999; Shamdasani et al 2001)

3.7 Print media

Print media are basically divided in newspapers and magazines. Within the magazine group the distinction between specialist journal and popular magazine can be made. Specialist journals are targeting a limited, explicit and describable group. They are aiming at people with a particular job or a special hobby and communicate expert knowledge and information. Popular magazines are basically magazines that are entertaining and have a journalistic content. Unger et al (2007) also know this division but they are taking the classification on to another level. Unger et al. (2007) divide the popular magazines in to general and special interest magazines and they emphasise that there is no definition of popular magazines. But they describe them as magazines that are targeting many people with not taking demographic or socio graphic measures into account. The sub group special interest magazines are aiming at a specific target group. These magazines have one journalistic focus that is covered in every issue. The reader's personal need in information, knowledge and leisure is addressed in the magazine. By contrast to specialist journals, Unger et al (2007) say, special interest magazines are targeting a broader group of readers although they are covering one specific topic. Special interest magazines try to transform very specific knowledge and complex interrelations into intelligible articles. Furthermore they are not used for occupational purposes.

3.7.1 The impact of print media- especially popular magazines

Popular magazines, hence special interest magazines are mostly read at home but also in public transport, at work or at holidays. The usage, Unger et al (2007) are explaining, is totally depending on the user. Time, place and time spend with the vehicle are arbitrary. Furthermore, a magazine can be used over a long period of time, which is also depending on the publishing interval. The reader is using the magazine very consciously and intense and the process of reading is rarely disturbed by side activities. (Unger et al., 2007)

In Weinstein's et al (1980) research it was found out that there is an increased brain activity when a magazine is read compared to the usage of electronic media. Therefore the learning effect is increased. So they conclude that with an increased brain activity the memory effect will also increase.

Moreover, popular magazines can be divided into different socio demographic groups. This has the advantage that advertisers can either communicate with the majority of people or just with a specific group. Another advantage of magazines is that there is wide range of magazines available, thus the period of the advertisement can be planned very precise. Popular magazines can be either national, regional or local. (Unger et al., 2007)

3.9 Online media

In this new Media environment, the consumer is increasingly in control. Consumers not only have more choices of media to use, they also have a choice about whether and how they want to receive commercial content. Customers define the rules of engagement and can insulate themselves with the help of agents and intermediaries if they so choose. (Keller, 2009) They define what information they need, what offerings they are interested in and what they are willing to pay. Online, companies can send tailored messages that can engage different segment of consumers by reflection their special interests and behaviour. The Internet offers the advantages of contextual placement, or sites for ad placement that are related to the marketer's offerings. The Internet is highly accountable and its effects can be easily traced. Instantaneously it can be

noted how many unique visitors or “UVs” click on a page or ad, how long they spend with it, where they go afterwards and so on. (Roberts 2006; Steel 2007) The Web is especially effective at reaching people during the day. The obvious caveat is that it will be totally ineffective for those target consumers who are strictly offline, at least in a direct sense. (Keller, 2009)

Unger et al. (2007) are mentioning the following advantages of the Internet as a communication medium: the offer is 24/7 available to the consumer -> high degree of service can be offered, real-time marketing actions are possible, the Internet is offering a platform for dialog between the company and the consumer and offers can be communicated internationally. Furthermore, companies can react very flexible. News and offers can be easily published with little effort and at low costs (Unger and Fuchs, 2007)

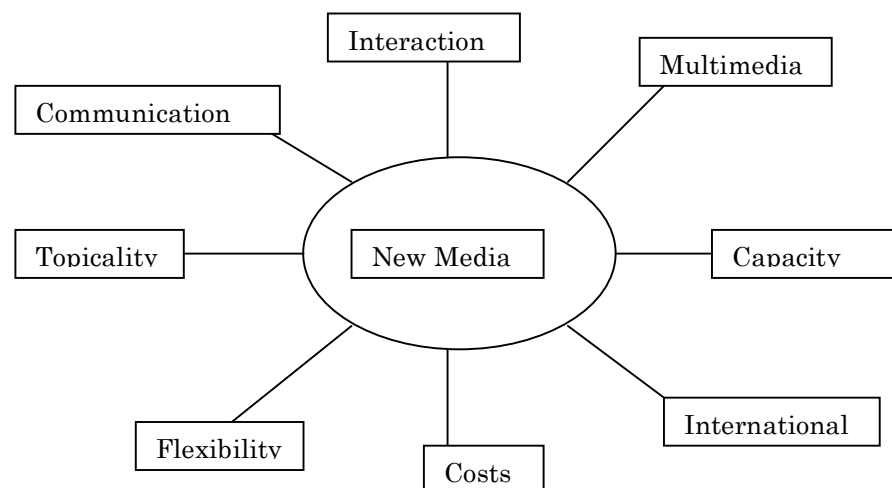


Plate1-2: The essential potential advantages of new media (Unger and Fuchs, 2007)

But the advantages the new media are offering have to be actively formed and maintained and are demanding a different understanding of marketing communication. E.g. topicality will just be an advantage if it is taken care of and it is implemented. Moreover, the possibility to have a two-way communication channel requires a fast reaction on customer requests. Negligence of these

channels and thus the not meeting the expectations user have towards the medium can result in the opposite effect and the advantages can turn into disadvantages. The result can be a damage of the image. (Unger and Fuchs, 2007)

3.10 Online- Source Credibility

With abundant information available to consumers from supposedly unlimited and often unfamiliar sources, building credibility is an essential challenge to Internet marketers. But credibility or trust is vital to successful electronic business. However, the credibility of information present on the Internet has been questioned. (Choi and Rifon, 2002)

Although many consumers use it, the Internet is still a relatively new and sometimes disorientating place for them. That is why consumer are likely e.g. to seek out and purchase brands online they trust. As the Internet became an important source of information users encounter abundant and diverse information online. They often will intentionally seek information thought to be useful for achieving their search objectives, which might not be an easy task because there is no central control over information that can be found online. That means with no overreaching quality control or editing process anyone can author and provide information in the internet. That means consumers must find ways to judge the credibility of the information on the web side. (Choi and Rifon, 2002)

The research by Rieh (2002) showed that provider's reputation and URL type are among the criteria consumers utilize to judge credibility of website information. He also found out that consumer judgements of website information credibility are more a function of the website's credibility, than by the perceptions of the actual author or creator of the content. In terms of advertising on the Web it can be assumed that the credibility of the advertisement is influenced by the reputation of the website provider.

3.11 Print – Online Media

Commonalities and differences in source credibility and context

Vehicles effects in message effects are evidenced in traditional media, most notably the creation of credibility perceptions, reasonably could be expected for banner ads on the web as well (Shamdasani et al 2001). Consumers are presented with thousands of websites when searching for information and they easily move from one site to the other sometimes even accidentally by clicking on links. Unlike in conventional media such as newspapers and magazines consumers have instant access to thousands of vehicle sources on the web. With the large number of websites available, consumers tend to seek credible information provided by well-established websites. In addition, since banner ads are inherently short on information, it is more likely that people might use other cues available at the time of processing to make judgements of the ads. Website reputation has been found to serve as a cue for consumer inference making about the content carried in the site including ads appearing in the website (Hermes 1996, Shamdasani et al 2001). Shamdasani et al 2001 also found out that the consumer evaluations of banner ads for low involvement products are mainly determined by website reputation, where as the effectiveness of banner ads of high-involvement products is enhanced by relevance between the advertised product category and the content of the website.

But they emphasise that both website reputation and relevance are found to have positive effects on the dependent variables (e.g. attitude toward the ad and the brand, intention to click on banner ads). The internet provides marketers and consumers with opportunities for much greater interaction and individualisation. (Smith and Mc Fee, 2003) Marketers can lose some control over what consumers will do with their online messages and activity. In that regard traditional media offer greater control in that the message is more clearly formulated and is expressed. (Keller, 2009)

The research by Choi and Rifon (2002) showed that vehicle source effects and content effects in traditional advertising may hold true for online advertising and therefore should be taken into account to develop effective web advertising strategies. That means for relatively unknown advertisers, who are not to be

perceived to be credible by consumers but want to produce positive consumer perceptions of the brand, may need to find places that are viewed as credible sources for their ads. On the other hand well-known advertisers with established reputations can rely on their own credible image to generate positive outcomes. Although credible website will still help to make their ads more credible. Source credibility is likely to be important in all media, but consumer perceptions of credibility in web advertising may be less certain than in more familiar traditional media and vehicles. Audiences might view conventional media as more credible than the internet (Flanagin and Metzger, 2000) and this difference in media credibility might also create differences in ad and brand credibility, ad and brand attitudes. In web advertisement, Choi and Rifon (2002) found out, that both website credibility and advertiser credibility are affecting the attitude towards the ad/brand. On the Internet people have become expert, sceptical processors of advertisements. The moment they classify a communication message as an advertisement, without any conscious effort, they either extract from it what is useful or abandon it. (Gallagher *et al.* 2001)

Dr. Gestermann (2010) is explaining that the abundant information in the World Wide Web is distracting the user from its actual reason why and what he was searching online. The complexity of the internet and the pluralisation of the offer generate make the user feel that he need to keep on surfing in order to find better more interesting websites. This is mostly leading to frustration and users find the information overload oppressing. The advantage of the print media is that they offer information in a context and in a seclusive story. The user can be sure that he will see every information even though he might not look for that particular one. This effect is leading to more satisfaction. (Dr. Gerstmann, 2010) Furthermore print media are used to evaluate which website might be relevant and interesting for a user. Like program magazines for TV are there to help people and give them orientation to select the most interesting TV program.

3.12 Synergy in Marketing Communications

A synergistic effect occurs when a campaign uses a combination of tactics to yield more positive brand attitudes than the sum of individual effort's effects.

Synergies exist among brand messages conveyed through different media (Naik and Raman, 2003). Whether across media or tactics, synergistic effects occur because of the variation in exposure to the brand message, caused by using either different media (Chang and Thorson, 2004) or different message formats that correspond to the tactics employed.

Stammerjohann et al. (2005) found out that variation in exposure leads to increased processing of the message by consumers, because each message generates a different memory trace. Hence, the network of memory traces that relate to a brand or the mental model of the brand expands, increasing brand likelihood through the wealth of items in memory that might act as recall triggers. (Micu and Thorson, 2008)

Not only do they have the brand message more accessible in their memory, but people exposed to an integrated campaign are more motivated to attend to the varied (source or format) brand messages than they would be if exposed repetitively to the very same brand message. (Chang and Thorson, 2004)

Bachem (2002) is advising if a campaign is done in order to raise brand awareness, the Internet should be used as a supporting medium as traditional media is reaching a higher percentage of the target group than online media. But he is emphasising that this is not the case for advertisement for E-commerce

3.13 The German market

3.13.1 Equestrianism in Germany

The from the umbrella association, FN, initiated IPSOS market analysis in 2001 found out that there are 1,6 mio. people active in horse sports and recreative riding in Germany. 750.000 riders are organised in associations. That means that 800.000 riders are not member of a riding club. Moreover, the study found out that there are about 1 mio. horses in Germany and that 1,6 mio tons of feed grain and 1,8 mio tons of hay and straw are utilized. It was recorded that there are



about 60 print vehicles that are offering horse related information and entertainment. The FN general secretary Soenke Lauterbach says in an interview for the member magazine PM in 2010: “Although the numbers are eight years old by now we can assume that there is still a big potential for the organized horse sports”

The FN is the umbrella association for equestrianism in Germany. There are about 52 associations (sport, breeding, harness, therapeutic riding) that are officially connected to the FN. Every federal state has its own equestrian association. In total there are 17 federal state associations. (North-Rhine-Westphalia and Lower Saxony have two) German breeders are organized in 26 associations that are connected with the FN. (FN, 2010)

The FN is reporting a decrease in membership numbers in German riding clubs from 764.542 members in total in 2005 to 748.839 members in 2010. The reasons are complex, after the FN (2010). Other leisure activities are attracting interest and the leisure time is decreasing because of working hours or school schedules. The competition of leisure activities is rising because of the demographic change that goes on in Germany. The majority of FN members is female (74%= 554.140) male members form a minority from 26 % in the FN. The numbers might be representative for the entire equine industry in Germany with some divergence

A FN research from 2007 (FN Deutsche Reiterliche Vereinigung e. V. Statistischer Bericht, 2007) shows the number of horses, clubs and club members in the federal states.

	Horses	Association	Members
North Rhine W.	116.700	1.256	182.208
Lower Saxony	114.700	1.113	141.200
Bavaria	109.100	959	95.289
Baden-Württemberg	80.200	901	104.811
Schleswig-Holstein	57.600	474	52.268
Hessian	46.600	715	74.617
Rhineland-Palatinate	36.00	491	45.895
Berlin/Brandenburg	24.200	482	16.183

Table 1-1: Number of horses and riders registered at the FN by federal state

3.13.2. Internet usage in Germany

The study of Schenk *et al.* (2008) showed that 62 % of the German inhabitants (40,23 mio.) from the age of 14 years use the Internet. This number has been rapidly increasing in the last years but Schenk *et al.* (2008) state that the increase in Internet users will grow rather slowly than fast in the future. The yearly research done by the national TV channels ARD and ZDF is proving Schenk's *et al.* statement as they record an increase from 5% in from 2007 to 2008 and an increase just from 1,5 % from 2008 to 2009 to 43 mio. Internet user in Germany. Furthermore, the study showed that experienced Internet users (people that use the Internet for more than three years) see the Internet as an established medium. Nevertheless, 37,3% of the German inhabitants are not using the Internet yet and because the numbers of users will grow more slowly the Internet did not reach the popularity of other media yet that provide e.g. news on a daily basis.

The research by Schenk *et al.* (2008) states that the Internet is used primarily (92%) at home by people that have an average monthly income of 3.000 euro or more. "The World Wide Web is mainly used more by males than females" (Schenk *et al.*, 2008) was disproved by the recent ARD-ZDF-Onlinestudie in 2009. The number of females equals the number of males by now. Furthermore the study shows that 96,1 % of people that are between 14 – 19 years old are using the Internet on a regular basis and are the biggest user group followed by the age group 30 till 49 where 84,2% of the total is using the World Wide Web. The number of people 50+ that is online increased in the last years from 20,7% to 40 %. (ADR ZDF Onlinestudie, 2009)

3.13.3. Media usage of German Riders as information source

A study about the Internet use as a source of information of German riders and horse keepers initiated by the German website www.pferde.de found out that 69% of the people that use the internet on a regular basis are search for information about horses in books and journals next to the Internet. 64% are asking friends, instructor and yard mates. The vet and black smith are on third position as source of information and the last one is retail.

But the information given by vets and blacksmith is considered as important and valuable as well as information by instructors and yard mates. “Neutral” sources of information books/journals and the internet come score equally and are considered as important, which is surprising for the researchers as the Internet scores higher than the retail. (www.pferde.de, 2007)

3.14 The future

Different official sources in Germany reported in 2006 and 2007 the fall of print media as source of information and advertising medium. (FAZ.net, 2006; mittelstanddirekt.de, 2007) IVW recorded numbers of sold issues of print vehicles from that time support the statements. (ivw.de, 2010) The circulation figures went down and the number of page impressions and unique visitors of the IVW approved websites as advertising medium increased.

But the actual fall of print media as an advertising medium did not happen. (Dr. Gerstmann, 2010) Print media give consumers orientation to find the information they search for, off- or online. Moreover, the IVW is reporting a stabilisation in Circulation figures in print media, while the number of page impression and unique visitors is still rising in online advertising media. (IVW,2010) The researches done by ARD and ZDF in 2007, 2008 and 2009 are reporting a steadily reducing increase in people that are using the internet. The research from 2009 is assuming that the number will equal over the next years.

Unger and Fuchs (2005) state that in short term online media will not replace offline media because of technical development restrictions that limit the

accessibility. But over long term online media will increase its share but not totally displace offline media.

4. Methodology

4.1 Research design

The research combines quantitative and qualitative measures and takes place in Germany. The research is designed to give a helicopter view on the German equestrianism print and online media market, recommendations to Pavo about effective media positioning in Germany .

The data that has been collected in the desk research are not only important for the helicopter view but also the basis for the recommendation.

The research approach, data collection as well as the vehicle evaluation was influenced by the quantitative and qualitative recommendations from Unger and Fuchs (2007) and Bachem's (2002) recommendations about website evaluation. Furthermore, the methodical approach was influenced by Pavo's needs.

4.1.1 Pavo

First of all a familiarisation with Pavo's philosophy and products took place. Pavo's target group and marketing communication goals were described and closely looked at in order to find out what Pavo needs. According to this criteria were established and vehicles rated after.

4.1.2 Media

Quantitative data for print media was searched after the recommendations from Unger and Fuchs (2007) and Bachem (2002) with adaptations to the topic and its capabilities. Qualitative measures as well but quality content and quality outline were taken as the most important quality criteria. The quality of content was measured by the credibility of health related articles. The quality of the outline was measured by paper quality of the cover page, paper quality of the pages and the quality of the pictures. The information as collected under the physical presence of the print vehicle.

The websites were collected and quantitatively and qualitatively rated after measures recommended by Bachem (2002). He is recommending to look at:

- ◆ What online vehicles are there?
- ◆ What quantitative and qualitative performance are the vehicles offering?
- ◆ What are the conditions to use the vehicle?

Reader interaction was added as a further measurement for qualitative performance, as this point can indicate which possibilities the user has to interact with a website e.g. influence on the content, raffles. Moreover, only websites were considered for the research that can be put in the following category:

- ◆ Journal homepage
- ◆ Communities/Information
- ◆ Online magazines
- ◆ Horse sales/market

The data is collected in lists that are based on each other. For print and online media different Excel sheets were made and clearly separated as there are different criteria that have to be taken in account when evaluating quantitative and qualitative factors of a vehicle.

4.2 Data Collection

4.2.1 Pavo

Information about Pavo's target group and marketing communication goals were collected by interviews and talks with the marketing department but also with other members from the Pavo team. A power point presentation about Pavo's corporate identity was used as a basis for understanding Pavo's marketing communication history and targets for the future.

4.2.2. Print vehicles

Print vehicles are found through different sources:

Source	Number
IVW (Informationsgesellschaft zu Feststellung und Verbreitung von Werbeträgern e.V.)	18
Pavo journal archive	15
horse related websites and on publishing websites	26
Total	61

Table 4-1: Sources of available equestrian journals in Germany

4.2.3. Online

Horse related websites were found at Pavo's archive, search engine Google (www.google.de), website rankings for equestrian websites (www.top100equestrian.com) and through advertisements.

Journal homepages	25
Community/Information	31
Online magazines	5
Horse sales	9
Total	79

Table 4-2 : Kind and number of available equestrian websites

4.2.4 Print Vehicle Media Data

The quantitative media data for the print vehicles was collected by desk-research. The data from 2008 and 2009 was collected from the IVW (Informationsgesellschaft zu Feststellung und Verbreitung von Werbeträgern e.V.) website (www.ivw.de).

- Print run -> indicator of volume per issue
- Sold issues -> indicator for how many issues per edition are actually sold
- Number of subscriptions -> indicator of reader's loyalty

If a journal was not checked by the IVW data was searched on the journal website where in many cases current data was available. If not so, the journals

were contacted by mail or telephone and asked to send the requested information via email or post.

Moreover data about

- Prices for 1/1 page and 1/3 page, full colour advertisement
-> downloaded from the journal websites or requested via email or telephone.
- Journal target groups -> downloaded from the journal websites or requested via email or telephone.

Pavo gave access to its journal archive, where most of the journals were physically available for the research. The journals that were missing were ordered at the publishing house.

Qualitative data from the journal was collected by looking through the journal, reading articles and feeling the paper. Furthermore it was paid attention to the advertiser in a magazine especially to horse feed manufacturers in order to get an overview about the advertising pressure in the horse feed sector.

4.2.5 Online Media Data

Information in order to measure the performance of websites were collected

- Monthly page impressions,
- Unique visitors per month
- Average time spend on the website

Quantitative data from some websites was available at Pavo's database because of earlier co-operations. Data from the other websites were found on the sites or requested by mail or telephone.

Prices for the most common form of online advertisement (banner, button, skyscraper, content ad) were collected from either the websites or requested by email or telephone. Data for the qualitative analysis was collected by browsing through the website and experience the vehicle as a user.

4.3 Data Processing

In order to process data it was written down in Microsoft Excel. Each stage in the research is documented with an Excel sheet and lists. This program was used for calculations and graphs as well. Five Excel lists were established in order to analyse quantitative and qualitative data of the print vehicles and three for online vehicles.

4.3.1. Print Vehicles- Long List Print

61 magazines were collected and the long list print was created. Available quantitative data was gathered:

- Print run,
- Circulation
- Number of subscriptions

were taken into account in order to get an overview of the journals available and in order to determine the reader's loyalty to the journal. Furthermore the data print run and subscriptions from 2008 and 2009 were compared in order to be able to see trends in the development of the journal.

The journals were divided into categories after their range or their topic they are dealing with and if their numbers are checked by the IVW. The categories were:

- checked by IVW (national/regional),
- numbers not checked by IVW (regional, special focus, children, leisure, sports, breeding, other)

The list was also used to note down if Pavo has been already cooperating with the journal.

4.3.2. Print vehicles -Short List Print

With Pavo's target groups and marketing communication goals in mind a short list was established with 27 journals that might be suitable. These journals were selected after

- ◆ their topic
- ◆ first impression of the quality of outline
- ◆ first impression quality of the content
- ◆ their self-description that was available in their media data

From each journal that was selected

- At least one copy was taken and read
- Prices for advertisement 1/1 page and 1/3 page were recorded
- Price per contact was calculated
- Key characteristics were noted such as target group or being an organ for an association.

Furthermore the possibility to place banner ads on the homepages was checked and noted in the list in order to get a picture whether print/online combinations are likely to be possible with the print medium.

4.3.3 Print vehicles- Content

In order to be able to evaluate the content and topics of a journal the content media list was created from the journals that were noted in the short list print.

The list assesses the journals on their ability to meet the areas and topics in equestrianism Pavo is targeting or Pavo wants to neglect. This is done on at least one copy per journal by counting the number of pages a journal is covering the topic/area in the issue. If a second copy was available it was also evaluated and took influence in the evaluation.

The topics that could be interesting for (potential) Pavo customers according to Pavo's target groups:

Focus on	No focus on
<ul style="list-style-type: none"> • Health • Competition • Leisure • Robust • Dressage • Western • Endurance • Harness • Breeding • Eventing • Jumping 	<ul style="list-style-type: none"> • Jumping, yards/riders that earn a living out of it • Racing • Riding School

Table 4-3: Pavo's target groups

Moreover, reader involvement (the number of pages a journal is giving its readers to place opinions, ask for advice or interact with the journals in form of raffles) was a criterion in order to check whether promotional activities are likely to be placed and accepted by readers.

The number of pages a magazine is using for products news and tests was counted as well in order to see if marketing PR is placed and to estimate if a journal is likely to report about products that are new in the market

The qualitative performance of the vehicles were measured by

- Quality articles-> articles were rated after how well health related articles are researched. If there was not health related article available in the issue an article about training was taken.
- The quality of the outline was measured by the quality of the cover pages, the quality of the other pages, structure and picture quality.

4.3.4. Print vehicles –Content Focus

After the quantitative content analysis the content categories are summarised in seven superior divisions in order to get a larger basis for a vehicle comparison and to make the comparison more easily accessible. This was done by summing up the number of pages of the topics Pavo is targeting in the most useful way. The divisions are Leisure, sport, general, specific, health, training, reader involvement are calculated as follows:

- Leisure: Training +leisure
- Sport: competition
- General: dressage+ jumping+ eventing+ breeding+ western+ robust+ harness
- Special focus: breeding+ western+ harness+ health, but also breed, which is not counted in pages but is noted as a specification
- Health: Health
- Training: Training
- Reader involvement: reader involvement

4.3.5 Print Vehicles- Graphs

With putting the data in the superior divisions they could be processed to a graph. The graph shows where a vehicle can be positioned in a context of four divisions that have been mentioned above. To be able to transfer the number of pages per division to an index and to relate one division to another, the number of pages of one division (A_{1div}) is divided by the sum of the pages of the two divisions ($B_{2divsum}$) one will relate the vehicle to. The result is multiplied with 10. The result (C_{index}) is the index that describes the relationship of a journal to one division.

$$C_{index} = A_{1div} / B_{2divsum} * 10$$

In order to investigate the relationship between the two divisions the calculation was done for the second division as well. The indexes for the vehicles from the short list were entered the graphs:

1. Sport-leisure- general-specific
2. Health-training-sport-leisure

Moreover an age graph was made for journals from the short list based on journal information. The graph shows which age groups are targeted by the journals.

The collected and processed data was noted in an Excel sheet with an auto search function in order to be able to find the journals by title, topic, area of circulation and other quantitative or qualitative characteristics. This list can be used as a planning tool for the future.

4.3.6 Print Vehicles- The helicopter view

After the analysis the journals were put in superior categories in order to make the analysis of the vehicles more easily accessible.

4.3.7 Online vehicles- Long List

75 websites were collected and noted in an Excel sheet. Quantitative information, if available and easily accessible, such as page views per month, unique visitors per month, average time spend on the website are noted there. Furthermore, it is recorded if the website has an active community and if advertisement can be placed there. The sites were put in the following rough categories: Journal homepage, Communities, Online magazines/ Information, Horse sales/market.

4.3.8 Online vehicles- Short List Online

From the Online Long list 26 websites that might be the most suitable were selected. The selection took place under the criteria:

- ◆ ad placement (the advertisement must be visible on first sight without scrolling down)
- ◆ currency of the news section
- ◆ the topics the website contains (had to be inline with Pavo's fields of interest)
- ◆ a good and credible first impression to the researcher-> Website design, URL and creator of the content

But also quantitative criteria such as how many unique visitors a website has were used to decide if a site is selected in the short list. The data of websites in the short list was collected, if not available in the long list, such as:

- ◆ Monthly page impressions,
- ◆ Unique visitors per month
- ◆ Average time spend on the website
- ◆ Prices of the most common web advertisements

4.3.9 Online Vehicles- Soft Factor Analysis

In the next step the websites were checked on their qualitative performance after Bachem's (2002) recommendations: Credibility, brand equity, unique content position, content design and navigation. Reader interaction was added as a further measurement, as this point can indicate which possibilities the user has to interact with a website e.g. influence on the content, participation on raffles. The website content was also evaluated to some extent. News, Information and health were the topics the websites were evaluated after.

- News: Is the website reporting about news? Is it up-to-date?
- Information (around the horse): can the user find horse related information on the website (products, tips/advice)?
- Health: To what extent is the website offering information on health related topics

The websites were rated from:

- ◆ 0 none
- ◆ 1 Limited
- ◆ 2 good/ to some extent
- ◆ 3 excellent/a lot

An index was calculated by summing up the scores from Bachem's (2002) criteria: the higher the index, the better the website.

4.3.10 Online Vehicles- The helicopter view

After the analysis the websites were put in superior categories in order to make the analysis of the vehicles more easily accessible.

5. Results

5.1 The brand values and key target groups of Pavo

The mission of Pavo is to contribute as the market leader in Europe within the horse feed industry to the wellbeing and health of the horse. Pavo is the first to develop innovative feeding concepts and quality products inspired by the rider's concern for the horse.

Pavo's brand values are

- Health- inspired by the owner's concern for the horse
- Pioneer- always on top
- Top products- based on knowledge

Pavo wants to offer products that suit the needs of every horse and horse owners. The target group are mainly young women that are involved in leisure riding and low level competitions but also riders active in top sport. The following disciplines are targeted by Pavo:

- Leisure
- Robust
- Dressage
- Western
- Endurance
- Harness
- Breeding
- Eventing
- Jumping

But does not want to focus on the following areas:

- Jumping, yards that earn a living from it
- Racing
- Riding School
- Training stables

Moreover Pavo is targeting specific areas in Germany, which are Bavaria, Baden-Württemberg, North Rhine Westphalia and Lower Saxony.



In the past Pavo was used to put product related advertisement in the media where the brand Pavo was communicated with a product. For the future Pavo plans to communicate the brand values by a family brand where consumers can be emotionally more involved and get a better feeling for Pavo, which is created by the messages sent through the communication channels. Therefore Pavo will have less product related advertisements, just for product introductions and more overall Pavo campaigns including several products. The aim is that consumers get a feeling for the brand Pavo and connect the products with the brand.

At the moment Pavo is present in German journals with advertisements, marketing PR and in the journalistic content as well as with its sponsoring partners. Pavo was cooperating with 15 different journals in Germany. (see Appendix 10-1)

Online Pavo is advertising with banners, static as well as animated ones that link to the Pavo Homepage. But Pavo is also cooperating with websites to actively promote products. Right now they are cooperating with four websites. (see Appendix 10-9) Next to that they have their own website where they present the company, put news, product information and feeding advices.



5.2. The media available in Germany

5.2.1 Equestrian Print Vehicles available in Germany

After Unger's et al. (2007) description horse magazines can be classified as special interest magazines as they cover a specific topic and are trying to transmit in dept knowledge in a commonly understandable way.

The research found in total 65 magazines that are focused on topics around horses:

- 8 national journals, checked by the IVW
- 9 regional journals checked by the IVW (leisure, sports, sales, breeding)
- 16 regional journals
- four leisure journals
- 11 journals with a strong focus (e.g. discipline)
- 4 sports journals
- 5 children magazines
- 3 breeding magazines
- 5 other that cannot be put in one of the categories

(Appendix 10-1)

For 15 of the in total 17 journals that are IVW approved, a trend could be determined. For 7 journals it can be said that they have a positive trend in print run and 8 have a negative trend. For the other 2 magazines that were IVW approved there were no numbers about the print run in 2008 available. For the other 44 magazines there were no reliable and neutrally tested numbers available in order to be able to determine a trend. The publishing houses that were contacted for further information state a positive trend in print run, sold issues or/and subscriptions for their journals but this was not perceived as a reliable source.

The major difference that was investigated between national and regional IVW approved journals is the percentage of subscription. IVW approved regional journals are found to have a higher percentage in subscription (average 86%) than IVW national approved journals (average 44%). Moreover, magazines that

can be categorised as breeding journals for a special breed tend to have a high percentage of subscribers as well, as they are mostly association magazines.

Next to that 12 regional magazines (Pferd+Sport, Reitsport Magazin, Der Hannoveraner, Pferdeforum, Rheinlands Pferde-Reiter, Reiter und Pferde in Westfalen, Reiter Prisma, Unser Pferd, Reiterjournal, Bayerns Pferde, Reiten und Zucht in Berlin, Der Trakehner) form a partnership called HippoPress. There the advertiser can book space for an advertisement in all 12 vehicles at one time and is reaching every region in Germany such as a journal with a national coverage does. The number of distributed copies (circulation 155,133) is higher compared to the national journal with the largest circulation Cavallo (circulation 74,685)

5.2.2 Print vehicle short list

The selection of magazines for a short list with journals that might be suitable for Pavo included 27 journals. (See appendix 10-2)

Name	
Cavallo	Bayerns Pferde
Mein Pferd	Reitsportmagazin
Pegasus	FreizeitReiter NRW
ReiterRevue	Rheinlands Reiter&Pferde
St.Georg	Reiterjournal
Das Pferde Magazin	Das Islandpferd
Reitsport International	Westernreiter
PM by FN	Reiter und Pferde in Westfalen
Züchterforum	Pferd und Wagen
Der Hannoveraner	Der Kutschbock
Der Trakehner	Dressur Studien
Pferde Zucht&Haltung	Piaffe
Pferdeforum	Quarterhorse Journal
Westernjournal	Pferde Fit&Vital
	Pferdefokus

Table 5-1: Print vehicles of the pre-selection (Print Short List)

These were the journals that at first sight could be suitable because of their topics, appearance and distribution area.

5.3 Print vehicles- Qualitative measures

5.3.1 Print vehicles- Content

The content of the journals was evaluated after their suitability to Pavo (See appendix 10-3). From that the vehicles were put in relation to each other in order to find out where they can be positioned in the context general/specific; sports/leisure.

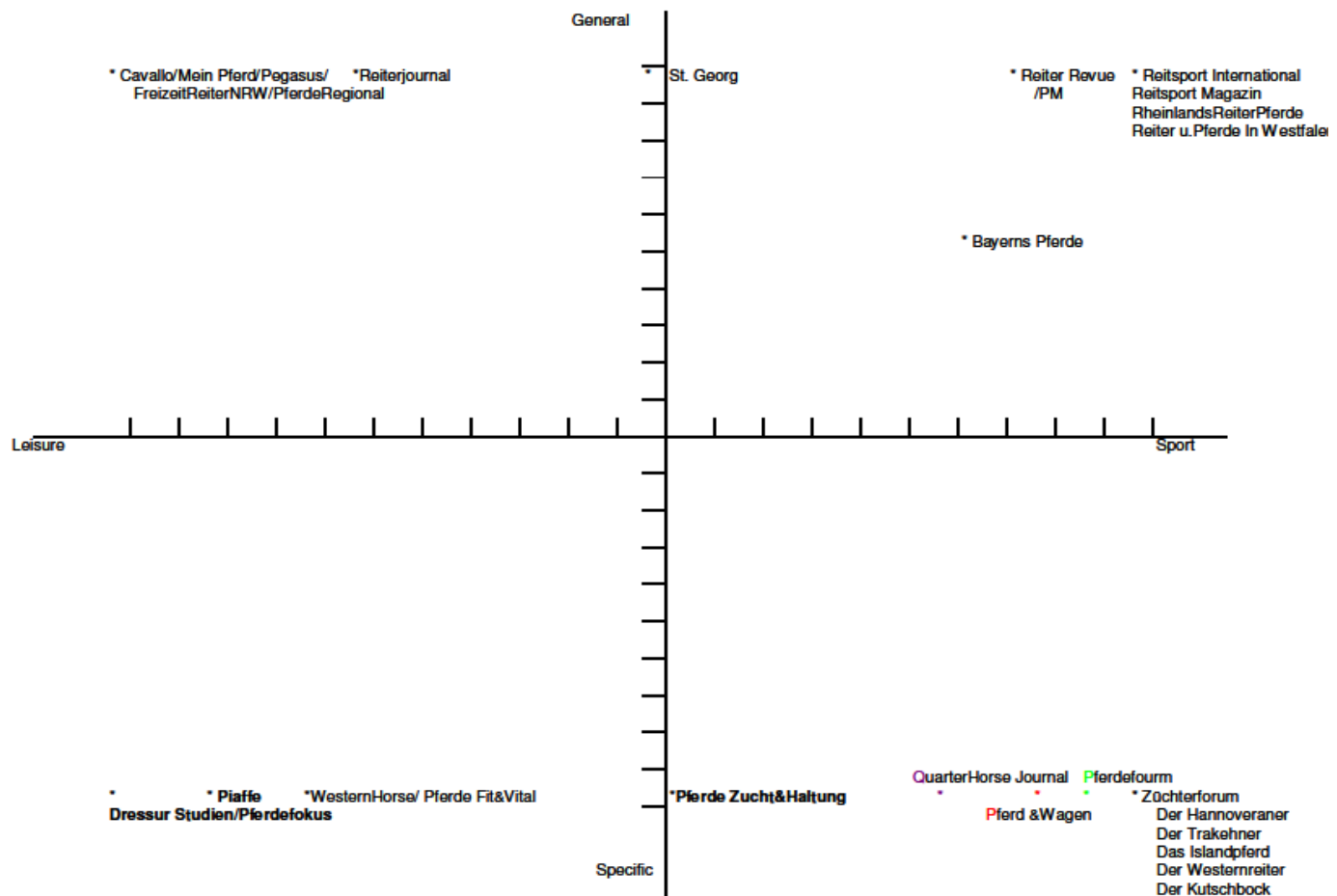


Plate 5-1 : Print media- the journals within the context specific/general content and leisure/sports related content; NOTE: the categorization for the 4 journals in bold ink is not coherent with the actual purpose of the journal. They are professional journals. Please see appendix 10-4 in order to read more about the calculations to the graph.

The graph shows that the journals have either general or specific content. Bayern’s Pferde is an exception. Moreover the journals are sports orientated and

report about sports events or they are leisure targeted. St.Georg is because of the practical content in the tested issues in between sports and leisure.

In the appendix 10-5 another graph shows where the journals can be positioned in a health/training, sport/leisure context.

11 journals try to involve the reader with the vehicle by publishing letters written by readers, reader photos, raffles and/or answering reader questions (7 national, 4 regional). Nationally published journals spend in average more pages (5,1 pages) to involve readers than regional magazines (1,7 pages).

18 journals offer product test and /or product news sections where products new in the market are presented.

Moreover, eight of the selected magazines for the short list are carrier of regional association news, where on average 39 pages are used to cover stories about regional events and riding clubs and next to that competition dates or/and event dates. It was further noticed that Cavallo, Mein Pferd, Pegasus, Reiter Revue and St.Georg had more journalistic content than the other magazines. Regional magazines report, to different extents, mainly about regional events but Reiterjournal, Reiter Pferde in Westfalen, Bayerns Pferde and Freizeitreiter NRW offer articles about health, training or/and legal affairs, too.

Please see appendix 10-3 for the detailed content evaluation

5.3.2 Print vehicle- Quality content and quality outline

The qualitative performance of the short list titles were measured and evaluated by the quality of the outline and content (health related articles).

Name	Quality outline	Quality content
Cavallo	2	3
Mein Pferd	2	3
Pegasus	2	3
ReiterRevue	3	3
St.Georg	3	3
Das Pferde Magazin	2	3
Reitsport International	2	3
PM by FN	2	2
Züchterforum	2	3
Der Hannoveraner	2	2
Der Trakehner	3	2
Pferde Zucht&Haltung	3	3
Pferdeforum	2	3
Bayerns Pferde	2	3
Reitsportmagazin	2	2
FreizeitReiter NRW	1	3
Rheinlands Reiter&Pferde	2	2
Reiterjournal	2	2
Das Islandpferd	2	2
Westernreiter	2	2
Reiter und Pferde in Westfalen	2	2
Pferd und Wagen	2	2
Der Kutschbock	1	2
Dressur Studien	3	3
Piaffe	3	3
Quarterhorse Journal	2	2
Western Horse	1	2
Pferde Fit und Vital	2	2
Pferdefokus	2	3

Table 5-2 : Quality content and outline analysis print vehicles

Key Outline:

1 = Poor paper quality, thin paper is used, poor binding, poor text outline, and poor picture quality reader friendliness -->

e.g. ink size

2 = Average paper quality, paper ok, binding ok, average text outline, picture quality ok

3 = Excellent paper quality, heavy paper, superior binding, text outline is very reader friendly, good picture quality

Key Content:

1 = Health related articles written by one vet or a journalist referencing to one vet or specialist

2 = Health related articles written by one vet or a journalist referencing to one vet or specialist

3 = Health related articles written by journalist referring to more than one vet or specialist, or written by Vet referring to scientific sources

All journals score with good or higher in quality of the content thus the content of journals can be seen as a reliable source of information. The quality of the outline is on average good. An exception is Westernhorse, Der Kutschbock und Freizeitreiter NRW, which score very low.

The journals that score with excellent in both outline and content (ReiterRevue, St-Georg) are perceived as high status vehicles. Pferde Zucht und Haltung, Dressurstudien and Piaffe, that were found to be very specific, professional journals, score also with excellent in content and outline quality, which is supporting the result from the content analysis in their professionalism.

5.3.3 Print vehicle Target Groups

22 journals had no further information about the age of their target group. Nine could give information. The Reiter Revue is the journal, which has the youngest group of readers (10-39 years old). Whereas PM by FN has on average the oldest group of readers (30-49 years old) and 89% of their readers own a horse. The average age from the journals that gave information about their target group age is 35,6 years. (For Graph please see appendix 10-6) It turned out that most magazines have female readers except for the Quarter Horse Journal which has mainly male readers (66%). Journals that gave a description of their readers state that the average reader is highly educated and has a high average income as measured by the national average income.

Regional journals are targeting members of the regional associations. According to the journals the readers are active competition riders, breeders and judges but also people that are interested in news from the region.

Journal	Age	Professionals	Sport	Leisure	Additional information
Cavallo	/			x	Critical leisure riders
Mein Pferd	/			x	
Pegasus	/			x	Reader owns on average 2 horses and keeps them at home
ReiterRevue	10-39		x		Readers are very interested in fashion, high average income
St.Georg	30-49		x		High average income
Das Pferde Magazin	/		x		People interested in horse sport
Reitsport International	37,6		x		Riders, horse owners, active riders, trainers
PM by FN	/		x		Members of the Persönliche Mitglieder, 89% own a horse
Züchterforum	/		x		Breeders, young stock keepers, stallion owners
Der Hannoveraner	/		x		Members of the Hannoverian association
Pferde Zucht&Haltung	/	x			Breeders, breeders associations
Pferdeforum	/		x		
Bayerns Pferde	26-39		x		Members of the regional sport and breeders association
Reitsportmagazin	/		x		Members of the regional sport and breeders association
FreizeitReiter NRW	/			x	Leisure riders in NRW that want to be informed about regional events and various topics
Rheinlands Reiter&Pferde	/		x		Members of the regional sport and breeders association
Reiterjournal	/		x		Members of the regional sport and breeders association
Das Islandpferd	/		x		Members of the IPZV
Westernreiter	/		x		Members of the EWU
Reiter und Pferde in Westfalen	/		x		Members of the regional sport and breeders association
Pferd und Wagen	/		x	x	Horse owners, leisure and sport drivers
Der Kutschbock	/		x	x	Leisure and sport drivers
Dressur Studien	/	x	x	x	Judges, professionals, riders
Piaffe	/	x	x		Ambitious riders, judges, sport riders
Quarterhorse Journal	19-39		x	x	Members of the DQHA

Western Horse	/		x	x	Members of the NRHA, AHCG, PHCG
Pferde Fit und Vital	20-39			x	Horse owners that perceive advertisement as helpful
Pferdefokus	/	x			Vets

Table 5-3 : Target groups of print vehicles in the short list

5.3.4 Print vehicles- The helicopter view

From the qualitative data analysis a helicopter view can be created, which shows the journals from the short list in superior categories.

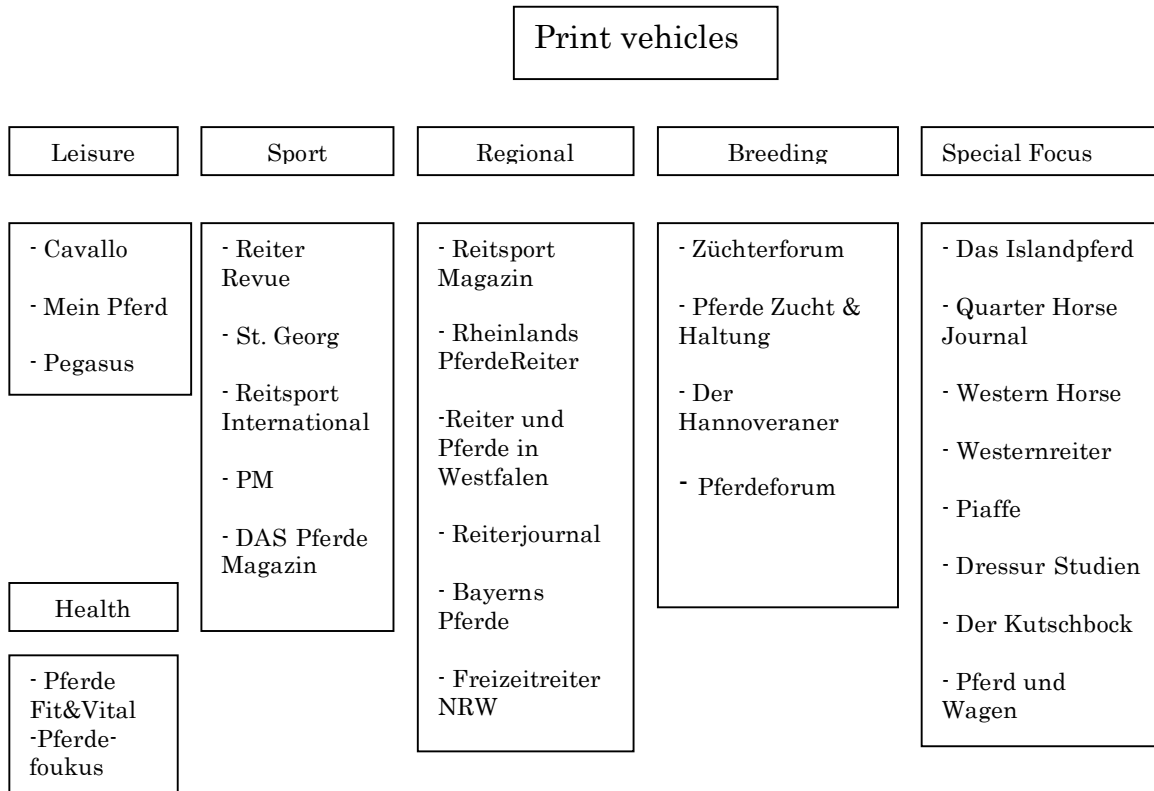


Plate 5-2: Shows the print vehicles from the short list in their superior categories in a Helicopter view

5.4. Print Vehicles Quantitative Measures

In terms of circulation the journals that are in one category can be compared to each other.

5.4.1 Circulation Leisure Journals

Title	Range	Publ.interval	Circulation	Subscriptions%	Trend
Cavallo	national	month	74,685	40	negative
Pegasus	national	month	43,426	31	
Mein Pferd	national	month	35,005	24	

Table 5-4: national leisure journals sorted by circulation

5.4.2 Circulation Sport Journals

Title	Range	Publ.interval	Circulation	Subscriptions%	Trend
PM by FN	national	month	55,000	100	
St.Georg	national	month	41,568	57	negative
ReiterRevue	national	month	31,022	56	negative
Pferdesport Int.	national	2-week interv.	20,000	34	
DAS Pferde Magazin	national	2-week interv.	12,000	35	negative

Table 5-5: National sports journals sorted by circulation figures

5.4.3 Circulation Regional Journals

Title	Range	Publishing interval	Circulation	Subscriptions%	Trend
Reiter Pferde in Westfalen	North-Rhine Westphalia	month	27,824	96	positive
Reiterjournal	Baden- Wuerttemberg	month	18,400	89	positive
Rheinlands Pferde&Reiter	North-Rhine Westphalia	month	15,603	92	positive
Bayerns Pferde	Bavaria	month	12,732	88	negative
Reitsportmagazin	Lower Saxony	month	10,057	75	negative
Freizeitreiter NRW	North-Rhine Westphalia	month	9,600	26	

Table 5-6: Regional journals sorted by circulation figures

Reiter Pferde in Westfalen has the biggest number in circulation but graph is just made to make the proportions visible. The journals cannot be compared as they target different areas in Germany.

5.4.4 Circulation Breeding journals

Title	Range	Publishing interval	Circulation	Subscriptions%	Trend
Pferde Zucht & Haltung	national	2 a year	24,000	100	
Der Hannoveraner	national	month	19,277	100	
Pferdeforum	national	month	12,630	99	
Züchterforum	national	month	10,000	45	

Table 5-7: Regional general journals sorted by circulation figures

The **special focus journals** with the highest circulation numbers per focus are:

- Western: Quarter Horse Journal (26,000)
- Icelandic Horse: Das Islandpferd (18,500)
- Training: Dressur Studien (8,171)
- Harness: Pferd und Wagen: (11,510)
- Health: Pferde Fit und Vital (57,000)

The special focus journals are all published nationally.

See Appendix 10-7 for tables

5.4.5 Costs

The cost per 1/3 (colour) advertisement for each journal can be found in the appendix 10-2.

5.4.6 Preference list

A list can be drawn in which print vehicles per superior category are presented that are good match for Pavo after the analysis of qualitative and quantitative data. Three major advantages they have over the other journals are given for reasoning.

Superior category	Title	Advantage
Leisure	Cavallo	Excellent health related articles Highest circulation number Best cost per reader ratio
Sport	PM by FN	Subscription journal Very credible source of information Interesting target group, which owns horses
Regional		-> cannot be really compared as they are active in different areas in Germany
Breeding	Pferde Zucht & Haltung	Professional journal Excellent scores in quality of content and outline Subscription journal
Western	Quarterhorse Journal	Highest number of subscription Is also targeting leisure riders

Harness	Pferd und Wagen	Interesting target group, which keeps horses at home Highest number of circulation Good quality outline and content
Dressage	Dressurstudien	Highest circulation
Health	Pferde Fit & Vital	High number of circulation Practical, easy accessible information

Table 5-8: Journal preference list

There was no other journals found for Icelandic horses therefore Das Islandpferd is the only choice.

5.5 Equestrian Online Vehicles available in Germany

In total 77 online vehicles were collected; 27 journal websites; 6 online magazines; 32 community and information websites; 9 online horse sale websites and 12 that is categorised as other. (Appendix 10-8)

27 of them were found to be suitable to put advertisement on the website and/or to be suitable for cooperation, for promotion and/or PR (Table 5-8). 12 websites where all kinds of information is available (sport, news, journalistic content, product news) communities where people can exchange information about specific subjects, create content by blogs or discussion forum contributions. It was found that some websites offer a mix from information/news, sales and community. 13 journal websites were selected, which might be suitable for a print/online campaign.

Name	
pferdaktuell.de	zeit fuer pferde
Horse today.com	pferde.de
wittelsbürger	Pferd und Wagen
horse-gate.com	Islandpferdeportal
Horseweb.de	Mein Pferd.de
Distanzcheck.de	Pegasus-fs.de
Das Islandpferd	Reitsportmagazin
Cavallo.de/outdoorchannel	Freizeitreiter NRW
ReiterRevue	reiten.de
St.Georg	Fn Neon
Züchterforum	deine tierwelt
Rheinlands Reiter&Pferde	wir-lieben-pferde
Reiterjournal	reitforum
Westernreiter	

Table 5-9 : Websites from the short list that might be suitable for cooperation.

5.6 Online vehicles- qualitative measures

In order to measure the soft factors of the website, the site was evaluated after Bachem's (2002) suggestions. The website could score from 0 to 3 .

The rating of the websites resulted gives the following results and the index is the sum of scores. (high index= good website)

Name	credibility	brandequity	UPC	content	Design	navigation	interaction	Index
FN Neon	3	3	3	3	2	3	1	18
Das Islandpferd	3	3	3	3	2	2	2	18
pferdaktuell.de	3	3	3	3	2	2	1	17
delne tierwelt	2	2	2	2	3	3	3	17
Cavallo.de/outdoorchannel	3	3	2	3	2	2	2	17
ReiterRevue	3	3	2	3	2	2	2	17
Mein Pferd.de	3	3	2	3	2	2	1	16
Pegasus-fs.de	3	3	2	3	2	2	1	16
St.georg	3	3	2	3	2	2	1	16
Züchterforum	3	3	2	2	2	2	2	16
wir lieben pferde	2	2	2	2	2	2	3	15
Reitsportmagazin	3	2	2	2	2	2	2	15
Rheinlands Reiter&Pferde	3	2	2	2	2	2	2	15
Reiterjournal	3	2	2	3	2	2	1	15
Freizeitreiter NRW	3	2	2	2	2	2	2	15
Westernreiter	3	3	2	3	2	1	1	15
wittelsbürger	2	2	3	3	1	1	2	14
zeit fuer pferde	3	1	3	2	2	2	1	14
pferde.de	2	2	2	2	2	2	2	14
horse-gate.com	3	1	2	2	1	2	3	14
Horse today.com	2	1	2	3	2	2	1	13
Pferd und Wagen	3	2	2	2	2	2	0	13
Horseweb.de	2	1	2	3	2	2	0	12
reiten.de	2	1	2	2	1	1	2	11
Distanzcheck.de	2	1	2	2	1	1	1	10
reitforum	1	1	1	1	1	2	3	10
Islandpferdeportal	1	1	2	1	1	2	1	9
Key: 0: none; 1: limited; 2: good/ to some extent; 3: excellent/ a lot								

Table 5-10: Qualitative website rating based on Bachem (2002)

The FN-Neon website, which is the official website in order to subscribe for a competition, scores 17 from 21 points. The service website has 333,333 visitors (please note: number of visitors not unique visitors)

The islandpferdeportal.de, reitforum.de and distanzcheck.de score very low as they are the websites that are simple and make a semi professional impression.

The magazine websites score all with 3 because their content is checked by the publisher and journalists of the journals. Moreover the journal websites score

between 2 and 3 in brand equity as they profit from the prominence of the magazines.

Community websites scored high in terms of interaction because there the user has many possibilities to create content by putting pictures online or/and edit and create text.

5.6.1 Website Target Groups

There is little sociodemographic data available about the users of the selected websites. The community Deine-Tierwelt.de reports that their users are mainly from 10 till 29 years old. Wir-lieben-pferde.de knows about their users that they are mostly female and that the biggest group of user is from 21 to 40 years old followed by the age group from 41 and older. For some websites the target group can be determined by the content of the website.

Target group	Website
Western	Wittelsbuerger.de, westernreiter.de
Icelandic horses	Islandpferdeportal.de, ipzv.de
Endurance	Distanz-check.de
Breeding	Horse-gate.de,

Table 5-11 : Target groups of websites

There was no website available that could meet the need of Pavo that focus particular target groups such as for drivers, dressage riders and leisure riders. For the journal websites are homepages of the journals and are seen as an additional service to the actual print product and therefore the target group is the same as for the journals.

5.6.2 Website content

The content of the websites were evaluated under the aspects information, health and news. This evaluation helps to understand the environment in which Pavo might communicate in. It is put in relation to credibility in order to be able to evaluate the actual value of the information presented on the website.

Name	information	health	News	Index	credibility
pferdaktuell.de	3	1	3	7	3
Horse today.com	3	2	2	7	2
wittelsbürger	3	0	3	6	2
horse-gate.com	2	1	3	6	3
Horseweb.de	3	1	2	6	2
Distanzcheck.de	3	0	3	6	2
Das Islandpferd	2	1	2	5	3
Cavallo.de/outdoorchannel	2	1	2	5	3
ReiterRevue	2	1	2	5	3
St.Georg	2	1	2	5	3
Züchterforum	2	1	2	5	3
Rheinlands Reiter&Pferde	2	1	2	5	3
Reiterjournal	2	1	2	5	3
Westernreiter	2	1	2	5	3
zeit fuer pferde	2	2	1	5	3
pferde.de	2	1	2	5	2
Pferd und Wagen	2	1	2	5	3
Islandpferdeportal	3	1	1	5	1
Mein Pferd.de	2	1	1	4	3
Pegasus-fs.de	2	1	1	4	3
Reitsportmagazin	2	1	1	4	3
Freizeitreiter NRW	2	1	1	4	3
reiten.de	3	0	1	4	2
Fn Neon	3	0	0	3	3
deine tierwelt	1	2	0	3	2
wir lieben pferde	1	1	1	3	2
reitforum	1	1	0	2	1

Key Content
evaluation:
0 = none
1= limited/ bad
2= good/ to some
extent
3= excellent/ a lot

Table 5-12 : Website content in the context to credibility

The table shows in terms of content, communities score quite low but official websites high also in terms of credibility community websites score rather low. Information websites such as horse-today.de, horseweb.de, wittelsbuerger.de that are independent websites show that they deliver information in a credible environment.

5.6.3 Cooperation possibilities offered by websites

All websites, but this was also a criterion, offer banner ads that are visible at first sight. The two community sites (deine-tierwelt.de and wir-lieben-pferde.de) offer brand pages where a company can create its own profile and can communicate directly to the user. Reitforum.de is also one of the biggest online communities in Germany but with little options to reach the members with a message. Information websites such as horseweb.de, horsetoday.de and pferde.de publish product news and offer various possibilities to display advertisement and get the user engaged. (Appendix 10-10)

Journal websites offer spaces for banner ads. The homepages of the national general journals offer videos on the website about training, health, interviews. (Appendix 10-10) Independent websites offer compared to journal homepages more tools for companies/ advertisers to involve with the website as well as association websites.

5.6.4 Online Vehicles- The helicopter view

From the qualitative data analysis a helicopter view can be created, which shows the journals from the short list in superior categories.

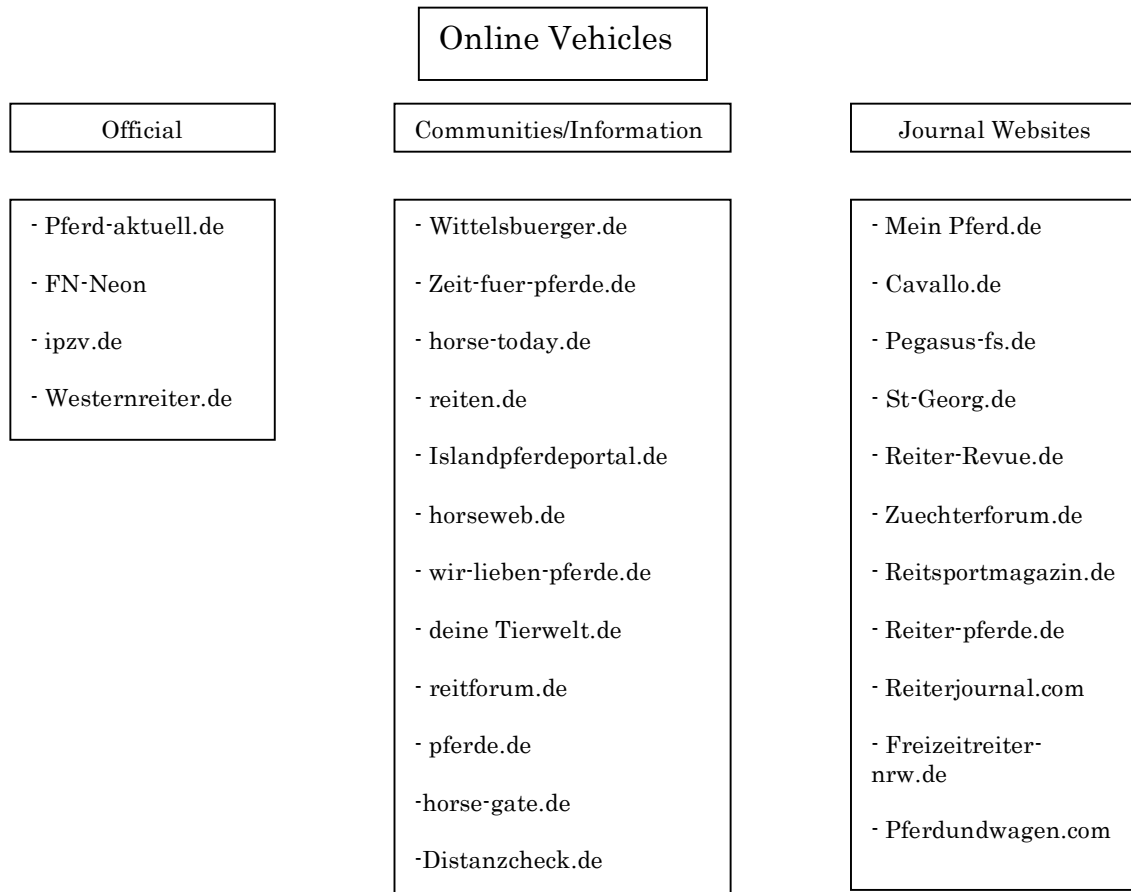


Plate 5-13: Shows the websites from the short list in their superior categories in a Helicopterview

5.7. Online vehicles - quantitative measures

Name	Page Impression	visitors	Unique visitors	time
Fn Neon	2.916.666	333.333		
pferdaktuell.de	1.000.000		300.000	
<i>Community/information</i>				
wittelsbürger	3.593.005		253.671	
zeit fuer pferde	depends on the cooperation			
Horse today	500.000		50.000	14
Horseweb.de	1.300.000		280.000	
<i>community</i>				
wir-lieben-pferde	582.210		20.530	
deine tierwelt	6.200.000		650.000	
reitforum	10.000.000		470.000	13
pferde.de	3.500.000		350.000	
Islandpferdeportal		90.000	25.000	
Distanz-check.de	500.000		54.907	
horse-gate.com	160.000		80.000	
Cavallo.de	250.000		30.000	
Mein Pferd.de			17.000	
Pegasus-fs.de			10.000	
St.georg			57.000	
ReiterRevue			27.000	
Züchterforum			30.000	
Reitsportmagazin			20.000	
Rheinlands Reiter&Pferde				
Reiterjournal				
Freizeitreiter NRW				
Das Islandpferd				
Westernreiter			24.500	
Pferd und Wagen			30.000	

Table 5-14: Quantitative data of non journal websites per month

The website with the highest number of unique visitors is the community deine-tierwelt.de.

Journal websites are seen as a supportive extra opportunity to co-operate with the journals. It was taken care of that the journals websites offer an interactive tool for the user and that it is actually used and up-to-date. Some journal homepages could not give numbers of their unique visitors. The number of page impressions was not collected.

It is conspicuous that the websites offer different methods of payment. 8 sites offer the usually used method of cost per thousand views, 17 use a fixed price per month. Magazine websites offer a special price, that needs to be further discussed, when banner and journal advertisement is booked. (Appendix 10-09)

5.7.1 Preference list

A list can be drawn which online vehicle per superior category/target group is a good match for Pavo after the analysis of qualitative and quantitative data. The major advantage they have over the other websites are given for reasoning.

Target group/superior category	Website	Advantage
Western	Wittelsbuerger.de	Highest number of visitors
Icelandic horses	ipzv.de	High credible website
Endurance	Distanz-check.de	Unique content position
Breeding	Horse-gate.de,	Unique content position
Communities	Deine-tierwelt.de	Professional website with enormous possibilities for communication
Project based	Horse-today.de	Various professional possibilities to get involved with the website
Official	Pferd-aktuell	Highly credible environment

Table 10-15: Website preference list

6. Discussion

6.1 Media available in Germany

The research has shown that there is a wide range of horse related journals and websites available. The number of journals is in line with the official number of the FN, which states that there are 60 horse related journals available in Germany (pferd-aktuell.de). Since there is not official number of horse related websites available, it cannot be said if the research has documented all available websites but it was tried to check official from the FN website and unofficial lists (e.g. Top lists) where websites were published.

The short list that was established shows the vehicles that suit Pavo on first sight but still there have to be made distinctions between the performances of them. In both preference lists the selection of vehicles is presenting the top vehicles per category but this is not a guarantee that these vehicles are the most suitable vehicles for a long term partnership or for a campaign. As the benefits of another vehicle might be exactly suitable for the campaign and the benefit overweighs the deficit of the vehicle. If a vehicle suits Pavo must be thus also seen in a particular context as there is “no bad or good vehicle but just the right one” after Unger et al (2005). Therefore the evaluation of the vehicles should not be seen as absolute but more as a rough estimation.

For particular target groups of Pavo there were just a limited number of vehicles available such as for dressage riders or drivers. There are just two journals available for each group that are especially focusing on the discipline. Therefore a particular targeting of these groups is just possible via print vehicles.

The analysis of the vehicles that might be suitable for Pavo was based on the target group and target region, quantitative and qualitative factors according to Unger and Fuchs (2007), Unger et al. (2005) and Pörner (2003). The qualitative factors, which had to be established for the vehicle selection, make the research subjective, although qualitative characteristics such as quality of the outline was put in a measurable context. The way of handling this fact was according to Pörner (2003) the task of the media planner and in this case the task

of the researcher. And because of this there might be other approaches, depending on the researcher, to complete the task.

Moreover, the research collected quantitative data about the advertisement formats Pavo used in the past and the most common ones. Of course there are various ways to get integrated in vehicles. The degree of user/reader involvement and the possibilities for brand involvement (e.g. raffles, product tests) were documented in order to estimate if a journal is likely to run promotions in cooperation with companies. Although it does not necessarily mean that vehicles which scored low in reader/user involvement is not willing to run projects with a company or that projects for user/reader involvement are not successful.

It must be mentioned that vehicles such as distanzcheck.de are selected in the short list although the website scored low in Bachem's (2002) soft factor criteria. But the content is unique and therefore very interesting to reach certain target groups. If a vehicle has a unique position, which is interesting for Pavo, but is scoring low in quality of outline and the benefits outweigh the deficits.

Although the results from print and online quality/soft factor analysis can not be really compared it can be said that journals offer in total a more credible environment for messages than websites except for the homepages of associations and journals websites.

The determination of the pro and contra of each vehicle should be done in a particular context as this could not be derived from the analysis of quantitative and qualitative factors of the vehicles. Therefore for the research question can be just answered in the practical application, thus in the discussion for integration possibilities.

6.2 Print vehicles

In the evaluation of print vehicle quality and content national journals that have a general content score the highest and are therefore perceived as high status vehicles and messages presented in this environment are said to be more effective after Unger et al (2005). Whereas regional journals, that are the official sources of the regional associations, might be less prominent but have on average a good quality of outline and content and represent a credible environment for messages because of their function as an official organ. Furthermore, those journals have a high number of subscribers, which gives more certainty that a repetitive confrontation with the message can happen. Therefore it can be questioned if high status and very prominent journals are offering the most effective environment for Pavo's message.

For some disciplines/topics there was just one vehicle available that is covering this particular subject such as the *Das Islandpferd* or *Pferde Fit und Vital*. These journals were found to be very interesting because they have a unique content although they might have deficits in other areas such as quality of outline.

Overall, the qualitative factors of the journals from the short list cannot be put in a meaningful measurable context as they all score at least with "good" in quality of content. Therefore the target group and/or target area of a journal is a better measurement for the suitability to Pavo. Although from *Pferde Fit & Vital* it was expected to have an excellent content quality as it is solely focusing on health related topics but the journalists are not referring to scientific studies or veterinarians.

The regional journals from the short were found to be official sources of regional associations for sports and breeding. They are publishing association news and regional competition advertisement but have less journalistic content. The target group of the magazines are association members, breeders and people that are interested in regional sports news. Although some journals could not give precise data such as age or number of horses the quality for the journal must not be questioned as they are the official source of the regional associations.



Freizeitreiter NRW is the exception. The journal offers indeed news about the leisure riders and drivers association VDF but is also covering topics, which might be interesting for non-association members.

The evaluation of content and topic of the journal was taken at some cases from one journal copy. Therefore the result of the content evaluation can be seen as an orientation but not as a total picture. The evaluation of journals where more than one issue were available has also shown that the structure of the content and topics vary between the issues and thus these results can also just been taken as an orientation. Further research could create a more precise picture if all copies per year could be included in a content evaluation. Moreover, journals develop such as Rheinlands Pferde und Reiter that recently changed their design. The market must be further observed and the results of this research present a snapshot of the German equestrian print and online landscape. Moreover, not every journal could give precise data such as socio demographic statistics about their target group and therefore there is a degree of uncertainty, which e.g. age group is reached or how many readers own a horse. But at least all journals could say who they are targeting at and with this information a rough target group profile can be drawn.

The research could not find out and explain why national general journals have on average more pages for reader involvement than general regional journals. But it would be an interesting attempt for a research to investigate the reason for the finding.

Member magazines such as PM, Westernreiter, Das Islandpferd and Der Hannoveraner offer a stable number of readers, relatively low advertisement costs and a credible environment for brand messages and a unique content. The weakness of these magazines is their low journalistic content besides the association news, rare reader interaction and hardly any health related topics.

6.3 Online Vehicles

It was noticed that from the abundant number of websites there are not so many matches that suit Pavo. Many websites do not make a credible and/or professional impression. That might lead to the assumption that in comparison to other branches the offer of horse related websites is less developed and thus the



need for steady improvements because of the missing competition or demand. But as research by pferde.de (2007) found out the Internet is an important source of information to riders. Therefore websites must be included in the communication strategy.

Moreover, websites that specify to one subject (breed, discipline and etcetera) rarely meet the criteria those were set up for sites to come in the short list. Also in terms of credibility, which is found to be an important criterion to the user (Choi and Rifon, 2002), the websites that were collected in the long list mostly did not meet this criterion. Therefore, just a small number of available websites were selected for the short list. The websites from the short list are very different from each other in design, topics and advertisement possibilities. The quantitative data in terms of visitor numbers that was collected from the websites are not perceived as reliable as they are not checked by an official or neutral organisation. The data can be seen as an orientation. Moreover the websites could not give data about their user structure. The target group had to be derived from the website offer but still is unknown the users of the websites are active riders/horse owners.

Furthermore journal websites were collected for the purpose to be used as a supportive medium for print campaigns therefore just basic information were collected. Of course they can also be used solely for advertisement without running a campaign in the print vehicle.

Three websites- reitforum.de, reiten.de, islandpferdeportal.de – score low in Bachem's (2002) criteria and website content. It was predictable that these site will score rather low as they already made a semi-professional first impression but they were taken in the short list because of their quantitative data. They seem to be popular, which is contradicting to the findings of Choi and Rifon (2002) that state that credibility is very important to the user. Of course, it is not certain what users look for on these websites, how long they stay on the website and if the aspect of credibility is very important to user of a community such as reitforum.de.

It can be assumed that a further professionalization of horse related websites will take place and the predicted take over of the Internet as the major

channel for communication might happen in the future (see Unger and Fuchs, 2007).

Despite the positive effects and benefits of online communication, the maintenance of interactive online platforms such as communities must be done on a regular if not even on a daily basis in order to use the advantages of the channel. (Unger and Fuchs, 2007) Thus if it cannot be insured that an active exchange of information can happen on these platforms it would be not advisable to include this channel in the marketing communication as it can damage the company image. (Unger and Fuchs, 2007) Still interactive Internet platforms offer various possibilities for user engagement, which might have a positive effect on attitude towards the brand and brand recognition.

Official websites such as pferdaktuell.de and fn-neon.de scored high in Bachem's (2002) criteria and seem to be very suitable for Pavo but they offer a limited variety in advertising and communication possibilities, thus the scores of website quality should be seen in the context of user engagement, advertising opportunities and target group.

For websites there was also little information available about the user sociodemographic structure. The 2 websites (deine-tierwelt, wir-liebe-pferde.de) have a very different user age structure. In order to get an overview about the German Internet user structure the reports by the ARD and ZDF (2009) should be used as an orientation, which are stating that the biggest group of user are 14 till 29 year-olds, thus a young user group. Further research could investigate if the age structure of horse related website users is comparable to the findings of the ARD and ZDF (2009) study.

The positive effects of synergy in communication that is described by Chang and Thorson (2004) and Stammerjohann et al. (2005) can be used just to some extent as little is known about the age structure of the equestrian print media and the equestrian media consumption. The information that was found in this research leads to the vague assumption that the journals are rather read by people in their thirties. Thus it cannot be really predicted if a user is consuming journal A he will also use website B. If the age group of users of equestrian print vehicles and Internet users are compared it can be detected that they do not

necessarily overlap and positive effects of synergy described by Stammerjohann et al. (2005) can be possible between print and online media in terms of age group targeting in some combinations and the can be applied.

6.4 Pavo in the Media

The online as well the print short list presents various vehicles that can be used in order to communicate with the user. After Bachem (2002) and Unger and Fuchs (2007) qualitative as well as quantitative factors should influence the strategy and vehicle selection. But as there is no official number available about how many horse owners there are in Germany the number of the target riders will be the number of people that are actively involved in riding: 1,6 m. (pferd-aktuell.de) in order to be able to measure efficiency. It is unlikely that 1,6 m. people in Germany own a horse as there are only 1 m. horses (pferd-aktuell.de) living in Germany and one person can own many horses (e.g. riding school). That is why there cannot be given a clue how many people from the target group (horse owners, breeders) are actually reached with the vehicles.

Based on Dr. Gerstmann's (2010) suggestion to keep involving print media in customer communication and Bachem's (2002) advice to use the Internet as an supporting medium if a campaign aims on brand awareness, the recommendation for Pavo's media cooperation is based on print media but with an open mind toward new media.

Furthermore, the research found out that the equestrian websites that might be suitable for Pavo are relatively rare. But as the Internet is a fast moving medium (Keller, 2009) it can not be predicted if there wont be professional websites available in the next 5 years that meet Pavo needs. Therefore, the development of equestrian websites must be observed.

The findings from Cho (1999) and Shamdasani et al (2001) about the relationship between vehicle content and advertisement effect and Atkins and Block (1991) and Ohanian (1991) findings about source credibility and persuasiveness of the message were taken as the basis of the vehicle suggestions. As in some cases a websites such as Fn-Neon represents a highly credible platform but people visit the website for a specific purpose like subscribing for a competition. Thus after the findings of Cho (1999) and Shamdasani et al (2001)



advertising on Fn-Neon would not have the desired effect of vehicle content and advertisement.

Therefore a long-term partnership with general journals that cover cross-disciplinary topics and offer health related content are found to meet Pavos demands for vehicle content and credibility. For campaigns vehicles are selected, that are targeting the same group Pavo's is targeting with their products in order to which serve the vehicle content- advertising effect described by Cho (1999) and Shamdasani et al (2001) and target the groups the product targets as well.

In the past Pavo has been using various vehicles because of favourable qualitative or/and quantitative characteristics and according to Pavo the partnerships have been successful to some extent. Some of the former cooperation partners are not suggested in the recommendation, although the cooperation has been a success but as this research found out they are not meeting Pavo's needs. (e.g. Pferdeanzeiger) Journals like the Pferdeanzeiger offer the opportunity to implement special forms of advertisement that have been raining attention, according to Pavo, in cooperation with events. But as Pavo is looking for long term partnerships other journals are found out to suit Pavo better.

The research finds its limits at the degree of cooperation with the media. This paper can give the helicopter view on the German equestrian print and online media market, position of the vehicles, describe their advantages and disadvantages and evaluate them in terms of their suitability for long term partnerships and campaigns but cannot give an exact tactics of integration.

6.5 Discussion of long term Partnerships and campaign options

The findings of this research allow different ways for Pavo to approach the media market. The budget is about 50,000€ per year for long-term partnerships and the supplement campaigns.

Both journals and websites are suggested for the media planning as both media have important functions for the user/reader that were described by Unger et al (2005) and Dr. Gerstmann (2010).

For general long term cooperation, by means targeting people that are involved with dressage, jumping or leisure riding, there was a national and a regional approach worked out with print media as well as a mixed approach from national and regional journal. Online, options for cooperation with a community website, project banes website and banner advertisement are presented as well as options for product campaigns.

6.5.1 Option 1 long term partnerships: National journals

This option suggests selecting national journals that are found to have a general content and are the top ones in their category, targeting different groups (leisure/sport).

Title	Publishing interval	Circulation	Subscriptions%	Subscription	Cost 1/3 ad in €	Cost per reader
Cavallo	month	74,685	40	30,000	2,150	0.028
PM by FN	month	55,000	100	55,000	1,320	0.024
St.Georg	month	41,568	57	23,688	2,232	0.053
Total		171,253	63	108,688	5,702	0.03

Table 6-1 : Quantitative Facts Option1

Advantages:	Disadvantages:
<ul style="list-style-type: none"> - Prominent journals, top in their category - Excellent content quality with well known experts - Reader involvement - Mixed target group from sport riders and leisure riders - Good websites for an online/print campaign -Product publicity possible, good websites 	<ul style="list-style-type: none"> - If Pavo wants to concentrate on certain regions in Germany, then advertising in national magazines is relatively expensive and less targeted way to reach the target group - Because for prominence projects might be expensive and not very easy to implement - Decreasing circulation numbers

Table6-2: Advantages and disadvantages national/general Journals.



6.5.2 Option 2 long term partnership: Regional Journals

This option suggest, targeting Pavo's focus areas with the journals of the regional associations.

Title	Publishing interval	Circulation	Subscription	Subscriptions%	Cost 1/3 ad in €	Cost per reader
Reiter Pferde in Westfalen	month	27,824	26,578	96	883	0.030
Reiterjournal	month	18,400	15,331	89	1,070	0.058
Rheinlands Pferde&Reiter	month	15,603	7,177	92	787	0.050
Bayerns Pferde	month	12,732	10,402	88	1,080	0.084
Reitsportmagazin	month	10,057	7,365	75	1,024	0.100
Freizeitreiter NRW	month	9,600	2,357	26	533	0.060
Total		94,216	69,210	61	5,377	0.08

Table 6-3: Quantitative facts option 2

Advantages:	Disadvantages
<ul style="list-style-type: none"> - Focus on the target region - High subscription numbers >chance to be seen again by the same reader is high - Regional topics -> close to the reader, tailored messages to the region can be send -Projects might be less expensive because of lower circulation numbers - Journals are official journals from the regional riders and breeders associations - Product publicity possible, good websites (Reitsport Magazin, Reiter&Pferde in Westpfalen, Freizeitreiter NRW), product testing in the journals 	<ul style="list-style-type: none"> - Many cooperation partners are needed to cover Germany - Low reader involvement (in some journals) and less journalistic content - Journals are targeting sport orientated riders (besides Freizeitreiter NRW), leisure riders are hardly reached, homogenous target group

Table 6-4: Advantages and disadvantages Regional/general Journals

6.5.3 Option 3 long term partnership: Regional Sports Journals/ National Leisure Journal

In order to be able to use the advantages that regional journals offer but reach the target group leisure riders as well, a national leisure journal, in this case Cavallo as it is the biggest journal with the best cost per reader ratio can be added to option 2.

Title	Publishing interval	Circulation	Subscription	Subscriptions%	Cost 1/3 ad in €	Cost per reader in€
Cavallo	month	74,685	30,000	40	2,150	0.028
Reiter Pferde in Westfalen	month	27,824	26,578	96	883	0.030
Reiterjournal	month	18,400	15,331	89	1,070	0.058
Rheinlands Pferde&Reiter	month	15,603	7,177	92	787	0.050
Bayerns Pferde	month	12,732	10,402	88	1,080	0.084
Reitsportmagazin	month	10,057	7,365	75	1,024	0.100
Freizeitreiter NRW	month	9,600	2,357	26	533	0.060
Total		168,901	99,210	59	7,527	0.04

Table6-5 : Quantitative facts option 3

Advantages:	Disadvantages
<ul style="list-style-type: none"> - High subscription rate - target group of Cavallo balances missing leisure rider targeting of regional journals -Tailored messages can be send to target groups and regions -Advantages from option regional journals and Cavallo in one option 	<ul style="list-style-type: none"> - Many cooperation partners are needed to cover Germany and the target groups - dependency on Cavallo as the main channel for leisure riders -high costs

Table 6-6: Advantages and disadvantages of regional journals + Cavallo

6.6 Online cooperation long term

Online the research found websites that offer projects for cooperation. Different options for integration online were worked out for: communities, projects and banner advertising.

6.6.1 Option long term cooperation: Online Communities

Communities		Brand page			
	Unique Visitors	Month	Total year	Start up	Total Y1
Wir-lieben-Pferde.de	20,530	€ 100	€ 1,200		€ 1,200
Deine-tierwelt.de	650,000	€ 416	€ 5,000	€ 4,000	€ 9,000

Table 6-7: Quantitative facts on one view *wir-lieben-pferde.de* and *deine-Tierwelt.de*, reach calculated by the total number of riders in Germany

Wir-lieben-Pferde.de	Deine-Tierwelt.de
<u>Advantages</u> <ul style="list-style-type: none"> - pioneer position in category “horse feed” possible - synergy effects with member magazine PM - young website -> possibility for growth - Age group of user overlaps with age groups of journals -> synergy effects with other journals -low costs-> no big investment for try-out 	<u>Advantages</u> <ul style="list-style-type: none"> - Individual possibilities to involve the brand with website - User has different possibilities to engage with the brand - Large community - People that are not members of the community are able to visit the brand page - Young female target group
<u>Disadvantages</u> <ul style="list-style-type: none"> - low score in navigation and design - limited user engagement possibilities- > no incentive to become a fan - User must be members in order to see the content 	<u>Disadvantages</u> <ul style="list-style-type: none"> - High costs - High maintenance -Also platform for other pets-> uncertainty if all your fans are riders or horse owners

Table 6-8: Advantages and disadvantages of *deine-tierwelt.de* and *wir-lieben-pferde.de*

6.6.2 Option long term cooperation: Project based online cooperation

The websites horse-today.de and zeit-fuer-pferde.de are offering project based co operations. Next to banner ads Pavo would have the possibility to realize projects with these websites. Horse-today.de seems to be multifaceted as they are presenting more than one project on their site and they are very keen on developing a professional website. In comparison to zeit-fuer-pferde.de, horse-today.de is offering news on a daily basis, journalistic content and product news. The website is offering different tools to present products and the advertiser (please see Appendix 8)

6.6.3 Option long term cooperation: Banner advertisement

In general all websites that are in the short list offer possibilities for banner advertisement. Putting banner ads on the starting page of websites with a very specific target group, is a cheap alternative compared to advertisement in the journals and should be considered for special focus groups and campaigns.

6.6.4 Cooperation for Special Focus groups

In order to reach groups that have a special interest in one particular discipline or breed two ways are possible to reach the groups either over print vehicles or online vehicles. Please see appendix 10-11

6.7 Campaigns

For the Breeder's and supplement product campaigns the communication environment is described shortly and 2 options are given how Pavo could communicate them in print and online vehicles.

6.7.1 Breeders Line campaign

The aim of the campaign is to raise awareness for the products and to transmit Pavo's brand values. The product involvement with horse feed is estimated as medium and the competitive pressure in advertising for feed stuff for breeding is estimated as medium during the whole year. The products are partly seasonal as some products of the Breeders line are feed in a particular period of foal



development. Thus the period of the campaign is given by the natural process of reproduction and process of foal growth. It would be most effective if Pavo's Breeders products would be integrated in content, promotion PR and advertisement during the season from December till May (Podo Lac: pregnant mares, giving birth and milk; Podo Start: foals drink milk, and start to eat their first solid food; Podo Grow: in December when foals are separated from their mothers) During this period the competitive pressure in advertisement and promotional activities from other feed manufacturers is rising.

The target group for the Breeders products are people that are active in breeding and raising young stars. There are no actual official numbers about how many breeders there are in Germany. Thus at this moment a number of how big the target group is, is not available.

6.7.2 Option 1: special focus journals

Positioning the product line in media vehicles that also specialised on the area would ensure that the campaign is reaching the target group with low scattering losses. The print media short list shows five print vehicles that would suit the Breeders campaign for advertisement because of their topics and quality of content.

Breeder's Campaign	Reach	December	January	February	March	April	May	Total
Pferde Zucht und Haltung	24.000	€ 702			€ 702			€ 1.404
Der Hannoveraner	19.277	€ 960	€ 960			€ 960	€ 960	€ 3.840
Züchterforum	10.000	€ 690	€ 690			€ 690	€ 690	€ 2.760
Pferdeforum	12.630	€ 943	€ 943			€ 943	€ 943	€ 3.772
Total	65.907	€ 3.295	€ 2.593		€ 702	€ 2.593	€ 2.593	€ 11.776
Cost per reader		€ 0,05	€ 0,04		€ 0,01	€ 0,04	€ 0,04	

Table 6-9: Quantitative facts Option 1 Breeder's campaign (1/3 page coloured advertisement)

34.807 (Total number of subscribers
(84%) will see the message again (without. PZ&H)



Advantages	Disadvantages
<ul style="list-style-type: none"> - Journals are very focused on breeding- >no scattering losses - the message is relevant for the readers - High percentage of people will see the message again - With Züchterforum it can be thought of doing an print-online campaign - Product/ company presentation possible in Pferde Zucht & Haltung 	<ul style="list-style-type: none"> - Two of four are specialized on one breed -> very specific - Pferde Zucht & Haltung is published just two times a year -> high advertising pressure not possible

Table 6-10: Advantages /Disadvantages Breeder's campaign option 1

6.7.3 Option 2: regional Journals

For the Breeders campaign regional journals are used that are official magazines from the regional breeding associations and regional journals that are reporting extensively about regional breeding events and news.

Breeder's Campaign	Reach	December	January	February	March	April	May	Total
Bayerns Pferde	12.732	€ 1.080	€ 1.080			€ 1.080	€ 1.080	€ 4.320
Reiter Pferde in Westfalen	27.824	€ 883	€ 883			€ 883	€ 883	€ 3.532
Rheinlands Reiter und Pferde	15.603	€ 787	€ 787			€ 787	€ 787	€ 3.148
Reiterjournal	18.400	€ 1.070	€ 1.070			€ 1.070	€ 1.070	€ 3.210
Total	74.559	€ 3.820	€ 3.820	€ 0	€ 0	€ 3.820	€ 3.820	€ 14.210
Cost per reader		€ 0,05	€ 0,05			€ 0,05	€ 0,05	

Table 6-11: Quantitative facts Option 2 Breeder's campaign (1/3 page coloured advertisement)

Advantages	Disadvantages
<ul style="list-style-type: none"> - all journals are published every month- > over the season high advertising pressure is possible - high number of people will see the advertisement/product publicity/ promotion again (80% subscribers) - Breeders from regional associations are reached 	<ul style="list-style-type: none"> - Not specialized on breeding- > scattering losses

Table 6-12: Advantages /Disadvantages Breeder's campaign option 2

For both campaigns it can be thought of sending product PR also to general journals that have a breeding section in it.

6.7.4 Online Breeder's campaign

The website horsegate.de is especially created for people interested in breeding. The website is publishing news and information about breeding but has also a community where active information exchange can happen. During the season it can be thought of having advertisement on the website.

Breeder's Campaign	Reach	December	January	February	March	April	May	Total
horse-gate.de	80,000	€ 350	€ 350	€ 350	€ 350	€ 350	€ 350	€ 2,100

Table 6-13: Possible advertising period on Hore-gate.de

Advantage	Disadvantages
<ul style="list-style-type: none"> - specific website attracts target group - Interactive platform 	<ul style="list-style-type: none"> - Just banner ads are possible

Table 6-14: Advantages and Disadvantages of the option

On Community websites the products can also be advertised via blog that rise awareness about the concept of the Breeders line that offers for every stage in the foal life a product.

Advantage	Disadvantages
<ul style="list-style-type: none"> - no extra costs if Pavo has a brand page there - quick adjustments can be made and quick reactions to events are possible 	<ul style="list-style-type: none"> - not directly aiming on the target group

Table 6-15: Advantages and Disadvantages of the option Breeder's advertising on community websites

Synergy effects can be made possible with advertising on journal websites, which are selected to be suitable for Pavo (option 1: Züchterforum, option 2: Rheinlands Reiter und Pferde). That means having either advertisement in the journal and a banner on the website or linking one to each other like advertising a promotion activity in the website that has to be done online.

Product publicity can be send to websites that publish news for free: horseweb.de and horse-today.de

6.7.5 Supplement campaign

Pavo's supplement line includes products for the needs of different breeds and disciplines. Therefore the products are likely to be communicated to a wide range of people. Products that aid training of horses in form of muscle support or nerve calming might be interesting for riders active in competitions especially during the green season, whereas mineral and vitamin supplements might be interesting for all riders though out the year. But the introduction of the new supplement range might need immediate communication to the target groups and a high advertising pressure

6.7.6 Option 1: Using long term partners

Pavo uses its partners that they are using for long term cooperation as the journals already target people that have different interest.

6.7.7 Option 2: Journals with a special focus on a discipline

Pavo is advertising in journals that target dressage and jumping sport riders during green season.

Supplement Campaign	Reach	May	June	July	August	Total
PM	55,000	€ 1,320	€ 1,320	€ 1,320	€ 1,320	€ 5,280
Dressurstudien	8,000		€ 490			€ 490
Total	63,000	€ 1,320	€ 1,810	€ 1,320	€ 1,320	€ 5,770

Table 6-16: Quantitative facts Option 2 Supplement campaign (Pm journal 1/1 coloured advertisement)

Advantages	Disadvantages
-Target group interested in sports - Dressurstudien special for dressage riders	- No high advertising pressure possible

Table 6-17: Advantages and disadvantages of option 2 for supplement campaign

6.7.8 Online supplement campaign

If Pavo decides on having a brand page/VIP profile the products can be communicated there via product PR, blogs, videos.

On Horse-today.de the shop window function can be used in order to present each product with a picture and a short description. The function is directly on the starting page and is immediately visible to the user as well as easy to use. A link can be installed that leads the user to the Pavo homepage. Brands such as Joules, Horseware Ireland and Pikeur also used that function.

Supplement Campaign	Reach	May	June	July	August	Total
horse-today.de	50,000	€ 425	€ 275	€ 275	€ 275	€ 1,250

Table 6-18: Quantitative facts for show window function on horse-today.de

Banner can be put on websites that are focused on one discipline or are focused on sport riders and particular products can be presented.

Supplement Campaign	Reach	May	June	July	August	Total
Wittelsbuerger.de	253,671	€ 325	€ 325	€ 325	€ 325	€ 1,300
Distanzcheck.de	54,907	€ 12	€ 12	€ 12	€ 12	€ 50
Horseweb.de	280,000	€ 200	€ 200	€ 200	€ 200	€ 800
Total	588,578	€ 537	€ 537	€ 537	€ 537	€ 2,150

Table : Quantitative facts banner advertising Supplement campaign

Under “product news” the supplements can also be presented for free.

7. Conclusion

The research could meet its objectives and could answer the research questions. The investigation of Pavo's brand values resulted in the three key words: Pioneer, health and top products. Pavo's target group can be described shortly as women that are actively involved in leisure riding, low level competition or top sport in various disciplines/breeds but also breeders. Groups and disciplines that earn a living out of horses are not in Pavo's focus. Pavo concentrates on four specific areas in Germany: North Rhine Westphalia, Lower Saxony, Baden-Wurttemberg and Bavaria.

There are currently 65 equestrian print vehicles and 77 online vehicles available in Germany that cover different topics about horses and horse sport. The selection for the short list found 26 journals and 27 websites that were found to be suitable on first sight because of their content, target area and/or target group.

The content analysis of the short list found out in terms of reader involvement that national journals use on average more pages for involvement (5,7 pages) than regional journal (1,7 pages). In total 11 journals try to involve the reader with the vehicle by publishing letters written by readers, reader photos, raffles and/or answering reader questions (7 national, 4 regional). Furthermore, the research found out that community websites have the highest degree in user interaction as there the user can interact with the content and create content. Overall the German equestrian website environment was found to be in its infancy with the potential to grow.

The print and online vehicles show specialisations on target groups as well. Journals have either a general content by means reporting about various topics or are specialized on one discipline or breed, thus targeting on one particular group of people. Websites were also to be found to target on special groups of people or to be interesting for a more heterogeneous group. Moreover, the research found out that some vehicles that take a unique content position score low in quality evaluation but are high frequented and/or the only sources of information for a target group e.g. Das Islandpferd or distanzcheck.de



The pro and contra of using a particular vehicle was determined by the practical application of the findings because these points come out when the data from the content/soft factor analysis is taken together for each vehicle and compared to others. Websites showed to be a good tool to reach a specific target group at a low price compared to a journal with the same focus. Moreover, the main advantage is the possibility to reach fast and immediate with the content and with the user, which was described by Unger and Fuchs (2007).

Journals, especially the regional ones, reach a specific target area and target group. This can be used for a direct communication to the area with low scattering. Where as national journals with a general content are very prominent, high status vehicles and have much reader involvement.

Furthermore, it was found out that not necessarily the vehicles with high scores in qualitative measures represent a suitable partner but vehicles that meet the demands of the context. In this case source credibility is playing a less important role and the actual context the message is presented in. The research can just present a snapshot of the Germany equestrianism media environment as especially online vehicles develop constantly because of its possibility to react fast on changes.

8. Recommendation

8.1 Long Term Cooperation Journals

For the long term cooperation with journals over the next 5 years Option 3 (regional journals and Cavallo) is the best match for Pavo in order to reach leisure and sport riders. A possible advertising schedule can be found in appendix 10-12.

The most suitable way to reach target groups that are focused on one discipline or a breed is:

Discipline/breed	Title
Harness	Pferdundwagen.com
Western	Wittelsbuerger.de
Icelandic horses	Das Islandpferd, Ipzv.de
Dressage	Dressurstudien
Health	Pferde Fit&Vital
Endurance	Distanzcheck.de

Table 8-1: Most suitable titles per special focus discipline/breed

In order to reach target groups that are focused on one discipline or breed it is more effective by reaching them via Internet if a website is available for that discipline. See appendix 10-13 for calculation

8.2 Long Term Cooperation Online

- In terms of online activities cooperation with the online community Wir-lieben-pferde.de suits Pavo's needs best.
- For project- based online cooperation horse-today.de

See appendix 10-14 for calculations

8.3 Breeder' Campaign

- Journals: option 1 -> Journals with a focus on breeding
- Online: horse-gate.de + journal home page Züchterforum

See Appendix 10-15 for calculations

8.4. Supplement Campaign

- Journals: Option 1 -> long term partners
- Online-> Banner ads on specialised websites + Horse-today.de

See appendix 10-16 for calculations.

8.5 Total Costs of Recommendation

Recommendation	Costs per year
Long term partnership Journals	€ 27.958
Special focus websites	€ 3.570
Special focus Journals	€ 2.898
Website community	€ 1.200
Breeder's Campaign	€ 14.596
Supplement Campaign	€ 2.050
Total	€ 52.272

Table 8-2: Total costs of recommendation

As discussed earlier the online offer for equestrian websites might develop in the next years and websites might become better and more professional as the Internet is a fast moving environment. That is why the online equestrian market offer should constantly be observed.

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