

Use, acceptance, and the impact of social networks and influencers on the equestrian sector

Uso, aceptación y repercusión de las redes sociales y los influencers en el sector ecuestre



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Abstract:

Influencers have gained an important place in many companies' business strategies since they convey trust and confidence to those who follow them. Their use as promotion tools is widespread in the sports field. However, they are only beginning to be introduced in the equestrian sector. The main objective of this paper is to analyse the opinion that potential target markets have about social networks and influencers as new communication tools. Quantitative methodologies have been used (sector data analysis, survey descriptive and inferential analyses) and qualitative methodologies (interviews). 80% of the current or potential audience admits that if there were more influencers, they would follow them. 80% of users who follow equestrian content profiles mainly follow informative ones, and 65.1% use them as a training and learning resource. 80.7% of the participants state that they have found new information thanks to an influencer, while 55.4% admit to making a purchase or applying one of the techniques because of them. Despite the sector being in a development phase, the use of influencers as a communication tool is highly recommended in the equestrian sector.

Keywords:

Influencer; social networks; purchase decision; horse riding; communication.

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Resumen:

Los *influencers* han alcanzado un lugar preminente en las estrategias comerciales de muchas empresas, ya que transmiten seguridad y confianza a quienes les siguen. Su empleo como herramientas de promoción está bastante generalizado en el ámbito deportivo y están empezando a introducirse en el sector ecuestre en particular. El principal objetivo de este artículo es analizar la opinión que el potencial público receptor del sector tiene sobre las redes sociales y los *influencers* como nuevas herramientas de comunicación. Se han empleado metodologías de tipo cuantitativo (análisis de datos de fuentes secundarias del sector, estudio y análisis bivariado de los resultados de una encuesta) y cualitativas (entrevistas). El 80% del público potencial admite que si hubiera más *influencers* los seguirían. Un 80% de los usuarios que siguen perfiles de contenido ecuestre siguen principalmente perfiles de tipo informativo y un 65,1% los aprovechan como fuente de aprendizaje y formación. El 80,7% declara haber hecho nuevos descubrimientos gracias a un *influencer*, mientras que un 55,4% manifiesta haber realizado una compra gracias a ellos. Se concluye que, a pesar de estar en fase de desarrollo en el sector, la utilización de los *influencers* como herramienta de comunicación resulta muy recomendable.

Palabras clave:

Influencer; redes sociales; decisión de compra; equitación; comunicación.

1. Introduction

The use of influencers is becoming more frequent in many companies' business strategies, which value their promotion of products and brands, and all types of organisations, as influencers convey trust and confidence to those who follow them. As in many other sectors, this type of sponsorship is appropriate for the equestrian industry, and its use in marketing activities is becoming commonplace. Due to the lack of studies on horse riding and the equestrian sector, the main objective of this paper is to analyse different stakeholders' position and vision concerning social networks and their impact on purchase decisions and influencers as new communication entities in the sector. It also aims to find out different groups' opinions about the current situation in the sector.

2. Theoretical framework

Society's evolution and its consumption and purchasing habits in recent decades have led to substantial changes in opinion leaders and the interest in advertising, especially since the birth of the Internet, bringing about a new scenario with more direct and accessible links (Joinson, 2002; Santamaría-De-la-Piedra and Meana, 2017). Its global perspective and immediate access to information has led to notable development in social networks, revolutionising the ways of connecting, which were not possible before (Gangadharbatla, 2009; Jhala and Sharma, 2016; Segado-Boj, Díaz-Campo, and Navarro-Sierra, 2020). Social networks make it possible to share different types of personal or professional information with known and unknown recipients, allowing information to gain further reach and have a greater impact that is more streamlined and effective than previous tools (Celaya, 2011; Herrera-Harold, 2012).

Today's consumer wants more information and is more demanding, at the same time they share information and collaborate online (Clavijo-Ferreira, Pérez-Curiel, and Luque-Ortiz, 2017; Sanz-Marcos, Jiménez-Marín and Elías-Zambrano, 2019). It is therefore not surprising to see how endorsers have gained strength on blogs and networks, as many of them become influencers thanks to their opinions, power of recommendation, capacity to segment and the feedback they can offer (Castelló-Martínez and Pino-Romero, 2015a; Muiños-Morales, 2017). The influencer as such is a relatively recent figure, characterised by having the credibility and ability to condition other people's attitudes and behaviour, who sometimes later become opinion leaders (Freberg et al., 2011; Gómez-Nieto, 2018; Martínez-Sala, Monserrat-Gauchí and Segarra-Saavedra, 2019). Their social importance has increased to such an extent that currently between 70% and 85% of users (depending on the study) state that they are following influencers on social networks, therefore large and small brands' advertising communication has adapted to this commercial phenomenon. Brands hire influencers in exchange for their products, when actions are planned on social networks (IAB Spain, 2019; Establés, Guerrero-Pico, and Contreras-Espinosa, 2019; Sanz-Marcos, Jiménez-Marín and Elías-Zambrano, 2019).

The business world has realised the potential of social networks to such an extent that they consider them an essential marketing promotion and communication tool. Although, most of the time the actions on social networks with influencers are developed synergetically with other advertising and public relations actions (Kimmel and Kitchen, 2014; Santamaría-de-la-Piedra and Meana, 2017; Navío Navarro, González-Díez and Puebla-Martínez, 2018; Coll and Micó-Sanz, 2019). In any case, although a significant number of marketing professionals are taking a chance on these types of campaigns, the ROI (return on investment) in the social networks is difficult to calculate, making it challenging to measure these types of campaigns' success (Sánchez-Jiménez, 2018; Mejía-Llano, 2019).

On the other hand, at a time when the number of sportspeople and federated members has increased in most sports (The National Statistics Institute (INE) 2019; Ministry of Education, Culture and Sport, 2019) and sport itself is considered to be a relevant consumer product that both contributes to personal and economic development (Álvarez-Alday and Fernández-Villarán-Ara, 2012), sports marketing has also developed significantly. This has gone hand in hand with the increase in the commercialisation of high-level sporting events, the entities' and sportspeople increasing social fame, and the evidence that the use of sport in promoting products tends to increase customer loyalty and company turnover (Alonso-Rivas and Grande-Esteban, 2004; Stanton, Etzel and Walker, 2007; Schlesinger, Alvarado-Herrera and Martí-

Parreño, 2012). In any case, this is more effective when there is a good fit between sportsperson and brand, and it is worse when the relationship is not coherent since it reduces the sportsperson's and the brand's credibility (Tripp, Jensen and Carlson, 1994; Chien, Cornwell and Pappu, 2011; Braunstein-Minkove, Zhang and Trail, 2011; Rossiter and Smidts, 2012; Martínez, 2015; Gómez-Nieto, 2018).

Moreover, sport's social and economic importance has added value to leisure, an undeniable aspect of personal development and fulfillment. Consequently, sport attracts companies to invest part of their marketing actions in it (De-la-Cruz-Ayuso, 2006; Reverter-Masia and Plaza-Montero, 2011), since most individuals consider it to be critical to differentiating themselves from the rest and emphasising that they do not merely consume for subsistence (Ritzer, 2001; Antón-Clavé, 2007). The leisure industry has much exploitable potential. The increase in affective commitment and customer loyalty to different products and brands leads companies to integrate the management of experience and the customer's leisure as it is essential to maintaining competitiveness (Grigorovici and Constantine, 2004; Parreño, 2010; Cabeza and Prat, 2012). Thus, leisure marketing should be committed to adding value for the customer by generating positive feelings and emotions whenever the customer and the company converge; before purchasing, transmitting information, and at times after-sales service (Moral-Moral and Fernández-Alles, 2012; Logroño-Tormo and Llopis-Goig, 2020).

Regarding horse sports and leisure, it is essential to consider that although most of the equestrian sector is currently dedicated to activities that aim to satisfy wellbeing and personal fulfillment, the use of horses has usually been connected with work in agriculture and the industry (Mihók and Castejón-Montijano, 2016; González-López, 2018). Paradoxically, this change in uses and customs in the sector has meant that it has a more significant economic impact on Spanish economic activity. It provides over 5 billion euros annually to the GDP (Deloitte, 2013; Royal Spanish Equestrian Federation, 2018).

Although society has traditionally considered equestrianism or horse riding as an elitist sport, there has been a change in this trend in recent years. It has been accompanied by an increase in horses and federated individuals (practically twice as many women as men, making it one of the few sports that has parity, as both genders compete equally), the public's increasing interest in a periodic broadcast of the growing national and international competitions and the emergence of new platforms like blogs, YouTube channels, or Instagram profiles allow these events to have greater visibility (Ministry of Education, Culture, and Sport 2015; Arias-González, 2018; Royal Spanish Equestrian Federation, 2018; Tirado, 2018; The Ministry of Education, Culture and Sport, 2019).

At the same time, there has been a surge in equestrian events associated with leisure; many are related to the promotion of Spanish Purebred Horses, which has a significant economic impact on the places where they take place (Sánchez-Guerrero, 2016; The National Purebred Spanish Horse Breeders' Association [ANCCE in Spanish], 2019). The horse breeding industry has undergone substantial economic growth due to the increase in the number of horse farms and the trade of horses, generating employment in mainly rural areas (Luque-Gil, 2006; *Federación Española de Asociaciones de Ganado Selecto*, 2017; Ministry of Agriculture, Fisheries and Food (MAPA), 2019).

Experts generally accept that equestrian sports and the sector, in general, lacks a global vision, as horses are used in different areas (tourism, education, sport, leisure), however, there are no joint strategic plans that make it possible to

overhaul the sector and exploit its maximum potential (Deloitte, 2013; Royal Spanish Equestrian Federation, 2018; Tirado, 2018). Equestrian companies start by producing as in many other sectors, offering their products or services so that consumers purchase them (Gutiérrez-Aragón, 2016). In this type of competitive market, importance is currently given to the endorser since consumers appreciate referential or trustworthy people's opinions (such as influencers) more than companies' messages about their products (Castelló-Martínez and Del-Pino-Romero, 2015b; Díaz-Iglesias, 2017).

The budgets dedicated to influencer marketing actions are increasingly more prominent. They produce more measurable results, have a direct impact on sales, a real return on investment, and a more immediate effect than traditional advertising in both the sectors where it has been more common (fashion and beauty), and in others where its use is gradually spreading, among which is undoubtedly the equestrian sector (Venegas, 2015; Aramendía-Muneta, 2017; Buttle and Groeger, 2017).

3. Methodology

As mentioned above, this study's main objective is to analyse the assessment of different equestrian stakeholders' assessment of social networks and their impact on purchase decisions and influencers and communication entities' value in the industry. In a disaggregated way, it will be possible to determine the evolution in the sector, among the research's other objectives, assessment of its target audience, and the main types of activities carried out by people who take part in equestrian activities, focusing on whether there is differentiation by gender. We also intend to determine social network's influence on purchase decisions in the equestrian sector, the public interest in the sector to follow equestrian contents, and the degree to which social networks are used for this purpose. On the other hand, we would like to determine the extent to which influencers are followed and accepted, the types of profiles that are followed, the types of content requested by the audience, and the recommendations or influences that they are willing to accept. Finally, the aim is to specify the different types of influencers in the equestrian world, the opinion on agreements and sponsorships with influencers, and the convenience of using influencers as a communication tool in the equestrian sector.

For this purpose, this article aims to address a study of results using methodological triangulation, data analysis techniques that are particularly valued in studies related to marketing and communication because they usually increase the quality of the contributions (Dahlstrom, Nygaard, and Crosno, 2008; Dzwigol, 2020). Applying and combining several methodologies and both quantitative and qualitative analyses makes it possible to obtain a global vision of the research subject (Webb et al. 1966; Denzin, 1970; Bericat, 1998; Olsen, 2004; Forni and De-Grande, 2020).

Quantitatively speaking, the data from secondary sources is analysed to determine the evolution of the sector's figures in recent years, and from a survey (primary source), which allows us to know, among other questions, the target audience's assessment, main activities, the extent to which they use social networks and their influence on purchase decision, the interest in following equestrian contents and the most demanded ones, the most followed types of profiles, how much they are accepted and the recommendations that influencer followers would be willing to accept. On the other hand, the qualitative technique applied was a semistructured interview, individual and group interviews were conducted with people within the sector (primary source). By complementing each analysis we will better understand the sector's evolution and situation, the assessment of the use of social networks and their influence on the purchase decision, and the

opinion about agreements and sponsorships with influencers. With all this in mind, applying all these analysis elements should make it possible to determine whether or not to use influencers in the equestrian sector communication field.

The 13 closed question survey has been implemented to determine the amount of knowledge and the opinion about influencers and social networks in the equestrian sector and other related activities. The questions included in the survey are directly related to its objectives and have mainly been designed according to several findings from previous studies on influencer marketing (Gretzel, 2018; Kádeková and Holiencinová, 2018; Jin, Muqaddam and Ryu, 2019; Stubb, Nyström and Colliander, 2019; Campbell and Farrell, 2020) (Table 1).

Table 1. Survey design

Concept	Objectives	Previous investigations
Influence of social networks on purchase decisions	To find out the influence of social networks on purchase decisions in the equestrian sector. To determine the recommendations or influences that they are willing to accept.	Stubb, Nyström and Colliander (2019): the implementation of agreements or sponsorship increases the source's credibility and the message and creates a more favorable opinion of the recipient. Gretzel (2018): when a good brand-influencer relationship is established, the marketing strategies based around influencers can have better results than other strategies.
Interest in specialised content and use of social networks	To find out the audience's interest in the sector by following equestrian content and the extent of using social networks for this purpose.	Gretzel (2018): there is increasingly more interest in analysing a current trend like the emergence of more professional influencer profiles.
Acceptance and transmission of influencers' trust	To specify the extent of acceptance and following of influencers in the equestrian sector.	Kádeková and Holiencinová (2018): consumers expect brands to make contact through collaborations with appropriate influencers (a more direct contact that conveys trust). The number of followers does not define the impact but the experience and credibility that they can communicate.
Types of profiles followed, and content demanded	To determine the types of profiles followed and the main contents requested by this field's audience. To specify the different types of influencers in the equestrian world.	Jin, Muqaddam, and Ryu (2019): the difference between types of influencer profiles or celebrities (traditional ones and from Instagram) creates differences in the perception of authenticity and follower-influencer relationship. Campbell and Farrell (2020): The content of the micro-influencers impacts sales significantly because followers find their recommendations more authentic than influencers' more generic ones. It is convenient to understand the differences between influencers, their abilities, focus, power, etc.
The convenience of the use of influencers as a communication tool	To analyse the convenience of using influencers in the equestrian sector as a communication tool.	Gretzel (2018): marketing specialists keep influencers in mind in their communication strategy because, in any case, they can be a better tool than other alternatives.

Source: created by the authors

The survey sample comprises 269 people residing in Spain who have some type of relationship with the world of horses. The approximate population in Spain related to the equestrian sector is estimated at 113,000 individuals, a figure that includes the sum of personnel employed in the industry, 61,000 workers approximately (Deloitte, 2013), plus the total number of federated members, around 52,000 (Royal Spanish Equestrian Federation, 2019c). To ensure that respondents were related to the field under study, the survey was distributed exclusively through communication methods specific to the equestrian sector (specialised magazines, equestrian centres, and influencers, among others). In addition, it included an initial filter question, which did not allow them to continue with the survey if the answer was negative; they were expressly asked about their relationship with the sector. Thus, for a trust interval of 95% and a proportion of the population of 80% (a low figure considering all the interviewees are stakeholders in the sector), the sampling error is $\pm 4,77\%$. The statistical programme SPSS was used to cross-check variables obtained in the survey to find relationships between them. Two types of interviews were conducted, one jointly with a group of experts belonging to the Quadres d'en Blai riding club (Riudoms, Tarragona), who had extensive experience in the equestrian world, and a series of individual interviews with people related to different aspects of the sector, a similar structure and questions were maintained to compare various stakeholders' vision. The interviews were mainly conducted between February and May 2020, when the Spanish population was in a lockdown due to the COVID-19 pandemic; therefore, most of them were conducted via videoconference. The design of the questions was based on previous works that showed the influence of the use of social networks and influencers on purchase decision and the increase in the credibility for the recipient when there are agreements and sponsorships with influencers (Jin, Muqaddam, and Ryu, 2019; Stubb, Nyström and Colliander, 2019).

4. Results

4.1. Analysis of the data from official secondary sources.

Secondary sources have been used to determine the evolution of various indicators related to the equestrian sector in recent years. Official data on the equestrian world in Spain shows a sector that is growing moderately, in which there has been an 8.82% increase between 2014 and 2019 in the number of licenses issued to riders (52,405 in 2019) and a 2.07% increase in the number of federated sports clubs (837 in 2019) (Ministry of Education Culture and Sport 2019; Royal Spanish Equestrian Federation, 2019c). In the same period, the number of competitions, athletes, participating horses, and athletes in three Olympic disciplines (Eventing, Dressage, and Show Jumping) increased substantially. In contrast, although Raid improved in several competitions by 14.55%, its participation in them decreased by 33.68% (Table 2). Regarding the competitions held in Spain, the growth of Dressage and Show Jumping competitions was notable, increasing by 440% and 344.12%, respectively. There was also an increase of 43.75% in competitions in Raid (Royal Spanish Equestrian Federation 2019a). Attendance at the 511 competitions held in 2019 reached 661 800 spectators, Show Jumping attracted the most people to the sports facilities (with 564 000) (Royal Spanish Equestrian Federation 2019b).

Table 2. Comparison of national competitions in Spain, 2014-2019

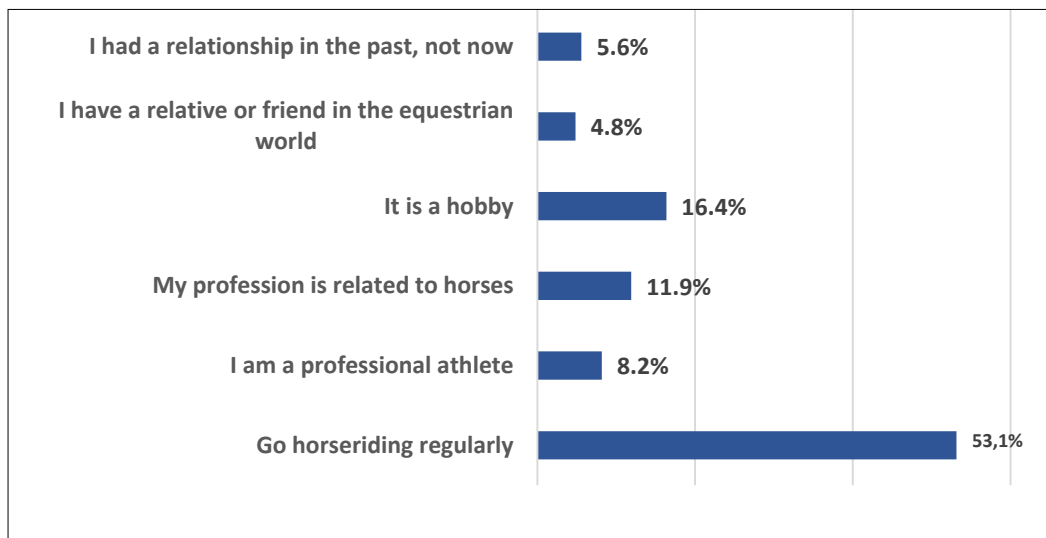
National Competitions in Spain	Complete competition			Dressage			Show Jumping		Raid			
	2014	2019	Var. 14-19	2014	2019	Var. 14-19	2014	2019	Var. 14-19	2014	2019	Var. 14-19
Competitions	14	32	128.57%	60	71	18.33%	160	174	8.75%	55	63	14.55%
Sportspeople	166	283	70.48%	691	873	26.34%	1.385	1.972	42.38%	95	63	-33.68%
Horses	213	362	69.95%	965	1.261	30.67%	2.321	3.441	48.26%	96	63	-34.38%
Track outings	1.869	3.294	76.24%	4.313	5.897	36.73%	23.010	32.194	39.91%	134	81	-39.55%

Source: Royal Spanish Equestrian Federation (2019a)

4.2. Quantitative analysis of primary sources

The main reason for quantitatively analysing primary sources is to obtain an overview of the target population in the equestrian sector, determining their activities, evaluating the amount of knowledge and interaction with social networks and the equestrian influencers, as well as the influence on purchase decisions. Moreover, the aim is to determine the most followed types of profiles, the extent to which influencers are followed, and the recommendations that the sector's audience would be willing to accept. To do this, we have surveyed a sample of residents in Spain who are related to the equestrian world and consequently with the sector that is the subject of this study. Women predominate among those surveyed with 85.5% compared to 14.5% of men, which is expected since we are dealing with a sport in which approximately 70% of federated licenses correspond to women (Hontangas-Carrascosa, Mestre-Sancho, and Orts-Delgado, 2018). Also, most survey respondents are young (93.3% under 35 years of age). This is reasonable considering the subject analysed and that most sports are usually played at an early age.

Graph 1. Relationship with the equestrian world

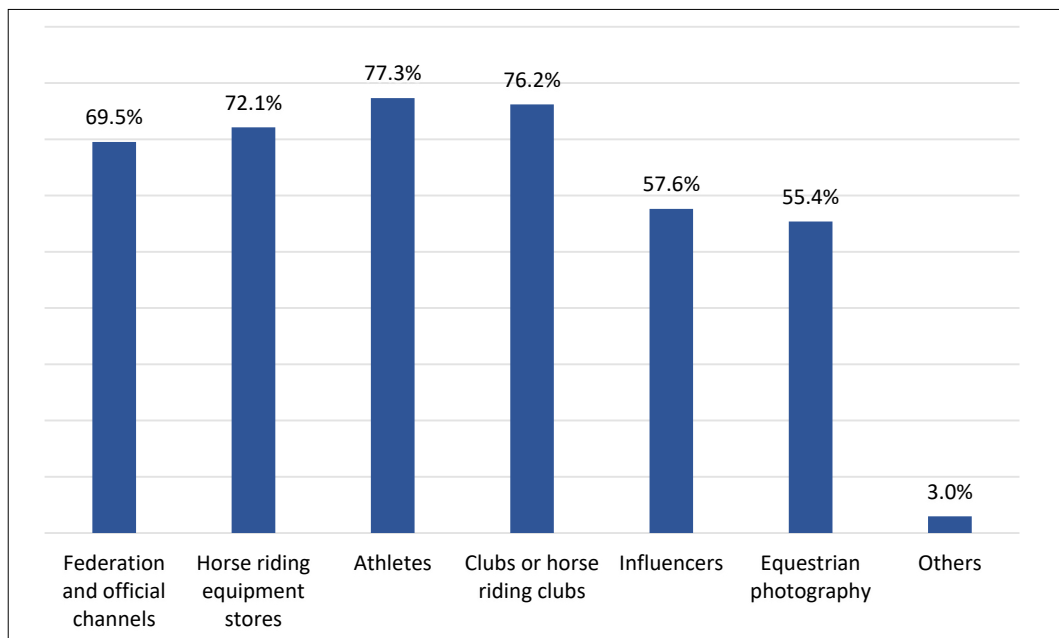


Source: created by the authors

Everyone who was surveyed had or has had some direct or indirect relationship with the equestrian world (graph 1), 69.5% have an amateur relationship with this sport, 51.3% take part in equestrian activities regularly, 16.4% consider it as a hobby or leisure activity. On the other hand, 20.1% of those surveyed had a professional relationship with the sector, either as professional athletes (8.2%) or as workers in the industry (11.9%).

A total of 99.6% of the participants in the survey regularly use social networks, 95.2% of them follow accounts or profiles related to the equestrian world. The social network most used for following equestrian content is Instagram (95.5% of users claim to use this social network), followed by YouTube (65.8%), Facebook (40.1%), and WhatsApp (27.9%). Blogging platforms (21.2%) and Twitter (8.9%) are used to a lesser extent, and the rest are used little. The content that generated the most interest provides training or new knowledge on equestrian issues (80.3% of respondents state this) and informative (77.3%). On the other hand, the most followed profiles are athletes' (77.3%), clubs' (76.2%), specialised stores' (72.1%) and official channels' (69.5%), influencers' profiles (57.6%), and equestrian photography (55.4%) (graph 2) also stands out.

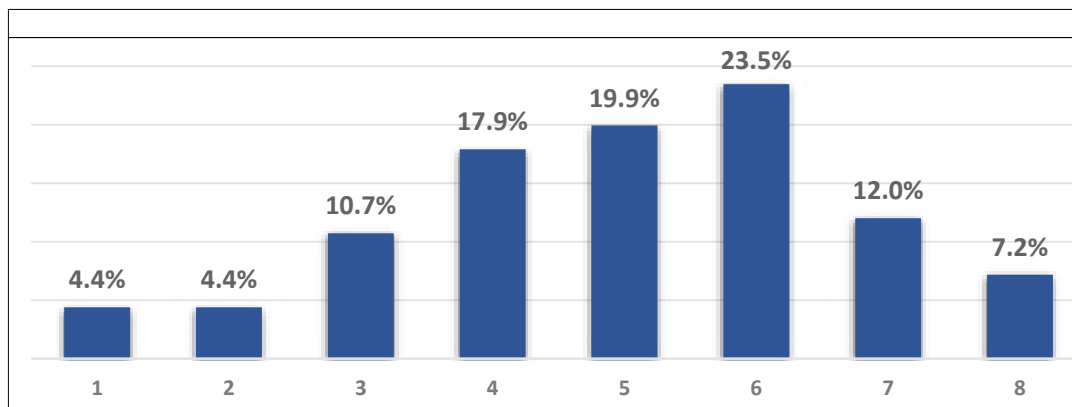
Graph 2. What type of profiles do you follow?



Source: created by the authors

In this context, 80.7% of the respondents acknowledge that they have found out something they did not know thanks to an influencer. On the other hand, 55.4% admit to having purchased a product or used a technique or any other element promoted by one of these professionals. In any case, most of the respondents understand social network's power to influence consumer purchase decisions. Thus, 61.3% of the participants considered that social networks' influence on purchasing was between 4 and 6 out of 8. 19.2% attributed a powerful influence to them. The weighted average of the responses yielded 4.99 points out of 8 (graph 3).

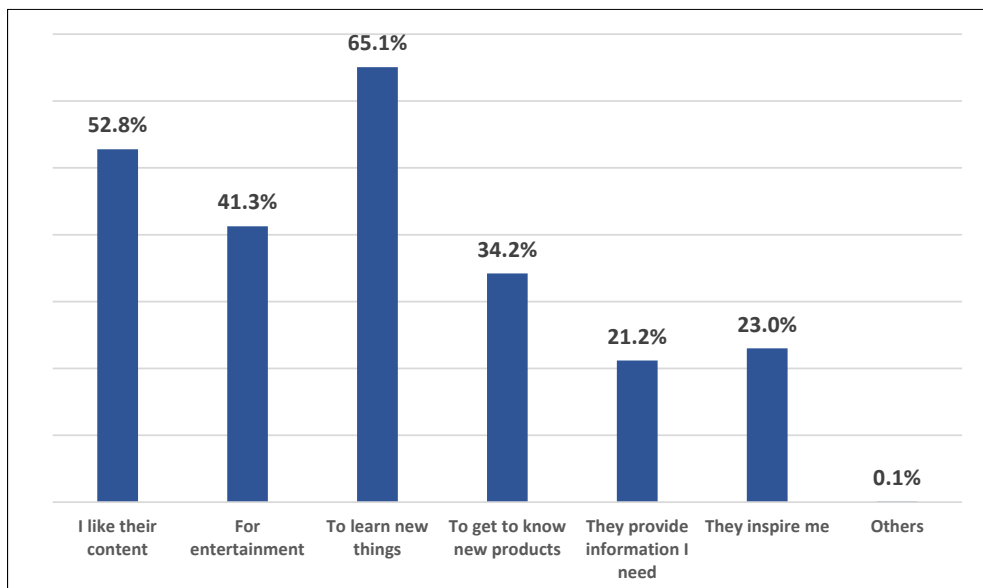
Graph 3. Degree of influence of networks on purchase decisions



Source: created by the authors

The main reason users follow equestrian influencers' profiles is to find new knowledge and learn (86.3%). Over half of those surveyed (52.8%) say that liking the content is a decisive act, while 41.3% follow them for entertainment and 34.2% to find out about new products (graph 4). On the other hand, the main feeling about influencers within the equestrian world is divided between those who think they help raise sector awareness (56.9%) and those who consider that they provide information to people once they already form part of this world (53.2%). Many respondents emphasise that they bring a modernising vision to how data is provided (44.6%) and are essential for helping beginners (48%). Only 13.8% consider them to be entirely unhelpful, and 4.8% believe them to be irrelevant.

Graph 4. Why do you follow equestrian influencers?



Source: created by the authors

Most of the participants in the survey know different media that provide equestrian content to the users, the most popular is the specialised magazine *Ecuestre* (70.3%). They also claim to know the international influencer Matt Harnacke's account. 60.2%, and national influencers' such as Natalia from NMV Horses (57,20%) and Silvia from My Horseback View (50,20%). Only 5.2% of the participants confirmed that they didn't know any media. When asked if they would follow more influencers if there were any more equestrian content accounts in Spanish, the primary response was affirmative, as 80.7% of the respondents said they would.

The statistical program SPSS has been used to cross-check the variables from the survey and find relationships between them. The analyses were based on two of the sociodemographic characteristics most used to analyse profiles (age and sex) and the variable Personal relationship with the equestrian world. In principle, the analysis results indicate no relationship between sex and the type of profiles followed on the network, as all of them show significantly low values. For this reason, it can be seen that both men and women have no preference for different types of profiles. There are no significant differences in proportions regarding the sex and the kind of content followed on the networks. However, a relationship between the sex variable and the question of following more equestrian influencers, if any was detected, (Table 3). A weak relationship was found ($V=0.199$ y $p=0.001$), but it can be affirmed that women are more willing to follow more profiles than men.

Table 3. Sex*If there were more equestrian followers, would you follow them?

Table crossed. Sex*If there were more equestrian influencers, would you follow them?			Sex		Total
			Female	Male	
If there were more equestrian influencers, would you follow them?	No	Count	15	37	52
		Expected count	7.5	44.5	52.0
	Yes	Count	24	193	217
		Expected count	31.5	185.5	217.0
Total		Count	39	230	269
		Expected count	39.0	230.0	269.0

Source: SPSS based on own information

Two different segmentations have been carried out for the analysis according to age. Firstly, the responses have been segmented more precisely according to five age groups (both professionally and regarding sport and leisure, access to the sector's activities usually occurs at very early ages): under 14, 15 to 18, 19 to 24, 25 to 34 and 35 years of age or older.

The results obtained determine that the age range has a significant relationship with the type of profiles that the respondents follow ($V=0.248$ y $p=0.002$). In the case of stores, it is observed that under 18 years of age and the 25-34 segment follow this profile more than expected, totally independent of the variables (Table 4). Likewise, regarding influencers, those who follow these profiles with a higher proportion than would be expected are these same two age segments ($V=0.348$ y $p\leq 0.000$).

Table 4. Age1*Equestrian horse-riding equipment shops and Age1*Influencers

Crossed table. Age 1* Store Profile of horse-riding equipment Influencer's Profile			Age 1					Total
			Under 14	From 15 to 18	From 19 to 24	From 25 to 34	35 or over 35	
Horse riding equipment store's profile	No	Count	5	18	37	4	11	75
		Expected count	7.8	22.3	31.8	8.1	5.0	75.0
	Yes	Count	23	62	77	25	7	194
		Expected count	20.2	57.7	82.2	20.9	13.0	194.0
Influencers profile	No	Count	9	27	58	4	16	114
		Expected count	11.9	33.9	48.3	12.3	7.6	114.0
	Yes	Count	19	53	56	25	2	155
		Expected count	16.1	46.1	65.7	16.7	10.4	155.0
Total		Count	28	80	114	29	18	269
		Expected count	28.0	80.0	114.0	29.0	18.0	269.0

Source: SPSS based on own data

On the other hand, there are significant relationships between the age groups and some of the reasons for following these profiles. There is a weak to a medium but essential relationship between age groups and why *I like the content* ($V=0.271$ y $p=0.001$), and *it helps learn new things* ($V=0.263$ y $p=0.001$). The analyses highlight that under 18s are attracted to *liking the content* while the 19 to 25 segments and older than 35 show more interest when *it is useful for learning new things* (table 5).

Table 5. Age 1*I like their content and Age 1*To learn new things

Crossed table. Age 1* The reason I like their content Reason To learn new things			Age1					Total
			Up to 14 years	From 15 to 18	From 19 to 24	From 25 to 34	35 or over 35	
Reason I like their content	No	Count	7	30	61	14	15	127
		Expected count	13.2	37.8	53.8	13.7	8.5	127.0
	Yes	Count	21	50	53	15	3	142
		Expected count	14.8	42.2	60.2	15.3	9.5	142.0
Reason to learn new things	No	Count	6	18	51	8	11	94
		Expected count	9.8	28.0	39.8	10.1	6.3	94.0
	Yes	Count	22	62	63	21	7	175
		Expected count	18,2	52.0	74.2	18.9	11.7	175.0
Total	Count	28	80	114	29	18	269	
	Expected count	28.0	80.0	114.0	29.0	18.0	269.0	

Source: SPSS based on own data

Secondly, a segmentation in three large age groups was conducted: up to 18, between 19 and 35, and over 35 years of age, grouping individuals so that it was possible to have a minimum sample in each group to perform the bivariate analyses. No general trend or significant differences between the age segments could be observed regarding whether they would follow influencers more if there were any nor in the question of whether they have discovered something they did not know thanks to an influencer. On the other hand, a weak relationship was observed regarding the question of whether they had consumed something on an influencer's recommendation ($V=0.174$ y $p=0.022$), those over 35 years of age were the least likely to do so and young people the most, which was above what would be expected because if there were the same proportion of consumers (59.4%) and non-consumers (40.6%) per recommendation in all age groups, the following would be true for all age groups. Therefore, we would expect there to be fewer younger followers of recommendations than what is found in the sample.

Another of the analyses linked the variable *relationship with the equestrian world* to investigate whether there were significant differences between the respondents according to their relationship with the sector. They were divided into

four categories: regular equestrian practice, professional relationship, hobby, no current direct relationship (but in the past). Individuals with no relationship with the equestrian world were excluded to ensure greater reliability in the study. The results provided essential differences and significant relationships in the case of following Federation profiles ($V=0.423$ and $p\leq 0.000$), equestrian equipment stores ($V=0.495$ and $p\leq 0.000$), athletes ($V=0.435$ y $p\leq 0.000$), and clubs or riding clubs ($V=0.0437$ y $p\leq 0.000$), with those who have a professional relationship and who go riding regularly following all these types of profiles more compared to the rest (Table 6). It was not possible to establish significant relationships in the case of the influencers' profiles ($V=0.125$ and $p=0.237$), inferring that this type of profile is followed similarly, regardless of the personal connection with the equestrian world.

The study was found to be composed of two types of opinion; those who followed profiles related to the equestrian world, preferably learning *new things* ($V=0.275$ y $p\leq 0.000$) as this is a major reason for those who ride regularly and do it as a hobby. In contrast, the group of professionals and those who have no direct relationship do not choose this option. Regarding influencers' opinion according to their relationship with the equestrian sector, significant differences were found in the opinion about modernising the way the industry is represented ($V=0.226$ y $p=0.003$); professionals and people who go horseback riding were the ones who adopt this position the most.

Table 6. Type of relationship* Types of profiles

Crossed table. Relationship 1* Types of profiles		Relationship 1				Total	
		Go horseriding regularly	Professional relationship	It is a hobby	No current direct relationship		
Sports Federation Profile and other official channels	No	Count	32	6	24	20	82
		Expected count	43.6	16.5	13.4	8.5	82.0
	Yes	Count	111	48	20	8	187
		Expected count	99.4	37.5	30.6	19.5	187.0
Horseriding equipment stores' profile	No	Count	26	6	19	24	75
		Expected count	39.9	15.1	12.3	7.8	75.0
	Yes	Count	117	48	25	4	194
		Expected count	103.1	38.9	31.7	20.2	194.0

Sportspeople/athletes profile	No	Count	16	9	17	19	61
		Expected count	32.4	12.2	10.0	6.3	61.0
	Yes	Count	127	45	27	9	208
		Expected count	110.6	41.8	34.0	21.7	208.0
Horseriding or equestrian clubs	No	Count	20	7	17	20	64
		Expected count	34.0	12.8	10.5	6.7	64.0
	Yes	Count	123	47	27	8	205
		Expected count	109.0	41.2	33.5	21.3	205.0
Total	Count	143	54	44	28	269	
	Expected count	143.0	54.0	44.0	28.0	269.0	

Source: SPSS based on own data

Table 7. Type of relationship* Have you purchased something based on a a recommendation?

Crossed table. Relationship 1* Have you consumed something based on a recommendation?			Relationship 1				
			Go horse riding regularly	Professional relationship	It is a hobby	No current direct relationship	Total
Have you purchased something based on a recommendation?	No	Count	46	25	21	10	102
		Expected count	56.5	21.9	16.7	6.9	102.0
	Yes	Count	93	29	20	7	149
		Expected count	82.5	32.1	24.3	10.1	149.0
If there were more equestrian influencers, would you follow them?	No	Count	20	7	10	15	52
		Expected count	27.6	10.4	8.5	5.4	52.0
	Yes	Count	123	47	34	13	217
		Expected count	115.4	43.6	35.5	22.6	217.0
Total	Count	139	54	41	17	251	
	Expected count	139.0	54.0	41.0	17.0	251.0	

Source: SPSS based on own data

Regarding the question of whether they have consumed based on an influencer's recommendation, whether buying a product or applying a technique, it can be seen that professionals are the least influenced. In contrast, those who are not directly related to the sector are more willing to listen to their opinions ($V=0.181$ and $p=0.410$). On the other hand, when faced with the option to follow influencer profiles if there were more of them, professionals and those who go horseriding regularly are more receptive ($V=0.307$ y $p<0.000$), in contrast to those who do equestrian activities as a hobby or have no direct relationship with the sector, who are less likely to follow these types of profiles (table 7).

Table 8. Type of relationship* Media

Crossed table. Type of relationship* Most known media from the sector			Relationship 1				Total
			Go horseriding regularly	Professional relationship	It is a <i>hobby</i>	No current direct relationship	
My Horseback View	No	Count	57	25	27	25	134
		Expected count	71.2	26.9	21.9	13.9	134.0
	Yes	Count	86	29	17	3	135
		Expected count	71.8	27.1	22.1	14.1	135.0
NMV Horses	No	Count	50	24	19	22	115
		Expected count	61.1	23.1	18.8	12.0	115.0
	Yes	Count	93	30	25	6	154
		Expected count	81.9	30.9	25.2	16.0	154.0
Matt Harnacke	No	Count	44	23	22	18	107
		Expected count	56.9	21.5	17.5	11.1	107.0
	Yes	Count	99	31	22	10	162
		Expected count	86.1	32.5	26.5	16.9	162.0
Magazine <i>Ecuestre</i>	No	Count	39	6	20	15	80
		Expected count	42.5	16.1	13.1	8.3	80.0
	Yes	Count	104	48	24	13	189
		Expected count	100.5	37.9	30.9	19.7	189.0
Picazo Audiovisual	No	Count	104	46	40	24	214
		Expected count	113.8	43.0	35.0	22.3	214.0
	Yes	Count	39	8	4	4	55
		Expected count	29.2	11.0	9.0	5.7	55.0
Total		Count	143	54	44	28	269
		Expected count	143.0	54.0	44.0	28.0	269.0

Source: SPSS based on own data

An analysis was also formulated about the relationship between each of the categories according to one's relationship to the sector and the most known media profiles in the equestrian world (Table 8). In the case of my Horseback View ($V=0.309$ y $p\leq 0.000$) and the magazine *Ecuestre* ($V=0,287$ and $p\leq 0,000$), the professionals and those who go horseriding regularly know more about this media. This last group tends to know about NMV Horses ($V= 0.261$ y $p\leq 0.000$), Matt Harnacke ($V=0.228$ y $p=0.003$), and Picasso Audiovisual ($V=0.186$ y $p=0.026$), so it can be said that they follow and know more media related to the sector. On the other hand, TodoCaballo and the Catalanian Magazine *Hípica* are followed almost equally, regardless of the respondent's relationship with the world of horses.

4.3. *Qualitative analysis of the primary sources*

As a complement to the previous analysis, a primary source qualitative analysis was proposed to have a more comprehensive view of the subject of this investigation. It was also employed to provide a greater depth at a methodological level so that it would be possible to better understand the situation in the sector, the valuation of social networks and the influence on the purchase decision and the possible opinion of participants in the equestrian sector on agreements and sponsorships with influencers. The qualitative analysis was carried out in two phases. The first phase consisted of a semistructured group interview via videoconference with five different aged participants who have a direct or indirect relationship with the equestrian world. They were asked very similar questions to those set out in the survey to gain a greater variety of responses. Then, they answered a second questionnaire more similar to the one used in the second phase of the qualitative analysis, whereby a series of individual interviews with people with different functions in the sector.

In the group of experts' interview, two types of influencers in the equestrian sector were found; athletes who promote high-end products are less effective than influencers who could recommend cheaper products since riders' buying power is not always as high as professionals'. Regarding the influencer's impact on the sector, all participants rated their contributions as positive, as they provide training and content of interest about this type of sport to more people. Concerning the sector in Spain, they confirmed a lack of development and modernisation and that the horse's welfare was not prioritised over other aspects. Respondents emphasised that many clubs and trainers have an outdated mentality and promoted obsolete training that stifles the sector's growth. According to them, the most generalised approach to riding is that it is considered leisure, making it difficult for professionals to make a living from it and therefore hampering many competitive aspirations.

Concerning the individual interviews, a wide variety of profiles related to the sector was obtained. To do so, we contacted the two most reputable national influencers (Silvia, from My Horseback View and Natalia, from NMV Horses), an international influencer (Carolina from Equestrian Trend) and Otti Verdú, an elite athlete, a representative of the Royal Spanish Federation of Horseriding and two riding clubs, one was from the Royal Polo Club from Barcelona and the other C.A.V.A Horse Girona. They were all interviewed similarly, however, with slight variations. The questions were divided into three main blocks to obtain a global vision of the analysis's main themes.

The aim was to learn about the situation of Spanish horseback riding both internally and in comparison with other countries through the first block of questions. Interviewees' vision of Spanish horse riding is practically the same since it is believed that Spain is far behind its European neighbours, both at an amateur level and in national and international

competitions. The Federation and one of the clubs differ from this opinion since they consider the sector to be well established and growing.

The second block of questions was aimed at determining the use and influence of social networks on society in general and the equestrian world. All interviewees highlight that social networks are an influential instrument in society and interpersonal relationships and are likely to impact young people. However, they can misuse social networks at times, which can be harmful in many ways. For this reason, content generators agree on the high responsibility that they have due to their power to influence.

On the other hand, it is suggested that social networks are also a good source of information and entertainment, which, when used well, help to form role models with whom to interact and learn. Moreover, social networks can undoubtedly influence consumers' purchase decisions, even though in the particular case of this sport, there is greater loyalty to the already known products so the power of influence on social networks is significantly reduced in this sector.

In contrast, the influencer is essential when there is a new need or product, especially if they have a more indirect relationship with the animal (e.g., clothes or accessories). Influencers mainly manage their social network account themselves, except for the Federation and the Royal Polo Club of Barcelona. Influencers ensure they publish the latest news in this world, trying to get to know their followers better, offering them quality content and training, and promoting their sponsors' products.

The third block of questions attempts to find out the opinion about influencers and their agreements with brands. Most interviewees have a favourable opinion of them, since influencers try out the products and report on their qualities, allowing brands to address a niche market directly. For all of them, the relationship between the influencer and the brand must fit the brand's positioning and values, since the message conveyed, must reflect the image of both. The effectiveness of this collaboration has been endorsed on many occasions by increasing awareness and sales of the sponsored brands. A small group emphasises that they can bring the equestrian world closer to a more general public by increasing other people's interest. The role of influencers in the sector is not very different from others, as they generate certain content aimed at a specific target and are not usually a promotional element outside this world, but rather provide more knowledge to those who are already a part of it.

Concerning the content, the influencers interviewed emphasise that their role is to provide a real point of view, more similar to non-professional riders'. It is estimated that in equestrian sports, there is a big difference between professional riders who are influencers and have many followers and sponsors and show their competition results, compared to the rest of the influencers who usually present products and generate informative content, among other tasks. Some of the institutions represented in the interviews consider that the possibility of creating sponsorship relationships with influencers is interesting for the future. In general, these types of relationships are strict and generally formalised through a contract.

By analysing the set of responses obtained in both types of interviews, we can determine responses that are repeated more by different participants in these qualitative studies (Table 9). In this sense, it is important to note that the qualitative

analyses allow us to investigate aspects or specific questions that might not have been sufficiently clear or evaluated with a quantitative analysis, confirming the convenience of combining both methods of investigation.

Table 9. Interviews: Most frequent overlapping points

	Most frequent response	Other common responses
How do you see riding in Spain today?	There is a lack of consent and strong horse breeding to have good national competitions.	<ul style="list-style-type: none"> • The social view of horseriding has evolved, becoming less elitist. • Traditionally, other aspects have been prioritised over the rider's professional development.
Is Spain behind many European countries? What do you think?	Spain is a long way from catching up to its European neighbours both at an amateur level and in national and international competition.	<ul style="list-style-type: none"> • It has evolved a lot in recent years • Not being among the top countries, it is not that far behind (just below the top five).
How is horse riding approached in Spain: leisure or competition?	It is generally considered to be more of a leisure activity than sport.	<ul style="list-style-type: none"> • There is an economic barrier to competition that hampers its development. • An increasing number of riders have competitive aspirations and/or are professionally involved in the sport.
How do social networks affect society?	They have a great power of influence, and condition younger people, in particular.	<ul style="list-style-type: none"> • They can lead to negative consequences, creating a need for approval. • They are a good source of information and allow for the creation of communities.
Do you think networks influence purchase decisions?	Absolutely yes	<ul style="list-style-type: none"> • When dealing with products that are directly related to the horse, people are less likely to be influenced.
How do you manage your social media accounts?	Mainly used as a source of information to show daily life.	<ul style="list-style-type: none"> • Providing training, opinions and advice to followers (influencer response) • Reporting competition results.
Opinion on agreements and sponsorships with influencers.	They are in favour of them, believing they are effective.	<ul style="list-style-type: none"> • Values and positioning are very important when choosing sponsorship (influencer response) • They bring brands closer to a very specific niche.
What do you think about influencers in the equestrian sector	Generally in favour of them, considering them as a source of extra information for the sector.	<ul style="list-style-type: none"> • They generate content, provide advice and honest opinions (influencer response) • They promote the sector internally, but do not promote it externally.
Have you established sponsorships with brands?	Yes, serious contracts are usually drawn up, which specify the characteristics of the relationship (influencer and athlete response)	<ul style="list-style-type: none"> • They have not been carried out, but in some cases, they are considered as an interesting option for the future (response from the rest of the interviewees)

Source: created by the authors based on interviews

5. Discussion and conclusions

The main objective is to determine and analyse different equestrian sector stakeholders' assessment of the social networks and their impact on purchase decisions; the influencers specialised in horse riding as practical communication elements. To this end, methodological triangulation has been carried out, conducting both quantitative and complementary qualitative analyses to achieve a more in-depth and comprehensive vision of the subject under investigation (Webb et al. 1966; Denzin, 1970; Bericat, 1998; Olsen, 2004; Dahlstrom, Nygaard and Crosno, 2008; Dzwigol, 2020; Forni and De-Grande, 2020). The participants in the qualitative study provided assessments that made it possible to evaluate and clarify aspects and positions that would not have been possible with the rest of the analyses. It can be inferred that the sector is evolving positively, but it is far behind other leading countries, where there is a lack of consistent sport horse breeding. Equestrianism is increasingly less elitist and is opening up to a broader public (Arias-González, 2018).

Most of the participants, approximately 70%, in equestrian activities go horse riding regularly or do so for leisure and self-fulfillment, while 20% go horse riding competitively or professionally. Unfortunately, in many cases, the decision not to compete is not due to personal choice but lack of resources (De-la-Cruz-Ayuso, 2006). It is a highly feminised sport in which women have 70% of the federation licenses (Hontangas-Carrascosa, Mestre-Sancho, and Orts-Delgado, 2018; Real Spanish Equestrian Federation, 2018; Ministry of Education, Culture and Sport, 2019).

The results of this work determine that social networks are considered to have a significant influence on purchase decisions, even though they can be misused (Ritzer, 2001; Antón-Clavé, 2007). The sector's public is also perceived to be interested in following equestrian world content and social networks are used for this purpose (Ministry of Education, Culture and Sport, 2015; Santamaría-De-la-Piedra y Meana, 2017; Arias-González, 2018; IAB Spain, 2019). Many respondents reported being active on several social networks and using them to follow equestrian content (Ministry of Education, Culture and Sport, 2015). 80% admit that if there were more influencers, they would follow them, with women professionals and those who go horse riding regularly more likely to do so. Most users who follow equestrian content profiles on networks mainly demand, around 80%, informative content (Federation, clubs, or official channels) while 65.1% use it as a source of learning and training. 80.7% state that they have made new discoveries thanks to an influencer, while 55.4% declare that they have made purchases or applied one of the techniques promoted by them. The over-35s and those who make up the professional segment of the groups are less open to accepting their recommendations.

On the other hand, there are two types of influencers in the equestrian world, those who, thanks to their activities on networks, generate contents of interest for the general public, become a reference and acquire the ability to condition their audience (Freberg et al., 2011; Gómez-Nieto, 2018; Martínez-Sala, Monserrat-Gauchi and Segarra-Saavedra, 2019), and the high-level athletes who by sharing results or promoting sponsor products also have the capacity to influence (Schlesinger, Alvarado-Herrera and Martí-Parreño, 2012). The agreements between influencers and companies should be carefully chosen. The brand's values and the sponsored party should coincide since the credibility of influencers rests on the honesty of their recommendations and opinions (Tripp, Jensen and Carlson, 1994; Chien, Cornwell and Pappu, 2011; Braunstein-Minkove, Zhang and Trail, 2011; Rossiter and Smidts, 2012; Martínez, 2015; Gómez-Nieto, 2018).

It is worth mentioning that because this sport involves a living creature, a horse, there is a greater reluctance to trust athletes or influencers specialised in social networks; there is a considerable loyalty to products already in use or recommendations from people closer to them. On the other hand, the influencer does become more important when faced with new needs or products, the less direct the relationship with the animal (e.g., clothing or accessories). In any case, the general opinion about influencers is favorable, considering that they help modernise the sector and are a good source of information for bringing brands closer to their niche market. The statistic analysis reveals that neither age nor the relationship with the world of horses determines factors for following these types of profiles in the equestrian sector, which points to a future boom and consolidation of equestrian influencers. In short, even though the use of influencers to persuade purchase decisions is still in a developmental phase within the equestrian world, influencer marketing can be as effective in this sector as in others (Castelló-Martínez and Del-Pino-Romero, 2015b). The result obtained in this research ratifies the convenience of using influencers in the equestrian sector as an efficient and valuable communication tool.

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