



BACHELOR THESIS

The needs of the farriers in an oligopolistic hoofcare industry

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Preface

In front of you lies the thesis “How to increase the market share in an oligopolistic hoofcare industry market”. In this report the current situation of the farriers in the Netherlands is researched by interviewing several farriers, all located in the Netherlands. The goal of this research is to investigate the current needs of the farriers in the Netherlands and how the hoofcare business could adjust their approach in case they want to increase their market share with this target group.

During my internship at one of the biggest players within the hoofcare industry, I got fascinated by this amazing market and target group the farriers. Traditional, but willing to innovate, if that makes their life or the life of the horse better.

After feedback on the Research Proposal, the following aspects were changed: Figure 1 in the introduction has translated from Dutch to English and general grammar and spelling mistakes. Furthermore, some questions from the questionnaire had been changed.

I would like to thank everyone that helped and contributed, while I was writing my thesis research. I would like to thank the following people in particular:

- My coach Henka Rooze, for her time and effort into guiding me and providing me with feedback.
- The interviewees, who took the time to answer the questions from the questionnaire.
- My colleagues, for their ideas and their supervising.
- My friends, for helping me with everything and for being patient with me.

Without all these people, this research would not have been possible. I hope you enjoy reading my thesis.

Yvonne Antons

Dronen, Augustus 12, 2019

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Summary

In recent years the number of farriers in the Netherlands has decreased though the number of horses hasn't. As there are only three big horseshoe manufacturers competitors in the Netherlands. Their goal is to increase their market share. In order to win existing farriers over, the horseshoe manufacturers need to know the needs of the farriers and the journey they are making when they are buying their products. The horseshoe manufacturers must strengthen their offer by developing services that will help to determine ways to better understand and address the evolving needs and expectations of farriers.

The main question of this research is: "How can horseshoe manufacturers better address the needs of farriers in order to gain a higher market share?". It is answered with the characteristics of farriers in the Netherlands, experience of the farriers with the horseshoe manufacturers, what the pain points in the customer journey of farriers are and how horseshoe manufacturers can increase the approach of the needs of the farriers. These questions were researched by conducting qualitative interviews with farriers.

The results of this research show the following:

Remarkable points of the characteristics of the farriers in the Netherlands are that most of them became farrier out of their interest in horses, the independency which the job offers and because they like the craftsmanship of the farriery. All of the interviewees get their products delivered or pick them up at the manufacturer or a retailer. The experience of the farriers with the horseshoe manufacturers is generally good. They are satisfied with the services that are offered by the company, except for the delivery service.

One pain point is that products are not always on stock. Thus, the farriers have to wait longer than expected. Another pain point they pointed out is that wrong products are delivered.

Farriers have different expectations of the horseshoe manufacturers in order to keep them satisfied. They trust to get reliable information about products, organize educational events and have products on stock, so that they can serve their clients at all time. When horseshoe manufacturers are aware of the needs of their customers, they should be able to increase the approach in order to gain a higher market share.

Samenvatting

De afgelopen jaren is het aantal hoefsmeden in Nederland afgenomen terwijl het aantal paarden gelijk is gebleven. Er zijn in Nederland slechts drie grote hoefijzerfabrikanten. Het doel is om hun marktaandeel te vergroten. Om de bestaande hoefsmeden als klanten binnen te halen, is het belangrijk dat de hoefijzerfabrikanten, de behoeften van hoefsmeden en het proces dat zij doorlopen tijdens hun keuze van producten voor hun bedrijf, goed in beeld hebben. Diensten, die helpen veranderende behoeften en verwachtingen van hoefsmeden beter te begrijpen en aan te pakken, zullen het aanbod van de hoefijzerfabrikanten versterken.

De hoofdvraag van dit onderzoek was: "Hoe kunnen hoefijzerfabrikanten beter inspelen op de behoeften van hoefsmeden om zo een groter marktaandeel te verwerven". Het antwoord op deze vraag werd gegeven met de kenmerken van hoefsmeden in Nederland, hun ervaringen met de hoefijzerfabrikanten, de pain-points in hun proces van aankoop en hoe hoefijzerfabrikanten hun aanpak om te voorzien in de behoeften van hoefsmeden kunnen vergroten. Deze vragen zijn onderzocht aan de hand van kwalitatieve interviews met hoefsmeden.

De resultaten van dit onderzoek laten het volgende zien:

Opvallende kenmerken van de hoefsmeden in Nederland zijn, dat de meeste van de geïnterviewde hoefsmeden zijn geworden door hun passie voor paarden of het vakmanschap van de hoefsmid. Alle geïnterviewde krijgen hun producten thuis afgeleverd of halen ze zelf op bij de fabrikant of een retailer. De ervaring van de hoefsmeden met de hoefijzer producent is over het algemeen goed. Zij zijn tevreden over de diensten die worden aangeboden door het bedrijf, behalve de bezorgdienst. Een pijnpunt van hun is, dat de producten niet altijd op voorraad zijn, waardoor de hoefsmeden langer moeten wachten en waardoor vertragingen oplopen. Een ander pijnpunt waarop zij wezen is, dat er verkeerde producten worden geleverd.

De hoefsmeden hebben verschillende verwachtingen aan de hoefijzerfabrikanten, om ze tevreden te houden. Ze vertrouwen erop dat ze betrouwbare informatie over producten krijgen, educatieve evenementen organiseren en producten op voorraad hebben, zodat ze hun klanten altijd van dienst kunnen zijn. Wanneer hoefijzerfabrikanten zich bewust zijn van de behoeften van hun klanten, moeten zij de benadering van de hoefsmeden te kunnen vergroten, om zo een groter marktaandeel te verwerven.

Chapter 1: Introduction

1.1 Developments of the hoofcare industry

Almost 100 years ago, farriery was still a thriving business. When automobiles and tractors were invented in the industrial age, the equine was no longer used for work, thus the need of farriers decreased. Then, in the 1960's, the horse industry got stronger again and so did the farriery. Nowadays, with the growth of importance of the internet, farriers have an enormous source of support and knowledge from all over the world (Edgell, J., 2002). Nevertheless, in the last couple of years, the number of farriers in the Netherlands has decreased (again), though the number of horses hasn't. From 2015 until 2017, there have been counted 450.000 horses in the Netherlands (KNHS, 2017).

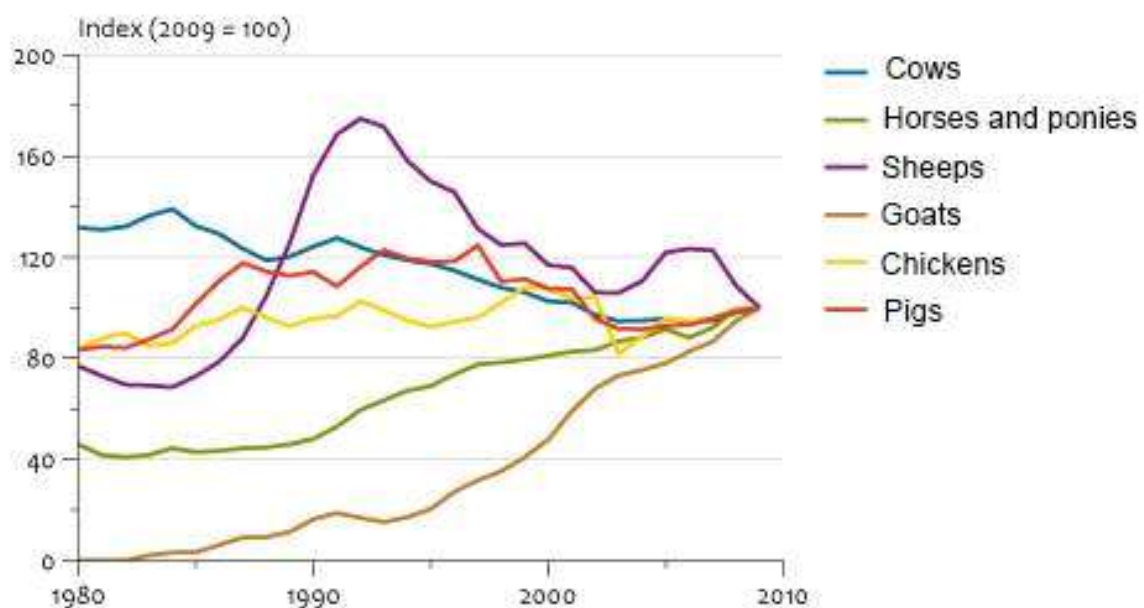


Figure 1: (CLO, 2010)

According to the “Hippische Monitor 2017” there are around 6.600 horse companies in the Netherlands, but the number is decreasing. The ecological value of the horse industry in the Netherlands is 1,2 billion (De Hippische Monitor, 2017).

There are only 3 big competitors in the hoofcare industry based in the Netherlands: Mustad, Werkman and Kerckhaert, so it is understandable that they want to increase their market share in such an oligopolistic industry. The motivation of this research is, that the farrier market is a stagnate one, which means that it doesn't grow anymore. Few new farriers enter the market, so it is important for the horseshoe manufacturers to win most of the current farriers over. In order to do that, the horseshoe manufacturers need to know the journey their customer is making and what their needs are. The customer needs to be the center of their business and decision making. To really live a culture centered

on the customers, they need to align the brands, products, services, R&D and innovation initiatives. People, processes, technology, systems and information. They need to gather the valuable information about their customers and get to know them better. This way they can make a more accurate customers definition, segmentation and generate actions that contribute to facilitate the daily work of customer (Mustad, 2019).

Although the hoofcare industry in the Netherlands has been driven by the focus on product development and quality, it is not enough in order to be the preferred choice of customers in the future. Because of that, they need to strengthen their offer through the development of services that will help to determine ways to better understand and address the evolving needs and expectations of farriers (Mustad, 2019).

In this report the goal is, to find out how horseshoe manufacturers can address the needs of farriers better, in order to gain a higher market share. This main question will be answered by researching the following sub-questions:

1. “How do farriers encounter the horseshoe manufacturers?”
2. “What are the characteristics of the farriers in the Netherlands?”
3. “What are the pain points in the customer journey of the farriers?”
4. “How can horseshoe manufacturers increase the approach of the needs of the farriers?”

How the question will be researched and answered is described in chapter 2: Methodology.

Now, that the topic and relevance is clear, the next step is to describe the theoretical framework. To analyze what information is already known and where a knowledge gap can be found.

1.2 Farrier Business

“Farriery is any work in connection with the preparation or treatment of the foot of a horse, for the immediate reception of a shoe thereon, the fitting by nailing or otherwise of a shoe to the foot or the finishing off of such work to the foot. (Hampton, Peterborough)”. A farrier has the theoretical and practical knowledge about shoeing all types of equine feet, normal or defective. He is also capable of making shoes to suit all types of work and working conditions, and of devising corrective measure to compensate for faulty limb action. Horse shoes are made of iron and also new modern materials as plastics and aluminum. Although, farriers need training in blacksmithing in order to make shoes, he is not a blacksmith. Blacksmiths work with iron and farriers work with horses (Hampton, Peterborough). In the Netherlands there are 800 certificated farriers, whereof 375 are member of the Dutch farrier association (NVvH). 10% of the 800 farriers are women. In addition, there are 700 natural balance trimming farriers (Olivier Smink, May 2019). “Natural balance trimming refers to preparing the feet of domestic horses in a manner that is consistent with those horses, domestic or wild, that self-maintain their feet through their environment and lifestyle (Ovnicsek, G.D., RMF, Page, B.T., DVM, Trotter, G.W., MS., 2003)”. To get to know the needs of a farrier, the manufacturers also have to consider in what stage their customer is currently in. There are five stages a farrier goes through while developing to a professional farrier.

Stage 1 – The Entry Farrier Stage

In this stage the individual enters the farrier profession, so he is energetic and motivated. The farrier wants to put everything he learned in school into his practice. Entry stage farriers will have some issues in the beginning. As is generally known they will have struggles with competence, certification, ethical concerns and reliance on external expertise for advice. Also, they will encounter personal concerns as the need for recognition, balancing work and personal life and of course, financial strain. They are transforming from a graduate student to a colleague.

Stage 2 – The Crossroads Farrier Stage

The farriers are now confronted with the decision if they want to remain a farrier or to re-orientate oneself. Important for the farriers is now, whether the benefits of working as a farrier outweigh the disadvantages of continuing.

Stage 3 – The General Farrier Practitioner Stage

Many professionals stay in this stage for many years. They have now been accepted and contribute their expertise independently. The quality of this stage is a rapid growth in knowledge, independence and autonomy. The goal of the general farrier is to have built one area of expertise where they are known for. Some of those farriers visit clinics or conventions for extra training.

Stage 4 – The Seasoned or Professional Farrier Stage

Farriers have now made the decision to stay in the farrier business and become a professional farrier. Furthermore, they are now ready to take on responsibility for developing or mentoring other farriers. They also want to broaden their expertise. It's not necessarily changing the way of working but changing their mindset. Over the years, they have gained a lot of experience where they can rely on. During this period, farriers are increasing professional isolation. For professional farriers, it is important to challenge themselves, otherwise they risk to become stagnate and stale.

Stage 5 – The Advisor or Leadership Farrier Stage

Farriers, who reach this stage, become a university farrier, a farrier school instructor or a professional consultant, an author, etc. Important for them is to develop the future of the farrier industry. Most of the farriers can easily identify the stage they currently in and others will have some difficulties (Buff, E. 2019).

With this knowledge about the customers, manufacturers can make a more accurate definition to reach out to the farriers in a more effectively way.

1.3 Market share in an oligopolistic market

There are only three big competitors in the hoofcare industry in the Netherlands. Kerckhaert, which was founded in 1906 and is based in Vogelwaard, Zeeland (Kerckhaert, 2019).

The second one, Werkman was founded in 1909 and is based in Groningen (Werkman Horseshoes, 2015). Mustad, the third competitor has a factory based in Drachten, Friesland and a distribution center based in Lelystad, Flevoland (Mustad, 2019). Important for those companies is to increase the market share in this oligopolistic industry. This chapter describes the terms market share and oligopoly.

Oligopoly means, that there are only a few companies in a particular industry that offer nearly the same products and services. Those companies are setting prices and trends. (Corporate finance institute, 2019) The market share of a company is defined by the total purchase of the customer, of the product or services. There are two different types of market share. There is the value market share, which is based on the total share of the company, out of a total segment sale and then there is the volume market share which refers to the actual numbers of units that a company sells out of total units sold in the market (The economic times, 2019). The measure of the consumers' preference for a product over other similar products is what is meant with market share. Therefore, more sales, less effort and a strong barrier to entry for other competitors will lead to a bigger market share. The goal is not to gain 100% market share because then there is the risk that market actions, like product of use changes will impact the company heavily (The economic times, 2019).

1.4 Customer satisfaction

“Customer satisfaction is essential for consideration because it refers to the final satisfaction for a customer and is being influenced throughout the entire sales process, from pre-purchase product expectations to post-purchase resolution of complaints” (R. Agnihotri, Februari 2016).

The customer experience is a reflection of the company's standards and operations, they are expressions of a company's culture. In that way, the impression that the customers have of the company, is the result not only of how they experience their products but also how the company can help them (Business Dictionary, 2019). The higher the customer satisfaction is, the more and better the performance measure will be (C. G. Chi and D. Gursoy, June 2009).

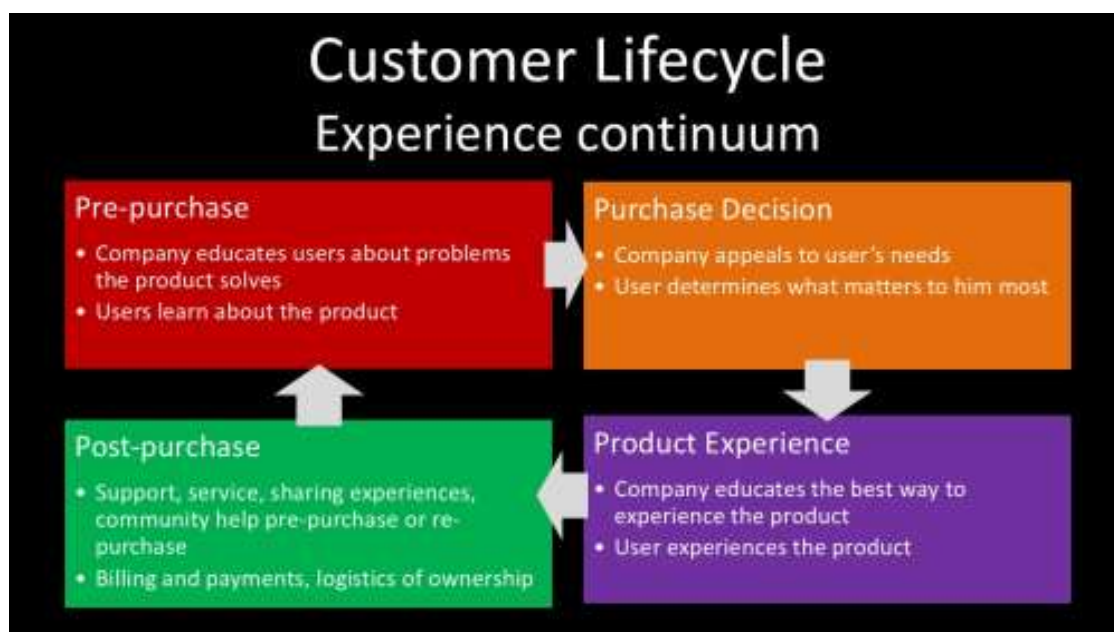


Figure 2: Customer Lifecycle

Customer satisfaction can be explained in three stages: pre-purchase, purchase and postpurchase. Those three stages are the customer journey. In the first stage, as you can see in figure 1, the pre-purchase the customer gets in touch with the industry or the brand. He is not willing to buy anything yet and is doing some research to gather information (Lemon, Katherine N; Verhoef, Peter C, 11-2016). The second stage, the purchase, describes all interactions from the customer with the brand. The customer is now experiencing the product and makes a choice and is actually buying something. This process can be influenced by the marketing of a company. The third stage, the post-purchase, includes the customers interaction with the brand, the usage or consumption and service request (Lemon, Katherine N; Verhoef, Peter C, 11-2016).

Within the customer journey, there are different touchpoints, which can be defined in four categories: brand-owned, partner-owned, customer-owned, and social/external/independent (Lemon, Katherine N; Verhoef, Peter C, 11-2016). The customer might interact with each of those touch points but the importance of them depend on the nature of the product, the service or the customer's own journey. The touch point "brand owned" describes the experience of the customer that are under the company's control such as advertising, websites and any elements of the marketing (Lemon, Katherine N; Verhoef, Peter C, 11-2016). The marketing aspect can also be handled by a partner and that would be the partner owned touch point. It also includes the partners in communication or distribution, etc. (Amorim, 2016). The actions of the customer, which are not influenced by the company or their partners, are called the customer owned touch points. Those touch points are the thoughts a customer has about his own needs and desires in the first phase, the pre-purchase phase. (Lemon, Katherine N; Verhoef, Peter C, 11-2016)

The first step towards customer journey management is a customer journey architecture framework. This framework will provide a foundation for including customer journeys as a way of working across the organization. Using customer journeys, horseshoe manufacturers will have an "outside-in" approach for pinpointing performance hot spots that matter most to customers (Angela Mancini 2017). Focusing on the customer experience is important because nowadays customers can interact with firms through an immense number of channels and media. (Lemon, Katherine N; Verhoef, Peter C, 11-2016)

When there are issues with the current user-centered approaches, personas can help solving those problems. User-centered means the design that brings the customers into the design process, so the usability of websites, systems and products (Miaskiewicz, T. & Kozar, K.A. 2011). A persona is a "fictitious, specific, concrete representations of target users" (Pruitt&Adlin, 2006). Meant are users, who share a common behavioral characteristic. The persona gets a name and a picture, although it is fictional, to make it seem like a real person in order to provide a story concerning the needs of the persona in context of the product that is being designed Miaskiewicz, T. & Kozar, K.A. 2011). The best way of building a persona is a one-on-one interview with a wide demographic of the targeted audience. Appendix B is an example of a persona which will be used as template to build a persona of the farriers after interviewing them. After approximately 30 interviews patterns in the data, which was gathered, begin to emerge.

Usually, the main points that want to be captured with a persona are:

- Demographic data (age, location,sex)
- Biography about their background
- Their goals on a company's website/service/product
- Their motivations for using it
- Their pain points or frustrations
- Other brands or websites they like.

The benefit of creating personas is the increased focus on the needs of the target users. Besides that, the extrapolation of the information from the persona to diverse situations and identifying with the users are benefits for companies. Eventually changes at the end of the product development process can be prevented (Miaskiewicz, T. & Kozar, K.A. 2011), which means that the work will be more efficient. Personas are only effective when they are accurate. Therefore, companies need to be up-to-date with trends and need to update their marketing strategy. There are different reasons why companies should make a persona: when they merge, when they shift in business strategy and they get a new direction or when their products or services change (Unknown, 2019).

1.5 Current approach of the farriers

The current approach of the farriers needs to be researched in order to compare it with the results from the questionnaire after interviewing the farriers, how they want the horseshoe manufacturers to contact them and what they expect from them.

Horseshoe manufacturers are currently contacting farriers by mail and there are dealers in each region that the farriers can call for advice or information about products or how to use products. For example, if there is a new product on the market other than the typical horseshoe or nail, and they don't quite know how it is supposed to be used. The horseshoe manufacturers also invented educative material on social media. Those are short films about how to use different products and then there is also a live video every month where a famous farrier shoes a horse and every farrier in the world can watch and ask questions. With analyses of the movement of the social media sites the horseshoe manufacturers can see what kind of video is popular and also if the sells go up for a specific product after showing the video. Watching those video's is for free and there is of course no guarantee that the ones watching it are buying the products of company showing it. All of the farriers are being approached in the same way. When they have special offers, they send campaigns via e-mail or post it on their Facebook or Instagram site and also their website although there are farriers who don't use the internet so often, especially older farriers. They don't get to know anything about the special offers. This research will gather such information, so the horseshoe manufacturers will know how the farriers want to be reached out to and also what they expect from the horseshoe manufacturers.

Chapter 2: Methodology

In this chapter the materials and methods used for this research are described. It is divided per sub-question. The term “materials” describes the variables that have been measured, for instance people, animals or plants and “methods”, on the other hand, describes how these variables were analyzed (Baarda, Goede, & Teunissen, 2011).

2.1 Interview design

There are two possibilities of doing a research and each one of them require a different approach and methodology. This research will be based on interviews with different farriers of the Netherlands and is therefore using the qualitative method (Jonker & Pennink, 2010). The answer to the main question “How can horseshoe manufacturers better address the needs of farriers in order to gain a higher market share?” will describe the experience of selected farriers from the Netherlands. The sub-questions each answer an aspect of experiences of the farriers: their needs, their current experience with the horseshoe manufacturers, their frustrations and at least their expectations.

2.2 Research group

The questions are based on the sub-questions, as well as literature mentioned in the theoretical framework. A total of 30 farriers will be contacted and interviewed in the period of June until July (during working days) and all farriers will be asked the same questions in order to get a general picture of the situation. All answers will be written down with a laptop. Farriers from the region “Flevoland” will be visited, others from the remaining regions (Gelderland, Zeeland, Groningen, Noord-Holland, Zuid-Holland, Noord-Brabant, Utrecht, Limburg, Friesland, Drenthe and Overijssel) will be contacted by phone, or skype, as driving to them would be taking too much time. To get a more valuable overview from the Netherlands, farriers from all regions will be interviewed.

2.3 Plan of action

2.3.1 Sub-question 1: What are the characteristics of farriers in the Netherlands?

The first sub question will focus on the characteristics of the farriers. Question number 1 from the questionnaire is about the personal data of the farrier. This means that information will be collected about the experience, the age of the farrier, how close he lives to his work, why he became a farrier, how he keeps contact to his clients and what kind of tools he uses every day in his life.

The second question is focused on the technology. Are they using social media and if they do what for channels are they using and how often? The third question from the questionnaire asks about the farriers lifecycle. In what stage is he at the moment (as mentioned in 1.2 Farrier business: The 5 stages of a farrier). The farrier will also be asked how his job changed him over time. Question four asks information about what types of products he uses, how often he uses them, how he gets them and what suggestions he has on the use of these products. The farriers will be contacted by phone or e-mail to arrange a meeting. Most of the meetings will be by a videocall or a simpel phone call. Farriers from the regions Flevoland though, will be visited, if they approve. The meetings will take place in the period from June until July 2019. The day will be chosen by the farriers. With the collected data, personas will be created to analze the outcome of the interviews.

2.3.2 Sub-question 2: How do farriers encounter the horseshoe manufacturers

The second sub question will focus on the experience of the farriers of all regions of the Netherlands with the horseshoe manufacturers. What do they think of the service of the horseshoe manufacturers and how do they experience the horseshoe industry? Question number 5 from the questionnaire in the Appendix A will help answering this. The goal of gathering this information is to find out what the horseshoe manufactureres do for farriers and also what farriers expect of them. Then it will be known if their expectations are fullfilled and if not what the horseshoe manufactueres can do differently. To ask these questions, farriers will be first contacted by phone or e-mail to arrange a meeting. Most of the meetings will be by videocall or simpel phone call. Farriers from the region Flevoland though, will be visited, if they approve. The meetings will take place in the period from June until July 2019 on a day, the farriers choose.

2.3.3 Sub-question 3: What are the pain points in the customer journey of farriers?

Question six deals with the pain points of the customer journey of the farriers. What are their frustrations, what barriers do they encounter and are those associated with a particular service? Furthermore, it is asked if there are barriers and frustrations that are associated with the farriers work and what tasks or responsibilities he dreads. These questions will also be asked in a meeting by phonecall or videocall in the period from June until July 2019. Farriers from the region Flevoland though, will be visited, if they approve. The meetings will take place in the period from June until July 2019. With the results from the interviews the customer journey can be created. First, clear objectives need to be set and then personas and their goals need to be profiled and defined. After that, all touchpoints will be listed out and elements that will be shown in the customer journey map must be identified.

2.3.4 Sub-question 4: How can horseshoe manufacturers increase the approach of the needs of the farriers?

At least the question about how the horseshoe manufacturers can increase the approach of the needs of the farriers, will be researched. In order to gain more market share the competitors need to know how they can approach the farriers in the best way, so that they will commit themselves to their brand. In order to answer this question, the farriers will be asked to tell how they want to be contacted. Question 7 from the Appendix A will help answer this. It concentrates on the improvements that can be made in the hoofcare industry that would help make the farriers job better. Here, it is asked how the customer maintenance can be improved, how they can help to upgrade the farriers value rather than the costs and if the farrier has the feeling that he has to compete for his work. Also, with question number 8 from the questionnaire, the farriers will be asked if they have any ideas for the horseshoe manufacturers to improve their services or products. These questions will be asked in a phonecall or video call except of the farriers living in Flevoland. They will be visited, if they approve. To arrange the meeting, farriers will be contacted by phone or e-mail. The meetings will take place in the period from June until July 2019.

Chapter 3. Results

This chapter will show the results from the interviews. The interviewees were 20 farriers from the Netherlands. The questions shown in de Appendix I were used in the interviews. The fully transcribed interviews can be found in Appendix III and a clear overview with summed up answers can be found in Appendix II.

3.1 What are the characteristics of farriers in the Netherlands?

In the Netherlands there are 800 certificated farriers, whereof 375 are members of the Dutch Association for farriers. For horseshoe manufacturers it is important to know their clients in order to respond to their wishes and needs. In order to create a persona, which helps by understanding the needs of one's clients, first the general data needs to be collected.

The Interviewees of this research were mostly between 30 and 60 years old. Figure 3 shows that seven out of 20 interviewees are between 40 and 49 years old.

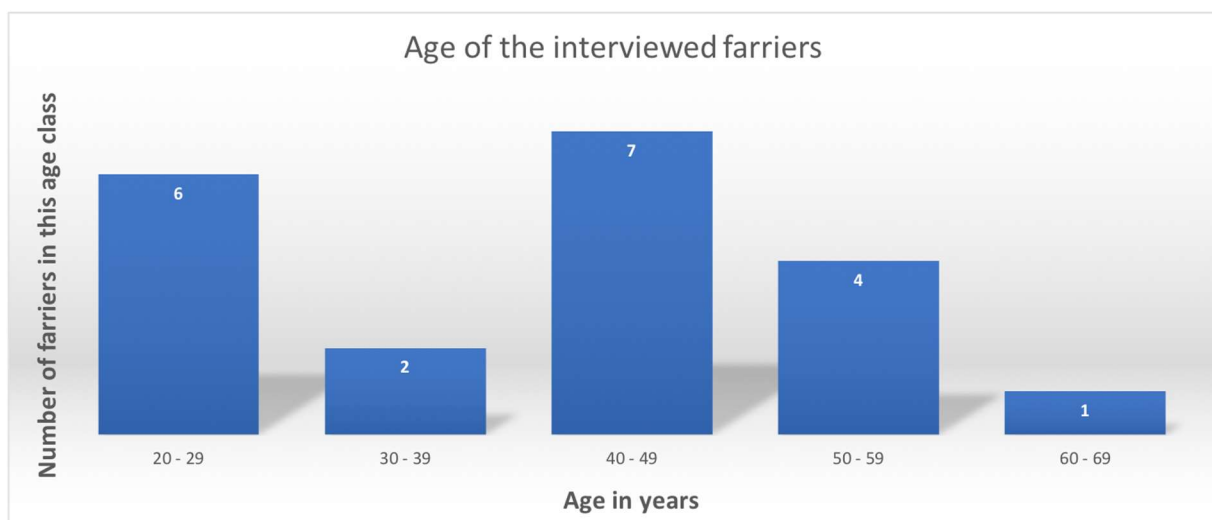


Figure 3: Age of the interviewed farriers

What they all have in common is, that farriers in the Netherlands have a van or a car with a trailer, with all of their equipment in which they visit their clients. The distance that farriers drive to their customers is between 10.000 and 50.000 km a year. There are several reasons, why the interviewees became farrier. Five of the interviewees indicated that they became a farrier because of their passion for horses and four interviewees took over the father's business, as can be seen in the appendix II, table 1. One other reason to get started in the farriery is the independency within this job. Being able to plan their days and choose clients they want to serve.

The interviewees were also asked if there were some nameable changes over the time. Their answer was, that their knowledge and skills have improved over the years, but there were also some changes in the farriery in general. That orthopedic shoeing has become more important, is a change especially the older generation of the interviewees have experienced. Another change, which particularly the older generation has endured is, the internet. According to the interviewees the internet has brought positive but also negative aspects. To be able to look a lot of information up, can be useful for the farriers but for their clients as well. As appears from the appendix II, table 7, clients have become more demanding what makes them difficult to handle.

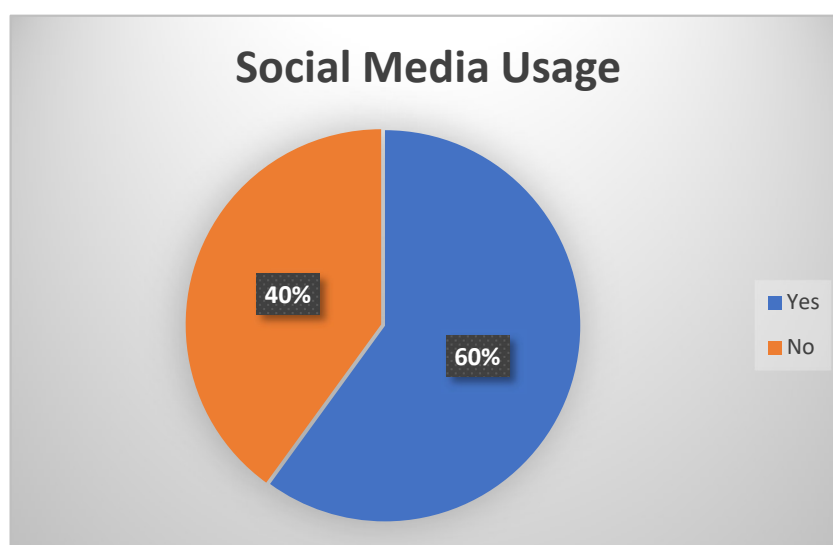


Figure 4: Social Media Usage

According to Figure 4: Social Media Usage use 60% of the interviewees social media to share photos and videos of their work or to see what other farriers are doing and to watch educational videos which the horseshoe manufacturers share. Numerous of the older generation farrier use social media as well but 40% of the interviewees indicated that they are not using any social media.

Furthermore, the interviewees were asked what brand they prefer, how they get their products and how frequently they get them. As in the appendix II, table 4 can be seen, twelve of the interviewees use Mustad, one person uses Werkman and also one person uses Kerckhaert products. The remaining interviewees use products from two of the three main competitors. Farriers either pick them up at the retail or get them delivered. All of the interviews stated, to not to get their products differently. The question of how often they buy products, seven of the interviewees answered with monthly, five answered with six times a year and the remaining either four times a year or they did not know exactly because they order when they need them.

3.2 How do farriers encounter the horseshoe manufacturers?

After having gathered the general information about a customer for creating a persona, the horseshoe manufacturers need to ask about how farriers encounter their company. In general, farriers encounter the horseshoe manufacturers positive. They are satisfied with their service and advice. The quality of the products is also very good though there are sometimes manufacturing faults but those problems are solved decently. As it can be seen in the appendix II table 5, all of the interviewees declare that they contact the horseshoe manufacturers when they order new products. The diagram below shows that out of 20 interviewed farriers, 17 are contented with the way their orders are handled. The interviewees encounter delivery problems of products such as missing goods or wrong products that were delivered. If that is the case, customers have to send those products back and cannot continue working. The interviews of the farriers who are using social media showed that they appreciate how horseshoe manufacturers are trying to help farriers by giving them educational videos and tips.

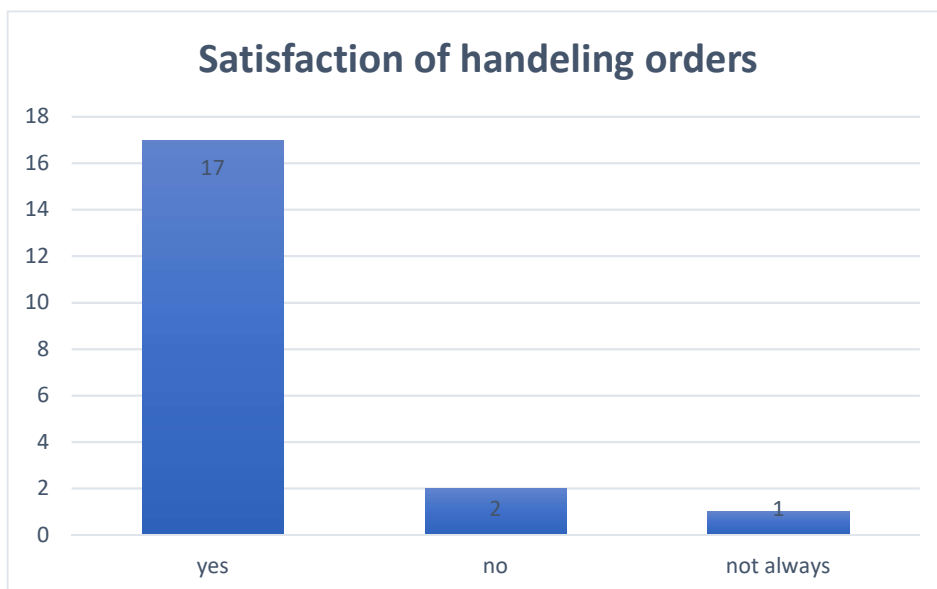


Figure 5: Satisfaction of handling orders

3.3 What are the pain points in the customer journey of farriers?

Pain Points are problems that customers experience of a company. Those problems are diverse and can vary by customer. The interviewees specified the pain points they experience in the customer journey when buying from the horseshoe manufacturers. For example, when the company do not have products on stock. Farriers also pointed out that they order products when they need new ones thus on short-term. Consequently, when they do not get their products one or two days after ordering them, they are not able to continue working. Especially when they need a specific product for a particular case. Also, it happens that they are sending different products than the customer has ordered. If this happens, the customer needs to send the product back to the horseshoe manufacturers which costs time and effort.

3.4 How can horseshoe manufacturers increase the approach of the needs of the farriers?

In case to improve the approach of customers, a company needs to figure out on how to reach out to them. As figure 6: How to contact farriers shows, 18 out of 20 interviewees want to be called.



Figure 6: How to contact farriers

Half of them also wants to be reached by e-mail but the other half does not check their e-mails regularly. Also, the ones who are not using social media want to be called when there are problems with their order or promotions of products they always use.

To keep customers satisfied and to make sure they will not leave the company, farriers have been asked what their expectations of the horseshoe manufacturers are, in order to keep them pleased.

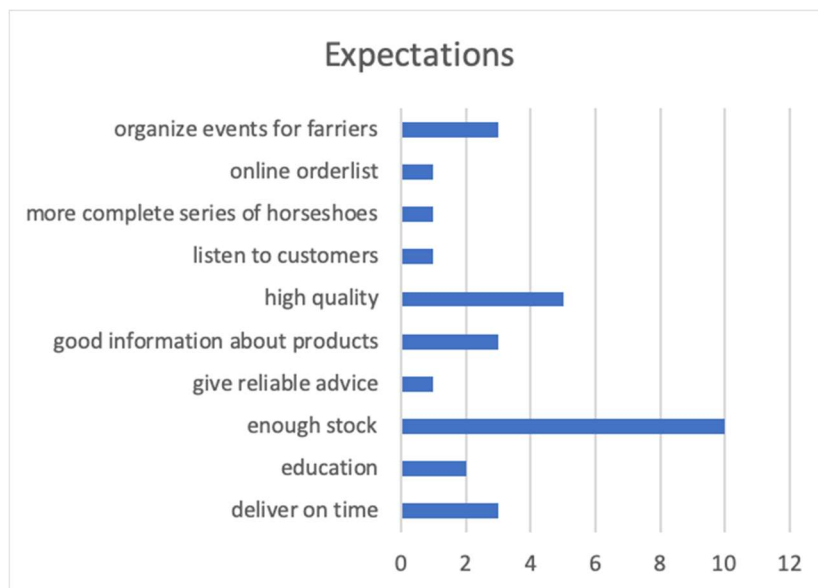


Figure 7: Expectations

As figure 7: Expectations shows, ten out of twenty interviewees pointed out that they expect the horseshoe manufacturers to have the products on stock. High quality of products and the reliable advice about products are also expectations farriers have of the manufacturers. Besides selling and delivering products, farriers also want the horseshoe manufacturers to organize events such as educational events. On those events, farriers can learn new methods of horseshoeing or how to use new products that have been brought out by the horseshoe manufacturers.

After having gathered all results of the proceed interviews, a persona of a farrier has been made.

3.5 Persona of a farrier

Piet Meyer

Age: 40

Work: Farrier

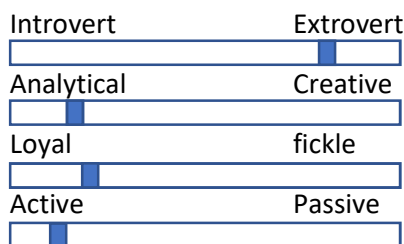
Family: Wife, two children

Location: Gelderland



Piet is working as a farrier for 22 years as a fulltime job. He starts his day with a cup of strong coffee before going to his customers by his van. In which he carries all of his equipment that he needs to treat the hoofs of the horses. While working he likes to make conversation with the people who help him hold the horses. In his free time, he likes to have barbeques with friends and his family.

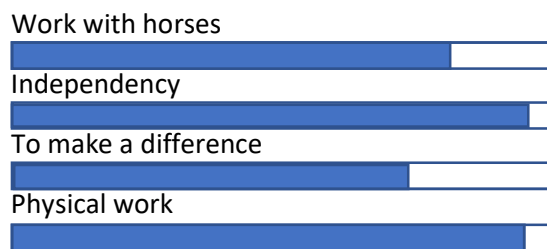
Personality:



Focused

Ambitious

Motivations:



Preferred Channels:



Goals:

- Develop skills
- Gain more knowledge and experience
- Help horses
- Try new methods in orthopedic shoeing

Frustrations:

- Products are not available
- Wrong deliveries
- Bad communication

This persona has been created out of the results from the interview. It is fictional, though the motivations, preferred channels, frustrations and goals are from the answers of the interviewees. The persona that is created, is 40 years old, has a family and lives in the region Gelderland, Netherlands. He is extrovert, likes to make conversations with, for example clients and he is loyal and active. Furthermore, he is extrovert, ambitious but also focused when he is doing his job. His motivations of being a farrier are that he likes to work with horses and the physical effort the job offers but he also wants to make a difference and appreciates the independency that comes with being a farrier. The goals he wants to achieve are among other things, developing skills, gain more knowledge and experience to make horses better and he wants to try new methods, for example orthopedic shoeing. When the horseshoe manufacturers want to contact him, he prefers his phone. He does use social media, but not that much and he does not check his e-mails that often. His frustrations with the horseshoe manufacturers are, that products are not available, or wrong deliveries and also bad communication.

Chapter 4. Discussion

The previous chapter described the results of the interviews. In this chapter these results are discussed and compared to the literature review. The results are discussed per sub-question.

4.1. Discussion of results

The purpose of this study was to investigate the question: “How the hoofcare industry can address farriers in a better way to gain more market share”. Because horseshoe manufacturers have experienced that they lose customers to the competitors and wanted to know what needs to change in order to gain them back.

4.1.1. The characteristics of farriers in the Netherlands

The results of the characteristics of the farriers in the Netherlands were mostly what was expected and already known. Two nameable results were that a few interviewees said that the ability and knowledge of other farriers has decreased over the years. The quality of a simple trimming has become quite bad. This is surprising, since the growth of the internet. Horseshoe manufacturers share a lot of educational videos and they organize workshops and sponsor school who qualify farriers. A reason for this regression could be that through the internet the younger generation thinks just watching a few educational videos will make them a better farrier and that they do not need to pay for workshops or further schooling. Another surprising result was that even the older generation of farriers use social media. Not as many as of the younger generation but still. They are using it to share their work, or to watch and learn from others. Also, their interest in improving their skills with new methods, such as the orthopedic shoeing, was unexpected.

The internet is also a change that can lead to frustrations. There are a lot of clients that read articles or experiences from others and then start making their farrier's life hard by telling them what he could do better, or by being demanding.

4.1.2. How farriers encounter the horseshoe manufacturers

Generally, the farriers encounter the horseshoe manufacturers positive. Besides selling products, the horseshoe manufacturers also share a lot of educational videos, tips and tricks for farriers for free. They organize live seminars which farriers all over the world can attend and ask questions right away. This helps improving their knowledge and eventually their ability if they practice a lot. There were some frustrations about the communication of the horseshoe manufacturers with the farriers. The interviewees mentioned that they need to improve their communication with the customer, especially when there are complications with an order or delivery. Farriers often order on short term, for example when they have an urgent case on which they do not have the right product for. They expect the horseshoe manufacturers to deliver the ordered product the next day and if that is not possible, farriers do not get informed about their delivery. This is irritating because the farrier has to explain to his client that he cannot do his horse because he did not receive the product. Horseshoe manufacturers need to understand that they can ruin the farrier's reputation and make him lose his clients.

4.1.3. The pain points in the customer journey of farriers

The pain points of the customer journey of farriers in the Netherlands are especially that they do not have products on stock regularly. As already mentioned, this can have a negative impact on a farrier's life. It was remarkable how many of the interviewees had complained about this matter. That products are not always on stock can be explained with a bad communication within the company because they should order new stock when they are running out of products and not when the goods are not available anymore. Another pain point, that was mentioned is, horseshoe manufacturers deliver wrong products. When this happens, customers get irritated because they have to send the product back to the manufacturer and still have to wait for the right one. The reason why horseshoe manufacturers sending wrong products can be either because they are not as concentrated at their work as they should be or because the ordered product is not available and they are sending a similar one, so the farrier can at least continue working. If the second reason is the case, they should communicate this with the customer. Maybe he doesn't want to have a different product delivered but at least he knows about it and can manage something else.

4.1.4. Increasing the approach of the needs of the farriers

The results show that farriers in the Netherlands use Facebook, Instagram but mostly WhatsApp as a media channel. They use it to get information, education or to get in contact with their clients. Though, there were a few interviewees who only use WhatsApp and want to be contacted by the horseshoe manufacturers by phone. That is because farriers are always on the road and working, so they do not have that much time to check their e-mails and respond to them right away. This makes it rather difficult for the horseshoe manufacturers to keep those clients pleased as they share promotion or a few sales on Facebook and Instagram. It is not possible to call every farrier, who doesn't use social media but they should figure out a way to reach out to them. It might be that the horseshoe manufacturers put most effort in developing in social media to be able to reach out to a lot of farriers and forget about the ones who don't want to use it.

4.1.5. Persona of a farrier

The created persona is fictional and was created with the results of the interviews. The age (40 years) was chosen, because seven of the interviewees are between 40 and 49 years old. His motivations, frustrations, goals and channels, which he prefers to use are all taken of the results from the interviews in order to create a general picture of a customer that buys products from the horseshoe manufacturers. Regarding his age, he prefers being contacted by phone because he does not check his e-mails very often. He also uses social media occasionally but not as a channel to get in contact with the horseshoe manufacturers. The frustrations that he encounters can be barriers to his work. When he does not receive the right product on time, his work will stand still. As a result, clients may leave him, which is bad for his reputation as a farrier. He wants to make a difference, help horses and serve customers well and in order to do that, horseshoe manufacturers must deliver the right products on time and if that is not possible than at least communicate with the customer about it.

4.2 Reflection on the research process & methodology

This paragraph evaluates the process and methodology of the research whether everything went according to plan. The similarities between the research and the literature review and aspects of the methodology, the student would have done differently will be discussed below.

In general, this research went according to the planning that was made before starting this research. Circa thirty were approached, whereof twenty farriers had been interviewed. Several of them had no time or interest to cooperate with this research or did not reply the request for contact. The conducted interviews were not as rewarding and extensive as planned. The reason therefore was, that the interviewees have not had much time or not so much interest in the results of this research. It was planned to interview at least one farrier of each region in the Netherlands. Unfortunately, only nine of twelve regions had been achieved: Gelderland, Zuid-Holland, Brabant, Friesland, Overijssel, Noord-Holland, Utrecht, Flevoland and Drenthe. The collected data is considered reliable, as the responses were similar to each other. As long as there aren't big changes in the hoofcare business they won't answer differently. Their motivations and expectations would not change drastically.

Some of the questions could have been formulated better. Question 1D and 1E were unnecessary for this research. The answers from the second question of the interview were not as was expected. This question must have been formulated differently. Question three and four were answered as expected. Question five could have brought better answers if it had been formulated better. Some of the sub-questions could have been merged. The sixth question also could have been merged with question five, because it was asked if they encounter barriers or frustrations with products or services of the horseshoe manufacturers. Question 7A and 7B were good, but 7C was redundant. The eighth question was a good one but farriers who had an idea did not always want to share it in case someone takes the idea. The last question was a simple question but necessary for the research as the main question of this research is how horseshoe manufacturers better address farriers.

A non-influential factor in this research was time. The research was restricted with a limited time frame and this meant that the interviews could only be conducted within three weeks. Farriers are busy all the time and often reply in short. Also, a lot of the interviews had been conducted through a phone call, because there was not enough time to visit all of the participants. In retrospect, a quantitative research would have been better to define opinions and behaviors from a larger sample farrier as their answers were not as played as expected.

Chapter 5. Conclusion & Recommendations

In this paragraph, conclusions are made based on the findings from the literature review and the results from the interview.

5.1. Conclusion

The purpose of this study was to investigate the question: “How the hoofcare industry can address farriers in a better way to gain more market share”. The number of customers that buy from the existing horseshoe manufacturers is decreasing. Also, when farriers are not satisfied with one of the services of the horseshoe manufacturers, they change over to one of the competitors. In order to win the ones leaving back, horseshoe manufacturers need to make some changes. After conducting the interviews, a few points became clear in which the hoofcare industry needs to improve. The most frequent pain point of the farriers is that some products are not on stock regularly.

Farriers in the Netherlands had been asked what their needs are regarding the horseshoe manufacturers. They were asked if they encounter any pain points when they are buying products and how they want the horseshoe manufacturers to address them, so that they won't change over to the competitor.

In general farriers can be described as hard workers who like working with horses, developing their skills and try new methods and also to satisfy their clients. A farrier can specialize in different fields such as orthopaedics, natural balance trimming, traditional shoeing, etc. When it comes to buying products from the horseshoe manufacturers, they all want to order products easily, get them delivered quickly and get advised if necessarily. Certainly, this is not as simple as they would like it to be. The biggest pain point, farriers encounter in their customer journey is that products are often not on stock or are delivered incorrectly. Due to this, customers get displeased and if this happens regularly, they will, eventually, changeover to one of the competitors. With the right communication about problems like this, the customer will be more patient and not leaving so quickly. Furthermore, it is important that horseshoe manufacturers keep in mind that the older generation of farriers does not naturally use social media for communicating. As horseshoe manufacturers often share educational videos, special sales or important information, they will miss out on those matters.

In conclusion, horseshoe manufacturers need to respond on the needs of the farriers better. They need to improve their delivery services and their communication with the customers, so that they will not feel displeased and eventually leave the company. The horseshoe manufacturers need to keep their customers satisfied in order to keep them and to gain more market share.

5.2. Recommendations

This research can be used by horseshoe manufacturers who want to know how they have to address farriers in order to gain more market share. When they want to improve their way of addressing farriers, they could consider following needs of the farriers in the Netherlands:

- Always have products on stock

A lot of the interviewees said that they cannot order some products regularly. It's because they are not available. This is irritating and after a couple of times frustrating for the farriers. As farriers order new products on short-term, they expect them delivered the next day or the day after. When this is not the case, it can cause trouble with his clients as the farrier is not able to shoe a horse when he does not have the needed product. If the horseshoe manufacturers do not deliver products on time regularly, they risk losing their clients because the farriers will then order a similar product by the competitors.

- Do not deliver wrong products

A few of the interviewed farriers said that they have received different products than what they have ordered. The reason can be that the company does not have the ordered product on stock and sends a similar one because of miscommunication or to make sure that the farrier can continue his work. If that is the case, the company has to communicate with the customer and ask for his agreement. It is also important to book the order in the system properly, so that no wrong products will be delivered.

- Continue with the educational videos

The educational videos on social media are helpful and popular. The interviewed farriers pointed out that they can really learn from them, for example how to use a specific product or valuable tips and tricks about repairing a hoof or how to use the equipment. According to the interviewees the ability of the farriers in the Netherlands has decreased. Simple horseshoeing quality has become inferior. Therefore, it is important that horseshoe manufacturers keep organizing educational events and seminars to help the farriery.

- Show commitment to your clients

When the interviewees were asked what they expect of the horseshoe manufacturers, some of them answered that they want them to show commitment. Every interaction with the customer is a chance to learn something valuable about them and to show that the partnership is valued. Listen to what they have to say and make them feel important. It is essential to gain new customers but also to take care of the existing customers to keep them in the company.

- Inform customers who do not use social media about promotions

The farriery is an old business and there are still a few farriers from the older generation who are not using social media and therefore miss out on special offers or promotions. If they have been customer for a long time, call them to inform them about special offers to show commitment. In order to do so, the customers will be feeling more valued by the company and is more likely to stay true to the supplier.

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Appendix I – Questionnaire Farriers

1 About you

- A. What region in the Netherlands are you from?
- B. How long have you been a farrier?
- C. How old are you?
- D. How many kilometers do you drive for work on an annual basis?
- E. What made you become a farrier?
- F. How do you get to your customer or client?

2 Technology

- A. Do you use social media?
- B. What social media do you use?
- C. How often are you using it?
- D. For what are you using social media?

3 Farrier lifecycle

- A. How has what you do changed over time?

4 Preferences (type, brands)

- A. Which brand are you using?
- B. How do you get your products? How frequently?
- C. Would you prefer to get them differently?

5 Hoofcare industrie experience

- A. How do you experience the service of horseshoe manufacturers?
- B. When do you contact horseshoe manufacturers?
- C. How are they handling your orders?
- D. Are you satisfied with their way of handling your orders?
- E. What do the horseshoe manufacturers do for you besides selling products?
- F. Are you satisfied with their services?
- G. What do you expect of the horseshoe manufacturers?

6 Barriers & Frustrations

- A. Are there barriers and frustrations associated with particular products?
- B. Are there barriers and frustrations associated with particular services?
- C. What tasks or responsibilities do you dread?
- D. Are there barriers and frustrations associated with what you do?

7 How can the hoofcare industry help you?

- A. How could they help you do your job better?
- B. Is there anything that could be done that could make it easier to find or maintain clients, get ahold of products, be on top of administration/accounting?
- C. Do you feel like you have to compete for work? How can they help you in that regard?

8 New service ideas

- A. Do you have any ideas? Is there anything you've thought "if only ____ existed?"
- B. What do you think of this idea? (What do you think other farriers think of it?)
- C. What could improve this idea?
- D. What would be a barrier to this idea working?

9 Approach

- A. How do you want the horseshoe manufacturers get in touch with you?

Appendix II: Results of the questionnaire

Table 1: Question 1 of interview

Interviewee	Region	Age	Years as farrier	Kilometer/year	Vehicle	Reason farriery
1	Friesland	29	6	50.000	Pick up	Father
2	Friesland	48	12	40.000	Van	Make a difference
3	Friesland	55	35	30.000	Car + Trailer	Father
4	Gelderland	51	10	20.000	Van	Hobby
5	Utrecht	65	47	48.000	Car + Trailer	Passion
6	Noord-Holland	49	22	35.000	Van	Hobby
7	Gelderland	45	12	30.000	Van	Physical work
8	Zuid-Holland	48	28	35.000	Van	Horse-Riding
9	Zuid-Holland	53	33	15.000	Car + Trailer	Passion
10	Flevoland	51	10	20.000	Van	Hobby
11	Drenthe	25	9	22.000	Van	Independency
12	Utrecht	39	18	35.000	Van	Hobby
13	Overijssel	42	15	33.000	Car + Trailer	Passion
14	Brabant	48	17	17.000	Van	Father
15	Drenthe	25	5	12.000	Van	Independency
16	Noord-Holland	23	1	10.000	Car + Trailer	Passion
17	Flevoland	27	8	12.000	Van	Horse-Riding
18	Utrecht	43	21	32.000	Van	Required skills
19	Gelderland	35	10	18.000	Car + Trailer	Father
20	Flevoland	29	4	15.000	Van	Passion

Table 2: Question 2 of interview

Interviewee	Usage	Channel	Frequency	Reason
1	No	None	Never	None
2	Yes	Facebook	Everyday	Work
3	Yes	Facebook, Instagram	Everyday	Work
4	No	None	Never	None
5	No	None	Never	None
6	No	None	Never	None
7	No	None	Never	None
8	Yes	Facebook	Everyday	Information
9	Yes	Facebook	Occasionally	Private
10	No	None	Never	None
11	Yes	Facebook	4x a week	Work
12	No	None	Never	None
13	Yes	Facebook	Everyday	Education
14	Yes	Facebook, Instagram	Everyday	Information
15	Yes	Facebook, Instagram	Everyday	Work, Information
16	Yes	Facebook, Instagram	Everyday	Contact
17	Yes	Facebook, Instagram	Everyday	Contact
18	Yes	Facebook	3x a week	Contact
19	No	None	Never	None
20	Yes	Facebook, Instagram	Everyday	Education

Table 3: Question 3 of interview

Interviewee	Changes
1	More products available
2	Improvement skills & knowledge
3	Attention to orthopedic shoeing; Internet
4	Improvement knowledge; more cooperation
5	Decreasing ability farriers
6	Treatment of horses
7	Decreasing ability farriers
8	Demanding clients
9	Increasing education & models horseshoes
10	More seminars für education
11	None
12	None
13	Natural balanced trimming gets popular
14	Improvement skills & knowledge
15	None
16	Natural balanced trimming gets popular
17	None
18	Decreasing ability farriers
19	Acces to information because of internet
20	None

Table 4: Question 4 of the interview

Interviewee	Brand	Receiving products	Frequency	Different way
1	Mustad	Delivery	When needed	No
2	Mustad	Delivery	4x a year	No
3	Mustad	Delivery	6x a year	No
4	Mustad	Pick up	4x a year	No
5	Werkman	Delivery	When needed	No
6	Mustad	Pick up; Delivery	6x a year	No
7	Mustad	Pick up	Every 3 weeks	No
8	Mustad	Delivery	Monthly	No
9	Mustad	Delivery	Monthly	No
10	Mustad; Werkman	Pick up	Monthly	No
11	Mustad	Pick up	Monthly	No
12	Mustad	Delivery	6x a year	No
13	Mustad; Kerckhaert	Pick up	Monthly	No
14	Kerckhaert	Delivery	Monthly	No
15	Werkman; Kerckhaert	Pick up; Delivery	6x a year	No
16	Mustad	Pick up; Delivery	When needed	No
17	Mustad; Werkman	Pick up	When needed	No
18	Mustad; Kerckhaert	Delivery	When needed	No
19	Mustad	Pick up; Delivery	6x a year	No
20	Mustad; Werkman	Pick up	Monthly	No

Table 5: Question 5A-C of the interview

Interviewee	Service experience	Contact	Processing orders
1	Good	New order	Quickly
2	Terrible	New order	Friendly; Incorrect
3	Good	New order	Good
4	Good	New order	Good
5	Good	New order; Questions	Good
6	Good	New order; Advice	Mostly good
7	Good	New order	Terrible
8	Good	New order	Good
9	Good	New order	Good
10	Good	New order; Questions	Okay
11	Good	New order	Good
12	Good	New order	Mostly good
13	Good	New order	Good
14	Good	New order	Good
15	Good	New order; Advice	Good
16	Good	New order; Questions	Good
17	Good	New order; Questions	Good
18	Not good	New order	Not good
19	Good	New order	Good
20	Good	New order; Questions	Good

Table 6: Question 5D-G of the Interview

Interviewee	Satisfied with manufacturer	More services	Satisfied with service	Expectations
1	Yes	Tips & Tricks; Live video	Yes	Good service
2	No	Sponsoring clothing	No	Involvement
3	Yes	Live videos	Yes	Deliver on time
4	Yes	Educational events	Yes	Good communication
5	Yes	Sponsoring	Yes	Good products
6	Not always	Barbecue; competition	Not always	Involvement
7	Yes	Events	Yes	More events
8	Yes	Tips & tricks	Yes	Faster delivery
9	Yes	Events; Seminars	Yes	More events
10	Not always	Events; Seminars	Not always	More education
11	Yes	Educational support	Yes	Good quality
12	Yes	Educational support	Yes	Faster delivery
13	Yes	Advice	Yes	Good communication
14	Yes	Advice	Yes	Reliable advice
15	Yes	Tips & tricks	Yes	Deliver on time
16	Yes	Events	Yes	Deliver on time
17	Yes	Events	Yes	Deliver on time
18	Not always	Advice	Not always	Good communication
19	Yes	Sponsoring	Yes	Faster delivery
20	Yes	Advice	Yes	Good service

Table 7: Question 6 of the interview

Interviewee	Frustrations products	Frustrations services	Tasks dread	Frustrations work
1	No	No	Difficult clients	No
2	No	Yes	Lost shoes	No
3	Yes	No	Trimming little ponies	No
4	Yes	No	None	No
5	No	No	Difficult horses	No
6	Yes	Yes	Difficult clients	No
7	No	No	None	No
8	No	Yes	None	Yes
9	No	No	None	No
10	No	Yes	Administration	No
11	No	No	Trimming little ponies	No
12	No	No	Administration	No
13	No	No	None	No
14	No	No	None	Yes
15	No	Yes	None	No
16	Yes	Yes	Difficult clients	No
17	No	No	Difficult horses	No
18	No	No	None	No
19	Yes	No	Administration	No
20	No	No	Trimming little ponies	No

Table 8: Question 7 of the interview

Interviewee	Help	Suggestions	Competition
1	Online order lijst	An application	No
2	No idea	None	No
3	Not possible	None	No
4	Education about products	None	Yes
5	Complete series of products	None	No
6	Enough stock	Increase communicati	Yes
7	No idea	None	No
8	High quality	None	Yes
9	No idea	None	No
10	More education	None	No
11	No idea	None	Yes
12	No idea	None	Yes
13	Deliver on time	None	Yes
14	Deliver on time	None	No
15	No idea	None	No
16	Reliable advice	None	Yes
17	Events	None	No
18	Deliver on time	None	No
19	Deliver on time	None	No
20	No idea	None	Yes

Table 9: Question 8 of the interview

Interviewee	New ideas	Opinion other farriers	Improvement	Barriers
1	Ordering-app	Useful	No idea	Logistic changes
2	No idea	None	None	None
3	Yes, won't tell	None	No idea	Competitor with same idea
4	No idea	None	No idea	None
5	More educational workshops	Good	Sponsoring	None
6	Improve delivery service	Good	Good purchase	None
7	Up-to-date catalogue or website	Useful	No idea	None
8	Offer complete series of products	Good	No idea	None
9	No idea	None	None	None
10	No idea	None	None	None
11	No idea	None	None	None
12	No idea	None	None	None
13	No idea	None	None	None
14	Ordering-app	Useful	No idea	Installation proces
15	Opportunity to see and test new product	Good	No idea	None
16	No idea	None	None	None
17	No idea	None	None	None
18	No idea	None	None	None
19	No idea	None	None	None
20	Ordering-app	Useful	No idea	No idea

Table 10: Question 9 of the interview

Interviewee	Channel
1	Phone; E-Mail
2	Any way
3	Phone
4	Phone
5	Phone; E-Mail
6	Phone; E-Mail
7	Phone; E-Mail
8	Phone
9	Phone
10	Phone; E-Mail
11	Phone
12	Phone
13	Phone; E-Mail
14	Phone
15	Phone; Facebook
16	Phone
17	Phone; Facebook
18	Phone
19	Phone; E-Mail
20	Phone; E-Mail

Appendix III: Processed Interviews

Interview 1

1 About you

- A. Friesland
- B. 6 years
- C. 29
- D. Ca. 50.000
- E. Father- Son passion
- F. Pick up

2 Technology

- A. No
- B. -
- C. -
- D. -

3 Farrier lifecycle

- A. More products available

4 Preferences (type, brands)

- A. Mustad
- B. Retail
- C. No

5 Hoofcare industry experience

- A. Good
- B. When I need new products
- C. Quickly
- D. Yes
- E. I have learned a lot in the past from Tips & Tricks or Live videos
- F. Yes
- G. Good service, Involvement

6 Barriers & Frustrations

- A. No
- B. No
- C. Annoying horses or clients (horse owners)
- D. No

7 How can the hoofcare industry help you?

- A. Maybe like an online order list
- B. An application
- C. No

8 New service ideas

- A. An app for orders as mentioned earlier
- B. I think they would find it useful
- C. -
- D. Logistic changes

9 Approach

- A. By phone or e-mail

Interview 2

1 About you

- A. Friesland
- B. 12 years
- C. 48
- D. Ca. 40.000 km
- E. The wish of having a job that really can make a difference and required skills
- F. Some centralized in a boarding stable, some mouth to mouth, some find my site. Van

2 Technology

- A. Yes
- B. Facebook
- C. 30 minutes a day
- D. For fun and work

3 Farrier lifecycle

- A. My skills and knowledge have improved and since my reputation and number of clients have grown over time, I now can be pickier and refuse clients that don't agree with my shoeing/trimming cycle for example

4 Preferences (type, brands)

- A. Mustad
- B. Retail, when I am running out of stock
- C. No

5 Hoofcare industry experience

- A. Terrible
- B. When I need something
- C. Very friendly but almost always incorrect
- D. No. No communication if something is not on stock and 9 out of 10 orders are incorrect. Always something missing of the wrong item delivered. I tried ordering via the website, via e-mail, via WhatsApp and by phone with the same result
- E. In the past nice arrangement for our competition farriers, some travel and clothing sponsoring. This year some shirts and jackets as well as regular customer
- F. Not for the Dutch competition farriers in comparison with the farriers from other countries
- G. Get orders correct, communicate about deliveries and treat farriers in all countries the same regarding sponsoring

6 Barriers & Frustrations

- A. Yes quality of last delivered drills
- B. No not really
- C. Lost shoes
- D. No

7 How can the hoofcare industry help you?

- A. No idea
- B. Not for me, enough products in the market
- C. No, too much work, not enough competent farriers in the area

8 New service ideas

- A. Not really
- B. -
- C. -

D.

9 Approach

A. Any means

Interview 3

1 About you

- A. Friesland
- B. 35 years
- C. 55
- D. ca. 30.000
- E. I had to, my father said so
- F. Car

2 Technology

- A. Yes
- B. Facebook and Instagram
- C. 45 min a day
- D. Work

3 Farrier lifecycle

- A. The focus was on a high production, with little attention to orthopedic shoeing. Because of the internet people form their own opinion which can be difficult

4 Preferences (type, brands)

- A. Mustad
- B. 4x a year, retail
- C. No

5 Hoofcare industry experience

- A. Good
- B. When I need new products
- C. Good
- D. Yes
- E. Grant Moon, a well-known farrier, has been to the Netherlands
- F. Yes
- G. Good products

6 Barriers & Frustrations

- A. No
- B. -
- C. Shoeing or trimming Shetlanders
- D. No

7 How can the hoofcare industry help you?

- A. Not possible
- B. -
- C. No, too little good farriers in the area

8 New service ideas

- A. Yes, but it is an own project
- B. Very good
- C. Yes
- D. Competitor with the same idea

9 Approach

- A. By phone

Interview 4

1 About you

- A. Gelderland
- B. 10 years
- C. 51
- D. Ca. 20.000km
- E. My hobby became my work
- F. Van

2 Technology

- A. No
- B. -
- C. -
- D. -

3 Farrier lifecycle

- A. Further training in order to be able to serve customers better. This further training was held by the Dutch farrier's association and various horseshoe manufacturers. More cooperation between farriers, which I think is good.

4 Preferences (type, brands)

- A. Mustad & Werkman
- B. Pick it up by myself or get it delivered, round about six times a year
- C. No

5 Hoofcare industry experience

- A. Good service
- B. When I need new products, or if I have questions about a particular product
- C. Good
- D. Yes
- E. They organize educational events and other interesting events
- F. Yes
- G. Involvement, knowledge, interest, good products by developing their products

6 Barriers & Frustrations

- A. No
- B. No
- C. No
- D. No

7 How can the hoofcare industry help you?

- A. With education of information for specific products
- B. No
- C. There is always competition but the products of the horseshoe manufacturers have to have a good quality price ratio

8 New service ideas

- A. No
- B. -
- C. -
- D. -

9 Approach

- A. By phone call, WhatsApp or e-mail

Interview 5

1 About you

- A. Utrecht
- B. 47 years
- C. 65
- D. Ca. 48.000
- E. Passion for horses and the farriery
- F. Car with trailer

2 Technology

- A. No
- B. -
- C. -
- D. -

3 Farrier lifecycle

- A. Quality and knowledge of farriers is decreasing

4 Preferences (type, brands)

- A. Mustad
- B. Delivered or I pick them up by myself
- C. No

5 Hoofcare industry experience

- A. Very good
- B. When I need new products
- C. Good
- D. Yes
- E. Sponsoring
- F. Yes
- G. More education for farriers

6 Barriers & Frustrations

- A. With particular products
- B. No
- C. -
- D. No

7 How can the hoofcare industry help you?

- A. More complete series of horseshoes
- B. No
- C. No

8 New service ideas

- A. More workshops for education of farriers
- B. I think most of the farriers would like this idea
- C. Sponsoring
- D. -

9 Approach

- A. By phone or e-mail

Interview 6

1 About you

- A. Noord-Holland
- B. 22 years
- C. 49
- D. Ca. 35.000
- E. I wanted to work with horses and I thought farrier would be a nice job
- F. Van

2 Technology

- A. No
- B. -
- C. -
- D. -

3 Farrier lifecycle

- A. How horse owners treat their horses. Not always in a positive way. They see a horse as an cuddle toy

4 Preferences (type, brands)

- A. Mustad
- B. Retail, when I need new products
- C. No

5 Hoofcare industry experience

- A. If they send, what I have ordered then good
- B. When I need something
- C. One day it's good, the other it is not. It happens that I get other products delivered then I have ordered.
- D. When everything goes right, I am satisfied
- E. A barbeque with different farriers, farrier competitions
- F. Most of the time, I am
- G. A good quality of the products

6 Barriers & Frustrations

- A. Yes, often products are not on stock
- B. Yes, with the production policy
- C. When products weren't delivered, because they were out of stock or because I received the wrong product, my clients get displeased.
- D. No I have enough clients. It would make my work easier, if products are delivered

7 How can the hoofcare industry help you?

- A. Enough stock
- B. No I don't think so
- C. Yes, but that is normal

8 New service ideas

- A. Improve the stock and delivery service
- B. All farriers would like this idea
- C. A good, or new purchase policy
- D. -

9 Approach

- A. By phone, otherwise e-mail, but I prefer telephone

Interview 7

1 About you

- A. Gelderland
- B. 12
- C. 45
- D. Ca. 30.000
- E. Working physically in combination with animals has always fascinated me
- F. Van

2 Technology

- A. Only Whatsapp
- B. -
- C. -
- D. -

3 Farrier lifecycle

- A. I don't think, I have changed but the ability of the farriers has changed negatively over the years.

4 Preferences (type, brands)

- A. Mustad
- B. 1x every 2 months, retail
- C. No

5 Hoofcare industry experience

- A. Okay
- B. When I need new products
- C. Yes, it has been a bit of a mess but that is better now
- D. Yes
- E. Every once in a while, they organize an event, that's nice, but I don't think they can't do it more often
- F. Okay
- G. Good quality of horseshoes

6 Barriers & Frustrations

- A. No
- B. No
- C. Administration
- D. No, enough work

7 How can the hoofcare industry help you?

- A. Don't know
- B. If they are doing a good job and increase their communication with customers, everything else will follow
- C. No, actually, too much work

8 New service ideas

- A. Up-to-date- catalogue, or website
- B. I think they would like this idea
- C. -
- D. -

9 Approach

- A. By phone or e-mail

Interview 8

1 About you

- A. Zuid-Holland
- B. 28
- C. 48
- D. Ca. 35.000
- E. Horse-riding
- F. Van

2 Technology

- A. Yes
- B. Facebook
- C. Every day
- D. Information

3 Farrier lifecycle

- A. Demanding clients

4 Preferences (type, brands)

- A. Mustad
- B. Retail, monthly
- C. No

5 Hoofcare industry experience

- A. Good
- B. Monthly
- C. Good
- D. Good
- F. Often, products not on stock
- G. Deliver products, which are not on stock more quickly

6 Barriers & Frustrations

- A. Yes
- B. Yes
- C. None
- D. No

7 How can the hoofcare industry help you?

- A. High quality and listen to your customers
- B. No, enough work
- C. They can help, by deliver the right products on time

8 New service ideas

- A. Offer complete series of products
- B. -
- C. -
- D. -

9 Approach

- A. By phone

Interview 9

1 About you

- A. Zuid-Holland
- B. 33
- C. 53
- D. Ca. 15.000 km
- E. That was my vocation
- F. Car with trailer

2 Technology

- A. Not that often
- B. Facebook
- C. -
- D. Private

3 Farrier lifecycle

- A. Continuing education and models horseshoes, both positive

4 Preferences (type, brands)

- A. Mustad
- B. Retail, monthly delivered
- C. No

5 Hoofcare industry experience

- A. Good
- B. Every month
- C. Yes
- D. Yes
- E. A lot of workshops and seminars
- F. Yes
- G. Good quality

6 Barriers & Frustrations

- A. -
- B. -
- C. Administration
- D. -

7 How can the hoofcare industry help you?

- A. I am satisfied
- B. No
- C. No

8 New service ideas

- A. No
- B. Not interested
- C. -
- D. -

9 Approach

- A. By phone

Interview 10

1 About you

- A. Flevoland
- B. 10
- C. 51
- D. Ca. 20.000 km
- E. My hobby became my work
- F. Van

2 Technology

- A. No
- B. -
- C. -
- D. -

3 Farrier lifecycle

- A. went to many seminars to be able to serve my clients in a better way. Those seminars were organized by the Dutch association for farriers and different horseshoe manufacturers

4 Preferences (type, brands)

- A. Mustad and Werkman
- B. I pick them up by myself or get them delivered, c. 6 times a year
- C. No

5 Hoofcare industry experience

- A. Good
- B. When I need to order something or when I have question about a particular product
- C. Okay
- D. Yes
- E. They organize events and seminars
- F. Yes
- G. Involvement, knowledge, good products by developing them

6 Barriers & Frustrations

- A. No
- B. No
- C. None
- D. No

7 How can the hoofcare industry help you?

- A. With educational service and product information
- B. No
- C. There is always competition, I can deal with that. Products must have a good quality and a good quality price ratio

8 New service ideas

- A. No
- B. -
- C. -
- D. -

9 Approach

- A. By phone, Whats app or E-mail

Interview 11

1 About you

- A. Drenthe
- B. 9 years
- C. 25 years old
- D. Ca 22.000 km
- E. Independency
- F. Van

2 Technology

- A. Yes, a lot
- B. Facebook and Instagram
- C. I share pictures or videos of my work, three or four times a week
- D. Both

3 Farrier lifecycle

- A. Haven't recognized that big changes

4 Preferences (type, brands)

- A. Mustad
- B. Retail, delivered, every 3 weeks
- C. No

5 Hoofcare industry experience

- A. Good, but sometimes products are not on stock and can't be delivered
- B. When I need something
- C. Very good
- D. Yes
- E. Nice events with seminars about new products
- F. Yes
- G. Good price quality ratio

6 Barriers & Frustrations

- A. No
- B. No
- C. Complaining clients
- D. No

7 How can the hoofcare industry help you?

- A. No I don't think so
- B. No
- C. No

8 New service ideas

- A. No
- B. -
- C. -
- D. -

9 Approach

- A. By phone

Interview 12

1 About you

- A. Utrecht
- B. 18 years
- C. 39
- D. 35.000 km
- E. A nice job
- F. Van

2 Technology

- A. No
- B. -
- C. -
- D. -

3 Farrier lifecycle

- A. Haven't seen any big changes

4 Preferences (type, brands)

- A. Mustad
- B. Retail, get them delivered at home
- C. No

5 Hoofcare industry experience

- A. Good
- B. When I need new products
- C. Good
- D. Yes
- E. They organize different events
- F. Yes
- G. Good service and products

6 Barriers & Frustrations

- A. No
- B. No
- C. Administration
- D. No

7 How can the hoofcare industry help you?

- A. I don't know
- B. No
- C. No

8 New service ideas

- A. I don't know
- B. -
- C. -
- D. -

9 Approach

- A. By phone

Interview 13

1 About you

- A. Overijssel
- B. 15 year
- C. 42
- D. 33.000km
- E. Passion for horses
- F. Car with trailer

2 Technology

- A. Yes
- B. Facebook
- C. Everyday
- D. Information, education

3 Farrier lifecycle

- A. Natural balance trimming is getting more popular

4 Preferences (type, brands)

- A. Mustad, Kerckhaert
- B. Retail, monthly
- C. No

5 Hoofcare industry experience

- A. Good
- B. When I need products
- C. Good, when they have everything on stock
- D. Generally yes
- E. Educational support
- F. Yes
- G. Communication when somethings not deliverable

6 Barriers & Frustrations

- A. No
- B. Yes
- C. Administration
- D. No

7 How can the hoofcare industry help you?

- A. Deliver on time
- B. No
- C. Yes, correct delivery

8 New service ideas

- A. An app to order products
- B. Other farriers would like it
- C. -
- D. Installation process

9 Approach

- A. By phone and e-mail

Interview 14

1 About you

- A. Brabant
- B. 17 year
- C. 48
- D. 17.000km
- E. Fathers business
- F. Van

2 Technology

- A. Yes
- B. Facebook and Instagram
- C. Everyday
- D. Information

3 Farrier lifecycle

- A. Improved skills

4 Preferences (type, brands)

- A. Kerckhaert
- B. Delivered, monthly
- C. No

5 Hoofcare industry experience

- A. Good
- B. When I need products
- C. Good
- D. Yes
- E. Educational support
- F. Yes
- G. High quality of products

6 Barriers & Frustrations

- A. No
- B. No
- C. None
- D. Difficult clients

7 How can the hoofcare industry help you?

- A. Deliver on time
- B. No
- C. Yes, correct delivery

8 New service ideas

- A. Ability to see and test new products
- B. Good, because farriers can try new products and don't have to buy them
- C. No idea
- D. Distance to manufacturers

9 Approach

- A. Whatsapp

Interview 15

1 About you

- A. Drenthe
- B. 5 year
- C. 25
- D. 12.000km
- E. Independency, working with horses
- F. Van

2 Technology

- A. Yes
- B. Facebook, Instagram, Whatsapp
- C. Everyday
- D. News, to learn from other farriers

3 Farrier lifecycle

- A. During my few years as a farrier I haven't experience big changes

4 Preferences (type, brands)

- A. Werkman, Kerckhaert
- B. Retail, every 2 months
- C. No

5 Hoofcare industry experience

- A. Good
- B. When I need products, advice for products
- C. Good
- D. Yes
- E. Educational support, advice
- F. Yes
- G. Organize events to get in touch with other farriers, see some new products

6 Barriers & Frustrations

- A. No
- B. No
- C. Difficult horses
- D. No

7 How can the hoofcare industry help you?

- A. Good information for products
- B. No
- C. Yes, especially because I am not in business so long

8 New service ideas

- A. No
- B. -
- C. -
- D. -

9 Approach

- A. Whatsapp, Facebook,

Interview 16

1 About you

- A. Noord-Holland
- B. 1 year
- C. 23
- D. 10.000km
- E. Passion for horses
- F. Car

2 Technology

- A. Yes
- B. Facebook, Instagram, whatsapp
- C. Everyday
- D. Contact with clients, Information, education

3 Farrier lifecycle

- A. Natural balance trimming is getting more popular; people are prepared to pay more for trimming horses

4 Preferences (type, brands)

- A. Mustad
- B. Delivery, when I need products
- C. No

5 Hoofcare industry experience

- A. Good
- B. Question about a product
- C. Good
- D. Yes
- E. No idea
- F. -
- G. Good quality of products

6 Barriers & Frustrations

- A. Yes
- B. No
- C. Administration
- D. No

7 How can the hoofcare industry help you?

- A. Deliver on time
- B. No
- C. Yes, correct delivery

8 New service ideas

- A. An app to order products
- B. Other farriers would like it
- C. -
- D. Installation proces

9 Approach

- A. By phone and e-mail

Interview 17

1 About you

- A. Flevoland
- B. 8 years
- C. 27
- D. 12.000km
- E. Horse-Riding, got fascinated
- F. Van

2 Technology

- A. Yes
- B. Facebook, Instagram, WhatsApp
- C. Everyday
- D. Contact with horseshoe manufacturers, share photos and videos of my work, see what other farriers are doing

3 Farrier lifecycle

- A. Not that much

4 Preferences (type, brands)

- A. Mustad, Werkman
- B. Delivery, when I need products
- C. No

5 Hoofcare industry experience

- A. Good
- B. Question about a product, or particular problem, if they have any tips for me
- C. Good
- D. Yes
- E. They give advice, they share useful tips and tricks on Facebook and Instagram, they have sales regularly
- F. Yes
- G. Reliable advice, not only trying to sell their products

6 Barriers & Frustrations

- A. No
- B. No
- C. No
- D. No

7 How can the hoofcare industry help you?

- A. Give reliable advice, organize events, small competitions or something like that, that's how farriers meet and can exchange their experience
- B. No
- C. Yes, but that is normal

8 New service ideas

- A. No not really
- B. -
- C. -
- D. -

9 Approach

- A. By phone or Facebook

Interview 18

1 About you

- A. Utrecht
- B. 21 year
- C. 43
- D. 32.000km
- E. Required skills
- F. Van

2 Technology

- A. Yes
- B. Facebook, Whats app
- C. Everyday
- D. Contact with clients

3 Farrier lifecycle

- A. The ability of the farriers has decreased

4 Preferences (type, brands)

- A. Mustad, Kerckhaert
- B. Pick them up, when I need products
- C. No

5 Hoofcare industrie experience

- A. Not good
- B. When I need products
- C. Not good
- D. No
- E. Organize events
- F. No
- G. Right delivery of products

6 Barriers & Frustrations

- A. No
- B. Yes
- C. -
- D. No

7 How can the hoofcare industry help you?

- A. Deliver on time
- B. No
- C. No

8 New service ideas

- A. No
- B. -
- C. -
- D. -

9 Approach

- A. By phone

Interview 19

1 About you

- A. Gelderland
- B. 10 years
- C. 35
- D. 18.000km
- E. Fathers business
- F. Car with trailer

2 Technology

- A. Yes
- B. Facebook
- C. 3 x a week
- D. Privat

3 Farrier lifecycle

- A. Access to more information because of the internet

4 Preferences (type, brands)

- A. Mustad
- B. Retail, 6x a year
- C. No

5 Hoofcare industrie experience

- A. Good
- B. When I need something
- C. Good
- D. Yes
- E. No idea
- F. Yes
- G. Good quality of products

6 Barriers & Frustrations

- A. Yes
- B. Yes
- C. Administration
- D. Difficult clients

7 How can the hoofcare industry help you?

- A. Deliver on time
- B. No
- C. No

8 New service ideas

- A. No idea
- B. -
- C. -
- D. -

9 Approach

- A. By phone and e-mail

Interview 20

1 About you

- A. Flevoland
- B. 4 years
- C. 29
- D. 15.000km
- E. Passion for horses
- F. Van

2 Technology

- A. Yes
- B. Facebook, Instagram, Whatsapp
- C. Everyday
- D. Contact with clients, Information, Education

3 Farrier lifecycle

- A. No changes

4 Preferences (type, brands)

- A. Mustad, Werkman
- B. I pick them up, monthly
- C. No

5 Hoofcare industrie experience

- A. Good
- B. When I need something or have questions
- C. Good
- D. Yes
- E. No idea
- F. -
- G. Good advice, good quality of products

6 Barriers & Frustrations

- A. No
- B. No
- C. Trimming/ shoeing little ponies
- D. No

7 How can the hoofcare industry help you?

- A. No idea
- B. No
- C. Yes, good quality price ratio

8 New service ideas

- A. An app to order products
- B. Other farriers would like it
- C. -
- D. Distribution difficulties

9 Approach

- A. WhatsApp and e-mail